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## Free Methodist Foundation

When Free Methodist Foundation went looking for an expense management solution that would integrate with Blackbaud Financial Edge NXT, one solution rose to the top of the list: Paramount WorkPlace.

### Paramount WorkPlace Wins on Value, Functionality, and Support

Joe Crupper, CPA, Director of General and Trust Accounting for Free Methodist Foundation, says the organization made a list of requirements for their new expense management solution, including the ability to easily capture receipts and have the expenses flow into Blackbaud Financial Edge NXT without the need for duplicate data entry. “We also wanted to streamline the reconciliation process of our corporate credit cards, which had always been a very time consuming, manual process.”

The organization reviewed Paramount WorkPlace and Gorilla Expense. “We ultimately decided that Paramount WorkPlace offered the strongest value, the broadest functionality, and the best customer support,” says Crupper. “It’s definitely been a good move for us.”

### Transforming Expense Management

Before Paramount WorkPlace, Free Methodist Foundation had a cumbersome expense report collection and approval process. Employees filled in expense data on an Excel spreadsheet — some even printed the spreadsheet and filled the data in by hand. Next, employees made copies of receipts and stapled them to a paper copy of the spreadsheet and hand delivered it to the first stop in the approval process: their supervisors. “The supervisor would then review, sign off, and hand deliver it to the next approver, and so on,” recalls Crupper. “It was a slow process, and there was no visibility into where a particular report was or what step it was in.”

Today, employees simply snap a photo of an expense receipt using the Paramount WorkPlace Mobile App, and the software’s optical character recognition (OCR) technology deciphers the data on the receipt and populates an expense entry. The employee can include additional information such as notes, and then simply saves the expense entry — along with the image of the receipt — to later add to an expense report.

“It’s really easy now for employees to create their expense reports,” explains Crupper. “From the App or their computer, they just select the expense lines they want to include on the report and submit it. It then starts routing automatically through the approval process we’ve set up.”

Reconciling the corporate credit cards involved even manual data entry and time. “Essentially employees would just stuff receipts into an envelope and then deliver it to accounting every month or so,” says Crupper. “Since we were paying the bill, there wasn’t an incentive for employees to turn the receipts in on a timely basis, or to provide any background information on a particular expense. Accounting had to sort it all out.”

Now, new procedures and workflows within Paramount WorkPlace ensure that corporate credit card transactions are correctly categorized and reach accounting in time for a speedy monthly reconciliation.



## Cloud Deployment Makes Smart Business Sense

Paramount WorkPlace is offered either as a hosted, cloud-based deployment or a traditional on-premise deployment, and Free Methodist Foundation opted for the cloud. “To ease the burden on our IT resources, a cloud-based solution makes sense for us,” says Crupper.

## Guided Implementation Maximizes Results

Crupper praises the thorough implementation spearheaded by Paramount WorkPlace consultants. “They first worked to understand our processes and what we were looking to achieve with the software,” he says. “Then they mapped those processes and workflows into Paramount WorkPlace and provided us with very good training on how to maximize the system.”

## Tailored Approvals Keeps Process Moving

Since implementing Paramount WorkPlace, the organization has both sped and simplified expense report and corporate credit card processing and is providing better oversight and insight into credit card activity.

Paramount WorkPlace helps keep expense reports moving through the approval process all the way to the accounting team. Expense reports are now processed more quickly, and the approved expense amount is transferred seamlessly into Blackbaud Financial Edge NXT. “Our payables department loves Paramount WorkPlace,” says Crupper. “It saves them a tremendous amount of time. And our employees get paid more quickly which keeps them happy.”

## A Good Financial Steward

Paramount WorkPlace is helping Free Methodist Foundation fulfill its mission of being a good financial steward. “We’ve got the policies in place and the software to both streamline and enforce those policies,” concludes Crupper. “Our employees are getting reimbursed more quickly and we have better visibility over our spending. It’s a win all around.”



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