

# Customer Success Story

## Educational Alliance

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Digitizing finance helped this non-profit improve their month-end close time by 66%—without relying on paper.



**Industry:** Non-Profit, Community Organization

**Client Since:** 2015

**Solutions:** Nexonia Accounts Payable and Nexonia Expenses

**Integrations:** Sage Intacct

Since 1889, Educational Alliance has brought together diverse communities in Manhattan by offering high-quality, multi-generational services. With over 1,000 full-time employees, their team operates 38 programs to improve the lives of 50,000+ New Yorkers annually.



## With 15 sites sprawled across Manhattan, Educational Alliance managed over 1,000 expenses and invoices per month.

The non-profit's paper-based processes were out of hand, and deeply impacted growth as well as their ability to serve more New Yorkers.

"Sometimes, invoices or expense receipts would get lost or were illegible. And there was no easy way to check until it was too late," explained Anthony Herrera, Senior Manager of Business Systems at Educational Alliance.

The invoice and T&E process was arduous. Both processes required attaching additional documentation to paper forms before they could be approved and copied. Those copies were next sent via messenger service further down the approval chain until they eventually reached finance. That was only for compliant expenses and invoices. Ones with missing signatures or incorrect coding took more steps to resolve.

As a final step, the AP team manually entered spending data back into Sage Intacct before ensuring accuracy and policy compliance—adding a tedious, and error-prone steps to an already challenging process.

## THE CHALLENGE

- Complex, multi-location organization
- Manual processes causing bottlenecks
- Missing documents, duplicates, and coding errors
- Disconnected accounting platform
- "Blame Games" between departments

## THE SOLUTION

- Unified expense and accounts payable solutions
- Granular allocation control
- Configurable, automated approval workflows
- Bi-directional integration with Intacct

## THE RESULTS

- 90% of errors caught prior to processing
- Improve cashflow and forecasting by program or location
- 66% faster month-end close
- Air-tight audit trail



“Before Nexonia, we were consistently over 30 days behind closing our books,” says Herrera. “There were times when a bill didn’t get to finance and was never paid. We even had threats to shut off service. And non-payment wasn’t because of cashflow, but purely from lack of oversight.”

Educational Alliance found themselves at a crossroads: continue hiring budget analysts—a costly challenge in Manhattan—or find a sustainable solution.

“Intacct is a powerful accounting platform, but it didn’t do what we needed for expenses or payables,” said Herrera.

“We knew we needed a tool that everyone could use. And we didn’t want our staff to get stuck entering data twice. We wanted a seamless, bi-directional sync between the two. Which is why Nexonia and its integration with Intacct were so appealing.”



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An outside technology firm, JMT Consulting, recommended Nexonia for its highly-configurable, user-friendly tools and seamless integration with Intacct. User adoption was successful because of the solution’s intuitiveness and support accessibility. As a result, stages of Educational Alliance’s process became digitized, eliminating the need for paper forms and costly messenger services.

## THE SAGE INTACCT INTEGRATION

Nexonia’s award-winning integration with Intacct allows data to effortlessly flow between platforms. Our solutions serve as the user-friendly entry system, a simple and intuitive tool that everyone can easily use. Intacct remains private, protected, and the single source of truth for data. “We don’t have to worry about double-entry and errors with Nexonia,” explains Herrera. He adds that while Intacct is great for accounting, it wasn’t the right way for Educational Alliance to accomplish their goal.

## LEARN MORE

To learn how Nexonia can revolutionize your expenses and payables management, visit [nexonia.com](https://nexonia.com)



“Now approvers only see the expenses they need to—with a complete audit trail to back up every action,” Herrera added with a sense of relief. “We no longer have to play the ‘blame game’ because we can just pull up the invoice and look at who approved it.”

Today, 90% of errors are caught before syncing with Intacct, which adds the hidden benefit of accountability. Budget analysts and program administrators are more aware of their coding mistakes and budget allocation because they are the first step in the approval process.

As soon as an expense or purchase is fully approved in Nexonia, it posts directly to the GL and generates a bill inside Intacct. The AP team decides how to pay and when.

“I cannot remember how we functioned without this. I’m not joking,” said Herrera. “It makes the process so much easier. Just being transparent, tracking any order at any time, and having an archive of it has been so impactful. I don’t know how we did it before.”

Educational Alliance’s AP team gained more time to focus on analyzing and improving their spending. With seasonal programming, it was essential to accurately project and forecast expenditures throughout the year. Their work helps the CFO intelligently adjust cashflow to meet program demands and keep costs down.

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**“Now we catch 90% of errors upfront.”**

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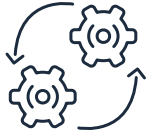
“We’d find instances where we’d order the same thing from six different places. Since AP had time to analyze spending to find this opportunity, we pull together the order from one vendor at a discounted rate.”

Speaking to other non-profits, Herrera advises, “Make the switch now. A manual process for any organization—growing or cruising—is unsustainable.”

With Nexonia Accounts Payables and Nexonia Expenses, Educational Alliance is now able to make better use of their staff’s time so they can grow sustainably and continue enriching the lives of the people who matter most.



## HIGHLIGHTED FEATURES



### Integration with Sage Intacct

What was once a laborious, manual, double-entry activity that everyone dreaded has been transformed into a streamlined and effective process. Any order or expense submitted in Nexonia is automatically coded and tied to the correct funding source and cost center.



### Digital Receipt Capture

Educational Alliance doesn't have to worry about losing receipts, invoices, or scanning and sending paper around Manhattan. With Nexonia, each purchase is easily tied with the correct receipt or invoice—maintaining compliance and speeding up payments.



### Complex Approval Workflows

Educational Alliance was able to completely streamline their approval process to give their program administrators and finance team more time to focus on strategic work with custom-built workflows.



### Powerful Reporting and Analytics

The seamless integration with Intacct allows Educational Alliance to use data from Intacct to inform programing, forecast cashflow, and even to consolidate vendors and negotiate better pricing.



### Accessible Training and Support

Both current employees and new hires quickly grasp the system due to Nexonia's intuitive interface and library of on-demand training resources—increasing user adoption and return on investment.

## ABOUT NEXONIA, PART OF EMBURSE

Emburse, Nexonia's parent organization, is a global leader in expense management and AP automation solutions, trusted by more than 4.5 million users in over 120 countries.

Nexonia is a leading provider of web- and mobile-based financial management solutions for expense, time, travel, and more. Our simple-to-use applications fully integrate with a variety of business systems and are designed to enhance operational efficiency. We're trusted by organizations including CrossFit, Hamamatsu Corporation, and Lufthansa Systems.

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