



Roman Catholic Diocese of Portland Streamlines Non-Profit Expense Reporting with ExpensePath and Intacct Integration

“ExpensePath has been a great partner to meet our needs. They were very hands-on from the start so we spent relatively little time getting started. From launch, even our least technical users could easily create and submit expenses. ExpensePath met all our specialized Accounting and Finance needs with Intacct integration. And they are responsive, with answers in minutes to questions from Finance or our users.”



- Laurie Downey, Controller (and Intacct MVP)

Industry

Nonprofit religious organization

Requirements

- Simple for employees, particularly those users who are not tech-savvy
- Proxy capabilities for certain users to work on behalf of others.
- Capture fixed and variable organizational and accounting data for all expenses.
- Integrated with Intacct to transfer data into customized entities, accounts, and dimensions.

Results

- Employees submit expenses correctly with everything Finance needs
- Expenses submitted on time and within the rules
- Saves Finance time, including easy export to Intacct

Background

The Portland Diocese is a religious non-profit corporation created by the Pope in 1853, covering the state of Maine. It represents over 250,000 Catholics, overseeing 55 parishes, 14 elementary schools and one high school, residential facilities, childcare centers, and a construction company. The organization manages assets over \$150 million with a budget exceeding \$50 million.

The Diocese is complex, organized into over 100 distinct entities with each represented in the accounting system (Intacct). Some users belong to a specific entity but others have expenses related to multiple entities. Prior to ExpensePath, expenses were done manually with an Excel spreadsheet and data was manually inputted into Intacct.

Users include corporate office staff, ministry personnel, seminary students, and school and social service employees. Many are not accustomed to working with technology products so require a simple and intuitive solution to capture expense data, provide receipt backup, and provide organizational specifics of particular expenses. In addition, there are proxies who create and submit expense reports on behalf of other users.

Free Setup & Trial

ExpensePath configured user data, expense options, and accounting information, all mapped to the Diocese's Intacct implementation. To further automate for users, defaults were set for each employee

so they only need to make changes from dropdown menus for atypical expenses.

Through a free no-obligation trial, the Diocese verified that the system was easy for employees and more efficiently delivered Finance the information they needed.

Intacct Integration

ExpensePath mapped all accounting data so approved expense data automatically flows into Intacct and find the right:

- Entities
- Accounts
- Classes
- Projects
- Locations
- Employees

Results without an Overhaul

With ExpensePath, the Diocese has seamlessly improved their process without compromising their requirements. The process is easier and more efficient for all participants through automation without needing to make fundamental accounting or process changes. ExpensePath has been able to work within the Diocese's requirements.

NonProfit Pricing

The Diocese benefits from ExpensePath's special pricing for non-profits, including variable pricing that charges the lesser of a user- OR usage-based price, depending on what is lower for that month.



Expense Management
Automation

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