



blackbaud®
**DEVELOPERS’
CONFERENCE**
June 15–17, 2021

Business Process Automation for Financial Edge NXT®

BLACKBAUD SKY® TRACK

BARTON DYSON

Session Host: Michael Sullivan



Safe Harbor Statement

This presentation contains forward-looking statements that involve inherent risks, uncertainties and assumptions. It outlines Blackbaud's current plans and general product direction as of the date this presentation was created. Functionality described in this presentation that is not currently available is subject to change at any time, without notice, at Blackbaud's sole discretion. It does not represent a commitment to develop or release specific features within the timeframe discussed, according to the presented design, or at all. Please make any purchase decisions based on features and functionality that are currently available.



Customization of Blackbaud Solutions

As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users



Barton Dyson
Founder
npAutomate
p: 843.343.3579



blackbaud
Channel Partner
blackbaud
ISV Partner

Hello! I'm Barton Dyson

DANIEL ISLAND, SC

AT BLACKBAUD 22 YEARS, PARTNER SINCE 2020

npAutomate develops technology that is hyper-focused on optimizing nonprofit and foundation business processes, leveraging your existing cloud platforms.

How much time is your organization spending on mundane tasks?

10 – 20%

of human work hours are spent on dull, repetitive computer tasks

\$500K – 2.5MM

is leaked by enterprise companies due to errors, fraud and misuse

70 – 80%

of rule-based processes can be automated



DIGITAL TRANSFORMATION: Radically Changing How We Interact, Work and Live



REAL-TIME INFORMATION

Stakeholders want and need more

ON-DEMAND

Always “on” and always social

INCREASED VELOCITY

Rapid innovation driving change

VISIBILITY TO INFORMATION

Access to information by those who need it.

Organizations Face Increasing Challenges



Competition
for funding



Limited
Resources



Disparate
systems



Rising
compliance
costs



New and
increasing
regulations



Time-
consuming,
manual
processes

Robotic Process Automation is Transforming Business Processes



Business Process Automation by the Numbers

By 2025

Process automation software will be able to perform tasks equal to the output of 140 million FTEs

> 600

actions can be performed by a process automation software robot in a given sequence

60.5%

is the expected compounded annual growth rate of business process automation worldwide through 2020



Digital Transformation



CURRENT TIME ALLOCATION

DESIRED TIME ALLOCATION



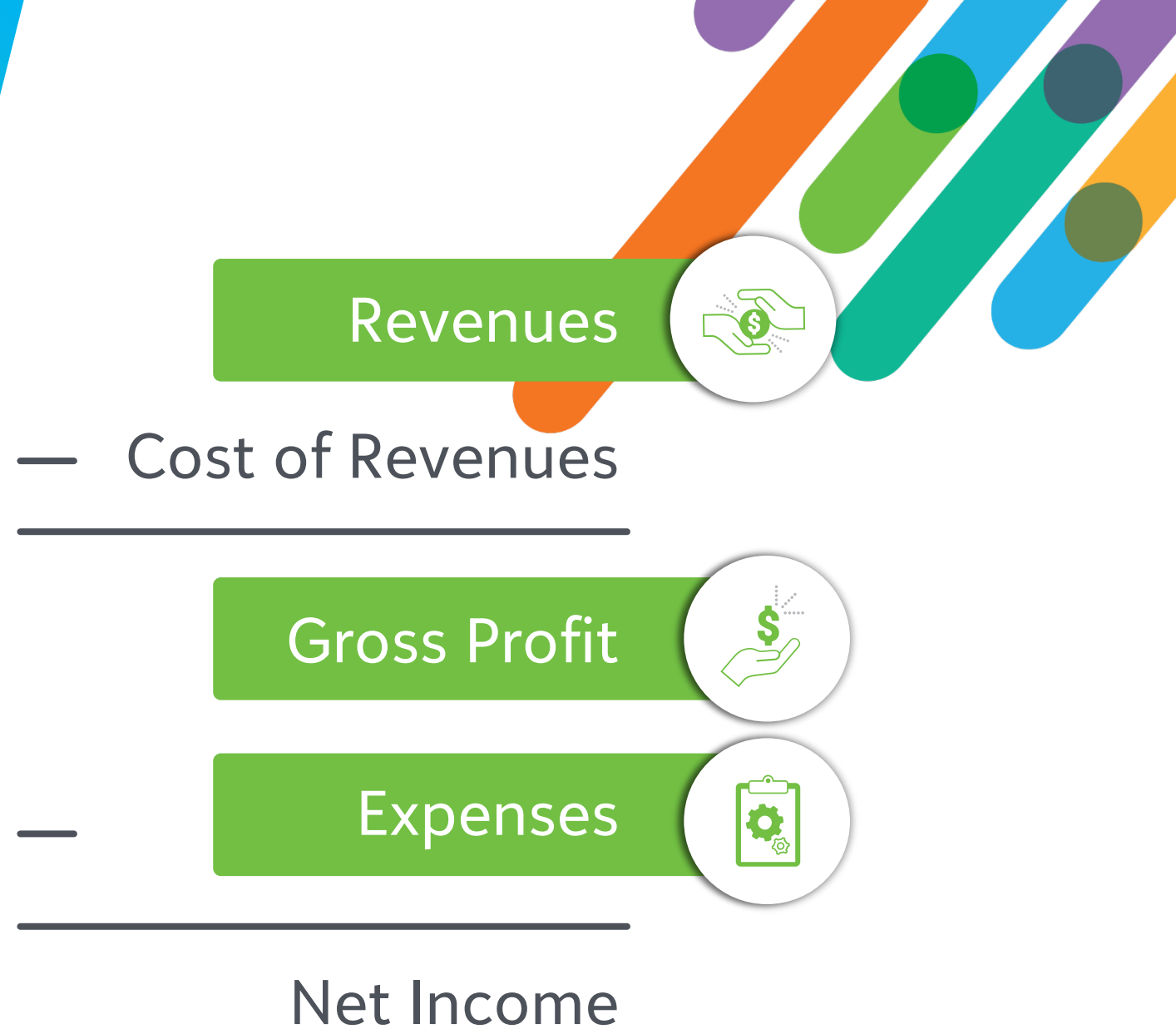
Democratizing Digital Transformation



Automation must be consumable to be useful.

Digital Transformation enables the ability to innovate on-demand, with access to secure data and new technology.

There are only
three things that
any organization
can control



There are Only 4 Ways Organizations Can Grow



Revenues

1. Acquire more customers or grants
2. Increase the average transaction
3. Increase transaction frequency



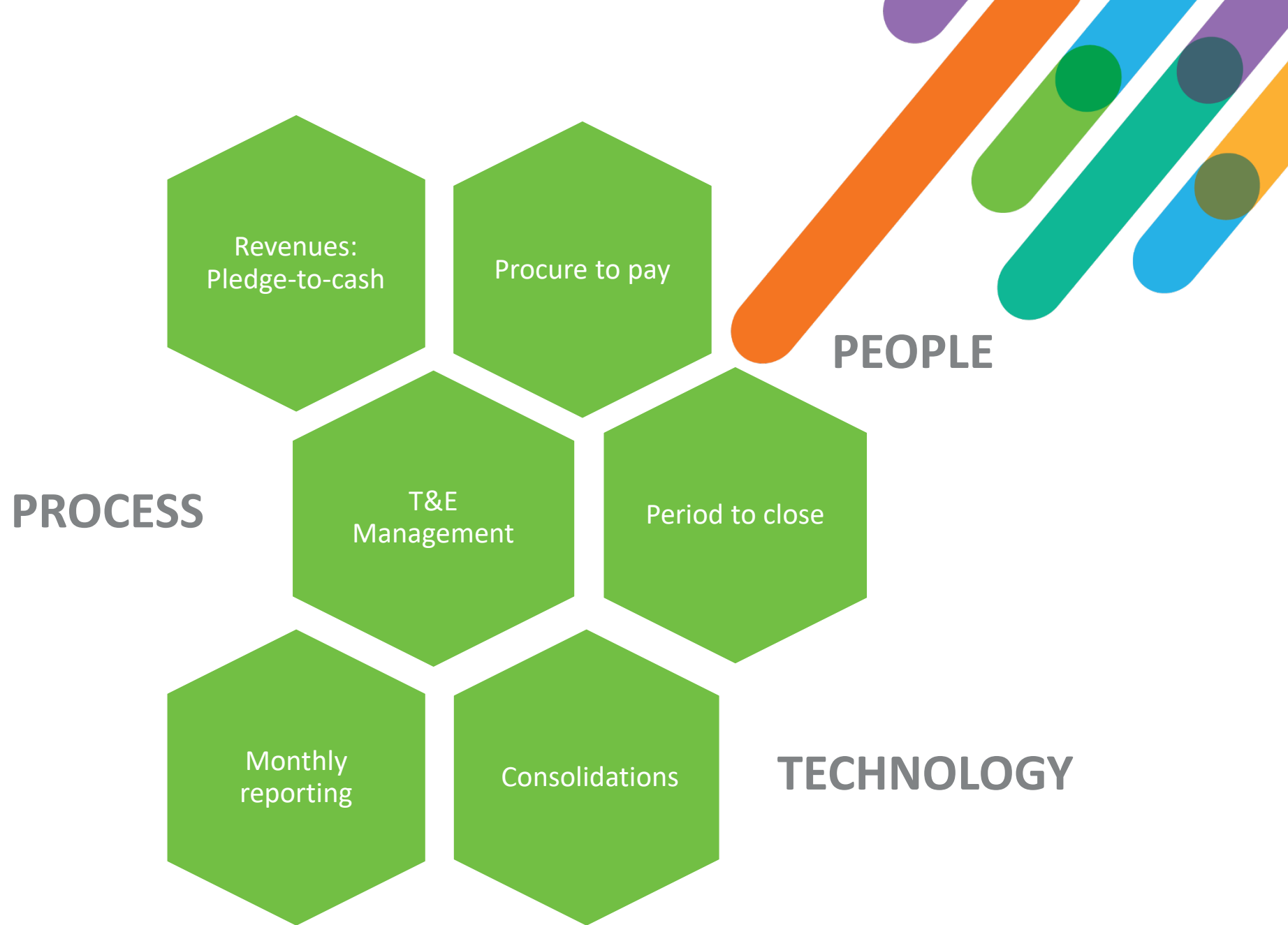
Gross Profit

4. Improve systems and processes

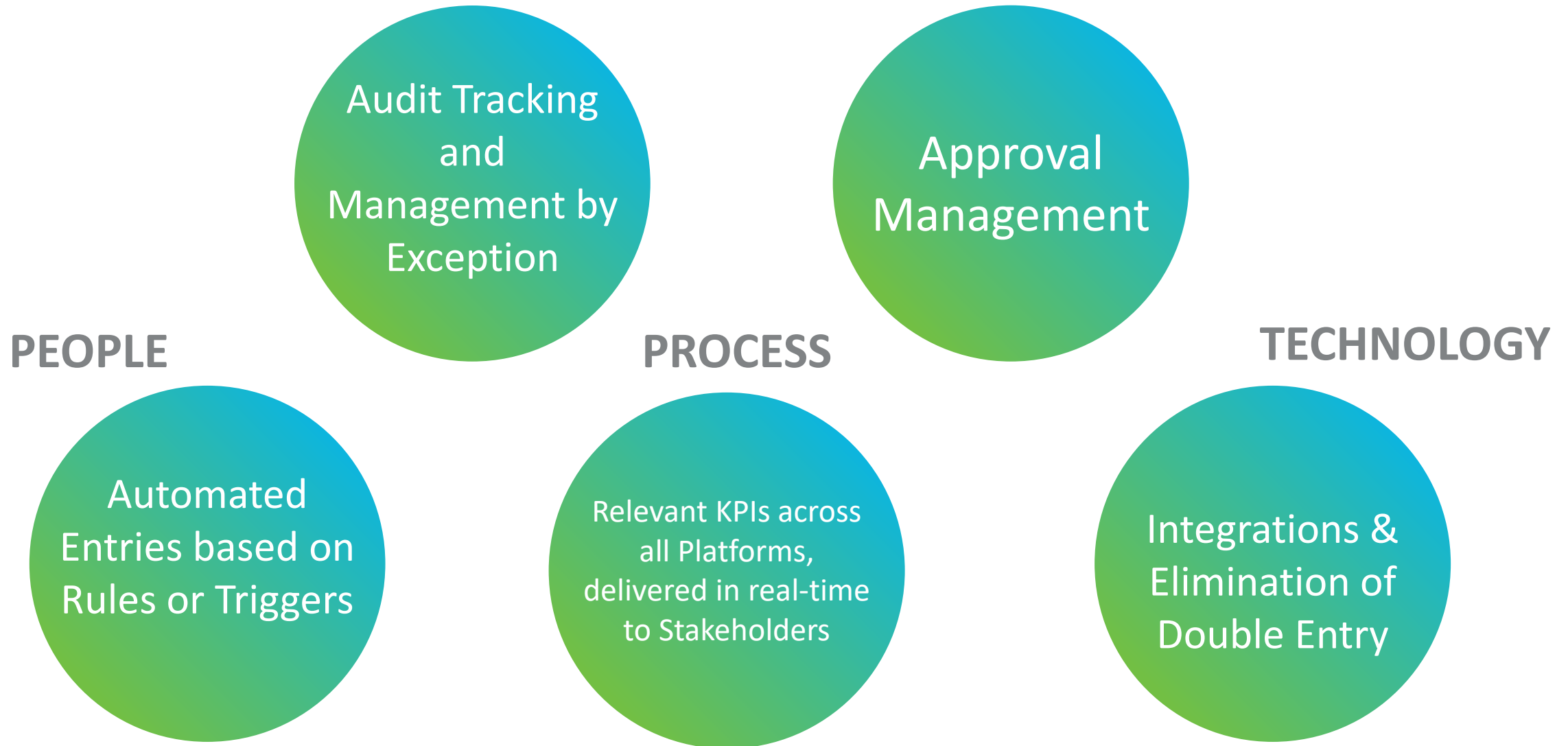


Expenses

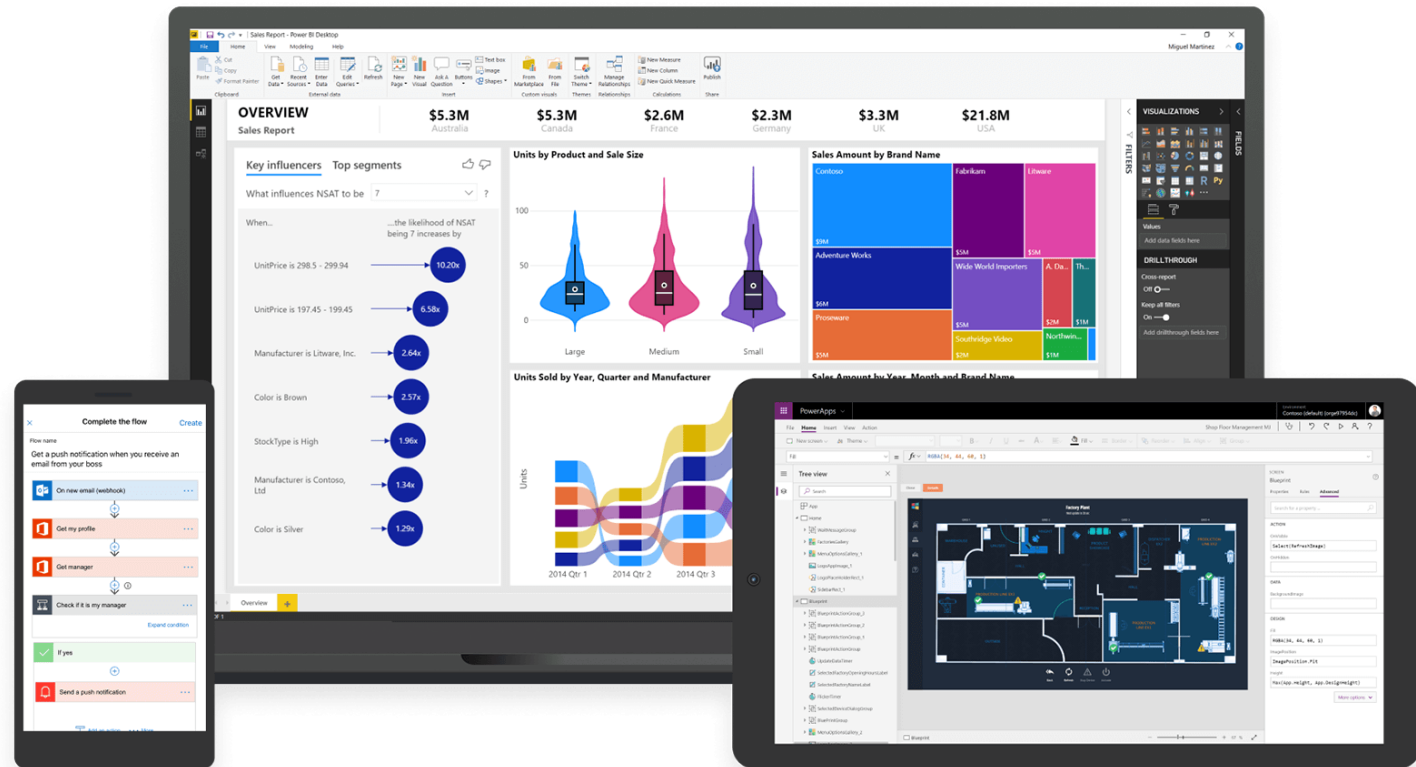
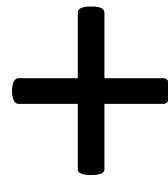
Processes to Manage

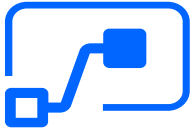


Problems Solved with Process Automation



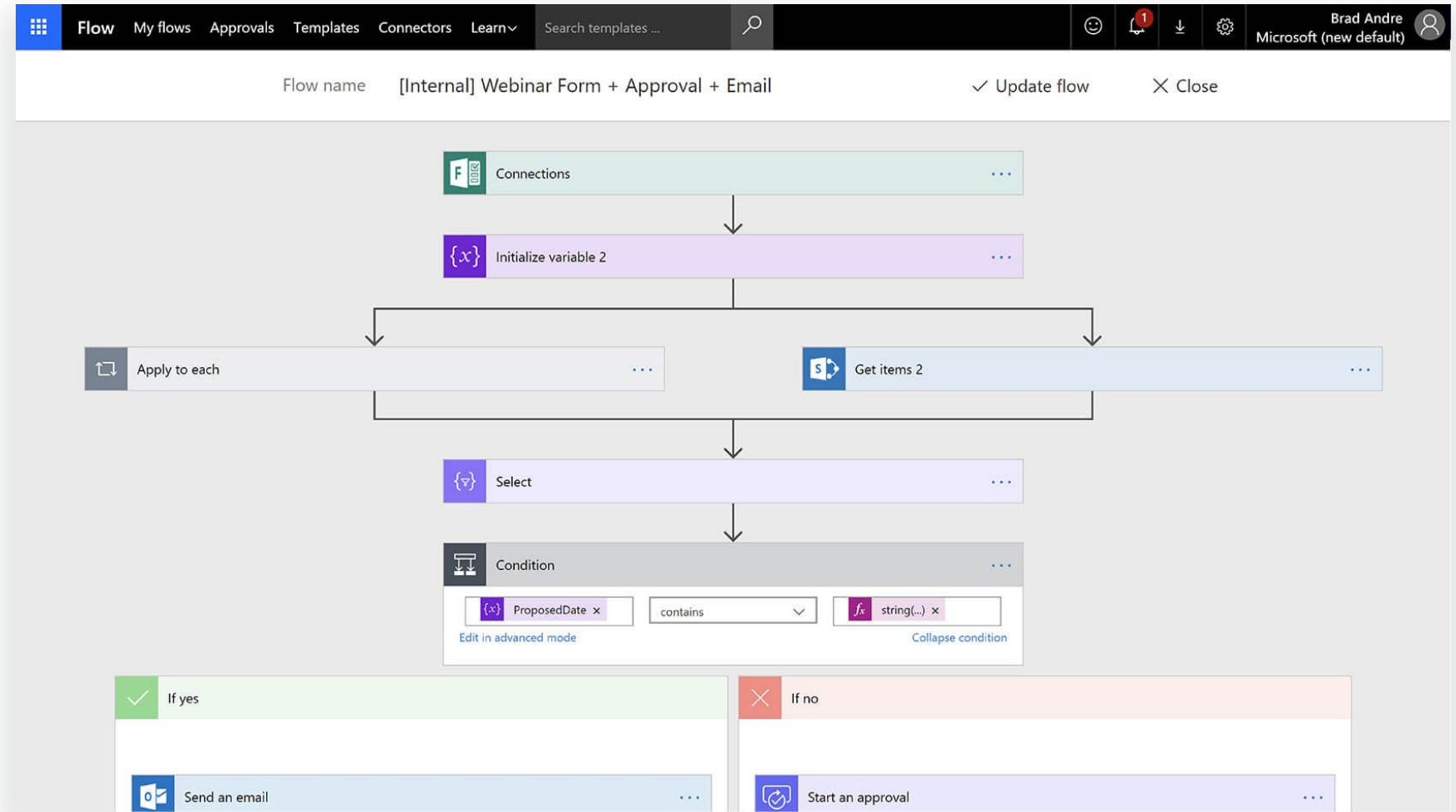
Blackbaud + Microsoft Power Platform





Power Automate

Build time-saving workflows into everything from individual tasks to large-scale systems with seamless integration using hundreds of prebuilt connectors.





Power Apps

Turn ideas into solutions. Increase agility across your organization by quickly building and sharing low-code apps that solve tough challenges.

The screenshot displays the Power Apps editor interface. At the top, the 'PowerApps' logo and navigation tabs (File, Home, Insert, View, Action, Gallery) are visible. The 'Insert' ribbon contains various controls like 'New screen', 'Label', 'Button', 'Text', 'Controls', 'Gallery', 'Data table', 'Forms', 'LinkedIn', 'Media', 'Charts', and 'Icons'. The main workspace shows a mobile app preview titled 'FABRIKAM RESIDENCES MOVE OUT INSPECTION'. The app screen is divided into several sections: 'Residence Info' with a floor plan image and text 'Floor Plan: 2bed, 2 bath'; a form for 'RESIDENT NAME', 'APT #', 'INSPECTED BY', 'INSPECTION TYPE', 'MOVING OUT DATE', and 'INSPECTION DATE'; an 'Inspection Checklist' table with columns for 'ITEMS', 'PASSED', 'REPAIR', 'REPLACE', and 'NOTES'; and a 'Top 9 Repairs' bar chart showing average costs for items like Light, Knobs, Floor, Ceiling, Fridge, Microwave, Walls, Alarm, and Washer. The app also features toggle switches for 'Repair needed?' and 'Cleaning crew?', and checkboxes for 'Kitchen', 'Bathroom', 'Master Bedroom', and 'Living Room'. The Power Apps editor interface includes a 'Screens' pane on the left, a 'Properties' pane on the right, and a bottom navigation bar with 'Screen1' and 'Gallery1' tabs. The 'Interaction' toggle is set to 'Off'.



Power BI

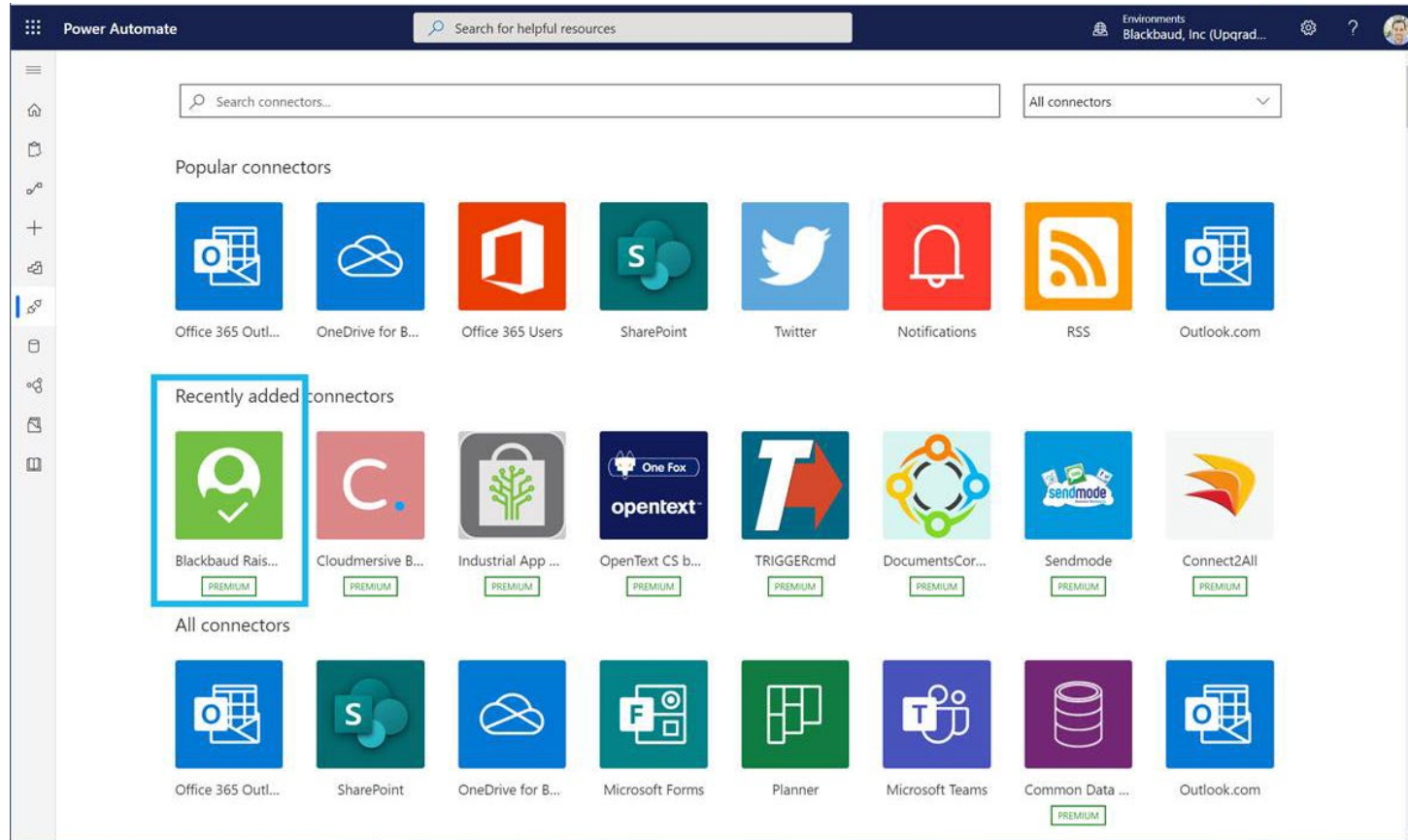
Rapidly develop analytics and business-critical reporting, accessible from anywhere.

The screenshot shows the Power BI interface for a workspace named "Sanbox Test". At the top, there is a navigation bar with the workspace name and a search icon. Below this is a notification banner: "Upgrade this workspace to get new features and improved security. [Upgrade now](#) | [Learn more](#)".

The main content area displays a list of items under the "All" tab. The items are organized into a table with the following columns: Name, Type, Owner, Refreshed, Next refresh, and Endors. There are two items listed:

Name	Type	Owner	Refreshed	Next refresh	Endors
Approvals	Report	Sanbox Test	11/16/20, 9:45:44 PM	—	
Approvals	Dataset	Sanbox Test	11/16/20, 9:45:44 PM	N/A	

375+ Microsoft & third-party solutions accessible for integration, workflow automation, and analytics



Microsoft Examples



Office 365 Out...



Microsoft Teams



Microsoft Forms

Other Technology Examples



Twilio



Adobe Sign



Twitter



WordPress



Instagram



Cisco Webex M...

Project #1 – Audit and Approval Management



Business Requirements:

Organization is heavily dependent on grant funding from hundreds of different sources. Utilizing Purchase Orders

Different approvers based on funding source and dollar threshold; up to 4 approvers for largest expenses.

Organization is heavily dependent on grant funding from hundreds of different sources. Utilizing Purchase Orders

Ability to view signers from Invoice record

Workflow for 'Declines' with ability to reissue approval once corrected


Power Automate Example – Email with Options


Mail - Barton Dyson - Outlook - Google Chrome





outlook.office.com/mail/deeplink?version=20201109002.09&popoutv2=1

Reply all | Delete | Junk | Block | ...


New invoice added that requires your approval!

 This message was sent with High importance.

 Barton Dyson
Tue 11/17/2020 9:36 AM
To: Barton Dyson

    ...

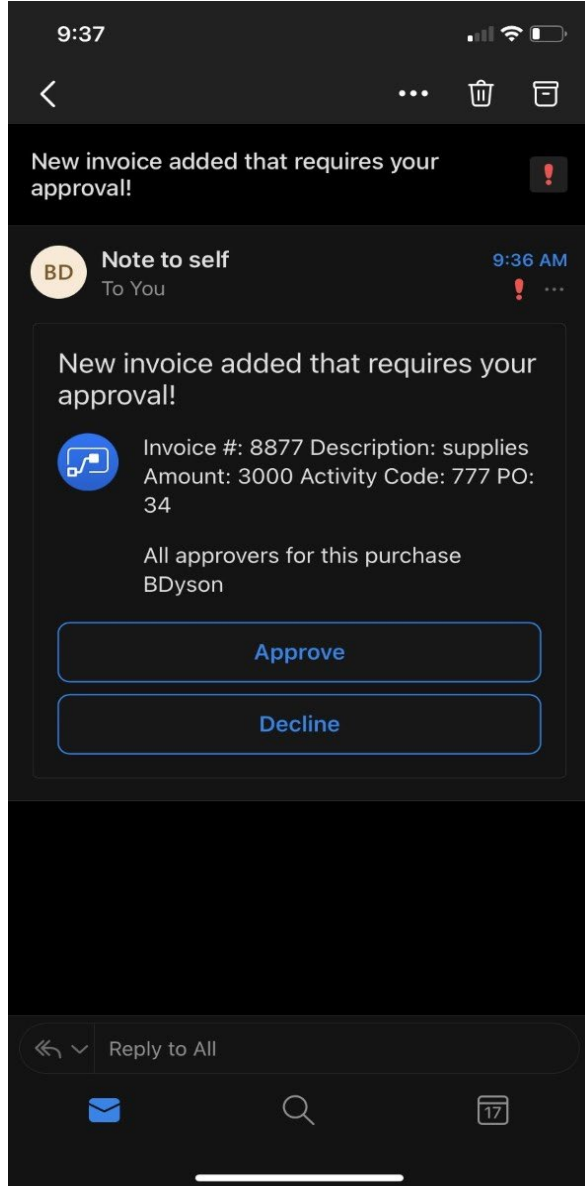
New invoice added that requires your approval!

 Invoice #: 8877 Description: supplies Amount: 3000 Activity Code: 777 PO: 34
All approvers for this purchase BDyson

[Approve](#) [Decline](#)

[Reply](#) | [Forward](#)

Self Service and Mobile Interaction



Edit Approver

Approval Code - Project or Dept

From amount

To amount

Approver 1

Approver 1 Email

Approver 2

Approver 2 Email

Approver 3

Approvers

Search: covid

276	From 0 to 50,000	Supporting WISEWOMAN Programs in Adapting to Virtual Engagements During COVID-19
276	From 50,000 to 200,000	Supporting WISEWOMAN Programs in Adapting to Virtual Engagements During COVID-19
276	From 200,000 to 500,000	Supporting WISEWOMAN Programs in Adapting to Virtual Engagements During COVID-19
276	From 500,000 to 100,000,000	Supporting WISEWOMAN Programs in Adapting to Virtual Engagements During COVID-19

Delivered securely through Teams leveraging MS365

The screenshot displays a Microsoft Teams interface. On the left, the 'Teams' sidebar shows 'Your teams' with 'PO Invoice Approvals' (marked with a 'PI' icon) and 'General'. The main area shows the 'General' channel header with navigation options: 'Posts', 'Files', 'Reports', 'Approver Management', 'Wiki', and 'Submit'. A large dark grey rectangular area is present in the center of the channel. To the right, a form is displayed with a green 'Submit approval' button at the top. Below it, the text 'Enter the "Invoice Record ID"' is followed by an empty text input field. At the bottom of the form is a blue 'Submit' button.

Audit with Power BI and A/P Integration

Teams interface showing the 'Approvals' tab for the 'Sanbox Test' team. The main content area displays a table of invoice data and a 'Custom fields' section.

Approvals Table:

FENXT Invoice ID	Invoice #	PO #	Description	Amount	Activity Code	Created By	Create Date	Approved By	Approval Date	Approval Notes
23	33444	23	grant expense	4,500.00	audit	Todd Fisher	11/15/2020 12:00:00 AM			
24	7474747	24	food	3,000.00	888	Todd Fisher	11/15/2020 12:00:00 AM			
25	7575	25	shelter	2,500.00	888	Todd Fisher	11/15/2020 12:00:00 AM			
26	8485	26	snacks	6,000.00	888	Todd Fisher	11/15/2020 12:00:00 AM			
27	8844	27	food	888.88	888	Todd Fisher 27	11/15/2020 12:00:00 AM			
28	7774	28	food2	888.00	888	Todd Fisher	11/15/2020 12:00:00 AM			
29	777777	29	food3	880.00	888	Todd	11/15/2020 12:00:00 AM			
30	7777777	30	food4	800.00	888	Todd	11/15/2020 12:00:00 AM			
31	23244	31	new	25.00	777	Todd	11/15/2020 12:00:00 AM			
32	58585	32	snacks	55,000.00	777	Todd	11/16/2020 12:00:00 AM			
Total				74,481.88						

Custom fields:

Field name	Value	Date	Comments
Approved	Yes	06/08/2021	
Approve1	[REDACTED]	06/08/2021	

Project #2 - Automated Entries Based on Rules & Error Checking



Business Requirements:

Create new Journal Entries based on existing posted journal entries to capture deferred revenue and capitalization

Scan each line of a posted journal entry to determine if new entries are required within a new batch, based on business rules and field values

JEs can exceed 4000 rows

In addition, monitor AP Invoices and Unposted JEs to ensure that a location custom field for Project equals account segment location.

Allow field users to initiate processes through an App on the Journal Entry screen, while also doing system checks on an hourly schedule.

Power App accessible from JE Record

Financial Edge NXT Home General ledger Payables Treasury Fixed assets Reporting Analysis Control panel

Batch #37766

Accounts Payable - 06/03/2021 - Test

Regular ✓ Posted: 06/03/2021 ✓ Create interfund entries ✓ Create bank adjustments

Post date: 06/03/2021 Number of entries: 19

Notes: Copied from Batch #37580 - Accounts Payable - 03/25/2021 ... [See more](#)

\$4,168,354.50
Total debits

\$4,168,354.50
Total credits

\$0.00
Balance

Edit Export Copy batch Create reversing batch

Transactions 19

Attachments

Attach a file

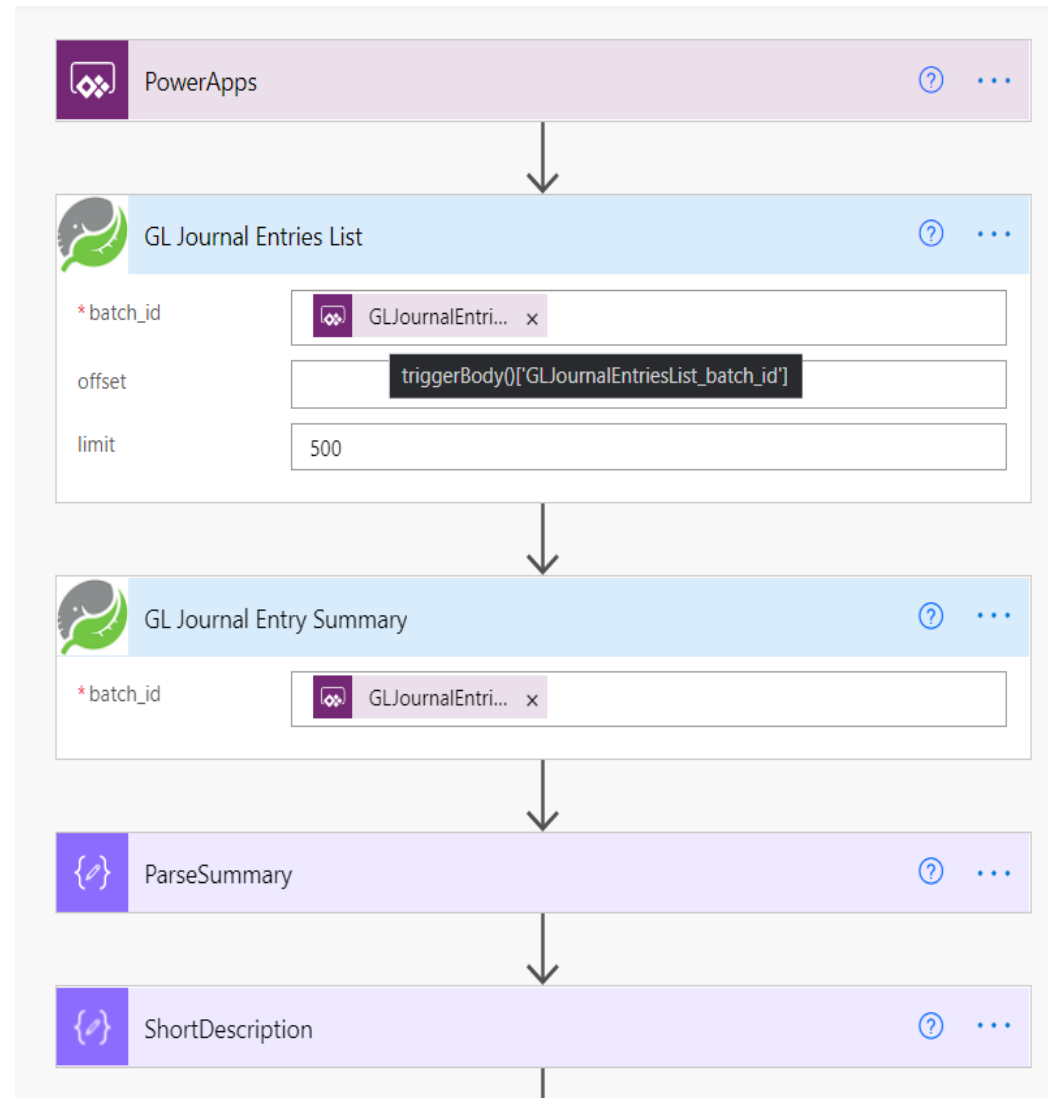
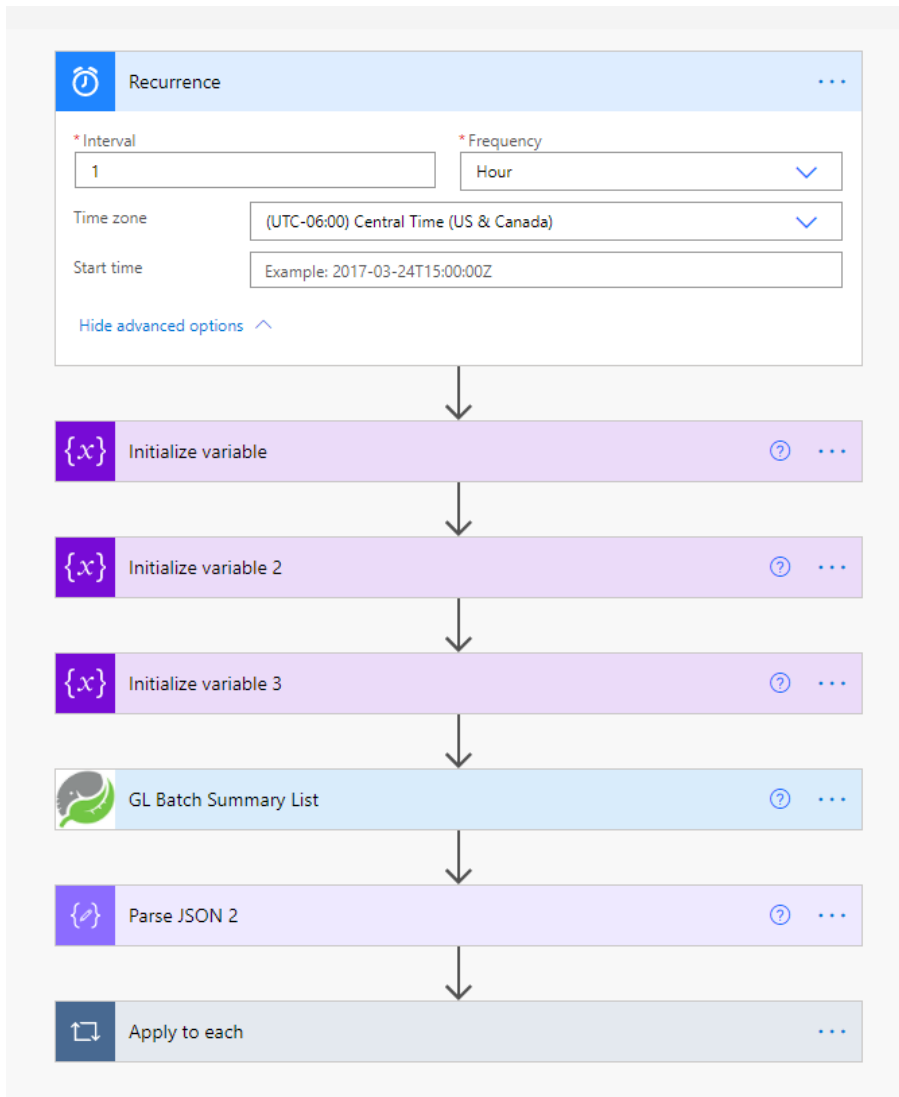
No attachments found

Journal Entry Macros

Create new Journal Entries

Check Locations Capitalization JE Deferred JE

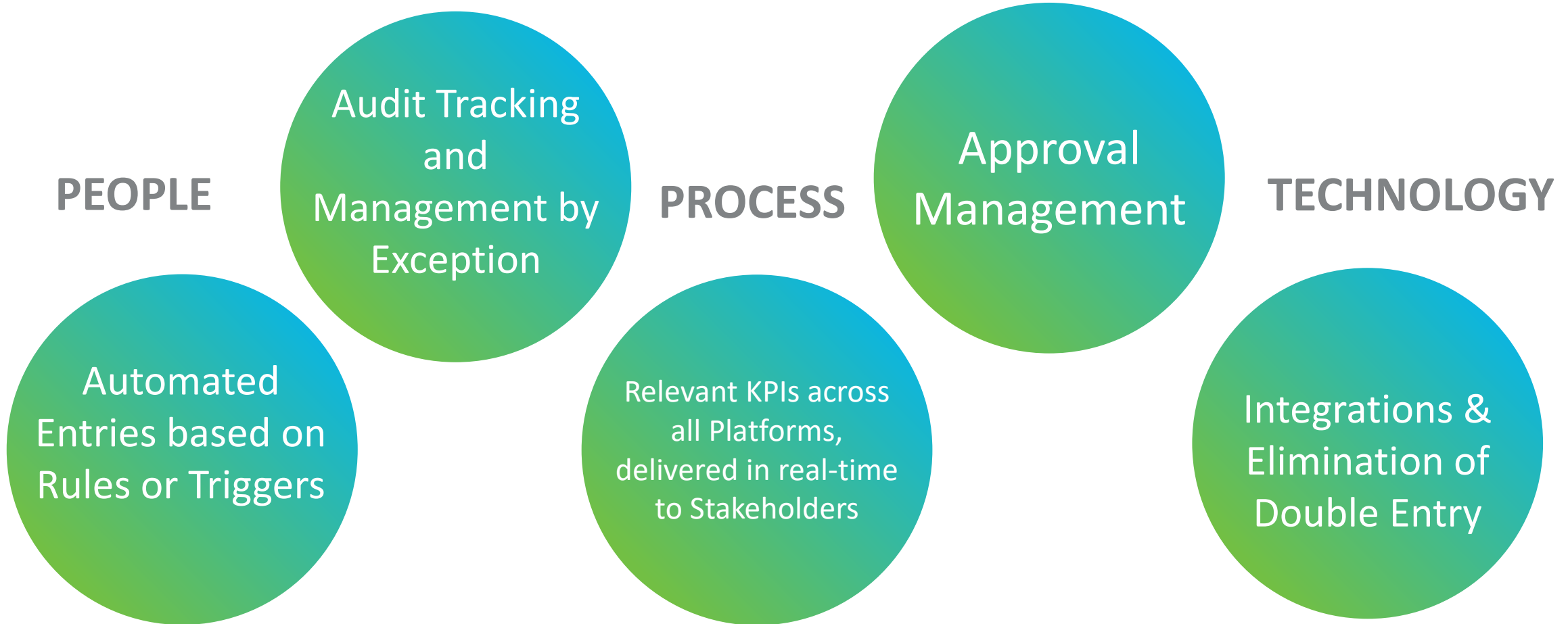
Delivered On Demand and Scheduled Hourly



Homework



Set aside technology and review business processes



Thank you!

barton.dyson@npautomate.com

www.npautomate.com





#bbdevdays

Thank you!