

Aboriginal Trust Management System

Developed by



Built on



Microsoft
Dynamics 365

UNIQUE CHALLENGES FACED BY A UNIQUE BUSINESS SECTOR

Many Indigenous Trusts and Corporations are responsible for distribution and investment of funds derived from native title claims and entitlements. This is an important and significant role.

There are unique challenges associated with the management and governance of these responsibilities, and historically the processes and procedures in place at these organisations to manage day-to-day activities have been ad hoc and time consuming.

Challenges faced by the industry include:

- Compliance and record keeping;
- Complexity of approval processes and procedures;
- High costs of administration (often due duplication of workload);
- Difficulties experienced in budget tracking and other financial activities; and
- Data security issues.

A SOLUTION FOR THESE INDUSTRIES, BASED ON TECHNOLOGY AND CLOUD OPPORTUNITIES

Illuminance Solutions is experienced in working directly with Indigenous Organizations to design and implement customer relationship management systems including cloud based platforms to facilitate key processes and procedures, comprising member record maintenance and management, claims management, procedural systems, accounting and reporting facilities.

Acquiring all the industry knowledge, we have developed a unique solution which addresses the operation challenges faced by the industry. Our solution converts paper/ excel based member records and fund applications to digital records using a system that is easy to implement and use.

We are experienced in providing training to employees and helping project teams with change management in order to ensure that the potential benefits of the new system are properly realised.

This system benefits more than merely the trustee organisations – it is able to make significant and lasting improvements to indigenous communities. Trustee organisations are better able to focus on strategic and community benefit activities while spending less time on administrative tasks.

KEY FEATURES



SELF-SERVICE MEMBER PORTAL

- Ability for members to login to the portal online
- Accessible through mobile devices
- Check balances available for each program and submit fund applications online
- Application processing will be done in ATMS and real time updates will be visible in the portal
- Members can check status of fund applications
- Members can update their contact details through the portal



MEMBER MANAGEMENT

- Maintaining the member registry with the ability to record the following for each member;
 - Key demographic information
 - Financial / bank details
 - Family / language group
 - Membership types- if any
 - Track activities (phone calls, SMS, Emails)
 - Create notes and tasks
 - Relationship between members
 - Store important documents for each member
- Case management (feedback surveys, complaints, advocacy, employment assistance)
- Manage onboarding process of new members



FUNDS MANAGEMENT

- Set program budgets for each member support program
- Set individual balance for each member support program
- Automatically calculate the balances from processing fund applications
- Automatic reset of program budgets (financial/ calendar year)
- Set up warnings/ restrictions around budgets.



FUND APPLICATIONS MANAGEMENT

- Functionality to submit and process fund applications for each member
- Select the member support program for each application
- Progress applications through a business process flow (an approval process) with validations if needed
- Enter disbursements (line items) for each application specifying the supplier
- Automated purchase order process by creating PO's and notifying the Vendor
- Track activities (phone calls, SMS, Emails) for each application
- Create notes and tasks for each application
- Store supporting documents for each application.

KEY FEATURES



COMMUNICATION MANAGEMENT

ATMS enables users to easily communicate with stakeholders using a range of different platforms and ability to integrate with other third party like SMS gateways and marketing products.

- Mass communication – Bulk SMS and Emails
- Dynamics 365 marketing lists for target communication
- Individual communication – email and SMS tracking
- Automatic notifications using Dynamics 365 workflows.



INTEGRATION WITH FINANCIAL APPLICATIONS

ATMS has the capability to deliver financial system capabilities by integrating well with with other Dynamics 365 applications such as **Business Central** and **Wiise** – a product built on Dynamics 365 Business Central.

Business Central is an all-in-one ERP business management solution that helps you connect your financials, service, and operations to streamline business processes, improve customer interactions, and make better decisions.

Wiise - a business software that helps manage accounting, payroll, banking and HR. From finance to forecasting and invoicing Wiise will help Trusts and Corporations get a clearer picture of what's happening at every level.

ATMS can also integrate well with existing financial applications such as **Xero** and **MYOB**. This will create a duplex information link between ATMS and the financial application.

- Based on the disbursements, ability to create line items in general ledger
- Functionality to create purchase orders which can be sent to suppliers
- Using technology such as Xero Webhooks and Azure functions, ATMS can have near to live updates.



REPORTING / COMPLIANCE

ATMS combined with Power BI has strong reporting capabilities.

- System / personal dashboards
- Microsoft Dynamics 365 advanced find for query based data extraction
- Microsoft Power BI – business intelligence reporting
- Put business rules in place for compliance.



SECURITY

ATMS is equipped with Microsoft Dynamics 365 that provide a security model that protects data integrity and privacy, and supports efficient data access and collaboration. The goals of the model are as follows:

- Provide users with the access only to the appropriate levels of information that is required to do their jobs.
- Categorise users by role and restrict access based on those roles.
- Support data sharing so that users and teams can be granted access to records that they do not own for a specified collaborative effort.
- Prevent a user's access to records the user does not own or share.

KEY FEATURES CONT.



FUTURE ROADMAP

ATMS has the potential to carry out the following functionalities / integrations in the future;

- Phone system integration – to operate a call centre for member services
- Investments tracking
- GIS integration for heritage surveys and Indigenous Land User Agreements
- Project management

MICROSOFT PLATFORM

ATMS is built on a modern and powerful Microsoft Dynamics 365 cloud-based platform, that combines components of **Customer Relationship Management (CRM)** and **Enterprise Resource Planning (ERP)**. The platform has been tailored to improve productivity, recording and communication and is able to integrate with the other Microsoft cloud based solutions such as;

- **Microsoft Azure services** - a toolbox of ever-expanding cloud services to help organisations meet their business challenges
- **Microsoft SharePoint** - web based document management and storage system
- **Microsoft Dynamics 365 Business Central**
- **Wiise** - built on business central platform
- **Microsoft Power BI** - business intelligence reporting.

Microsoft
Partner

Gold Application Development
Silver ISV

Dynamics 365 Business Central



HAPPY CLIENTS



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