



COMPANY

Kintera, Inc.

COUNTRY OR REGION

United States

INDUSTRY

Professional Services: Software
Application Service Provider

CUSTOMER PROFILE

Kintera®, Inc. provides online solutions to help nonprofit organizations use the Internet to increase awareness, commitment and donations. It recently launched The Giving Communities™ interactive website where consumers can connect and get involved with thousands of causes and organizations.

More than 15,000 accounts in the nonprofit, government, education and corporate sectors use Kintera's technology and "software as a service" innovations to manage e-marketing, communications, programs, services and online fundraising. Kintera's technology enables volunteers, members, donors and staff to share real-time data and information to foster a sense of community and achieve common goals.

CASE STUDY

Rose Business Solutions Contributes to Kintera's Donor Experience

BUSINESS SITUATION

With such a large account base, Kintera sought a cost-effective financial management solution which would allow it to easily integrate client and company data into a secure, centralized system accessible to all users. The company needed a financial system compliant with federal requirements for a publicly held company that would give it easy and quick access to real-time data for instant release to the market.

SOLUTION

Microsoft Dynamics GP

- ◆ Its modular SQL based system is easy integrated and affordable.
- ◆ Sales and purchasing system integration reduces customer/vendor data inaccuracy.
- ◆ The project accounting module allows employees to analyze real-time financial data by whatever criteria they require.

BENEFITS

- ◆ Consolidated data entry points and increased data control
- ◆ Timely access to reports necessary for critical decision making
- ◆ Increased Customer/Vendor transaction accuracy

RATIONALE

Three areas of Kintera's operation required improvement and the existing system did not fulfill that need:

1. Reporting and accountability to facilitate executive decision making by providing a real-time dashboard view to better manage the company.
2. Providing customers and vendors with accurate invoices, payments and statements.
3. Reducing multiple data entry points performed by the Accounting staff.

RESULTS

By implementing Microsoft Dynamics GP these areas were efficiently and effectively addressed, and Kintera has prepared itself with automated financial reporting processes to meet its future growth.



SYSTEM OVERVIEW

- ◆ Microsoft Dynamics GP 8.0
- ◆ Microsoft SQL Server 2000 Enterprise
- ◆ 34 concurrent users
- ◆ 50 PCs, 1 primary server, 1 supporting server
- ◆ FRx, Crystal Reports viewer, Forms Printer module, Audit Trails module, Professional Services Toolkit Library module, Adobe Acrobat Standard
- ◆ Clients configured with Windows XP Pro, Office XP or 2003

BACKGROUND

Company-wide system integration

Kintera, Inc. chose the Microsoft Dynamics GP solution with the Project Accounting module. The integration between the customer billing and vendor payables through the Project Accounting module provided a greater level of accountability as demanded by Kintera's customers. Their use of the Project Accounting module also made available an audit trail for the flow of data between customers and vendors.

Microsoft Dynamics GP solution, along with multiple integration processes and eConnect functionality, has positioned Kintera with future automation that will assist in their planned efficiency associated to the flow of data from their own CRM product. Their strategic development of additional modules such as EFT for Payables Management and Collections allow them to manage their customers/vendors in an automated fashion reducing errors and increasing accuracy.

Real-Time information gathering

Prior to Microsoft Dynamics GP, Executives of Kintera, Inc. lacked the ability to run or collect real-time information regarding the operations of the company. This data was gathered and reported as part of accounting month-end procedures and was only available at the Company level. With the Project Accounting module ongoing status of financial information can be obtained in real-time at a project level with summary data at a contract or customer view. FRx allows the Finance staff to produce accurate and timely financial statements each quarter and year-end.

Improved billing and invoicing information

Operational information that was required by Kintera's customer base was clear and accurate billing and payment information. Prior to Microsoft Dynamics GP, customers would receive several invoices and payments from more than one accounting system per month. With the implementation of Microsoft Dynamics GP and the Project Accounting module, Kintera was not only able to generate invoices and payments to customers/vendors from one system; they were able to generate that data on one document. This substantially reduced the number of documents each customer would receive each month (invoices and payments). In addition, the one document would clearly show the relationship between billings and payments for each customers account.

Consolidated data entry efforts

Before the implementation of Microsoft Dynamics GP, the accounting staff would have to enter data into multiple systems to generate billings to customers or payments to vendors. The entry points were across different accounting systems which would add to the inaccuracy of the data. With the implementation of Microsoft Dynamics GP, Kintera, Inc. was not only able to reduce the number of entry points and increase accuracy, they were able to consolidate the functions into the corporate office and reduce the number of overhead staff.



BACKGROUND *(continued)*

Convenient on-line transactions

The use of the Dynamics GP Project Accounting module has allowed Kintera, Inc. to tie together their customer/vendor transactions associated to a complex relationship that Kintera, Inc. has with its customers. As part of the contract signed for support and professional services, a Kintera, Inc. customer will have access to a hosted website to collect online transactions (donations) made by donors. These online transactions collected through Kintera's hosted site need to be disbursed to the customer (vendor) along with the billing for monthly and professional services. The Project Accounting module allows vendor transactions, the payment of online transaction amounts, and customer billing transactions to be shown on one document which was most beneficial to the majority of Kintera's customer base.

Kintera, Inc. is constantly considering ways to improve the flow of data from external systems by considering integration tools such as eConnect. Online transaction data captured in the company's CRM will be successfully integrated using the eConnect tools in the future. This will allow Kintera, Inc. to bring in data in an overnight automated process with status reporting as opposed to using valuable resources during the middle of the workday.

Access to real-time data

Kintera, Inc. uses SQL Reporting Services to create and distribute some of the more complex operational reports driven by the Project Accounting module. Other reporting tools such as Business Portal functionality will ultimately be used to access the real-time data collected by the Project Accounting module by Executive Management which will give them an even faster way to make important business decisions.

Kintera, Inc. continues to use the additional modules such as Extender, Audit Trails and Electronic Signature to add value to the data collected. By implementing Extender windows additional data, not already available through the conventional Dynamics GP windows, has been collected and proven to be valuable in the analysis of project level data. Audit Trails and Electronic Signature give the company a means to access the effectiveness to a given process as well as add a level of accountability to the accounting staff.