

Local Chapter of International Non-Profit Seeks Simplified yet Flexible Solution for Managing Dues and Donation Assessments

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QuoteWerks Demonstrates Its Ability to Deliver Cost Effective, Flexible Solutions for Non-Profits and Businesses Alike.

Situation

Summary

In addition to managing its membership record and collecting membership dues, the local chapter of a 93-year-old international service organization actively supports numerous local, regional, and international foundations and associations dedicated to improving the lives and opportunities for children in need. The non-profit club wants to streamline its dues, donations, and assessment invoicing process in order to reduce volunteer time spent on back office support and increase community outreach time and availability for its leaders.

Customer Profile

The Kiwanis Club of Southwest Orlando is a good example of an organization that is expanding its service reach and member base quickly and effectively. Based in the southwest sector of Orlando, Florida, the organization is a chartered local chapter of Kiwanis International, an international service organization dedicated to expanding community support and services to children. The club currently has over 30 members that actively volunteer to support the organization's community outreach and support services. Additionally, the club supports various foundations including the Arnold Palmer Hospital Foundation.

The Kiwanis Club of Southwest Orlando has used QuickBooks Pro 2007 since the club's inception in early 2007, but its rapid growth and expansion meant the organization and its volunteer leaders needed to get more out of the club's software. "We were adding new members monthly while also expanding our support for foundations from 1 to 7 in just over a year," says Megan Altman, CPA, the club's Accountant. The greatest challenge was how to manage the growing membership roster and prepare dues statements for the various dues the club's pay. Additional complexity is added when the club began accounting for member contributions to the seven foundations the club is involved with currently. "The financial reporting and accounting requirements for 501(c)(4) organizations are complex and easily managed in QuickBooks. We had to grant multiple users access to QuickBooks to manage our membership support operations

Solution Overview

Customer Profile

Local non-profit chapter of an international service organization dedicated to providing community-based services to children and their families.

The major challenge for this organization was to find a solution that would automate and manage the club's dues and charitable donation assessments while integrating with QuickBooks.

Objectives

Deliver a low cost, quoting solution that would allow a newly formed non-profit to manage its membership records and invoices in a seamless manner while ensuring the integrity, security, and accuracy of its accounting data in QuickBooks.

Solution

- QuoteWerks Professional Edition
- QuoteWerks Contact Database (included in the all editions)
- QuoteWerks Layout Design Tool (included in all editions)

Third Party Tools

- QuickBooks Pro 2007

in QuickBooks. Since many of these users would otherwise have no need to be in QuickBooks, this implementation was not ideal in terms of data security, data accuracy, cost reduction, and overall efficiencies,” explains Altman.

Problem

Context

QuickBooks was being used in various ways to manage members’ data, foundation data, payment schedules, and dues profiles that would drive the total dues assessment by member based on their prior service to Kiwanis. The club’s Board of Directors was finding it difficult to maintain non-financial data in QuickBooks. Additionally, QuickBooks was not designed to serve as a membership management portal, thus reducing the ability of the club to customize their members’ statements and invoices. Training multiple club members on QuickBooks was proving both costly and inefficient since many of the users were not touching financial data.

How does a growing non-profit, staffed by volunteers, effectively manage its membership data and invoicing needs while maintaining required accounting standards?

Objectives

The challenge was to source a software application that was intuitive in nature and did not require a complex installation and deployment process. Additionally, the application had to provide online training resources given the time constraints of the club’s volunteers, most of whom hold full-time jobs.

Finding the Right Partner

In partnering with Orlando based Aspire Technologies, Inc. (the creators of QuoteWerks), the Kiwanis Club of Southwest Orlando was quick to realize the power and benefits of an integrated add-on for QuickBooks. Given the multi-industry support built into QuoteWerks, the club was able to easily and quickly design and customize their statements utilizing the layout design tool in QuoteWerks. Best of all, the club is able to maintain multiple layouts based on the foundation or dues assessment being invoiced. Once invoiced, the data is seamlessly transferred to QuickBooks via QuoteWerks’ integrated link to the club’s QuickBooks accounting application.

From a membership management standpoint, the club’s Secretary and Membership Director are able to utilize the built-in contact database to record and maintain the membership data for each member and the profiles used in calculating dues. No longer do they need to access QuickBooks for this non accounting relation function.

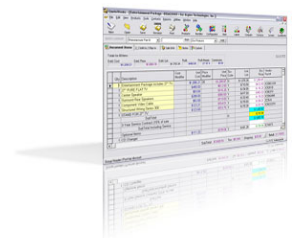
Benefits

- Customize and utilize multiple invoice templates
- Store all member contact information within QuoteWerks
- Reduce license cost exposure through concurrent licensing.
- Rapid deployment with on-demand training resources for volunteers
- Ability to email invoices from within QuoteWerks
- Report on outstanding dues and assessment invoices
- Improved security and accuracy of accounting system data.

“The efficiencies and cost savings introduced by QuoteWerks means that our club has more time and money to do what is most important – serving the children in our communities.”

Megan Altman, CPA
Accountant

Kiwanis Club of Southwest Orlando



Solution

Process

Club Accountant Megan Altman downloaded a demo copy of QuoteWerks and obtained a trial key from Aspire Technologies, Inc. Altman utilized the online training resources and tutorial videos available at www.quotewerks.com/training.asp to familiarize herself with the layout design tool, creating a products database, and creating quotes. Once comfortable, Altman utilized the demo to create the March 2008 statements for the club's members and emailed them from QuoteWerks to all 30 members. Once purchased, the club replaced the trial key with their license key and was able to continue utilizing the layouts and data built by their treasurer during the club's evaluation of the software.

QuoteWerks offers a fully-functioning demo edition for companies to fully evaluate the system and the benefits it offers. Companies requiring additional features such as real-time pricing and availability, or multi-user support can obtain trial keys from the QuoteWerks Sales Team.

"Not only will we continue to use QuoteWerks and QuickBooks, but I will be advocating and recommending that all my business banking clients use the two applications in tandem for their business needs."

Megan Altman
Accountant
Kiwanis Club of Southwest Orlando

Evaluation

Results and Benefits

Today, the club is utilizing QuoteWerks to maintain its membership data, invoice dues, track contributions and gifts to foundations, and report on outstanding commitments. Best of all, the club was able to avoid the need for additional QuickBooks licenses for non accounting functions by utilizing QuoteWerks Concurrent user model for licensing.

"The efficiencies and cost savings introduced by QuoteWerks means that our club has more time and money to do what is most important – serving the children in our communities," says Altman. "Not only will we continue to use QuoteWerks and QuickBooks, but I will be advocating and recommending that all my business banking clients use the two applications in tandem for their business needs."

For More Information

For more information about the Kiwanis Club of Southwest Orlando and its services, please visit www.sworlandokiwanis.org

To access the QuoteWerks demo edition using the World Wide Web, go to: <http://www.quotewerks.com/reqdemo.asp>

For more information, call the QuoteWerks Sales Team at (407) 248-1481 or email us at sales@quotewerks.com

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