

# Go Paperless: Streamline Your Purchasing Process

*“Since we implemented Sage MIP Fund Accounting, our purchasing agents have been [freed] up for professional purchasing duties, like negotiating better prices and improving vendor service. Best of all, each purchasing agent now processes twice as many orders as before, and electronic requisition really saves time and money .”*

Tony Miller, CFO  
Oklahoma City-County Health  
Department

In today’s economic climate, companies are looking for new ways to cut costs and streamline business processes to become more competitive. At the same time, a new age of social responsibility has shifted public awareness toward preservation of the environment and a call for companies to “go green.” Both trends have created a compelling business case for going paperless.

In the past, print was merely a function of the work environment. The philosophy that prevailed was to buy inexpensive print solutions that provided convenience. Information was printed and filed away in the proprietary system you devised. Unbelievably, that filing system you came up with probably caused you to reprint items you just couldn’t locate or worse, recreate the data when no trace of the original content could be found.

In the economy of today, the landscape has changed. Managing documents has become a key factor in controlling cost and increasing productivity in the workplace. Suddenly those same inexpensive print systems don't seem so cheap when you factor in the cost of consumables, maintenance and the impact on the environment.. Additionally, the time it is taking you and your staff to find and use that data has a negative impact on your productivity. Quickly locating, accessing, and disseminating information is critical in doing business efficiently.

Sage MIP Fund Accounting Electronic Requisitions and Purchase Order modules can be a great first step toward going paperless. They enable you to streamline and electronically manage the purchasing process.

## Electronics Requisition Module

With this module, you can electronically request, approve, and track requisitions and purchase fulfillment, maintaining strong internal controls and a paperless workflow. You can review the requests impact on your budget and encumbrances in just one click. You’ll also receive e-mail notifications when your requisition is approved.

### Track Each Electronic Purchase Requisition

- One-click Budget Checking tool lets you easily review the budget impact of the current request.
- Seamless integration with the Purchase Orders and Inventory Control modules allows more efficiency and control of processes.
- Speed request entry by using Stored Item Codes to facilitate the storage of item descriptions, standard quantities, pricing, and account coding for quick recall.
- Automatically receive e-mail notifications when your purchase requisition is approved or for pending approvals.
- Quickly and easily monitor your own requests and those requests awaiting your approval, plus easily trace the entire purchase requisition workflow history and record notes with each step of the approval process.
- Run comprehensive reports and optionally customize your own, including purchase requisition registers, purchase requisition history, and budget analysis selections.

The Electronic Requisitions module is fully integrated with other Sage MIP Fund Accounting modules, including Purchase Orders.

## Purchase Orders Module

The Purchase Orders module combines easy-to-use purchase order entry and seamless receiving. Audit controls prevent possible payment for items not actually received, and customized codes can be created for commonly ordered items and automatically generate new purchase orders.

### Flexible Production With Purchase Order Software

- With purchase order software, use Item Codes to speed purchase order entry—Item codes facilitate the storage of item descriptions, standard quantities, pricing, and account coding.
- Flexible Processing—There is the option to print a single purchase order on-the-fly or process multiple orders simultaneously as a batch job.
- Easily verify coding and check for available budget—Organizations can use purchase order software to verify their available budgets with a single click to ensure funds are available before issuing purchase orders.
- Ensure audit controls with full receiving functionality to prevent possible payment for items not actually received.
- With purchase order software, reduce data entry with full account coding transferring from originating Purchase Order to invoice entry.
- Extensive tracking capabilities—Assign buyers, track delivery dates, intended item recipients, requisition authorizing purchases, and more. You can easily create user-defined fields to collect and report on the information needed for your organization's purchasing policies.
- Have multiple locations or buildings? Drop-ship orders to an unlimited number of unique addresses and receive full or partial orders and

store it all in one purchase order software solution.

- Flexible reporting—Options are available for creating custom Purchasing reports or choosing from numerous ready-to-use reports.

The return on investment can become evident very quickly. The example below is a real case study. By running a single system instead of three or four, they've reduced software licensing and maintenance fees by at least \$15,000 a year. Since adopting the software, their budget has grown by more than 25 percent, and their employee base has risen as well. Yet they've managed to run the agency without adding staff in HR, payroll, or purchasing.

### Case Study

When the Oklahoma City-County Health Department (OCCHD) says it's "here for good," they mean it. For 56 years, the agency has served the Oklahoma City metro area with programs and services offered to every citizen in the county, including emergency preparedness, food safety programs, school wellness, and smoking cessation plans. OCCHD works hard to ensure that public health is not just okay, but the very best it can be.

OCCHD strives to use resources wisely. Yet the agency found itself with separate standalone software systems for human resources, inventory, time and attendance, and purchasing. The multiple systems created redundant data entry, and maintenance costs were high.

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### Search for Integration

"We needed a totally integrated system," says Tony Miller, Chief Financial Officer. "We shopped around quite a bit, and discovered that Sage MIP Fund Accounting was the most complete non-profit solution on the market. Every other product seemed to be missing at least one piece. Furthermore, Sage MIP Fund Accounting integrated seamlessly with diverse applications, so that we could finally create a single end-to-end system."

Once OCCHD started using Sage MIP Fund Accounting, the wisdom of its choice became apparent. "Sage MIP had the easiest reporting application of any software I've ever used," comments Miller. "The solution is Windows-driven, so the interface is familiar to almost any user, making it very easy for our employees to pick up. Overall, getting Sage MIP Fund Accounting up and running was surprisingly fast and simple."

### Remarkable Reports

An immediate benefit of the new system came from easier data analysis. "We have numerous different reporting requirements, and the software makes it simple to customize any type of analysis we need," says Miller. "For instance, we can set up our accounting structures and cost centers however we want. This saves a tremendous amount of time and effort. Also, we can obtain sophisticated data immediately, and provide it to our governing board. This lets them make

## Case Study: At a Glance

### Challenge

Agency needed to consolidate four stand-alone software systems into a single database, and streamline purchasing, HR, and payroll activities.

### Solution

Sage MIP Fund Accounting with full complement of modules for finances, HR, and procurement.

#### Sage MIP Fund Accounting

- General Ledger
- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Fixed Assets
- E-requisitions
- Purchasing
- Encumbrances
- Inventory
- Human Resource Management
- Employee Web Services

### Results

Software doubled the efficiency of purchasing agents; savings of \$15K year in maintenance costs; budget grew by 25 percent, without requiring additional staff in HR or payroll.

better strategic decisions. Everyone has noticed dramatic improvements.”

### Combining HR and Payroll Records

Because Sage MIP Fund Accounting has a modular design, OCCHD was able to add human resources management capabilities to the system when it was ready. “We set up the Human Resources Management module ourselves,” says Miller. “It’s a tab-driven module, and very visual and intuitive. You can quickly flow through different set ups for an employee. The best thing, however, is that our payroll and HR systems now share a single database, eliminating redundant entries.”

Next came the latest solution from Sage MIP Fund Accounting: Employee Web Services (EWS), an online time reporting and self service application. Employee hours are automatically recorded into the payroll system, and the software electronically generates pay stubs. “We saw a demo of EWS at the Sage Summit user conference,” explains Miller, “and immediately recognized its potential for saving even more time for our staff.”

### More Productive Purchasing Agents

The bottom-line benefits of switching to Sage MIP Fund Accounting are evident in OCCHD’s purchasing department. “With our old system, purchasing agents were mostly paper pushers,” says Miller. “They were buried under so much paperwork that they couldn’t focus on really important tasks.”

The new system changed all this. “Since we implemented Sage MIP Fund Accounting, our agents have been relieved of data entry duties,” Miller notes. “This frees them up for professional purchasing duties, like negotiating better prices and improving vendor service. Best of all, each purchasing agent now processes twice as many orders as before.”

The return on investment is evident in many areas throughout the agency. “Electronic requisitions with Sage MIP really saves time and money,” explains Miller. “And by running a single system instead of three or four, we’ve reduced software licensing and maintenance fees by at least \$15,000 a year. Since adopting the software, our budget has grown by more than 25 percent, and our employee base has risen as well. Yet we’ve run the agency without adding staff in HR, payroll, or purchasing. This is a big deal, as we are now serving our community much more effectively.”

### Putting It All Together

Going paperless will have tremendously positive implications for your business. In addition to a significant increase in productivity, you’ll free up office space currently reserved for paper storage, improve timeliness of communication and document delivery via automated email or fax, enhance document security, save money in paper costs and postage, and extend the reach of documents to multiple people in separate locations. Perhaps best of all, you’re demonstrating corporate responsibility by getting lean and going green!

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