MAT Finance

Service Definition 2026/27

Let's Improve Education Together

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Bromcom

It’s no big secret in schools; staff workload is colossal.

75%[1]

of support staff say they are routinely working outside of contract hours due to workload

75%[2]

of teachers say general admin is taking up ‘too much’ of their time

50%[2]

of leaders feel overburdened by administrative tasks

1 – NEU Support staff survey 2023, 2 – DFE Working lives of teachers and leaders 2023

Your MIS often adds to the problem.



Information is scattered. Staff waste time duplicating data and switching systems.



Information isn't reaching the right teams, so decisions are made on incomplete data.



Clunky interfaces mean everything is laborious with no option to automate



Staff are stuck at a desk to complete tasks and retrieve information.

We bring everything into one place.

Bromcom is more than a financial management solution: budget planning and HR are included as standard, with MIS functionality available to add later within the same platform.



Bromcom MAT Finance
Service Overview

Bromcom MAT Finance is a robust, fully managed, web-based financial management solution designed for multi-academy trusts. It is fully integrated with Bromcom MIS and MAT Vision, bringing together MIS and central HR data from each of your schools in a single offering.

Bromcom MAT Finance is hosted on Microsoft's UK-hosted Azure platform. General ledger, accounts payable, accounts receivable, budgeting, cash management, staffing, asset management and business intelligence are brought together in one online system. MAT Finance also provides administration, communication, reporting, analysis and workflow functionality to support collaboration and streamline Trust and school financial processes.

A single database holds finance data for all your schools. Schools use the same centrally managed chart of accounts, which can be based on the DfE academy chart of accounts or a locally defined structure mapped to it. Fund and cost centre structures are also defined centrally within a Trust-and-school hierarchy, and cost centre structural templates can be set by school type for easier maintenance.

Access permissions are managed centrally, and users can be granted access to one or more of your schools' data, including Trust-level consolidated reporting. The same users can also be given access to MIS data using the same login, with a personalised dashboard showing MIS and financial information according to their roles and preferences.

A comprehensive purchasing solution supports both local and central purchasing, including the ability to pool multiple requisitions into a single order. Electronic workflows can be defined and enforced across the Trust, with school-level and Trust-level sign-offs set against multiple conditions, including supplier-based rules to manage related-party transactions. Support is provided for electronic purchase invoices from suppliers to reduce manual invoice entry, and automatic purchase order matching can be applied within defined tolerances to save time and reduce errors. Delivery note and goods receipt note processing is also supported and can be configured by supplier.

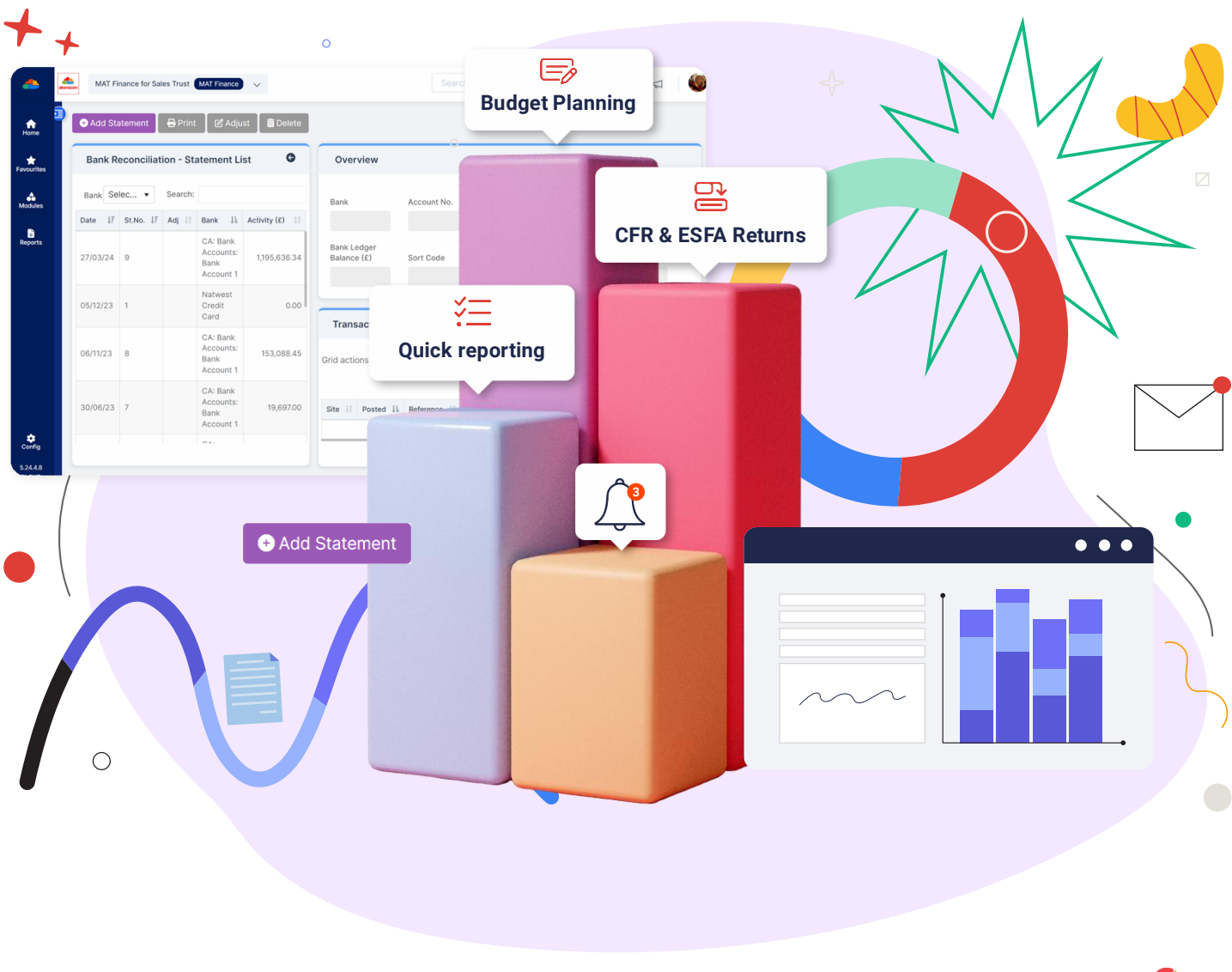
Sophisticated posting and project codes can be used to monitor income and expenditure against projects and metrics such as Pupil Premium.

MAT Finance enables you to define valid combinations of schools, cost centres, funds and accounts, and apply controls so only appropriate combinations are available to specific users or user groups. This supports wider access for users who are less familiar with the accounts structure, while keeping controls in place through centrally defined rules.

MAT Finance is designed to simplify financial management and streamline processes that are often complex. It helps reduce day-to-day administrative effort, giving users more time for routine tasks and supporting both individual schools and the Trust to make timely, well-informed financial decisions using business intelligence and financial insight.

Standard built-in reports are supplemented through integration with Microsoft Excel and Microsoft Power BI to support more sophisticated analysis.

Bromcom Finance has a consistent look and feel with Bromcom MIS, providing a clearer and more joined-up experience for users.



Finance
In Depth

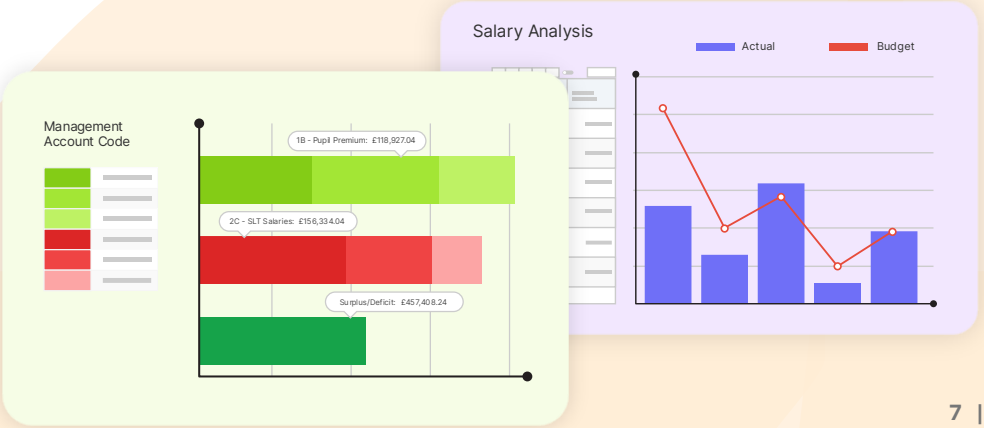
Bromcom Finance combines the breadth of functionality users expect with a modern, user-friendly interface. Below, we highlight key financial capabilities of the service.

Accounts Payable

All aspects of Accounts Payable can be managed within Bromcom Finance, including raising purchase orders, recording and paying invoices, and monitoring spend. Key capabilities include supplier record management (with local and shared accounts), product catalogues and product search, purchase orders, Delivery Notes and Goods Receipt Notes, and processing of both order and non-order invoices, including credit notes. Supplier payments can be managed centrally by the Local Authority or locally by individual schools, supported by configurable approval workflows. Electronic communications are built in, including emailing purchase orders and issuing BACS remittances, alongside comprehensive reporting and enquiry tools such as the Aged Creditors Report and VAT accounting.

Accounts Receivable

Many schools generate additional income through lettings and other chargeable services, and Bromcom Finance helps you manage this efficiently from end to end. The system enables you to maintain accurate customer records, apply credit terms, manage multiple income streams, generate and track PDF invoices, and process payments through receipts or via the optional parent portal, MyChildAtSchool. Customer records can be created from existing MIS contacts, including staff, parents and students, supporting a single source of truth and improving accuracy while reducing duplication. Core functionality includes customer records, products and charge types, invoices, credit notes, refunds, statements, approval workflows and electronic communications, including emailing documents directly to customers. Comprehensive reporting and enquiry tools are provided, including the Aged Debtors Report, VAT reporting, and revenue tracking by cost centre, fund and ledger/account code.



General Ledger

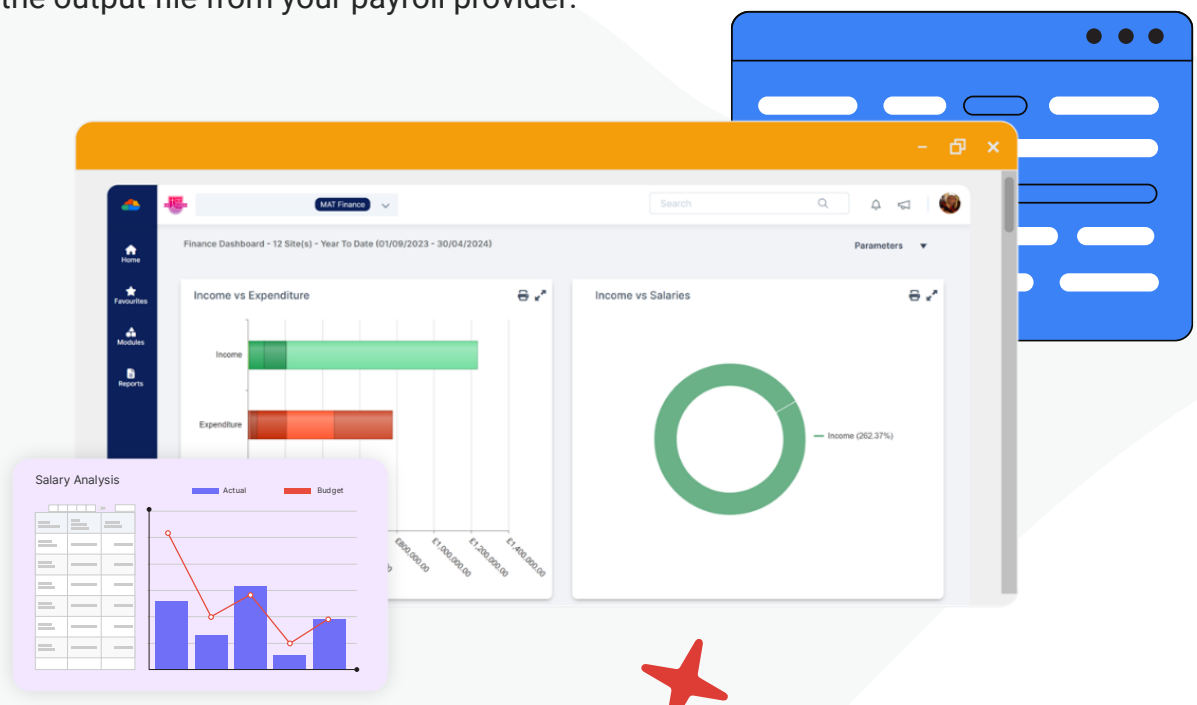
Bromcom Finance provides an intuitive and flexible General Ledger for monitoring the financial position of each school. Users can drill down from any entry to view full transaction details and individual journal lines, supported by comprehensive enquiries, sophisticated manual journal processing and a wide range of reports. Core functionality includes management of the chart of accounts, including accounts, funds and cost centres, providing a robust structure for accurate financial coding and reporting. Bromcom's Manage Timelines feature enables structural adjustments to be applied across different financial years without impacting preceding or future years, supporting consistent year-on-year reporting. The system also provides full support for, and mapping to, CFR reporting requirements.

Staffing

Staff contract data held in the Human Resources areas of MAT Vision and Bromcom MIS is directly accessible in MAT Finance, helping you maintain a single point of truth. Salary expenditure mapping is easy to oversee, supporting completeness, accuracy and quick adjustments. You can run salary calculations for "what if" scenarios, apply annual awards and make apportionment adjustments.

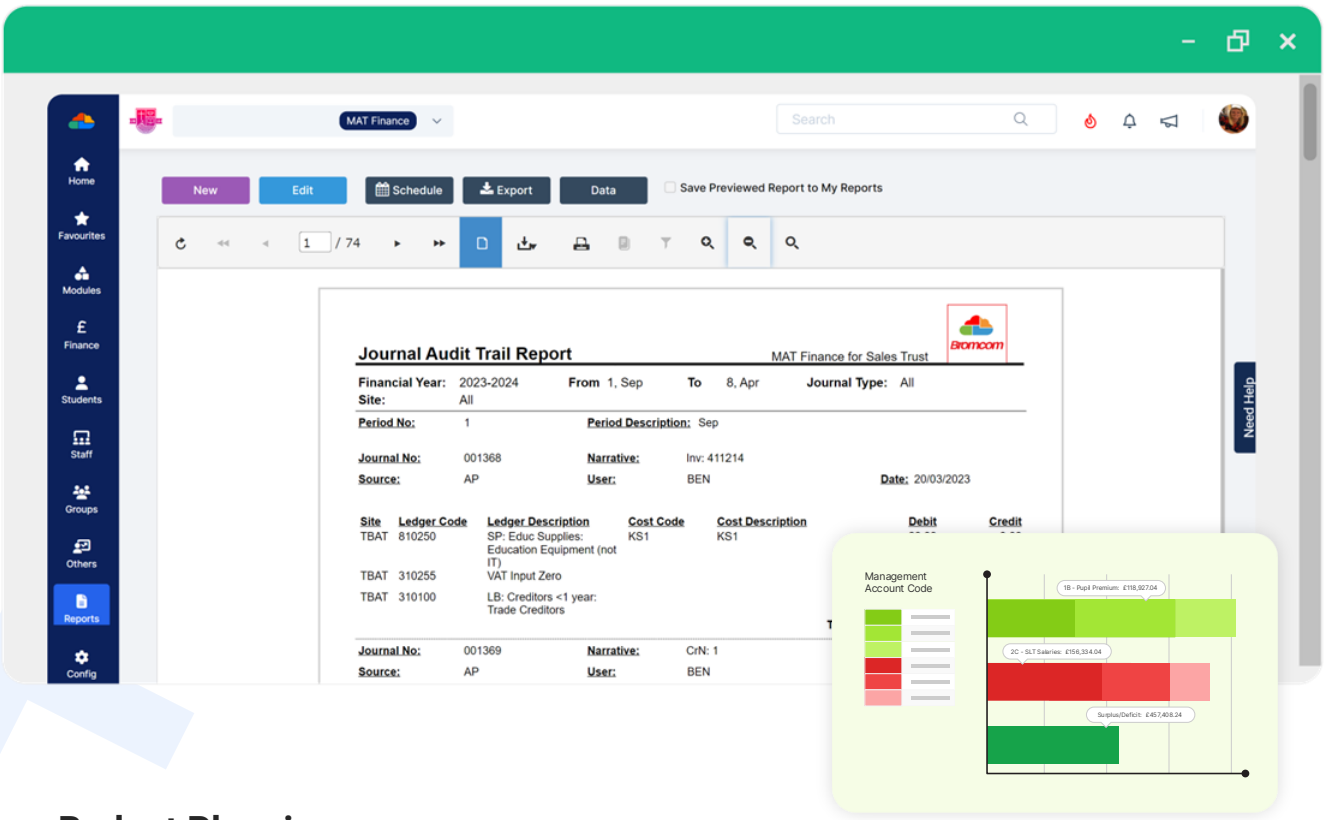
Review projections provide oversight of actuals to date and outstanding commitments, with extensive drill-down and drill-through capability. From a staff member's salary projections in MAT Finance, the linked HR contract record can be opened directly for further detail. Enquiries support a full review of salary expenditure and commitments by cost centres, ledgers and funds, with drill-down to the underlying transactions and clear budget status indicators.

Actual salary costs can be recorded efficiently through individual adjustments or via automatic import. The payroll import facility is flexible and configurable to match the output file from your payroll provider.



Cash Management

Any number of bank accounts can be managed, with budget income recorded and receipts captured for accounts receivable invoices and non-invoiced income. Paying-in slips and direct bank payments can be processed, and both bank and card accounts can be reconciled using a reconciliation workflow that supports attaching electronic statements. Bank statements can be imported for automatic matching before reconciliation is confirmed. Reverse look-ups are available from the cashbook, with full drill-down to source transactions, payment runs and receipts.



Budget Planning

Budgets can be entered manually or imported. You can fix budgets and monitor virements. Budget warnings and colour highlighting support hard stops or overrides, in line with allocated user permissions. Budget profiles can be managed for income and expenditure, and budget holder dashboards are also included.

Assets Management

Asset Management enables you to maintain accurate records of your assets. Asset records can be auto-generated from invoices or created through direct entry. Equipment can be moved between locations in bulk, or transferred between staff holders as required. Inspections and stocktakes can be planned and completed with supporting reports. The system also enables the recording of asset sales and disposals, alongside depreciation processing for ongoing asset valuation.

Reporting & Analytics

Finance reporting combines a wide range of built-in reports with a powerful ad hoc report writer, supporting the creation of custom reports. A report scheduler enables automated production of regular reports, which can be sent directly to the appropriate staff member. A broad set of financial reports is provided out of the box, including Trial Balance, Balance Sheet, Balances and Reserves, Audit Trail, Making Tax Digital, and reporting and analysis tools.

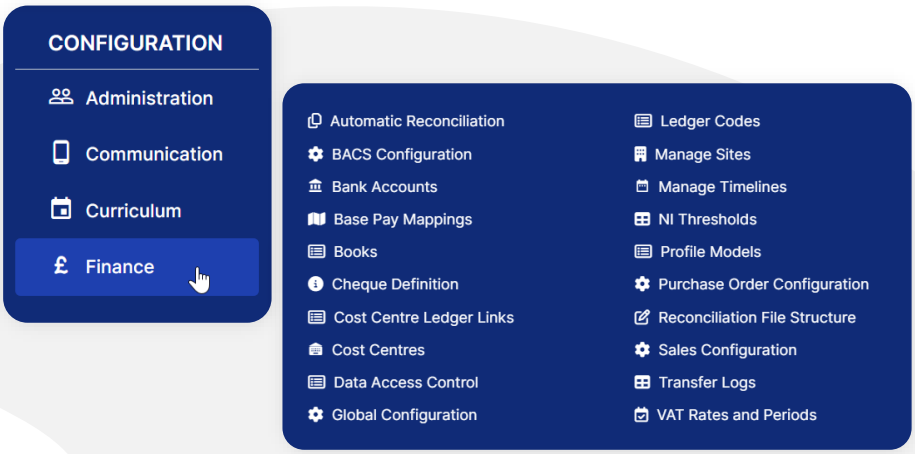
Business Intelligence and Dashboards

Our unique link to Microsoft Power BI enables your Trust to create custom dashboards and present them within the Bromcom solution. Power BI connects directly to Bromcom, with no need to set up additional reports or links. Bromcom MIS and MAT Finance is the only solution that can display Power BI dashboards within its interface, making dashboards more accessible across roles within your Trust and supporting wider use of performance reporting. Fully customisable dashboards can be tailored to your establishment, and external data sources can also be presented to SLT, such as payroll information or national and local comparison data.

Consolidated and group-level reporting is supported through a graphical presentation of data. Reports can cover multiple years or any period range you require, with drill-down available to the underlying detail. Live data feeds supply the BI dashboards with data from across the MIS and finance, helping senior leaders measure the KPIs that matter to them, with confidence that the information is up to date.

Setup & Maintenance

Permissions for MAT Finance can be set up and maintained easily, with a fine-grained level of control over view, add, edit and delete privileges. Integration is available for Active Directory, Google and Microsoft sign-in, alongside time and location access controls, two-factor authentication, and an audit trail of system activity. Key financial records and transactions provide direct access to the relevant audit trail. A secure web service API is also provided to support third-party integration.



MAT Finance Service Feature List

Finance	Features	MAT Finance
Accounts Payable	Authorisation & Approval Workflows	✓
	Contracts	✓
	Delivery Notes	✓
	Invoices & Credit Notes	✓
	Multiple Payment methods	✓
	Purchase Orders	✓
	Punch Out	✓
	Sundry Processing	✓
	Supplier Records	✓
	Staff Expenses	✓
	Automatic Pre-payments & Accruals	✓
	Automated Workflows	✓
Accounts Receivable	Authorisation & Approval Workflows	✓
	Customer Records	✓
	Invoices & Credit Notes	✓
	Deposits	✓
	Trip Income	✓
	Products	✓
	Receipts	✓
	Statements	✓
	Automated Workflows	✓
General Ledger	Automatic Reconciliation	✓
	Bank Reconciliation	✓
	ESFA / DfE / Academies Chart of Accounts	✓
	Rollup Account Codes	✓
	Cost Centre Enquiry	✓
	Document Enquiry	✓
	Ledger Enquiry	✓
	Journal Browser	✓
	Trial Balance	✓
	Petty Cash	✓

Finance continued...	Features	MAT Finance
General Ledger ***Continued...***	Recurring & Reversing Journals	✓
	Document Cloning	✓
	Intra-company Journals	✓
Reporting	Quick Reports (custom reporting)	✓
	Audit Trails	✓
	Comprehensive Reporting	✓
	Excel Integration	✓
	Financial Dashboards	✓
	MAT Reporting	✓
	Making Tax Digital & VAT Reporting	✓
	Management Reports	✓
	Reporting at Single School, Cluster, & MAT Level	✓
	Cashflow Statement	✓
	Purchase Order to Purchase Invoice Variation	✓
	Statement of Financial Activities (SoFA)	✓
	Budget Holder Report	✓
	Aged Debtor	✓
	Aged Creditor	✓
Salary Projections and Budget Planning	Budget Monitoring	✓
	Budget Forecasting (3, 5, n years)	✓
	Budget Maintenance	✓
	Staff Contracts	✓
	Individual Salary Payments	✓
	Salary Calculator	✓
	Salary Projections	✓
	Scenario Management	✓
	Budget Variances	✓
	Budget Projections Report	✓
Asset Management	Depreciation	✓
	Asset Register	✓

Integration & Technical Features

Google Integration

Google Integration synchronises student, staff, and group data between Bromcom MIS and Google Workspace, enabling automatic provisioning and ongoing management of Google accounts. The integration supports the transfer of key information such as groups, calendars, photographs, and associations, and connects with Google Drive to allow Google Classroom creation and maintenance directly from the MIS. Single Sign-On can also be enabled, allowing users to access the MIS and related services using their Google credentials.

Microsoft Office365 Integration

Office 365 integration enables automatic provisioning of student and staff accounts from Bromcom MIS, alongside the creation and maintenance of Microsoft 365 Groups with the correct student and staff associations. Calendars and photographs can be synchronised, and Teams can be created and managed directly through the MIS. The integration also links to OneDrive for secure sharing and storage of MIS-generated documents and resources, with Single Sign-On available to allow users to access Bromcom services using their Microsoft 365 credentials.

Public or Private Cloud

By default, Bromcom MIS is delivered as a SaaS solution via a secure, multi-tenant, UK-hosted Microsoft Azure platform. This provides continuity of service, routine backups, managed updates, and strong cyber security, while benefiting from economies of scale to deliver high performance at a lower total cost.

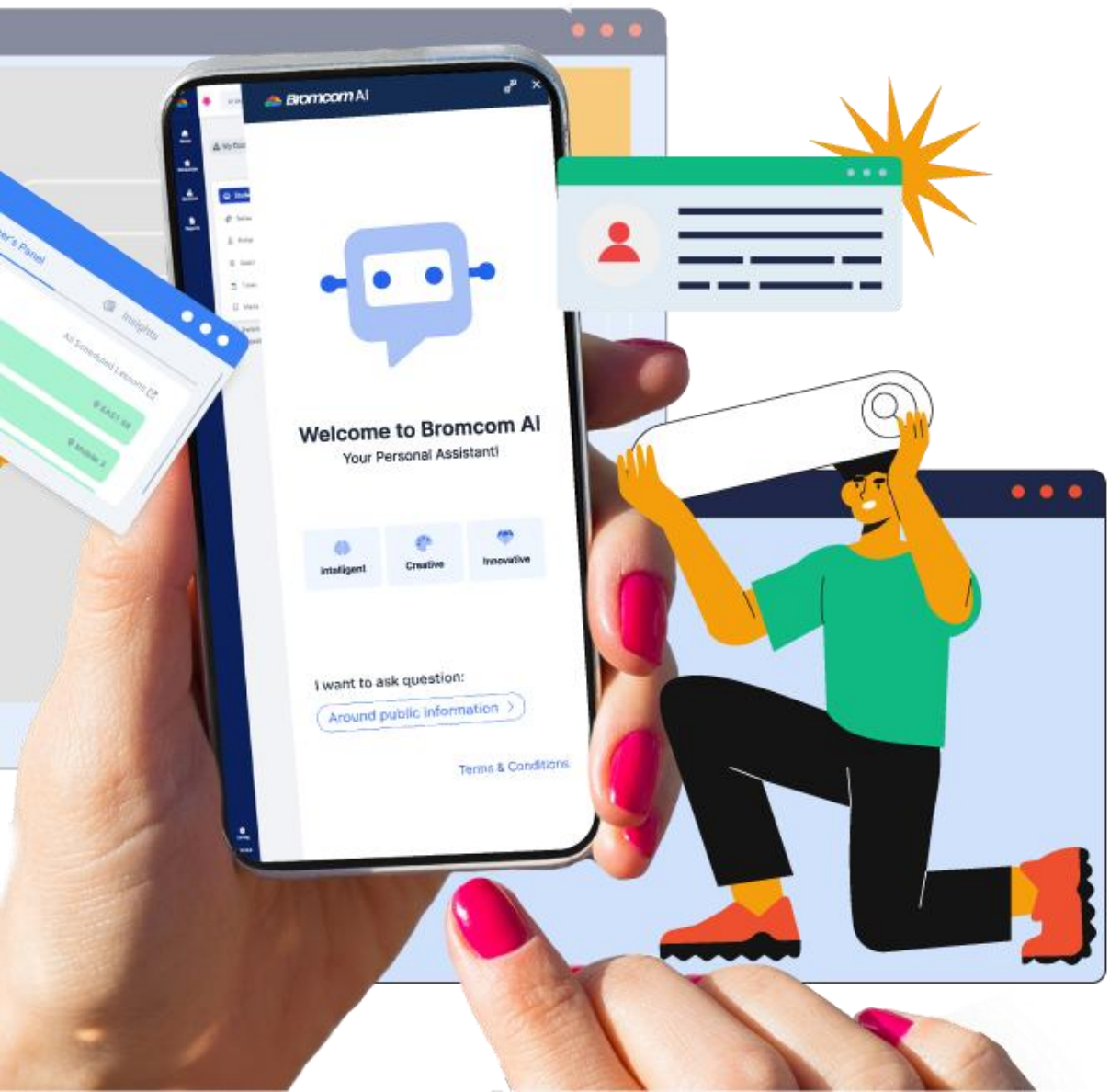
Where required, Bromcom can also provide a Private Cloud option, delivering a dedicated cloud environment maintained specifically for the customer. This offers increased control but carries a price premium due to the additional infrastructure and replicated management services. Private Cloud infrastructure can be procured directly from Bromcom, or provided by the customer, with Bromcom hosting and managing the Bromcom applications, updates, and key database activities (including SQL installation and configuration). This option is available via the G-Cloud price list for organisations requiring a dedicated deployment model.

Embedded Power BI

Bromcom is the only MIS that can display Microsoft Power BI dashboards directly within the interface. This seamless integration makes Power BI accessible for every role in your school, supporting fully customisable dashboards tailored to your establishment. Dashboards can also present external data sources for SLT, such as school survey results, payroll and finance information, and national or local authority comparison data.

Integrated AI

Integrated AI is built into the heart of the MIS, providing additional support for Bromcom users. Bromcom AI can help you find public information and answer general knowledge questions that are not related to your school or data. It supports and streamlines key tasks such as communication, reporting and lesson planning. Accurate text translation into other languages is also available in seconds.

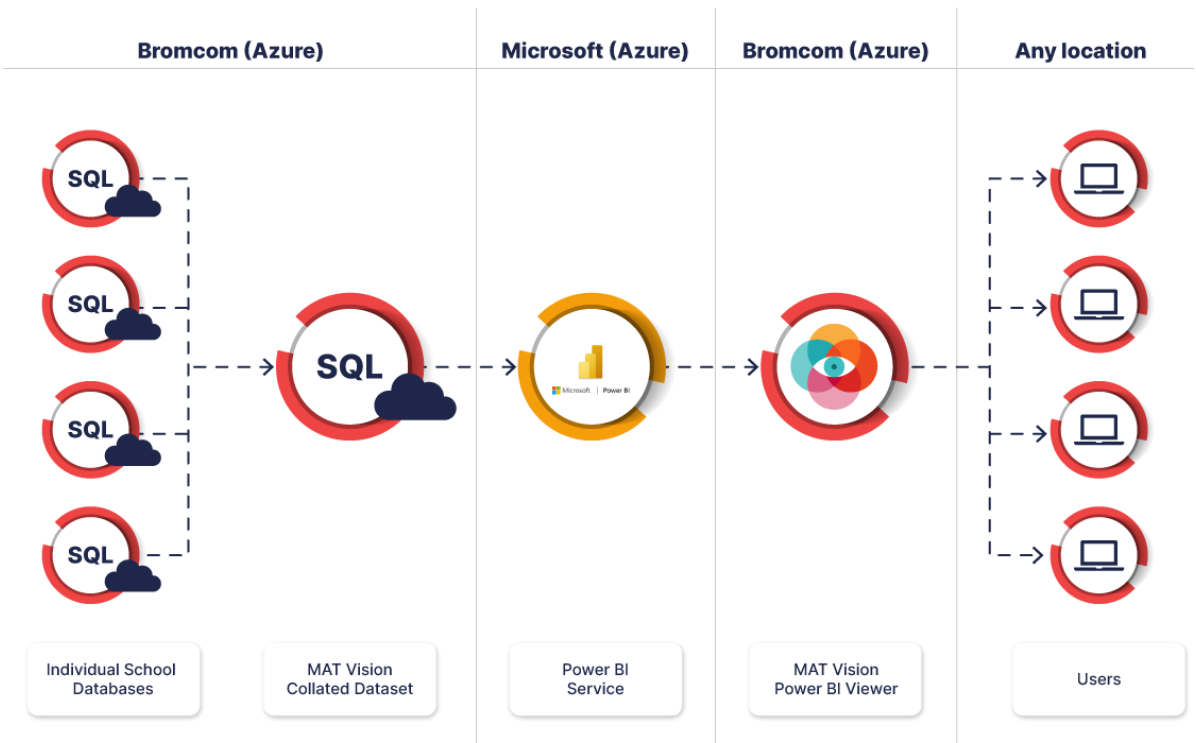


Bromcom Vision
MAT-Wide Reporting

For flexibility and scalability, we created MAT Vision to provide a detailed view of your Trust and to support the creation of custom dashboards. Vision automatically collates data from across your schools, producing a single, secure dataset that brings together the information you need at Trust level.

A wide range of built-in statistics is provided, including attendance, assessment, behaviour, exclusions, pupil and staff demographics, and staff absence. A central report builder enables interrogation of the collated dataset, and many users also use the direct link to Microsoft Power BI to create tailored dashboards for their Trust and schools.

To help you get started, a Power BI dashboard is provided covering pupil and staff demographics, attendance, staff absence, location analysis and statutory assessments. The dashboard includes Trust-, school- and individual-level views and is filterable throughout, down to pupil level.



Your Journey to Bromcom

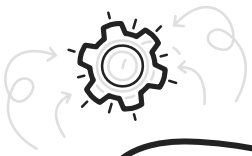


Discovery

We'll work out where you are now, what you want to achieve from the switch, and how we can get you from A to B.

Migration

We'll audit all your data and check if anything needs cleansing. After that, your data migration can be performed in a matter of hours.



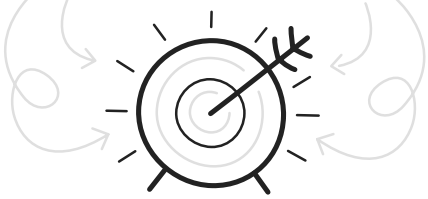
Transition

Training can start using a copy of your own data, helping staff get up to speed quickly. Our Customer Success Managers are on hand to ensure that everything is lined up according to your needs.



Support

You receive ongoing support from a dedicated helpdesk and then join our user groups and specialist communities to learn from likeminded peers.







I am very grateful to the Bromcom team. I really appreciate the high level of support they have provided for our schools, particularly given the ambitious migration timeline.



Chiquita Henson
Corinium Education Trust



Data Migration.

As a Local Authority, there are several options for data migration:



Bromcom-managed migration

- Bromcom works with you to confirm the required Bromcom Finance configuration
- Your staff are expected to have finance management experience
- Bromcom completes initial configuration and data loads
- Full training provided on Bromcom services
- Migration covers the current financial year



Hybrid Finance setup

- Bromcom works with you to configure Bromcom Finance and load opening balances and initial transactions
- No technical experience required
- Your staff are expected to have finance management experience
- The Local Authority supports initial data loads
- Full training provided on Bromcom services
- Data checking guidance included
- Regular check-ins throughout the project
- Multiple financial years can be set up



No data transfer (suitable for new schools)

- 1-to-1 setup consultancy session
- Full setup guide provided, including a guided Walkthrough setup wizard

Offboarding and data portability

With Bromcom, customers always retain full ownership of their data. Where a customer chooses to cease using our services, we provide a clear, transparent and supplier-neutral offboarding process designed to support an orderly transition to an alternative solution.

Up to two copies of the customer's complete data set can be provided on request. Each copy is supplied as a full SQL backup file and made available for secure download via our SFTP service. This format is industry standard, widely supported, and intentionally selected to facilitate onward migration, independent archiving, or secure handover to a successor supplier.

Where required, the SQL backup may be shared by the customer with an incoming supplier in advance of contract termination. This enables the new supplier to analyse the data structure, validate migration tooling, and test migration processes ahead of the live changeover. This approach reduces transition risk, supports parallel planning, and avoids reliance on untested migration processes at the point of service change.

This forms part of Bromcom's commitment to transparent and ethical offboarding. Customers retain full control over their data and are free to determine how and with whom it is shared. Your data, your choice.

All requests for full SQL data extracts must be submitted on or before the contract end date. In addition, customers may manually export data at any time during the contract term, including in advance of termination, to support transition planning, assurance activities, and business continuity.

Following contract expiry, system access is removed and accounts are decommissioned in line with our security and data protection obligations. Customers retain access to their data through the agreed offboarding process prior to decommissioning, ensuring they are not technically or contractually constrained when transitioning to an alternative provider.

Book a demo and begin your journey.

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G-Cloud Services

Bromcom MAT Finance Service Definition

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