



## CASE STUDY

# Efficient Time Savings with PEX

### Organization



### Organization Type Community Organization

### Brief

Executive Director Joe Hunter finds a simple way to enable spending with robust security and oversight

The Papillion Community Foundation supports its community through various events held throughout the year that focus on culture, inclusivity and support of its veteran residents.

As the Executive Director of the foundation, Joe Hunter splits his time between the operational tasks of managing events and fundraising as well as the back end administrative office tasks.

## CHALLENGE

Joe manages daily spend and expenses for the foundation as well as the projects related to the Papillion community. “We are a staff of one and a half so spending hours reconciling or trying to track down receipts is time consuming for me. I’m the one doing the accounting, fundraising, event planning and the 100 other things we do day in and day out so really making sure I was being time efficient is huge for me.”

As part of the time savings initiative, Joe took on the task of streamlining their financial software by transitioning to Aplos and also consolidating the number of bank cards they were using as an organization. “We had petty cash, we had a debit card, we had a credit card - we had several different bank accounts

with several different banks that we worked with. For us having those cards floating around out there was not something we were super comfortable with. For example with the debit card, someone would have access to an operating account with over \$80k.”

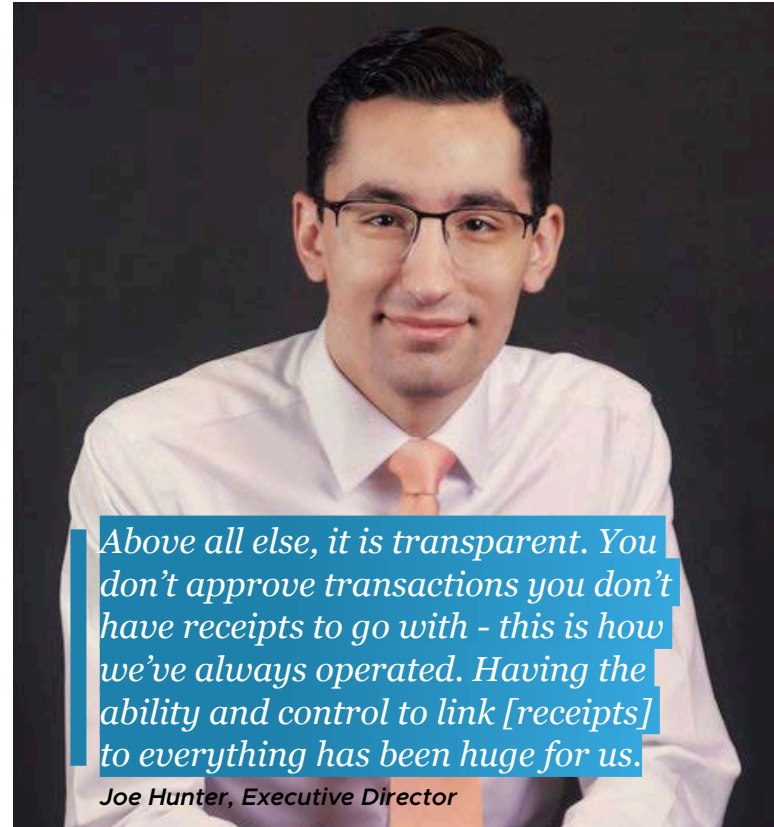
## IMPLEMENTATION

With the Aplos changeover, Joe learned about the PEX/Aplos integration and recognized the need to set up PEX cards at Papillion. The implementation process was simple and quick. As Joe says, “PEX [customer service] was a huge help and super flexible in answering my questions. It was a smooth process. We pretty much started using [the cards] the same week we funded the accounts.”

Adopting PEX streamlined the back end operations of the Papillion Foundation. As a paperless office, PEX’s receipt capture offered immediate benefits. “Being able to scan receipts right away so I’m not keeping track of a hundred different receipts each week was huge.” Not only was Joe able to gain efficiencies from the integration but he also enjoyed the benefits of PEX’s different card options. “Having the option and flexibility of getting the different types of cards PEX offers was huge for us for future projects.”

## CLOSING REMARKS

Adopting PEX has helped Joe upgrade their processes while gaining time to focus on the foundation’s key mission. PEX cards offered the level of security and control that Papillion needed. “The biggest thing is that you still have the control; you are able to set those spending [categories]. There still is the security and oversight - for example having the ability to manage the account while away/on vacation or update admin needs as needed.” Ease of use, high levels of control and security offered the back end assistance Joe needed to enable the Papillion Foundation to continue to create important programs for their community.



*Above all else, it is transparent. You don't approve transactions you don't have receipts to go with - this is how we've always operated. Having the ability and control to link [receipts] to everything has been huge for us.*

**Joe Hunter, Executive Director**

## A FEW OF THE BENEFITS OF PEX



### TRACKING AND INSIGHTS

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



### STREAMLINE RECONCILIATION, REDUCE UNAUTHORIZED PURCHASES

PEX works with your General Ledger codes and integrates with most accounting software, allowing transactions to easily be 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 declined.