PRESTONTRAIL
community church

NEXONIA CUSTOMER SINCE 2014

Company: Preston Trail Community Church

Location: Frisco, TX

Industry: Nonprofit/Religious

Company Size: 50-100

Accounting System: Intacct

Solution: Nexonia Expenses

Tammy Bunting
Chief Financial Officer

without **emburse nexonia**

- Finding a system that addresses the unique pain points of accounting in the church industry.

- Managing the manual process of reconciling multiple credit card transactions.

- Workflow bottlenecked with lack of expense approval layers.

with **emburse nexonia**

- A fully automated expense report process configured to the church's individual needs.

- Multiple approval levels added, removing the backlog of reports.

- Integrated credit card data saved the accounting team hours of data entry.

> " Nexonia is very, very customer-centric and that goes all the way from the top right through to their customer service. Needless to say, we've been very pleased. "

Tammy Bunting, CFO, Preston Trail Community Church

Preston Trail, a community church in Frisco, Texas, has a policy of "no perfect people allowed," which speaks to their ideals regarding spirituality and acceptance. Recognizing that their financial processes were far from "perfect", Preston Trail's finance team decided to modernize their outdated accounting system and implement Intacct ERP to help give the church's finances greater efficiency and managerial visibility.

This opened the doors for tackling Preston Trail's biggest pain point: how to find a system that automates the large amount of ministry expense reporting while also integrating directly into their Intacct system. In an interview with the Nexonia team, the CFO of Preston Trail Community Church, Tammy Bunting, reveals how her team ended up saving a large amount of time and money by integrating Nexonia Expenses with Intacct for full expense automation.

How did you begin working with Nexonia?

Tammy: We had purchased Intacct through an accounting technology company called AcctTwo. At that time, they brought Nexonia to our attention as an offering because AcctTwo had seen a demo of the Nexonia Expenses platform through their connections at Intacct. They knew our accounting needs, especially that it's typically a huge battle for churches to successfully manage business credit cards.

So, they brought Nexonia to our attention and booked a live demonstration for us. The demo was really great, the individual showcasing the product made it very specific for churches, which is an industry that has different requirements versus other nonprofits, so that was exceptional. The language that they used was mission driven, which really resonated with us. The Nexonia team showed us screenshots that were very relevant to the Preston Trail ministry leaders; the people who would be using Nexonia the most.

> ❝ The Nexonia integration has also made reconciliation simple because all of those digital receipts and transactions have ltered over into the accounting system without the accounting team having to do anything. That's huge for us! ❞

Tammy Bunting, CFO, Preston Trail Community Church

As I mentioned, one of the biggest challenges we as churches have is managing credit cards. We don't have a lot of invoices every week but we have many, many ministry leaders out on the streets actually doing credit card purchases at Walmart or Target, buying supplies anywhere and everywhere in order to do their ministry work. So, managing the massive amounts of credit card transactions was one of our biggest pain points.

How did Nexonia help to support you and address those pain points?

Tammy: The very first issue for us was having just one location managing all of our credit cards. Before Nexonia, our Director of Finance received all of the expense receipts, pulling all of the transaction information off the web and trying to code it all. Having one individual holding the entire responsibility for managing those credit cards just wasn't a sustainable setup. What Nexonia did is decentralize that process. It allowed the accounting team to push the responsibility back to the ministry leaders so that they could digitally upload their own receipt images, code them to the right program and send it to us for approval.

Nexonia lets you build multiple approval levels, which allowed us to put in workflows that streamlined reporting. Instead of being restricted to a messy paper trail, we now have a web-based system that decentralizes the expense report task, automates approvals and streamlines the end result so that our accounting team is better able to reconcile it. So, all of those things were huge time savers for us.

Could you tell us a bit about how Nexonia's integration with Intacct helps you?

Tammy: The Nexonia integration with Intacct is kind of like the icing on the cake because there's several integrations going on. First of all, the coolest thing about Nexonia is that it actually goes out and finds all of the transactions that the ministry leaders are creating, puts these transactions in a queue for them, and then (once they code it) it automatically sends that information over to our accounting platform. At that point, the accounting department just says, "Okay, great. Here it is. It all landed on the statement. It's in my reconciliation. Check! I'm done." So, the integration with the actual credit card company is a huge time saver.

My ministry leaders are happy to go in and use the Nexonia platform because we've made it easy for them. The Nexonia integration has also made reconciliation simple because all of those digital receipts and transactions have filtered over into the accounting system without the accounting team having to do anything. That's huge for us!

What advice would you have to other CFOs who are considering moving to Nexonia?

Tammy: First of all, if I was a CFO of a company that was considering using Nexonia, I would march into my finance office and walk up to the person that manages all those credit cards and say, "If I could automate this process for you and have your staff actually code it for you so that all of the expense report information flows directly into the accounting system, how would that make

you feel?" I think that person would respond by saying, "I don't believe you. It's not possible!" But, if I could convince them that it was possible, I would follow that up by saying: "Don't worry - your job is safe! But, let's automate this. Let's allow the system to work for us so we can spend more time analyzing the data as opposed to being buried in the transactions."

Do you have anything else that you'd like to add about Nexonia and Intacct?

Tammy: First of all, Nexonia has an amazing support team. I have a few of their people on speed dial and every time I call them, they are there. They're friendly and efficient. So, I would say that the biggest thing is that Nexonia is very, very customer-centric and that goes all the way from the top right through to their customer service. Needless to say, we've been very pleased.

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