

AT A GLANCE

City of North Bend, OR

-  Customer Since 2014
-  Population: 9,695 (2010)
-  Payroll Employees: 86
-  Caselle Licensed Users: 5
-  Operating Budget: \$26,000,000
-  Metered Services: None

Challenges

As a result of their existing government accounting software, the city of North Bend, Oregon struggled to make their accounting processes efficient and less time consuming.

Results

After migrating over to Caselle software, the city has streamlined their processes and saved more than 256 hours.

Benefits

- User Friendly financial reports
- Cut budget process by 40+ hours
- Simple and accurate Accounts Receivable
- Cut Payroll process by 2 to 3 days
- Reduced Manual journal entries
- Increased efficiency with General Ledger

"Caselle cared about us as a community. We weren't just another sale. We felt like we had an entire team."

- Laurie Brookes
Finance Director

Case Study | North Bend, OR

North Bend Improves Accounting Processes With Caselle, While Keeping Auditors Happy



THE JOURNEY

In 2012, the city of North Bend, Oregon was using a software that was no longer meeting their accounting needs. Employees found themselves consumed in non-integrated and duplicative processes that were time consuming and inefficient. One such example was the city's inability to produce the required Auditor reports directly from their system. Instead, they combined numerous reports. As the city decided how to best prepare for the future, they determined they needed to streamline their processes while remaining in compliance with auditors.

After identifying their priorities, they began their due diligence by first talking with several other local cities about what software they recommended. After receiving feedback, they chose to attend one company's annual conference so that they could network with other users and learn more about the product. This enabled them to learn the strengths and weaknesses of the software.

Still not completely satisfied with the feedback they received, they decided to put out an RFP. They viewed various demos and asked questions about how each software's attributes could meet their city's unique needs. Price and superior quality were the driving factors in their decision-making process, as well as strong references from other cities. This ultimately led them to Caselle.

Like many cities that are considering making the transition to a new software company, North Bend had some reservations about going through implementation. But Caselle's process exceeded their expectations. Finance Director Laurie Brookes describes the experience as "going much more smoothly than (she) imagined. We worked as a team and communicated regularly with Caselle. We had weekly meetings. Everyone at Caselle has been so good to work with. The customer service is phenomenal." They chose to begin using Caselle on January 1st rather than waiting for the end of the fiscal year (June 30th)

to coincide with the end of the calendar year for payroll. "Once our software was setup, we came to Utah for 5 days of individual training which was incredibly helpful. The training we received was custom, and based on exactly what we needed."

THE SOLUTION

Since implementing Caselle software, North Bend has experienced significant improvements in many areas of their accounting processes. The Caselle modules have allowed the city to easily setup and access various financial reports. By grouping these reports together, employees can now provide important information to management, quickly and efficiently. Additionally, miExcel, the functionality which allows them to share, import, and manipulate data between other Caselle applications and Excel spreadsheets, has proven to be invaluable. North Bend has saved 40+ hours in their budget process since utilizing miExcel.

With Accounts Receivable, implementing cash receipting has become much simpler and more accurate. Year-end entries can now be entered into the prior fiscal year without requiring journal entry preparation. The Payroll module has cut down the time spent by at least 2 to 3 days. The Accounts Payable module has also saved the city at least 2 to 3 days of time by allowing them to enter prior fiscal year bills into a previous period. This process avoids large journal entries at the end of the fiscal year.

The city has also saved approximately 72 hours by using General Ledger. This module has allowed their employees to cut down on journal entries. By uploading reports from miExcel straight into each

"Caselle is supportive and forward thinking. They get to know the people they work with and make suggestions based on what works for our community. We have such high praise for Caselle. They genuinely care about their customers."

**- Laurie Brookes
Finance Director**

journal, they have also minimized input errors. The Bank Reconciliation feature has also streamlined reconciliations for all bank accounts.

When North Bend's employees have questions, Caselle's Knowledge Base has also been a tremendous asset for the city. This database allows them to look things up quickly so that their workflow is not disrupted. According to Brookes, "it is the first place we go when we need clarification. The answers can be found quickly which saves time by instantly resolving our problem."

THE CONCLUSION

By implementing Caselle software, the city of North Bend has saved well over 256 hours. The software has allowed them to streamline their accounting processes – saving the city time and money. In addition to the efficiencies they have gained, the customer service and support that the city has received from Caselle has allowed them to better serve their own customers, while staying ahead of the technology curve and growing as a city.

* Data and statistics gathered in May 2017

