



## Tech Tools for Going Virtual with your Finance Office



**WE'RE A NONPROFIT ON A  
MISSION TO USE TECHNOLOGY TO  
BETTER SERVE THE WORLD.**



We do this by delivering tech services, education, and training that help nonprofits and communities thrive.



**NONPROFIT  
TECH SERVICES:**

- Managed IT Support
- Cloud Services
- Security & Compliance
- Data Support
- Strategic Consulting
- Machine Learning & AI
- Community Integrated Design



**NONPROFIT  
EDUCATION & TRAINING:**

- Reports
- Consumer Guides
- Assessments
- Workbooks & Articles
- Online Training
- Free Webinars



**WORKFORCE  
DEVELOPMENT:**

ITWorks & CXWorks:  
Free IT and Customer  
Experience training  
programs

PunchCode:  
12-week immersive  
programming bootcamp



## KAREN GRAHAM

Director of Education &  
Outreach, Tech Impact

Pronouns: She/Her

I lead the Idealware team of researchers, presenters, and writers who create technology information resources designed to help nonprofit leaders put their vision into action.





## ANDREA MILLS

MBA, CPA, CCSA®, CGMA; Principal for Outsourcing,  
[Fiscal Management Associates](#)

Pronouns: she/her

Andrea has extensive experience helping nonprofits, individuals, and foundations make important fiscal decisions. With her support, organizations strengthen the effectiveness of their giving and receiving of contributions, implement powerful fiscal management tools, establish appropriate fiscal policies and procedures, and successfully assess strategic decisions.



## ANDY WOLBER

Technology writer

Pronouns: He/Him

Andy (@awolber) is a contributing writer for TechRepublic, and has taught Nonprofit and Government Technology for Grand Valley State University. Prior staff roles include positions with Michigan Nonprofit Association, NPower Michigan, the Dallas Historical Society, and Dallas Black Dance Theatre. He holds an MBA/MA in Arts Administration from Southern Methodist University.

# POLL

What best describes your roll in your organization?

- ☐ Head of finance
- ☐ Finance or accounting staff
- ☐ Executive director
- ☐ Consultant or contractor
- ☐ Other



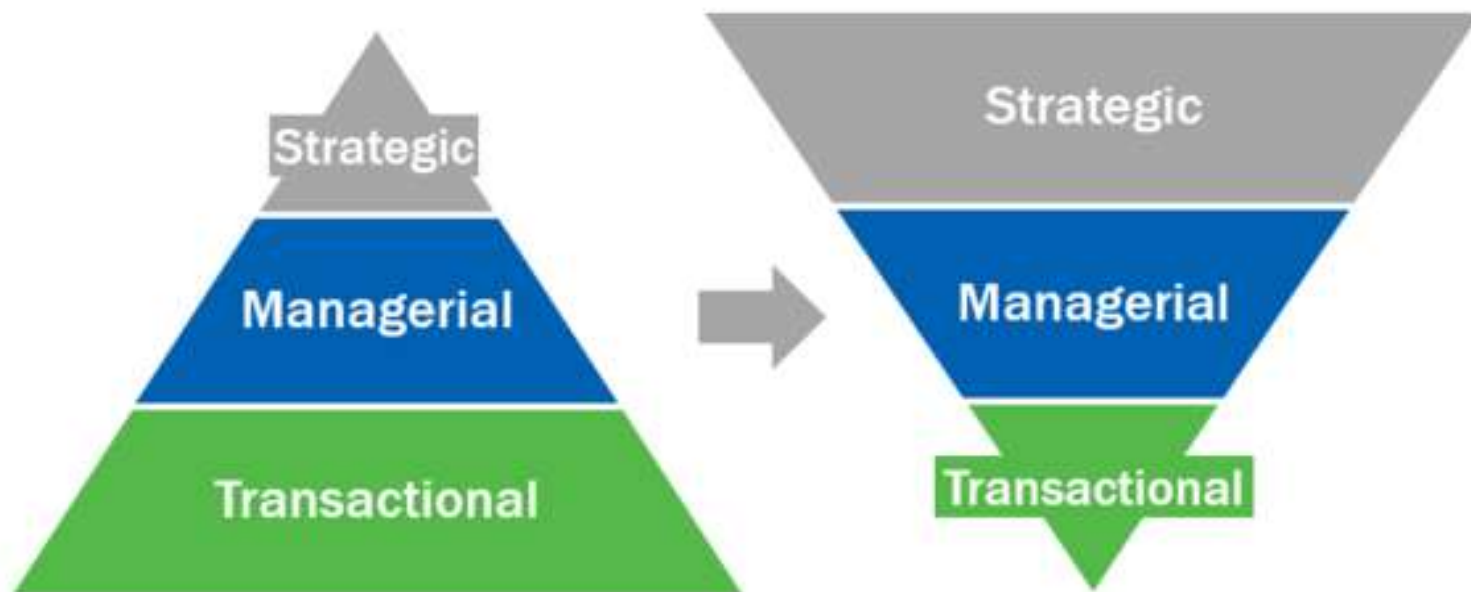
## AGENDA

1. Financial operations
2. Solutions: Core + Store + More
3. Apps vs. Apps + Services

- All attendee lines will remain muted
- Please connect to audio by dialing in (toll) or by using your computer speakers (VoIP Toll Free).
- If you have dialed in by phone select Telephone and enter your audio PIN number in the audio panel
- If you lose audio, please exit out of the presentation and reconnect
- We are recording today's presentation and you will be sent a link to the webinar recording
- Please use the "Q&A" to ask us questions.



# Changing Roles



*Adapted from the following sources:*

Jeanne Bell and Elizabeth Schaffer, *Financial Leadership for Nonprofit Executives: Guiding Your Organization to Long-term Success* © 2005

Betty Ferreira, "Finance Digital Transformation for Not-for-Profits," [ReStructure Consulting](#)



# PRIORITIZE THE PAIN POINT

**What causes the most  
(accounting or  
financial management)  
pain?**

Revenue

Expenses

Earned + Contributed

Expenses

# Earned + Contributed

Billing

Ticketing

Point of  
Sale Systems



# Earned + Contributed

Individuals

Corporate  
Donors

Foundations

A diagram consisting of three rectangular boxes. At the top left is a gray box labeled 'People'. To its right, at a slightly higher vertical position, is a smaller gray box labeled 'Other'. Below these two boxes is a large red box labeled 'Expenses'. The 'Expenses' box is wider than the 'People' box and extends further to the right, partially overlapping the horizontal space of the 'Other' box.

People

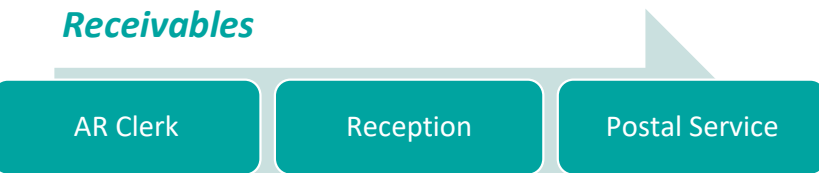
Other

Expenses

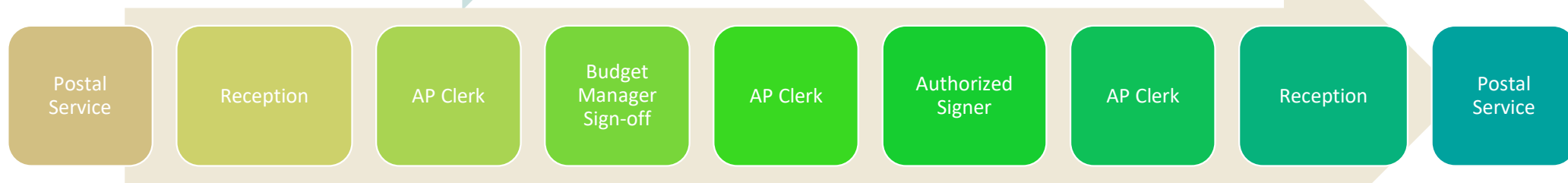
# PRE-PAPERLESS WORKFLOW

How many hands touch a single invoice?

## *Receivables*



## *Payables*



## *Receivables (continued)*



# FINANCIAL AUTOMATION

## *Receivables*

System Generated Invoice released  
by AR Clerk

## *Payables*

AP Clerk Reviews Inbox

Budget Manager Approves

Authorized Payer Approves

## *Receivables (continued)*

Payment sent directly  
to Bank



# POLL

What is keeping you from fully automating?

- ☐ Perceived Cost
- ☐ Leadership Inertia
- ☐ Perceived Effort
- ☐ Security Concerns
- ☐ Control Concerns
- ☐ Staff Resistance, Readiness

# CORE ACCOUNTING SYSTEM

posttv

SWOC  
IN  
TECH

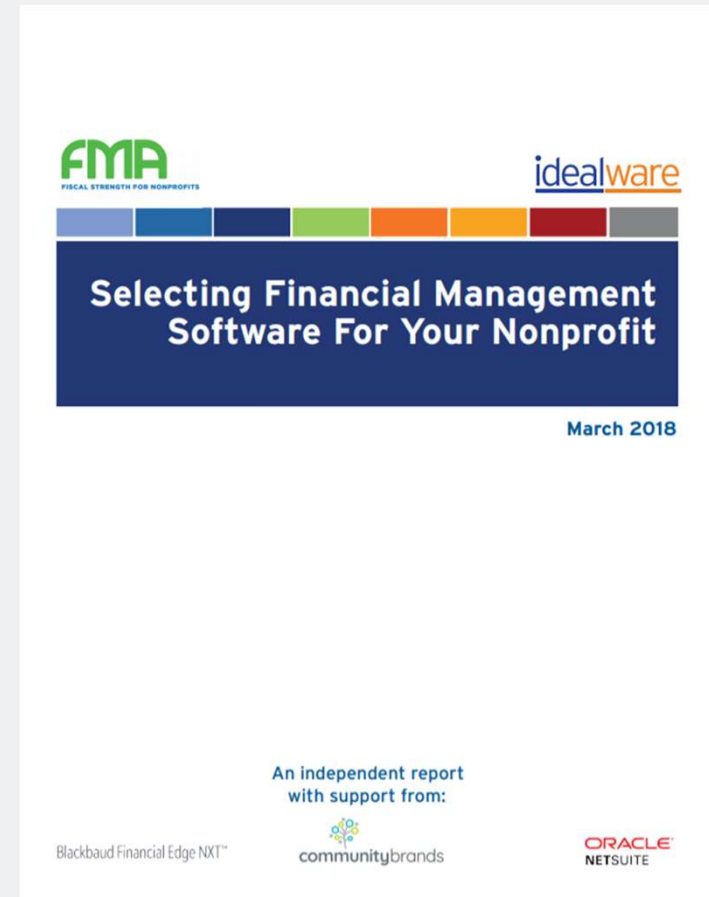


# SELECTING FINANCIAL MANAGEMENT SOFTWARE FOR YOUR NONPROFIT

1. Define the team
2. Identify your needs
3. Consider workflows
4. Identify potential solutions
5. List your concerns
6. Ask questions
7. Choose a solution
8. Plan the transition

Download the free guide at

<https://offers.techimpact.org/reports/nptechpolicyworkbook/>



## ACCOUNTING APPS

[QuickBooks](#)

[Abila MIP Fund Accounting](#)

[AccuFund](#)

[Aplos](#)

[Araize FastFund Accounting](#)

[Denali Fund](#)

[Financial Edge NXT \(Blackbaud\)](#)

[FinancialForce](#)

[FundE-Z](#)

[Microsoft Dynamics 365 Business Central](#)

[Oracle NetSuite](#)

[Sage Intacct](#)

[Xero](#)

[Zoho Books](#)

ON-SITE



CLOUD





# ACCOUNTING VENDOR'S STORE

QuickBooks App Store

quickbooks.intuit.com/app/apps/home

Find the right apps for your business

Search by app name, keyword, job, or category

APP COLLECTIONS

- Popular apps
- Trending apps
- Free apps
- Premium apps

CATEGORIES

- Calculate quotes
- Get funded
- Make payments
- Manage customers
- Manage human resources
- Manage projects
- Perform analytics
- Prepare taxes
- Receive payments
- Run payroll
- Send invoices
- Sync data
- Track expenses
- Track inventory
- Track time

Popular apps

**Receipt Bank**

Sync the data from your receipts and bills with QuickBooks Online

★★★★★ (347)

**Bill Pay for QuickBooks Online**

Pay bills directly inside QuickBooks for more control and visibility.

★★★★★ (115)

**TSheets Time Tracking**

Simplify payroll and invoicing with time tracking powered by QuickBooks!

★★★★★ (4461)

**Fundbox**

Get access to credit to fund your company's future.

★★★★★ (787)

**Expensify**

The only receipt tracking and expense management partner of the AICPA

★★★★★ (1434)

**Fathom**

Insightful dashboards and performance reports for your business.

★★★★★ (122)

**Bulk Import Excel | CSV | IIF - SaasAnt Transactions Importer...**

Import / Export / Delete Excel Transactions/Lists (Invoice, Bill, Journal etc.)

★★★★★ (1267)

**Qvinci - Consolidation, BI, KPIs and Financial Reporting**

#1 Reporting App in the Intuit Store

★★★★★ (138)

**QuickBooks Payroll, HR & Benefits**

The #1 payroll provider for small businesses

★★★★★ (307)

[QuickBooks](#)

Sage Intacct Marketplace
marketplace.intacct.com/marketplace?category=a2Ci000000DhkIEAC


## Welcome to the Sage Intacct Marketplace!

Best-in-Class business applications to extend your success in the cloud.


**CATEGORIES**

- \*New Marketplace Listings
- AP Automation
- AR Automation
- Budgeting and Planning
- Business Management
- CRM
- Document Management
- eCommerce
- EDI
- Finance & Administration
- Fixed Asset & Leasing
- HCM & Payroll
- Inventory Management
- Manufacturing
- Point of Sale
- Project Management
- Spend Management
- Tax Management


### Not for Profit




**Fully Automated AP Solution for Sage Intacct**  
by: [Bill.com](#)  
Learn why thousands of Sage Intacct customers use Bill.com to automate their AP workflow!




**Tipalti**  
by: [Tipalti](#)  
Tipalti provides one end-to-end cloud-based global accounts payable automation solution.




**FloQast**  
by: [FloQast](#)  
FloQast automates common accounting workflows helping to streamline and make them more efficient.



**Workforce Go! HCM**  
by: [Workforce Go!](#)  
Think of us as the experts who can help you get



**Yooz Accounts Payable Automation**  
by: [Yooz](#)



**Nexonia Expenses**  
by: [Nexonia](#)  
Save time & money by automating expense

[Sage Intacct](#)



Software for Nonprofit & Social

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# Software for Nonprofit and Social Good Organizations

## All Products

Home > Products

Blackbaud's software products are specially designed to support the unique needs of nonprofit and social good organizations. Explore our software solutions that can help you advance your organization's mission.

BY MARKET

BY SOLUTION AREAS

BY PRODUCT NAME

Reset

**Blackbaud Altru**

Cloud-based ticketing, membership, and fundraising.

**Blackbaud Award Management**

Improve student access to scholarship funds, enhance cross-functional visibility and automate donor reporting.

**Blackbaud Church Management**

Drive vitality and care for your congregation with an easy-to-use, scalable solution for all sizes.

**Blackbaud CRM**

Constituent Relationship Management for large to enterprise-level nonprofit organizations.

**Blackbaud DonorCentral**

Online portal providing access to account and grantmaking information and enabling donors to suggest grants anytime, anywhere.

**Blackbaud Employee Giving**

A fully integrated workplace charity giving software solution to help maximize employee engagement and serve your community.

**Blackbaud Employee Volunteering**

Easy, intuitive cloud-based solution for launching and accelerating your employee volunteerism.

**Blackbaud Enrollment Management System**

One solution to seamlessly connect all aspects of the admissions process.

**Blackbaud eTapestry**

Simple cloud-based fundraising and supporter management for growing nonprofit organizations.

**Blackbaud FIMS**

Fully-integrated foundation management system.

**Blackbaud Financial Edge NXT**

A complete cloud-based fund accounting solution designed for nonprofits and government entities.

**Blackbaud Fundraiser Performance Management**

Use the power of your data to drive fundraising results.

1

2

3

4

[BlackBaud](#)

Strength of Integration?

## TRUST



Public dashboard status?  
Certifications?

## SECURITY



Single Sign On?  
Multi-factor authentication?  
Audits?

# THIRD-PARTY APPS



## THIRD-PARTY APPS

Payroll:

[ADP](#)

[PayChex](#)

(example: [MNA](#))

Other examples:

[Bill.com](#)

[Expensify](#)

[Square](#)

[Stripe](#)

[TechSoup.org](#):

ADP

ClickTime

DocuSign

Paya

PayAnywhere

## POLL

What category of app are you most interested in exploring?

- Payroll
- Bill pay
- Expenses
- Billing
- Time tracking
- Other



# POLL

What category of app are you most interested in exploring?

- ☐ Payroll
- ☐ Bill Pay
- ☐ Expenses
- ☐ Billing
- ☐ Time Tracking
- ☐ Budgeting
- ☐ Grants Management
- ☐ Data Visualization
- ☐ Other

ADP Payroll for Nonprofits with 49 or fewer employees access to discounted rates-g-50682-

techsoup.org/products/adp-payroll-for-nonprofits-with-49-or-fewer-employees-access-to-discounted-rates-g-50682-


See our nonprofit COVID-19 resources

techsoup United States

PRODUCT CATALOG SERVICES COMMUNITY RESOURCES HELP LOG IN JOIN

Donor or Company Category Hardware Browse full catalog

## ADP Payroll for Nonprofits with 49 or Fewer Employees – Access to Discounted Rates



Donor Partner: ADP  
Platform: Multiple platforms  
Format: Online  
Product ID: G-50682  
Availability: Available


Boost Subscribers: see special Boost pricing

Admin Fee:  
**\$100.00**


LOG IN

or Become a TechSoup Member

### RELATED PRODUCTS



QuickBooks Online Plus, 1-Year Subscription, 5 Users



QuickBooks Premier Editions 2021, 1 User License

[ADP at TechSoup.org](https://techsoup.org)

If you want to see the best cloud accounting software apps all in one place, then you'll LOVE this ultimate list.

In it, I'll be sharing **147** of the best cloud accounting software apps on the market.

Each item in the list will contain a brief description and will focus on how you can level up your accounting automation.

While the list is in no particular order, it has been grouped according to categories so that you can find the best cloud accounting software apps based on your interest.

Ready to dive in?

Let's go!

## Quick Links

- [Cloud Accounting Software](#)
- [Bills & Expense Apps](#)
- [Invoicing, Billing & Proposal Apps](#)
- [Job Apps](#)
- [CRM Apps](#)
- [Accounts Receivable Apps](#)
- [E-Commerce Apps](#)
- [Financial Services Apps](#)
- [Inventory Apps](#)
- [Payments Apps](#)
- [Payroll & HR Apps](#)
- [Point of Sale Apps](#)
- [Reporting & Analytics Apps](#)
- [Time Tracking & Scheduling Apps](#)
- [Cloud Accounting Conversion Apps](#)
- [Cloud Accounting Backup Apps](#)
- [Other Cloud Accounting Apps](#)

[Cloud accounting list by FutureFirm](#)

EXPORT/  
IMPORT



API



Application programming interface



**APP OR SERVICE?**





Finance/  
Accounting-  
As-A-Service

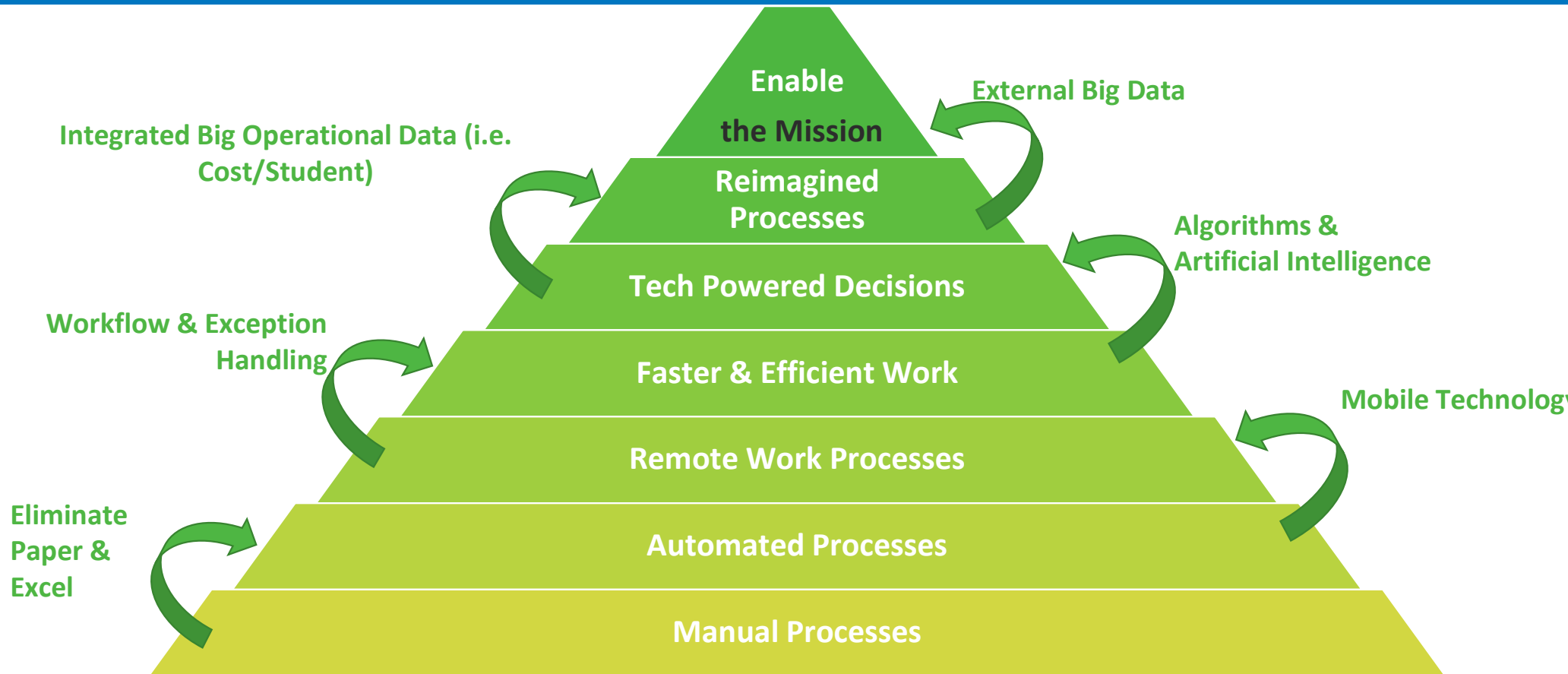




# PANEL DISCUSSION



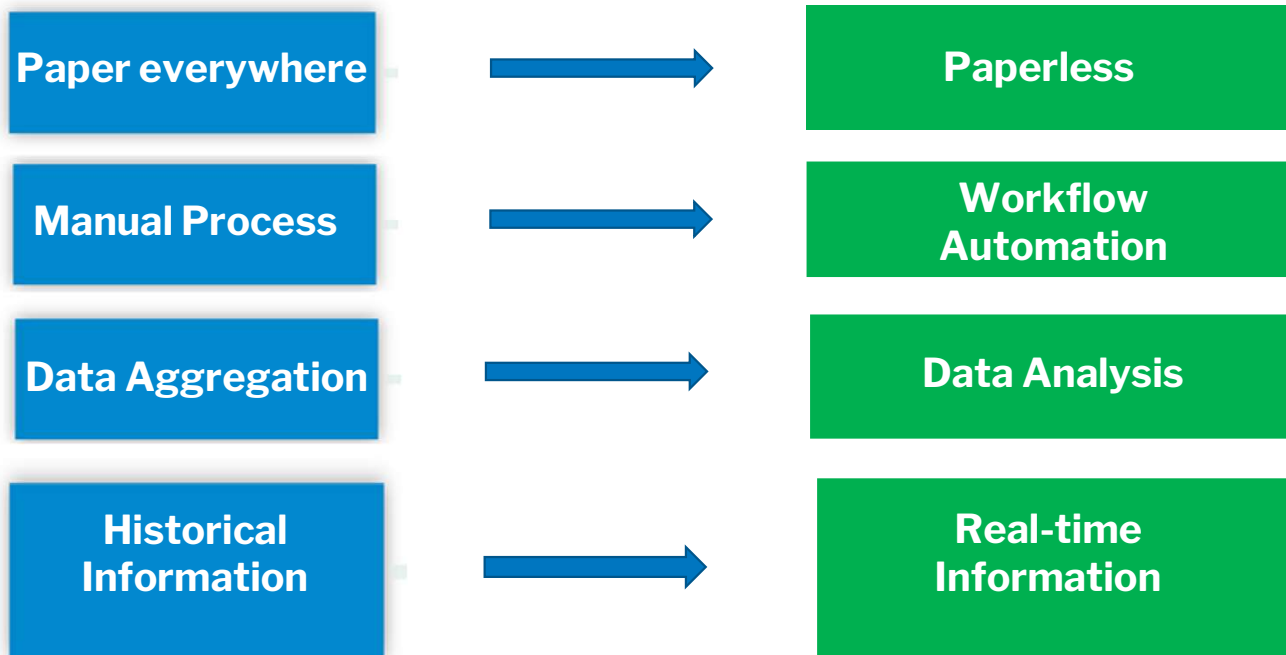
# EVOLUTION OF FINANCE



Adapted from TechVentive in "The 'Digital' Finance Future: Business as Unusual by Brian Sommer. August 6, 2020  
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# NOW V FUTURE





**THANK YOU**

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Andy Wolber: [andy@wolberworks.com](mailto:andy@wolberworks.com) or [@awolber](https://twitter.com/awolber)

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coming now!

**TECHIMPACT.ORG**

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Andy Wolber

Jeanne Bell

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