

Technology can save time and money!

Situation:

A not-for-profit organization had a bookkeeper that would not make adjustments to their accounting system to work within the reporting requirements of the organization. The organization wanted reports in a different format and needed them sooner than the bookkeeper could deliver them. The bookkeeper insisted that they would come by weekly to pick up data and return in two weeks with checks to be paid.

Solution:

Because BookKeeping Express stresses technology, the company was excited that they could fax or scan information and deliver it to BKE the day it arrived in their office. BKE also requested and received approval to log on to receive monthly credit card and bank statements the day they were prepared which allowed the financial statements to be completed timely.

In the initial interviews with the prospect BKE learned that they had several centers that they wanted to track costs and revenues on. By setting these up as classes within QuickBooks we were able to provide them with separate statements for each center, as well as a combined statement for the organization.

Bookkeeping Express now provides quarterly analytical reports showing how the company compares to other Not for Profits of similar size, indicating how much of their funds are used for administration and how much is spent on charity causes.