# Business Process Automation for Financial Edge NXT®

BLACKBAUD SKY® TRACK

blackbaud®
DEVELOPERS' CONFERENCE
June 15–17, 2021

**BARTON DYSON**

*Session Host: Michael Sullivan*

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# 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

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Microsoft Certified
POWER PLATFORM FUNDAMENTALS

blackbaud Channel Partner

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# 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

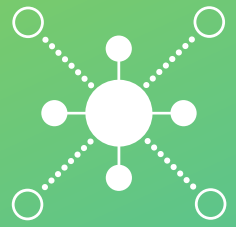
**INCREASED VELOCITY**
Rapid innovation driving change

**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

Revenues

— Cost of Revenues

Gross Profit

— Expenses

Net Income

# There are Only 4 Ways Organizations Can Grow

## Revenues

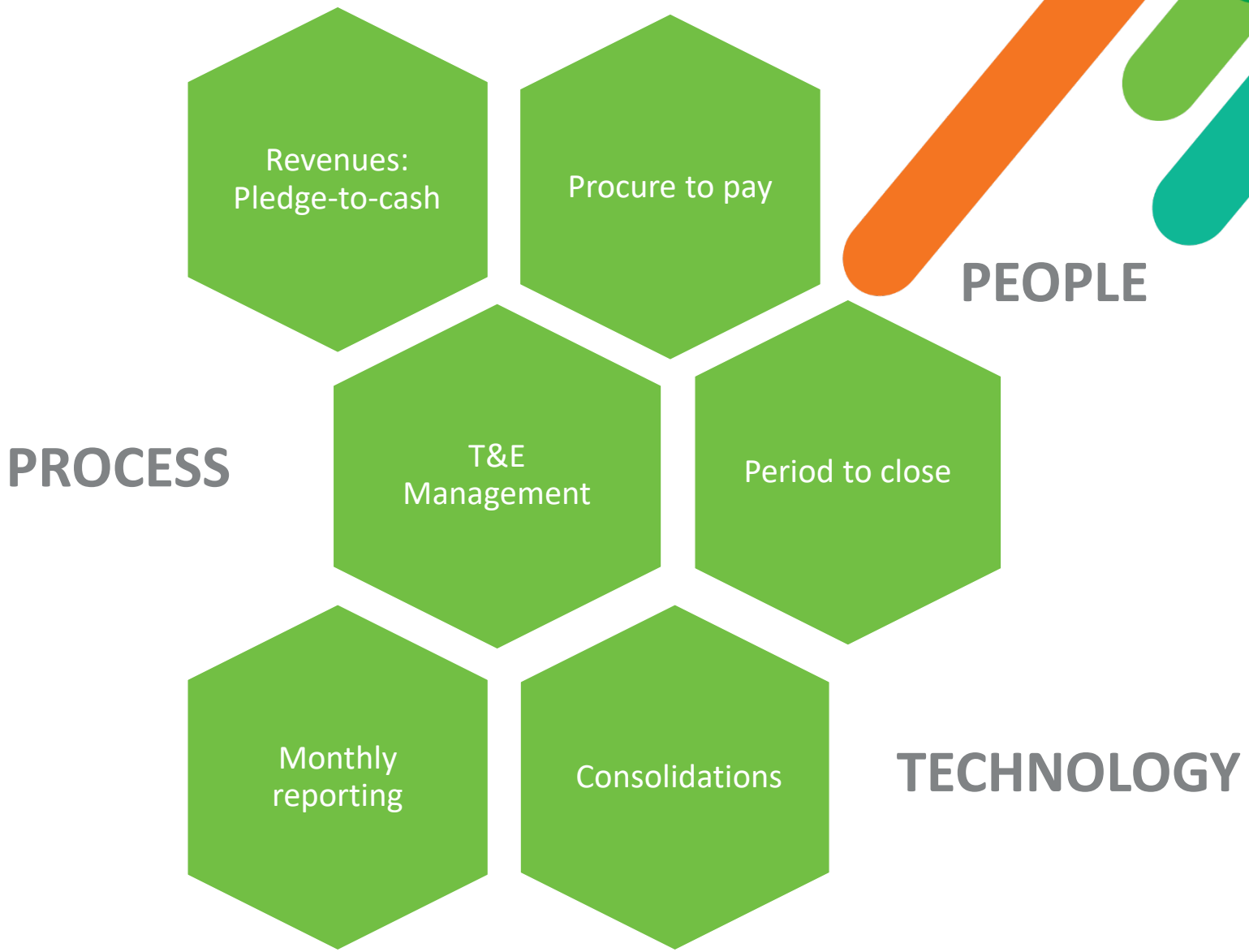
1. Acquire more customers or grants
2. Increase the average transaction
3. Increase transaction frequency

## Gross Profit

4. Improve systems and processes

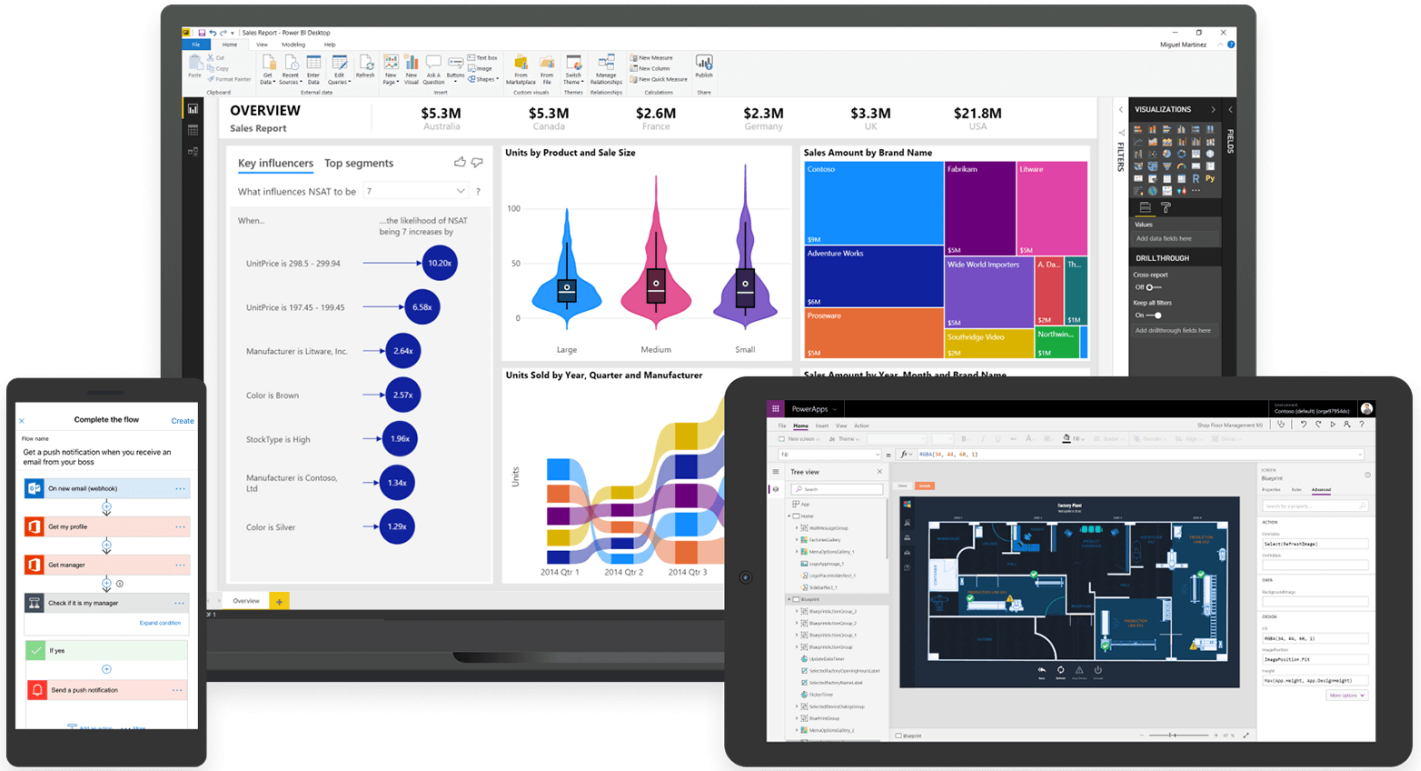
## Expenses

# Processes to Manage



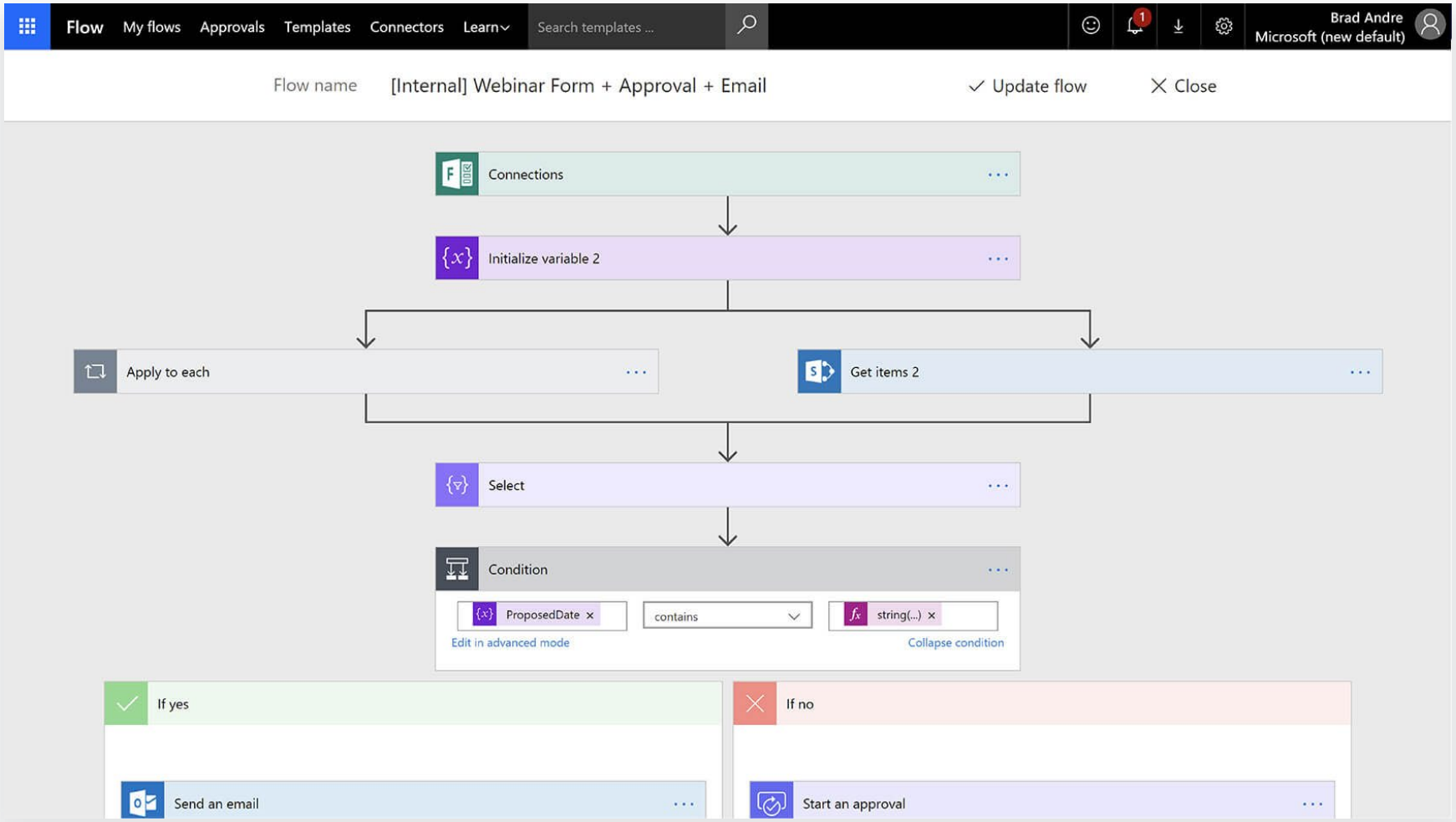
# Problems Solved with Process Automation

# Blackbaud + Microsoft Power Platform



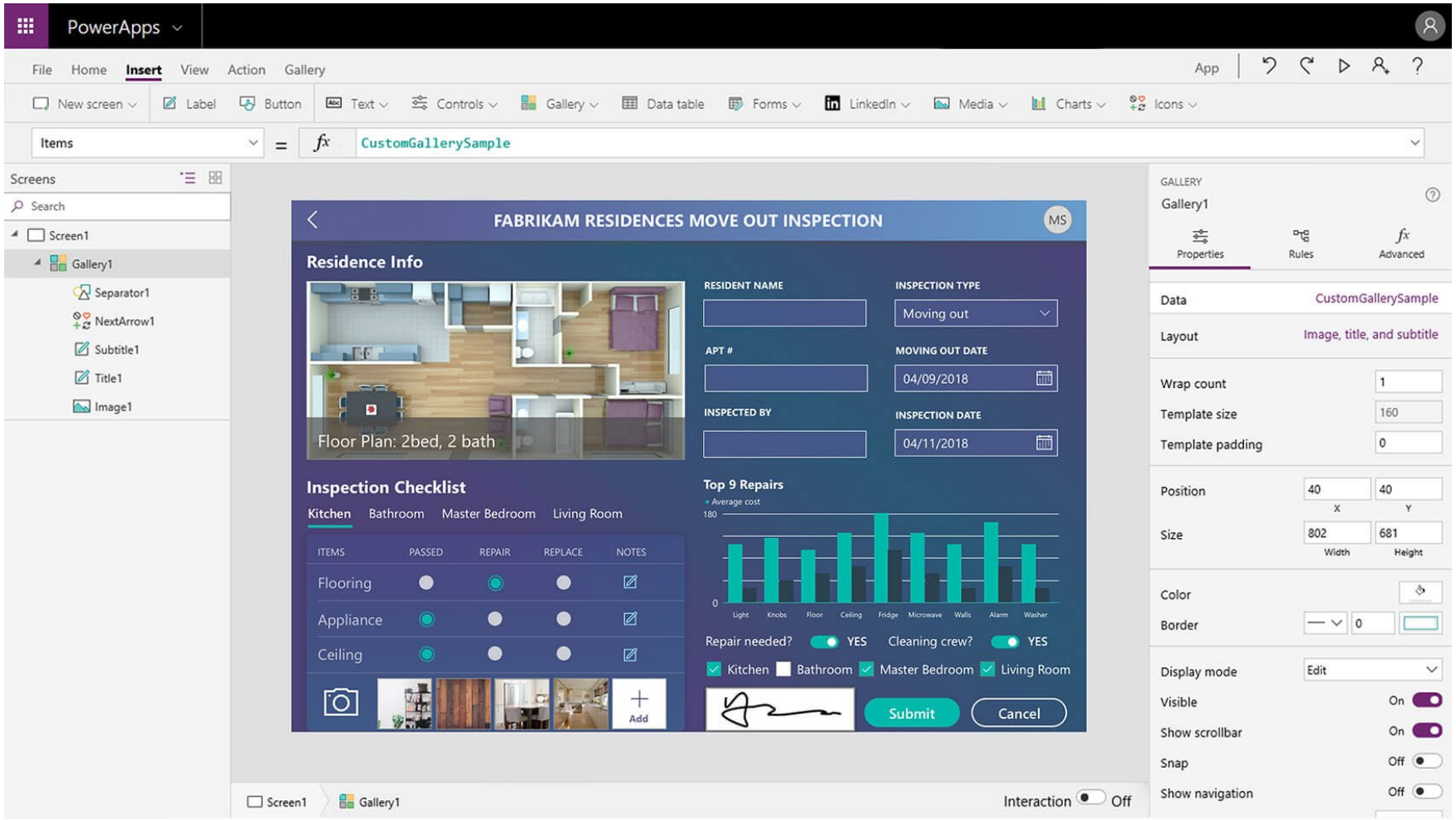
# Power Automate

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



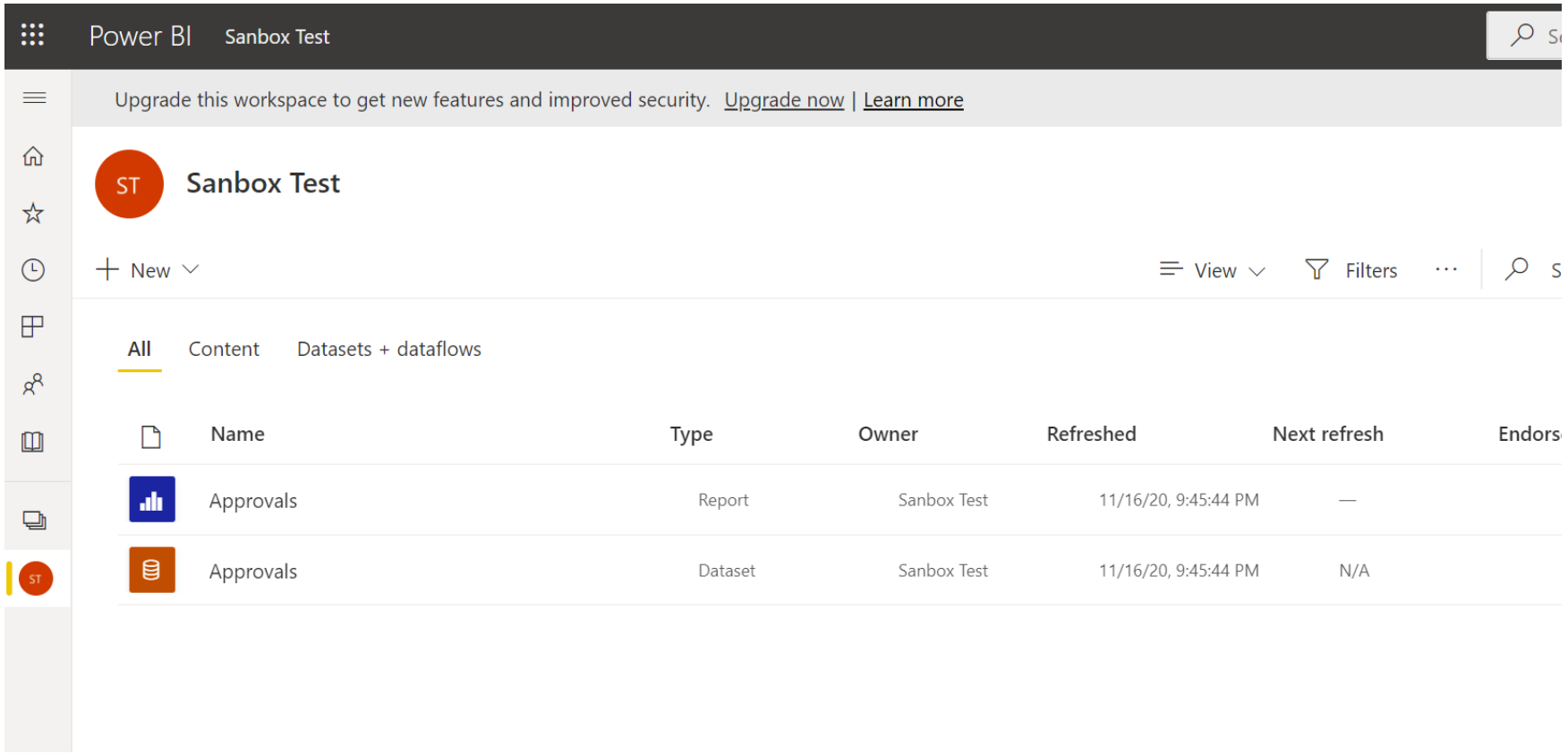
# Power Apps

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

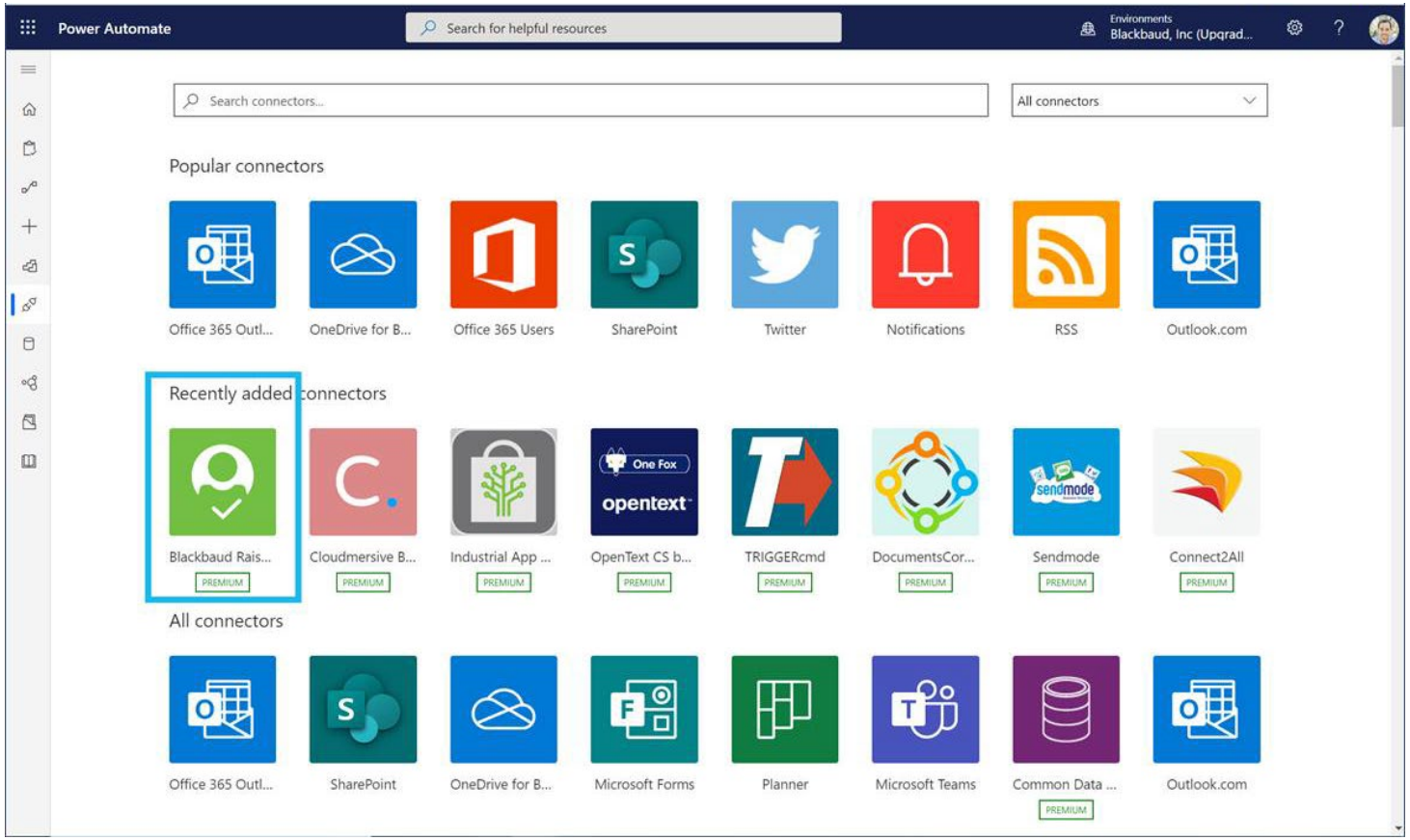


# Power BI

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



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




## Microsoft Examples

Office 365 Outl...

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**

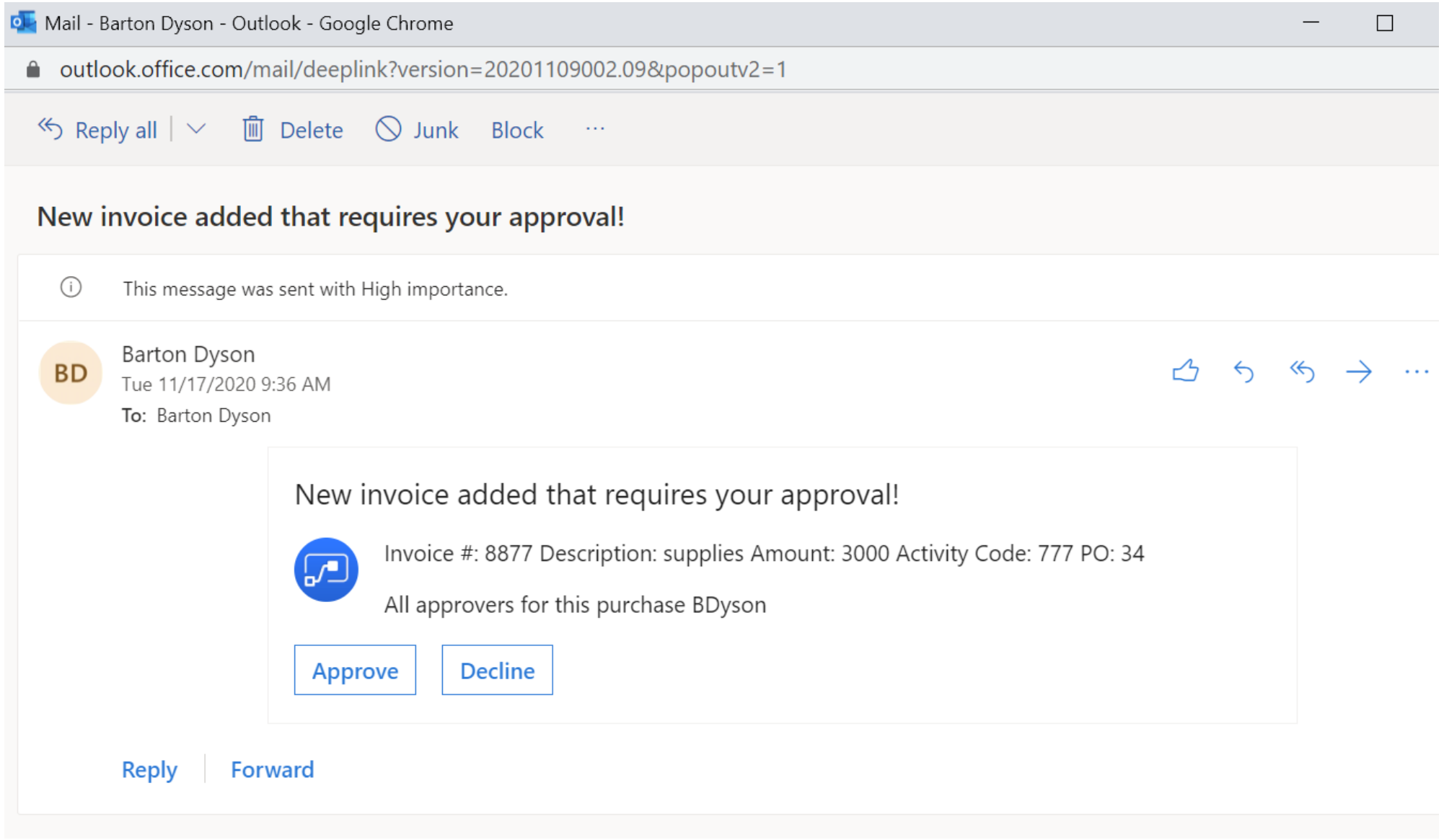
**Different approvers based on funding source and dollar threshold; up to 4 approvers for largest expenses.**

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

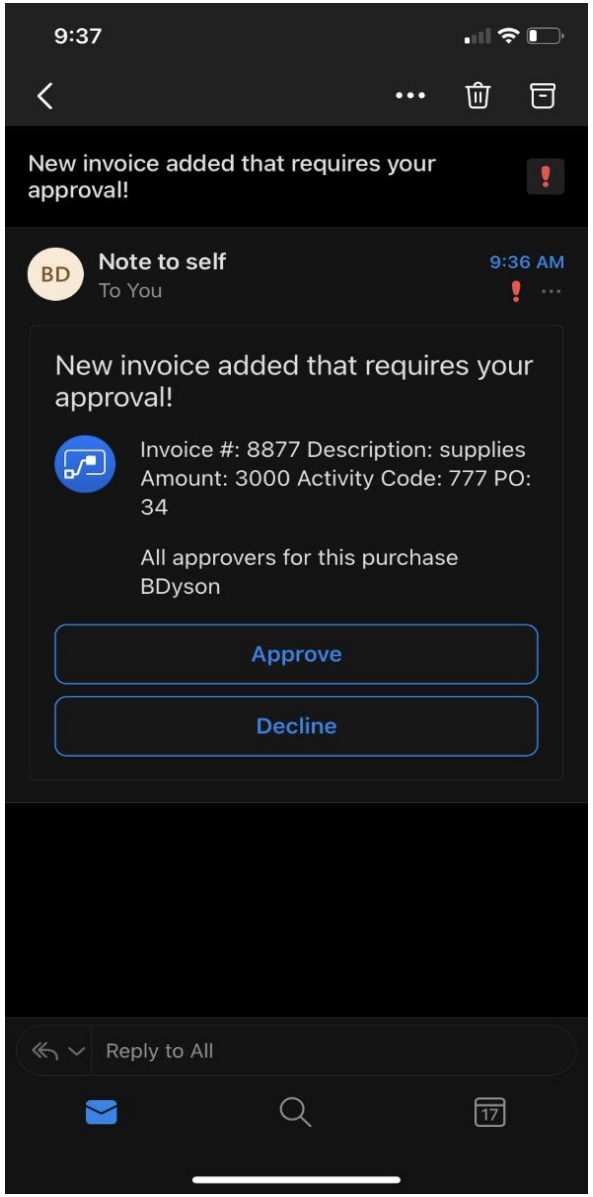
**Ability to view signers from Invoice record**

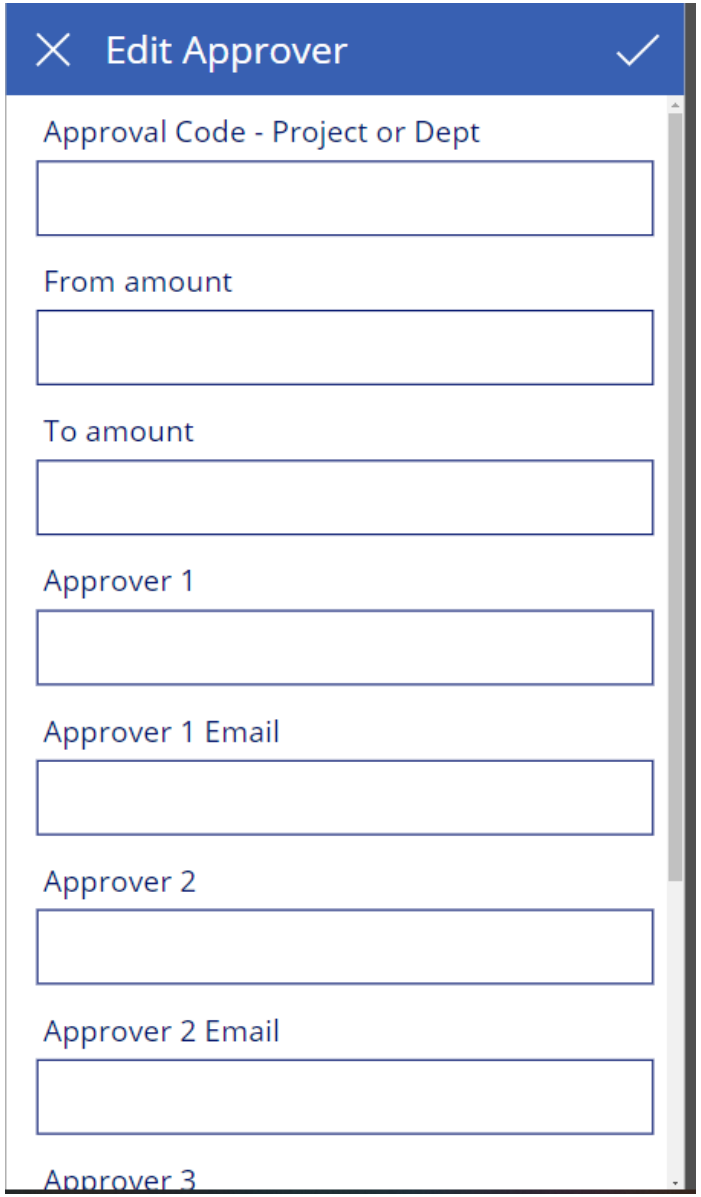
**Workflow for 'Declines' with ability to reissue approval once corrected**

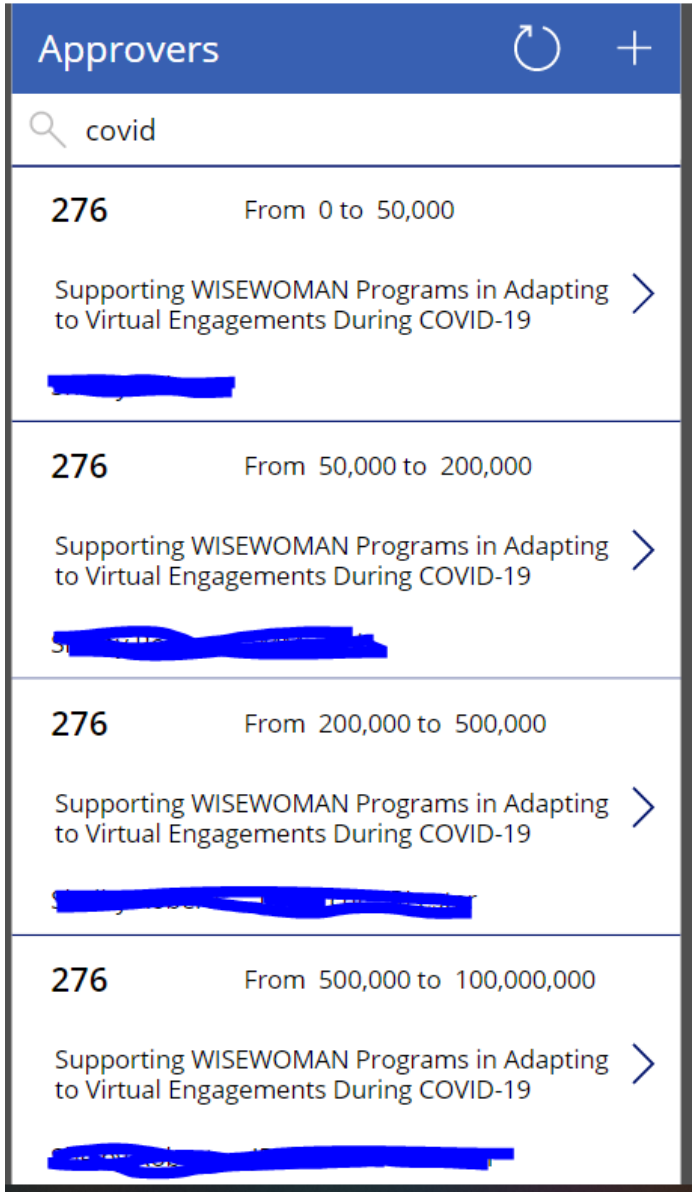
# Power Automate Example – Email with Options



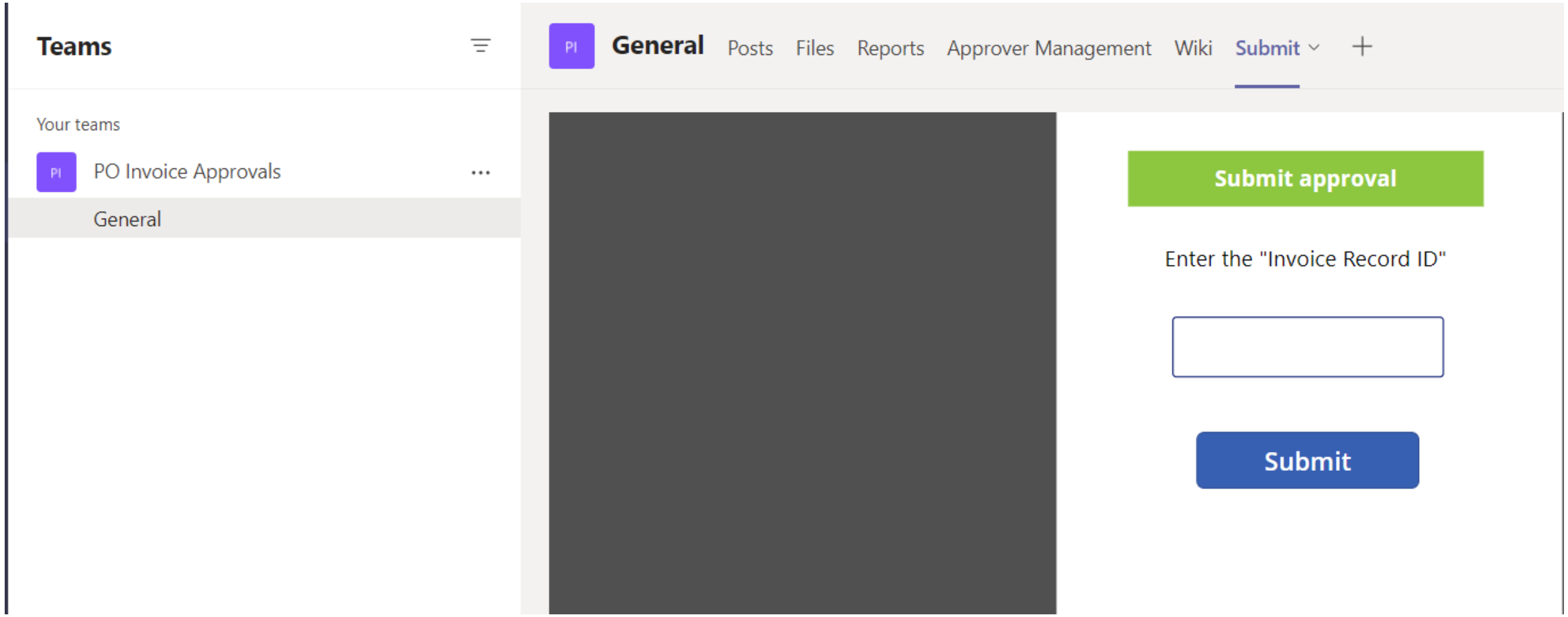
# Self Service and Mobile Interaction



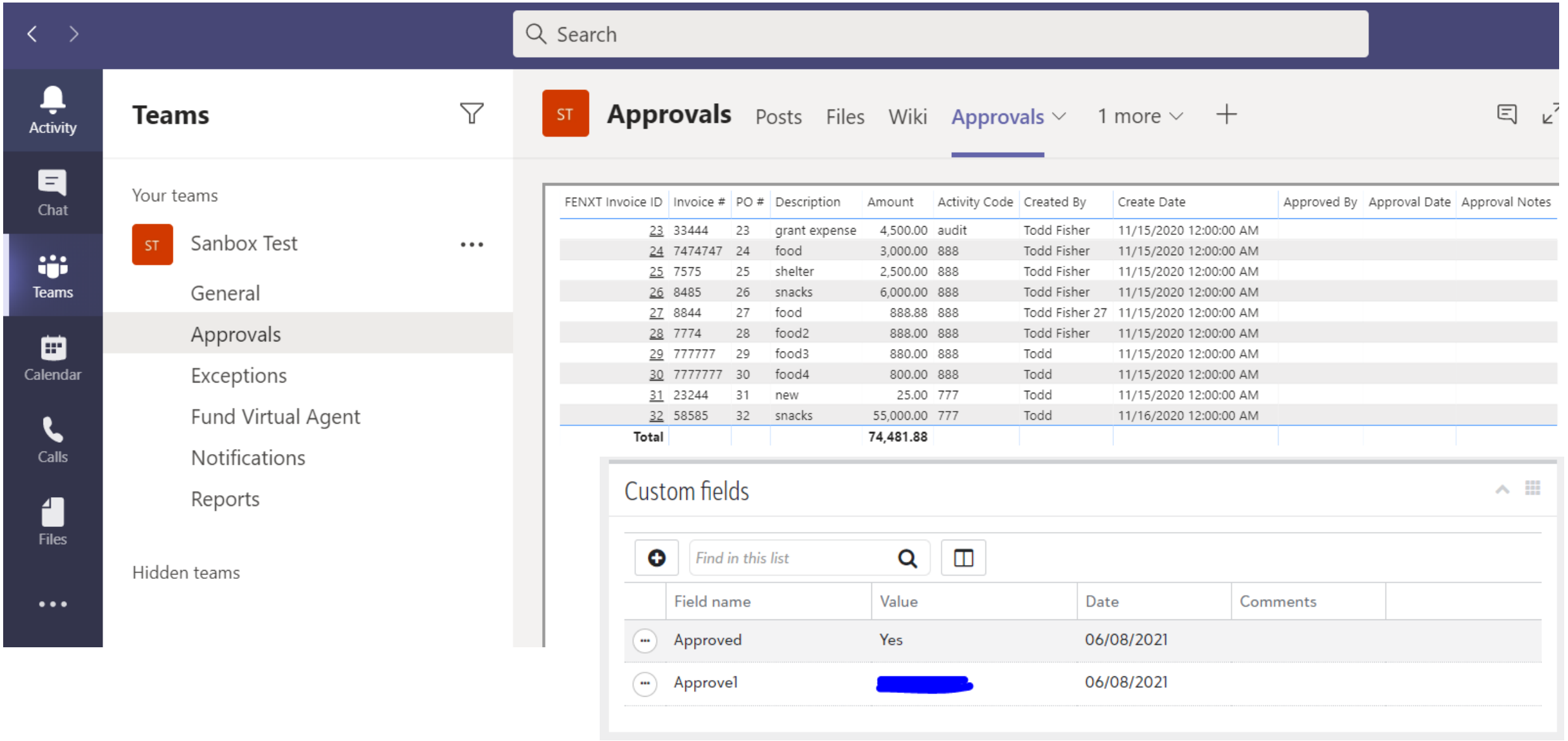



# Delivered securely through Teams leveraging MS365



# Audit with Power BI and A/P Integration



# 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**

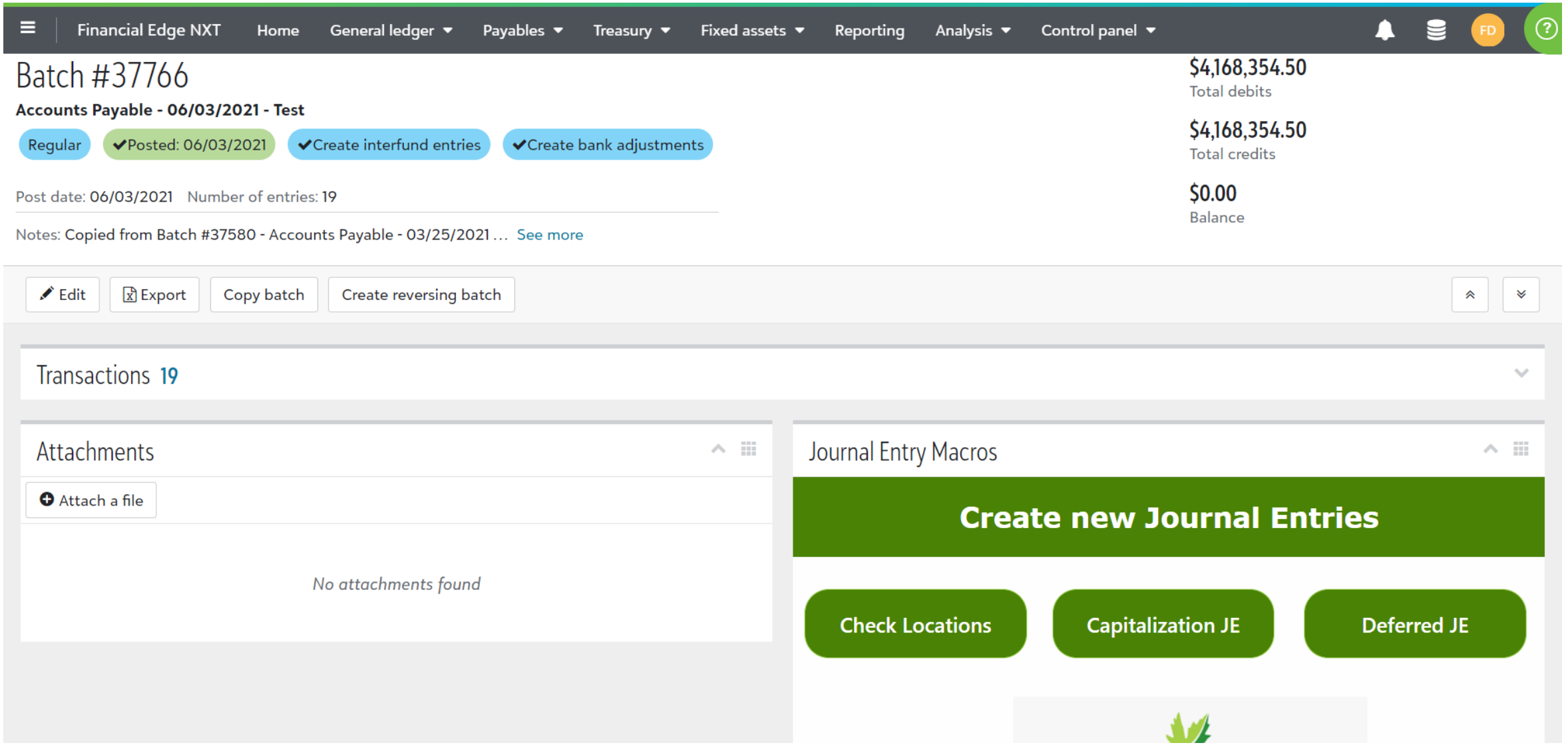
**Scan each line of a posted journal entry to determine if new entries are required within a new batch, based on business rules and field values**

**JEs can exceed 4000 rows**

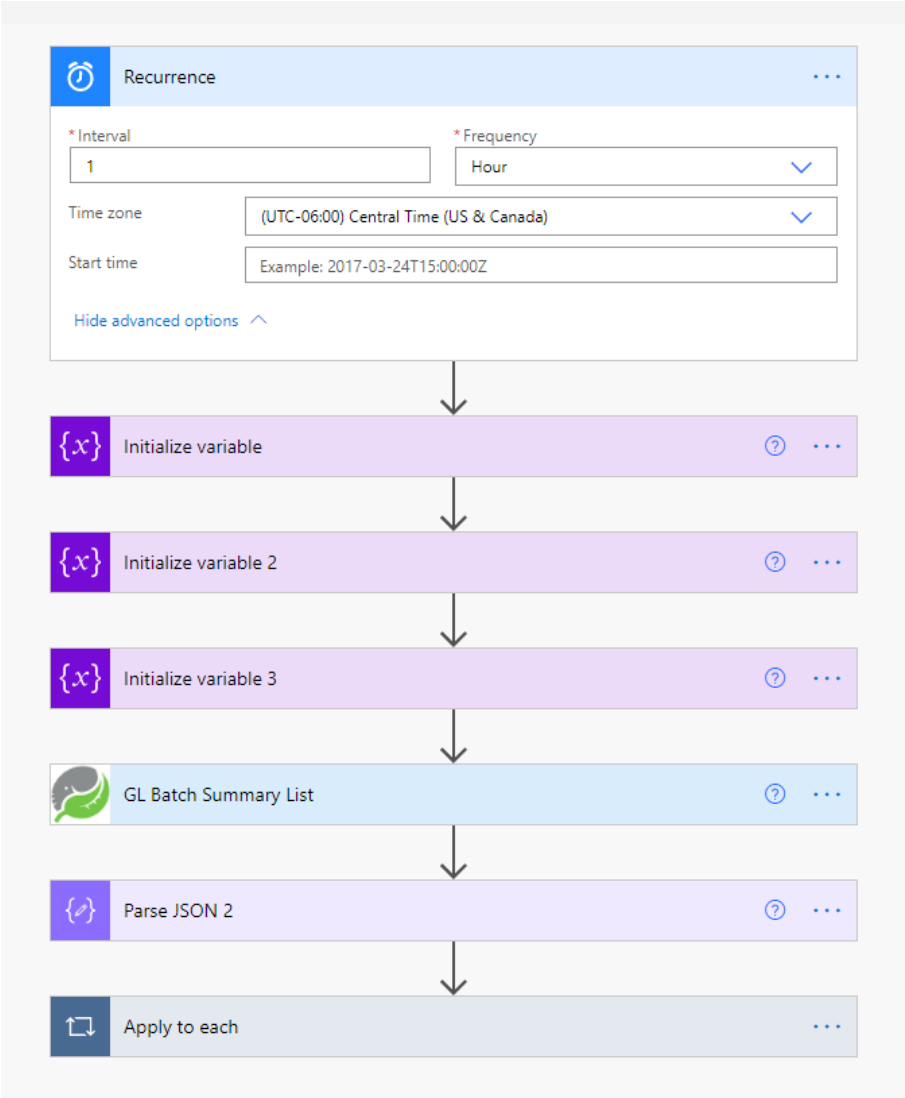
**In addition, monitor AP Invoices and Unposted JEs to ensure that a location custom field for Project equals account segment location.**

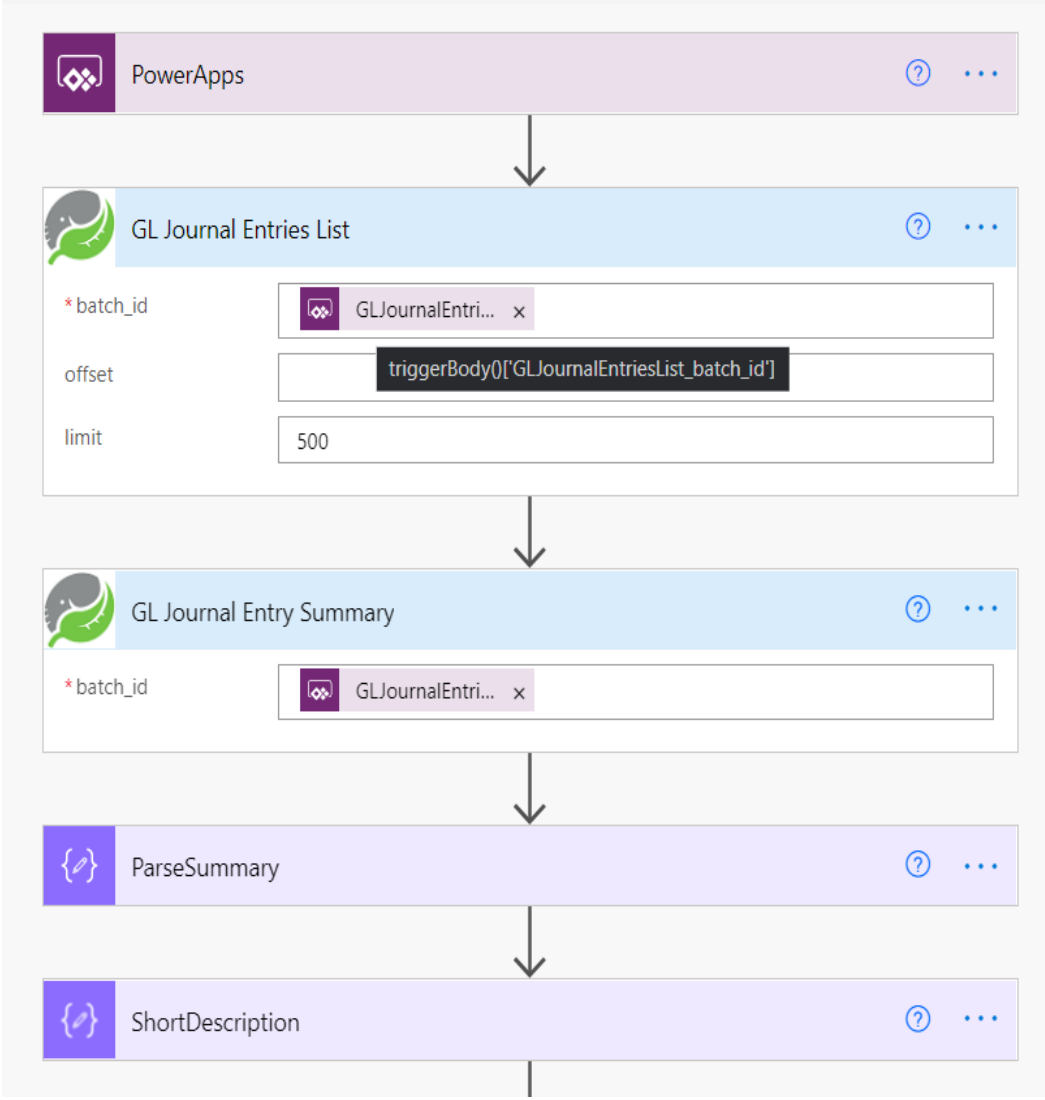
**Allow field users to initiate processes through an App on the Journal Entry screen, while also doing system checks on an hourly schedule.**

# Power App accessible from JE Record



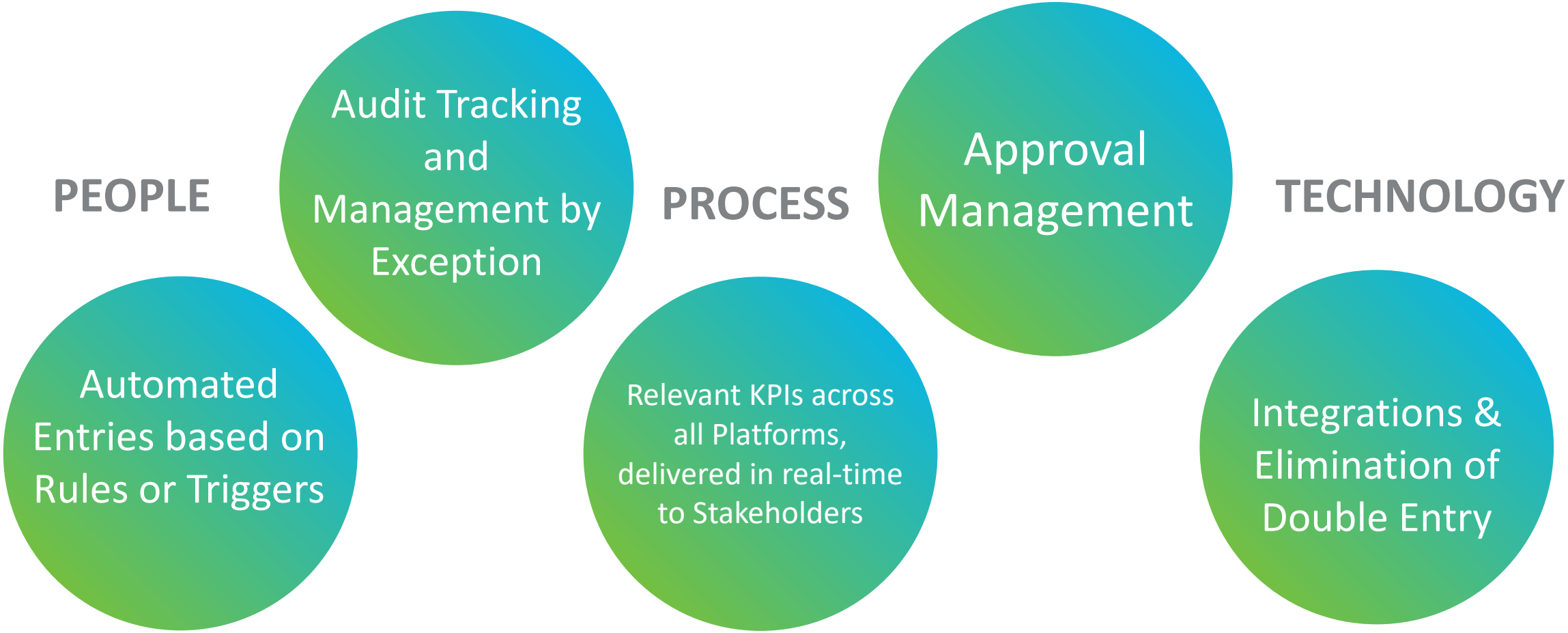
# Delivered On Demand and Scheduled Hourly



# Homework

## Set aside technology and review business processes



# Thank you!

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#bbdevdays

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