PEX

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CASE STUDY

Everything a Growing Non-Profit Needs for Finance Management

Organization

DOGTREE PINES
SENIOR DOG SANCTUARY
PRESCOTT ARIZONA

Organization Type
Non-profit

Brief
Aplos and PEX are easily integrated to provide a first-class solution for non-profit finances. A growing organization can scale up volunteer and staff operations without needing to sink additional time into financial management or piles of receipts and paperwork.

Dogtree Pines Senior Dog Sanctuary was created to rescue large senior dogs in need of extensive medical care and provide them medical care, nutritious food, and love. Located in Prescott, Arizona, the Sanctuary is volunteer driven with a team of over 10 volunteers and growing.

CHALLENGE

Terry Green joined Dogtree Pines Senior Dog Sanctuary as Treasurer based on her own personal love and passion of adopting senior dogs. Since the Sanctuary has only been operating as an official not-for-profit organization for a year, the founder was managing a lot of the finances through her own personal account. But, as awareness of the Sanctuary grew, so did donations and volunteer staff and Terry quickly realized the need to improve the organization's expense management.

As a first step, Aplos was set up to manage finances and a corporate credit card was created to help track the Sanctuary's expenses and keep it separate from the founder's personal accounts. However, Terry soon realized a credit card was not enough; "We got a corporate credit card but that was really only for [the founder] and when the occasion arose for someone to take a dog to the vet, or someone to pick up medications at a pharmacy, they would often have to use their own personal credit card. I would then need to write a reimbursement check and it became more problematic to ask volunteers to pay out of their own pocket for Sanctuary expenses."

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Through the PEX/Aplos integration, Terry recognized how easy it would be to have PEX cards available for the Dogtree Pines team and manage expenses that way. As Terry says, "[The team can] make a purchase, take a picture of the receipt and that's all I need. I manage all the tagging to keep things simple for the team and the [PEX] cards have really helped us streamline the whole process of tracking our expenses."

IMPLEMENTATION

An immediate benefit of setting up the PEX cards was keeping the founder's account and the Sanctuary account separate. The PEX card's spend and merchant rules made it much easier to track Sanctuary specific expenses and not deal with splitting receipts and removing any personal items from the founder's credit card.

Additionally, having the ability to have generic PEX cards is a great way to allow for delegation of tasks. As Terry says, "The founder had previously done everything herself but with over 16 senior dogs to take care of, she was spread thin so the generic cards will help her delegate duties to others." The PEX cards also reduced the need to write reimbursement checks to volunteers who had to purchase out of pocket.

CLOSING REMARKS

Introducing PEX's expense management system to Dogtree Pines helped Terry better manage the finances of a blooming non-profit organization. PEX offered organization and clarity to the daily expenses of Dogtree Pines and also enabled them to grow and expand to include more community members who wanted to contribute.

As Terry says "The top three benefits of PEX are streamlined expense tracking, tighter controls, and increased delegation for Sanctuary purchases." Terry enjoyed the real-time tracking of expenses in the PEX dashboard. With the Aplos/PEX integration Terry was able to have everything in one place to keep things simple and organized.

PEX cards created a controlled structure for tracking expenses and a way to expand to more of the community - everything a starting non-profit needs.

"The top three benefits of PEX are streamlined expense tracking, tighter controls, and increased delegation for Sanctuary purchases."
Terry Green, Treasurer

A FEW OF THE BENEFITS OF PEX

TRACKING AND INSIGHTS
Precisely track and control spending by employees and volunteers. Payments are more transparent with the PEX solution.

STREAMLINE RECONCILIATION
PEX works with your General Ledger codes and integrates with most accounting software, allowing transactions to be easily allocated to different projects, events, travel, etc.

ENABLE FUNDING ADJUSTMENTS IN REAL-TIME
You have the option to either directly fund and defund cards or automate the process. Set up alerts to instantly know when a card is used or a transaction is declined.