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ACCOUNTING & AUDIT

New donor management system for small nonprofits

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Isaac M. O'Bannon • Jul. 30, 2013

Often working with shoestring budgets, many small nonprofit organizations do not use financial management software with the ability to track tax-exempt giving by donors or to create giving statements. In a recent survey of nonprofits with less than \$50,000 in annual revenue, 75 percent indicated they monitored their finances through Microsoft Excel, their bank account, a personal accounting software or used nothing at all.

The survey, by [Aplos Software](#), also showed that 21 percent used QuickBooks, which is not specifically designed for tracking donors or generating contribution statements. This leaves individual nonprofits with the time-intensive process of manually creating required giving statements and means less time is available to achieve their mission, according to one of the cofounders of Aplos, which makes several programs designed for management of nonprofit and church finances.

“Instead of having to enter data and manually create donation receipts at the end of each year, Aplos Donor Management does the work for you and your statements are prepared with the click of a button. It's that simple,” said Tim Goetz, CPA.

That is why Aplos Software has introduced the Aplos Donor Management to its line of financial software for nonprofits and churches. With Aplos Donor Management, he says that small nonprofits and churches can easily track donors and donations with simple, user-friendly software and quickly create clean, professional contribution statements as required by the Internal Revenue Service. “Small nonprofits face limited time and resources. This low-cost solution will free countless hours lost on paperwork that can now be spent on their mission,” commented Goetz.

The web-based program’s customizable contact database lets users track donor information, create customizable fields and add their photos, then export the contact information to Excel as needed. In addition, Aplos’ cloud-based software means there is no need to download software to get started and data is secure and automatically backed up. Aplos Donor Management also allows multiple users with role-based permissions. For example, the administrator could give access to a volunteer to update the contact database, but not provide access to input any donations.

An annual subscription to Aplos Donor Management costs \$49.99 and includes up to 10 users and up to 5000 donors. As the nonprofit grows and needs a more comprehensive fund accounting software, Aplos Donor Management can easily be upgraded to the Aplos Accounting Suite.

Goetz also said the system has advantages for CPAs and public accountants who serve nonprofits.

“CPAs can streamline managing their nonprofit clients with Aplos’s free accountant access. With one log-in, accountants can access the finances of all of their clients that use Aplos Donor Management, Aplos Accounting or Aplos e-File to pull real-time reports, audit activity or manage the books,” Goetz said.

“Every week we get new calls from professional bookkeepers and accountants who want to move their nonprofit clients to the Cloud to increase efficiencies, expand their service area and improve the accounting methods of their client. Nonprofit clients can range significantly in size, needs and current accounting software.

Consolidating these clients under one software that can meet the varied needs of each client not only helps the accountant, but also adds value to the client relationship by providing more real-time oversight, feedback and accountability.”

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