# Software Solutions
## Personal Attention. Public Solutions.

## IS YOUR TECHNOLOGY HELPING, OR HURTING, YOUR EFFICIENCY?

Answer "Yes" or "No" to the following questions:

| | YES | NO |
|---|---|---|
| Does your office electronically send requisitions to approvers? | | |
| Are approvers automatically notified there is a pending electronic approval request? | | |
| Can you find answers to budgetary questions in five minutes or less? | | |
| Can your software create spending thresholds that notify you when nearing your budgeted amount? | | |
| Does your software automatically back up data for protection against a natural disaster or cyber-attack? | | |
| Can you reconcile with the bank within your accounting software? | | |
| Can you see, at a glance, the percentage of budget spent in each general ledger account? | | |
| Can your system create multiple approval steps during purchasing and receipting to mitigate theft? | | |
| Can you forecast and compare expense and revenue projections with the actuals? And quickly view them alongside previous years? | | |
| Can you quickly build custom reports like the Certificate of Available Resources, and reference ones from years past within the software? | | |
| Can you drill down within your files to see details of purchase orders and their origins? | | |
| Does your software show important transaction details on credit card purchases, such as the vendor? | | |
| Does your system require a vendor for one-time payments, creating a large list of unnecessary vendors? | | |
| Is your software support team easily reached and effective in solving your problems? | | |

**"No" Total (14)** \_\_\_\_\_

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**Tally the number of "no" answers and see your results below.**

| Score | Result |
|-------|--------|
| 0-4 | **Process is a Priority**<br><br>You definitely have an eye for a good process. You want to make sure your technology does the work for you and keeps your office as efficient as possible. Make sure you get evaluated regularly for potential process gaps to ensure you are as efficient as possible with your time and resources. Also, routinely check that your support line is there for you if you do hit a bump in the road by calling in with questions as they come along. Keep up the great work! |
| 5-9 | **Seeing Some Sparks**<br><br>Although your technology is helping your office in some areas, there are still gaps where information is not seamlessly transferred or visible in the software. This leaves room for errors or causes a time-consuming process to take place. If your information can stay in the system and be referenced easily, you are more equipped to provide answers to internal and external departments for community improvements. |
| 10-14 | **Technology Troubles**<br><br>Your technology is meant to make your workday easier, not more difficult. If your technology seems like a roadblock in processes or an extra step, it is not serving your team or your community. Your software should make inputting, referencing, and reporting data as simple as a few clicks. The longer you stick with this process, the more you're wasting your time, money, and energy on a solution that isn't going to work for your office long-term. |

**To receive a complimentary process analysis, or to see our products in action, contact us:**

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