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100 percent cloud-based, Aplos requires no product installation, a plus for small nonprofits with limited staff. The main user interface contains several tabs listed vertically on the left side of the screen: Dashboard, Settings, Accounts, Transactions, Contacts, and Reports. Rather than continuing as an App-based system, Aplos made the transition to inclusive software, with two components: Accounting and Donor Management.

The accounting function includes complete fund accounting functionality, a fully customizable chart of accounts, and a bank reconciliation function that can download banking transaction details directly into the system. The accounting function also includes complete AR and AP functionality. The Aplos data entry screens are designed for ease of use, and they contain lookup options that are available by clicking in the data field.

Aplos also offers new users a free webinar to assist them in setting up the system. The Donor Management component can be used as a standalone product or in conjunction with the Accounting component to create a complete financial and donor management system. Aplos can run on either Windows or Mac platforms, and is compatible with most Internet browsers.

#### **CORE NFP/FUND ACCOUNTING CAPABILITIES: 4.25 Stars**

The Aplos chart of accounts can be completely customized or users can opt to utilize the default chart of accounts included in the system. By combining the previously offered apps into the main accounting component, Aplos has simplified its software, while also reducing potential costs. Offering true fund accounting, Aplos allows users to easily create and manage multiple entities using Aplos Oversight, which is free.

Aplos also allows users to set up and manage multiple funds in the system, making it easy to track program and grant expenses accurately. Multiple transaction types are

easily processed in Aplos, with users able to switch from section to section within the

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All fund accounts are classified as Equity accounts in Aplos, and are color coded for easy identification. For those tracking grants, simply enter a new fund and manage all income and expenses for that grant. The User Activity log tracks all system usage, and users can provide outside accountants and auditors access to the system at no cost. Cloud-based, Aplos is available from anywhere with an Internet connection, making it easy to manage multiple locations, offices, or even nonprofits. .

#### **MANAGEMENT FEATURES: 4.0 Stars**

Aplos has five separate levels of system access available including Administrator, Bookkeeper, Auditor, People Manager, and Contribution Manager. While the Administrator level offers full system access, the other options offer only select features relevant to the specific job. A contacts database contained in Aplos tracks all online donations received through the Donor Management component, which allows users to quickly create an online donor form that will link to campaign emails, social media, and can link to a business website.

Complete integration with Aplos Accounting means that all data entered into the online donation form is recorded in the Aplos Accounting as well. The Donor Management component also offers complete donor management, with the ability to record detailed information on donors using user-defined fields. Users can also quickly create monthly giving statements that include both donations and pledges for easy tracking. All data entered into Aplos is securely stored on their servers and automatically backed up on a regular basis. The Aplos e-File component allows users to file Form 990 electronically.

#### **FINANCIAL STATEMENTS & REPORTS: 4.0 Stars**

Aplos has about 20 standard options, including income statement, fund balance summary, account list, trial balance, expense summary and expense detail, and a

balance sheet. Report modifiers are available, including the option to include fund

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organizations. Customization options are also somewhat limited, which is why exporting to Excel is probably a better option for the smaller nonprofit that needs custom reporting.

### **INTEGRATION/IMPORT/EXPORT: 5 Stars**

All Aplos reports can be exported to Excel for spreadsheet customization. As a cloud-based product, Aplos offers unparalleled access to the product from anywhere, making it a terrific choice for nonprofits with multiple offices, or those that have employees working from home. Aplos components integrate seamlessly so duplicate data entry is eliminated. Users can also import data from QuickBooks or Excel into Aplos, and managers can set up their accountant or bookkeeper as a user, providing unlimited access to all system data.

### **HELP/SUPPORT: 5 Stars**

Help functionality can be found throughout Aplos. Clicking on a question mark icon will take users to an interactive screen where they can email Aplos support personnel. All system support is included with the cost of the software, and new users are provided with a free 15-day trial where they can try out the software on their own – no credit card required. At the end of the session, users will be given the option to purchase the software at that time.

### **SUMMARY & PRICING**

Specifically designed for nonprofits with revenues of less than \$500,000 annually, Aplos allows small nonprofits to be up and running immediately with little down time needed for training or system setup. Affordably priced for even the smallest nonprofit, Aplos Accounting starts at \$12.00 per month for a single user; \$20.00 per month for unlimited users. The Donor Management option is \$10.00 for a single user.

**Best Fit:** Aplos is designed for small to mid-sized nonprofits with annual revenues of

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- Integrates with Donor Management component
- Affordable for even the leanest budget

### Potential Limitations

- Limited budgeting capability
- Rapidly growing nonprofits may outgrow product

## 2014 Overall Rating: 4.5 Stars

Accounting • Auditing • Nonprofit • Software

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