



**EXPRESS**  
INFORMATION SYSTEMS



## **Not For Profit**

EIS delivers a powerful suite of capabilities specifically focused on the unique needs of the not-for-profit organization. The tools are empowering organizations to streamline and optimize their finances and reporting obligations for more effective operations. That translates into more time focused on providing services and value for their beneficiaries.

From commitment management to fund management, we promotes accurate and timely reporting, easily accessible data, and automated processes to reduce daily overhead. The tools are designed to help Organizations successfully operate today and secure the funding needed for future growth.

## **Grant Management**

Delivering timely information about successful budgeting and grant performance can help increase your likelihood of receiving future grants. Grant management systems can help cut costs and improve productivity while processing applications, making awards, and administering and closing grants. Automated grant management allows you to streamline transactions, monitor daily expenditures, and deliver timely reports for optimal grant performance by providing the following functionality:

- Validates transactions against budgets: period-by-period, grant-to-date, or grant life basis.
- Helps eliminate overspending with automated budget warnings.
- Helps prevent posting of grant transactions when budget is exceeded.
- Allows grants to span multiple fiscal periods.
- Enables you to assign specific users, general ledger accounts, or projects to a grant.
- Lets you attach a sponsor or a list of sponsors to the grant.
- Provides "actual" versus "budget" comparison with detailed summary reports.
- Delivers specialized reports or standard reports that automatically summarize based on grant inception-date or ending-date, regardless of fiscal year parameters.

## **Fund Management**

Multiple fund management is a critical task that can have broad ramifications on the future success of your organization. We offer fund management applications to help your organization fully adhere to the increasing number of reporting guidelines. Now you can accommodate the special regulations, restrictions, and limitations needed to manage multiple funds across several projects. Each fund can be assigned a unique ledger account that provides revenue, expense, and balance sheet reports. Funds can also be summarized as a whole within the organization.

By automating fund management, our solutions help reduce errors associated with manual entries and manual reconciliation of funds. The solutions will also save you valuable employee time and minimize the need for your staff to know all related accounts. Most importantly, fund management solutions make reporting easier and results more accessible, helping ensure that reporting guidelines are met on time.

## **Commitment Management**

When you plan and account for future expenses, you help strengthen and preserve your financial integrity and reduce budgeting surprises. We provide automated commitment management applications that can help not-for-profits prevent overspending by forecasting future expenses and gaining a clearer picture of what lies ahead. Automated commitment management gives you the flexibility and budgetary insight you need to better administrate resources.

Now your organization can provide account-level budget knowledge to those generating and authorizing requisitions, giving them the budget control needed for successful operation. Our commitment-management applications deliver superior budget control and acute visibility, without impeding the purchase order process by pre-encumbering requisitions, and provide account-level budget information to those generating and authorizing requisitions. It is even possible to seamlessly add committed purchases to any of your financial reports.

## **Encumbrance Management**

Keep your focus on utilizing budgets effectively, rather than on tracking expenses and worrying whether you've exceeded limits. With our Encumbrance Management, not-for-profit organizations can proactively manage and adhere to budgets, streamline period-end reporting processes, and monitor encumbrances from any point in time.

### **Proactively manage your budget**

Encumbrance Management provides checks and controls that ensure budgets stay within specified limits.

- Instantly alert users if budget limits have been exceeded when purchase order line items are entered.
- Ensure funds are correctly allocated by reserving encumbrances when purchase orders are first entered.
- Modify controls by entering tolerance levels for a specified amount over the budget.
- Prevent mishandling of funds by requiring a password to approve encumbrances that exceed the budget limit.
- Save time and effort by conducting mass encumbrance approvals.

### **Improve inquiry and reporting efficiencies**

Seamless integration with ERP solutions make it easy to search for and analyze critical budget information.

- Track encumbrances on an annual, period, or year-to-date level, with the assurance that budget status information is accurate and up to date.
- Easily view summary or detailed information for specific encumbrances or across a range of accounts.
- Simplify period and year-end reporting processes with the ability to query current or historical encumbrances.
- Gain an accurate view of encumbrances from any point in time. Track outstanding encumbrances, view a historical snapshot, and view and print reports from a day, a week, or a year past.

## **Fundraising**

In order to raise program funds, you need to cultivate strong relationships with your donors, increase donor and member retention rates, and improve your overall operational efficiency.

Fundraising solutions provided by EIS can help you maximize donations and minimize costs of fundraising campaigns.