

The simplest way to manage your nonprofit



OPERATIONS ESSENTIALS FOR NONPROFITS

Spreadsheets alone can't keep up with the complex demands of funders, directors, project managers and auditors. Take control of your information so you can manage your purpose instead of your process.

Simplify your operations

Take another step in your digital transformation with a cloud-based app that is built on the Common Data Model for Nonprofits. Functionality to support essential operations comes ready to use on Day 1, as well as the ability to customize and tune to your specific needs. With centralized information your team will work from a secure, single source of truth that ensures you can grow with confidence.

Funding Management

Track details of each source of funding providing a complete picture of funds with or without restrictions and awards from proposal to close.

- ✓ Track Funds
- ✓ Manage Awards
 - Subawards
 - Subcontracts
 - Deliverables
 - Planned Payments
 - Objectives

Project & Cost Management

See all project work in one place – from setup to budgeting to reporting. Real-time visibility of time and expenses means less scrambling at the end of each period.

- ✓ Project Budgeting
- ✓ Cost Center Budgeting
- ✓ Manage Agreements
- ✓ Track Vendor Performance
- ✓ Manage Time & Expense
- ✓ Plan Trips
- ✓ Manage Requisitions

Workforce Management

Build a complete picture of how your workers will spend their time and ensure accurate budgeting and planning of labor costs even as they change over time.

- ✓ Worker Details
- ✓ Compensation Plans
- ✓ Labor Cost Schedules
- ✓ Plan Worker Level of Effort
- ✓ Track Compliance

Stop

- Entering the same data multiple times
- Managing disconnected spreadsheets
- Scrambling to assemble information
- Relying on heroes to provide accurate answers
- Purchasing single-purpose technologies
- Depleting unrestricted funds to cover costs

Start

- Safeguarding your data
- Seeing a complete picture of your work
- Enabling teams to access accurate information
- Taking on more without breaking processes
- Mitigating the risk of time-consuming audits
- Achieving full cost recovery for your projects

Work seamlessly and securely with familiar tools

Built on Microsoft's Power Platform with direct integration to all the apps in your Office 365 environment including Excel, Word, OneNote, and more, you can rely on the same security and accessibility as enterprise customers around the world. In addition to the nonprofit-specific features of the app you can:

- Access your information from anywhere, on any virtually any device
- Plan and track financial information in multiple currencies
- Work directly with documents stored in OneDrive or SharePoint
- Control access using one of the many preconfigured security roles or create your own
- Create rich analytics and reporting working directly from your data using Microsoft Power BI
- Integrate with your other systems or tools using Microsoft Power Automate

Use Case 1: Smaller Nonprofit

Size: 20

Funding mix: 95% award-based from multiple funders

Technology mix: Office 365, Sage 50, Power BI

Detail: This small nonprofit is headquartered in the US with one additional office in another country. Core information and processes are managed by Operations Essentials for Nonprofits and transactions from their accounting system are imported to enable budget plan vs. actual reporting in Microsoft Power BI and Excel.

Use Case 2: Larger Nonprofit

Size: 37,000

Funding mix: 60% donation-based

Technology mix: Office 365, Unit4 Business World, Tableau

Detail: This global nonprofit uses a fully integrated ERP system for accounting and operations. Integration between the central ERP and Operations Essentials for Nonprofits is established to enable smaller satellite offices to manage and report on locally relevant project information and meet country-specific data sovereignty requirements. Consolidated information is made available for reporting through a data warehouse.

Getting started

At just \$15 per user per month nonprofits can replace several single-purpose apps while saving money and working within a single environment. Contact us today to setup a demo and learn more about Operations Essentials for Nonprofits.

"HAI has staff in multiple locations across different countries which adds to the challenge of maintaining and accessing timely information organization-wide. Having critical information centralized was our first milestone." – **Tara Krumenacker, Director of Finance, Health Alliance International**



Setup a demo today! Visit <https://operationsessentials.com> for more information.

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