

# Sage Intacct Forms and Operational Flows for Nonprofits

Extend your Sage Intacct solution with fully configurable portals, forms, and workflows

Sage Intacct Forms and Operational Flows allows you to maximize your value and extend your Sage Intacct solution by establishing integrated data collection via links and external portals for your most important relationships. Enable powerful enterprise content management across the entire organization with the ability to consolidate data and operational flows, creating 100% data collection coverage, and centralizing approval and collaboration.

## **Improve collaboration across your nonprofit**

Whether with grant recipients, applicants, vendors, employees, or anyone else, make working together easier by building custom forms to gather data with collaborative, chat-style dialogues. Streamline internal communications from finance to program staff with tools to ensure everyone has access to the information they need when they need it. Save time and communicate more effectively with pre-built or custom external-facing portals. Whether you are a community foundation with donor advisors or a grantmaker with applicants and recipients, empower stakeholders to access their own data and engage with your organization as needed.



## **Gain efficiencies with automated operational workflows**

Sage Intacct Forms and Operational Flows eliminates process bottlenecks and allows you to drive momentum with employees, grant applicants, fund advisors, vendors, and more. When everyone has access to the information they need, the next steps are clear and action can be taken. Sage Intacct Forms and Operational Flows provides opportunities to identify process improvement and act without external consultants or IT involvement. Infuse automation into your organization by eliminating email and paper-based approvals with a centralized approval process in a single inbox.

## **Increase transparency and capture the insights you need**

The ability to collect data and drive entries into corresponding Sage Intacct application areas, as needed, means all of your data is in one place for easier and faster decision-making. Improve transparency across your entire organization and eliminate redundant work with user-level insights into workflows and approvals. Implementing Sage Intacct Forms and Operational Flows at your organization allows you to reduce the dependencies of costly add-on applications and simplify your IT stack.

The image shows two screenshots of a software interface. The left screenshot is the 'Grant Recipient Portal' for Chris Jordan, CEO of Healthy Homes Nonprofit. It features a sidebar with navigation links (Home, Inbox, Shared with me, Form Hub, My Network) and a main content area with a welcome message, a 'Reports and Requests' section with links to 'Interim Report', 'ACH and Organization Update Form', and 'Existing Recipient Grant Application', and a 'Your Actions' section. The right screenshot is a detailed view of the 'Interim Report' form, which includes a date field, a section for attaching support collateral, an 'Executive Summary' text area, a signature field, and a checkbox for acknowledging the accuracy of the report. The form is branded with the 'Healthy Homes Nonprofit' logo.

One use case of Sage Intacct Forms and Operational Flows is to use the pre-built or fully configurable forms and portals to manage the entire grant life cycle from eligibility to application to interim reports and draw requests.

#### Grantmaking:

- Grant applications
- Eligibility quiz
- Award letters
- Interim reporting
- Final reporting
- Grant and payment history portal

#### Donor-advised funds:

- Applications
- Award acceptance letter
- Change forms
- Contribution pledges
- Grant requests
- Portal with contribution history and giving details

#### Vendor or grantee contracting:

- Registration
- ACH information
- Contracts
- Portal with contract and payment history
- Contract template library

#### Other use cases:

- Volunteer requests
- Volunteer waivers
- Meeting minutes
- Board member applications
- Board member nominations
- IT service requests
- PTO requests

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