



Technology Consulting in the Community

Spring 2015

**Toluwani Esther Awoyele
Thomas Merton Center
Final Consulting Report**

**Carnegie Mellon University
Pittsburgh, Pennsylvania
www.cmu.edu/tcinc**

Carnegie Mellon University



THOMAS MERTON CENTER

Executive Summary

Student Consultant, Toluwani Esther Awoyele
Community Partner, Diane McMahon

About the Organization

Thomas Merton Center (TMC) is a nonprofit organization located in Pittsburgh, Pennsylvania. The mission of the TMC is to engage people of diverse philosophies and faith to find common ground in the nonviolent struggle towards a more peaceful world. The center was named after Monk Thomas Merton (January 31, 1915 - December 10, 1968). Thomas Merton was a social activist who was immensely involved in social justice issues in his community. He authored more than 70 books which were centered on peace, nature, spirituality and social justice. The organization was named after him because the mission of the organization resonates with his name. The mission statement of the organization is as follows:

The mission of Thomas Merton Center is to build a consciousness of values and to raise moral questions relating to issues of human rights and social justice.

Over the years, Thomas Merton Center has been successful in achieving its mission. Several social justice campaigns and rallies are carried out yearly and voices of thousands has been raised through the support of the center.

As part of Carnegie Mellon University technology development for the city of Pittsburgh, Thomas Merton Center was chosen for a consulting engagement between Diane McMahon (Director, Thomas Merton Center) and Toluwani Esther Awoyele (Student Consultant). The period of the consulting engagement was from January 2015 – May 2015.

Improving organizational efficiency by eliminating redundant data entry

The purpose of the consulting engagement was to synchronize QuickBooks and Salesforce in such a way that when data is entered on QuickBooks, a middleware application that stands as a bridge between QuickBooks and Salesforce is triggered. Data is then extracted from QuickBooks and transferred to Salesforce. Minimal human effort is required to achieve this and data integrity is ensured.

Before the consulting engagement, Thomas Merton Center makes use of two major applications to manage its finances and customer relationship. These two applications are QuickBooks and Salesforce. QuickBooks is used to manage the organization's finances while Salesforce is used to manage the organization's relationship with its donors and customers. Any donation received by the organization, is entered into QuickBooks and an employee prints out the information entered on QuickBooks and manually enter the information to Salesforce. This is a redundant process causing occasional data errors.



Outcomes

There are several solutions in the Salesforce App exchange marketplace that can handle QuickBooks – Salesforce integration. Most of these solutions are generalized and assumes that a QuickBooks user uses all the QuickBooks functions. This assumption is not true for the Thomas Merton Center therefore a customized solution for integrating QuickBooks and Salesforce was developed. The application platform that was able to enable this is called “Workato”[1]. Workato requires a user to create a custom synchronization of various fields on QuickBooks which will translate to fields on Salesforce.

The solution has successfully transferred 68 donor information that was entered on QuickBooks into Salesforce. Also payments received from a donor entered on QuickBooks updates the donation function in Salesforce.

This solution is sustainable and it is a free solution for QuickBooks – Salesforce integration. The director of Thomas Merton Center already receives emails about data being synced between Salesforce and QuickBooks and the employed data entry staff now sees most of the data that was entered manually before in Salesforce and therefore have no need to re-enter the data.

Recommendations

The future of the Thomas Merton Center should be one that cater for social justice and promotes human rights for persons from every race, gender and class irrespective of background or any external bias. In order to attain this level of social justice, effective relationship management (customers, donors and campaigners) and an innovated way of carrying out technical task is necessary.

Improving the use of the organization’s financial application and implementing a social media platform for Campaign purposes are recommendations that should be carried in order to achieve this vision.

Community Partner

Diane McMahon, Ph.D., CFRE
mcmahond@thomasmertoncenter.org
Managing Director
THOMAS MERTON CENTER
5129 Penn Avenue
Pittsburgh, PA 15224

About the Consultant

Toluwani Esther Awoyele
tawoyele@andrew.cmu.edu
Toluwani is a Master of Information
Systems Management Student.
She will begin working as a
Researcher for IBM this summer.

Thomas Merton Center Final Consulting Report

Student Consultant, Alice Student
Community Partner, Bob C. Partner

About the Organization

Thomas Merton Center

Thomas Merton Center (TMC), Pittsburgh peace and Social Justice Center was named after Thomas Merton. Thomas Merton (January 31, 1915 – December 10, 1968) was a monk at the abbey of Gethsemani in Kentucky. He was a social activist, involved immensely with social justice issues in his community. He wrote more than 70 books which centered on peace, nature, spirituality and social justice. He also wrote a best-selling autobiography. The organization for peace and social justice was named after him because the mission of the organization still resonates his name.

Thomas Merton Center pursues various social justice projects in the city of Pittsburgh. Events such as rallies are always scheduled as part of the organization's duties to the community. The pledge of the organization is to support basic human rights.

The mission of the organization is as follows:

The Thomas Merton Center works to build a consciousness of values and to raise the moral questions involved in the issues of war, poverty, racism, classism, economic justice, human rights, and environmental justice. TMC engages people of diverse philosophies and faiths who find common ground in the nonviolent struggle to bring about a more peaceful and just world.

TMC is run by 7 employees and serves the community of Pittsburgh. There is no limit to the number of people served. An estimate of the organizations' budget is \$500,000 per year and the organization is looking at raising more social justice issues in Pittsburgh. The organization is also funded mainly by donations from donors and philanthropists. The organization is currently involved in 23 programs [2] and serves thousands of people through those programs.

Facilities

The organization has two buildings, the thrift store and the main building. The thrift store was born out of the organization some years back and it is used to deliver used items to the community at a low cost. The main building is where the actual organization for peace and social justice runs. The facility consist of two floors: a basement and the first floor. The first floor houses two offices (one for the director and another for the finance coordinator), a computer room, an open space with a bookshelf that contains books (like a library) and tables for reading, a small compartment divided out of the open space is used as the computer space. The computer space contains about 4 desktop computers. There is also a small kitchen just after the open space which has some cups, plates and a coffee-maker. At the back of the kitchen is the restroom and a smaller open space.

On each of the tables in the open space is a small reading lamp, which lights up the rooms. There are also ceiling lights which serves as the main lighting of the building.

Programs

The major programs embarked by the organization are rallies and campaigns. This is what the organization stands for and takes on projects to ensure the peace and welfare and social justice of the residents of Pittsburgh. Detailed information on the 23 programs the organization is involved in along with contact address for these programs is found on the website (<http://thomasmertoncenter.org/>).

Staff

TMC is run by 7 employees. 2 full-time employees and the rest are part-time employees and interns. Below is a list of the staff and their role within the organization.

Staff Name	Role
Diane McMahon	Managing Director
Sr. Mary Clare Donnelly, RSM	Office and Project organizer
Ros Maholland	Finance Director
Marcia Snowden	Operations Manager
Gabriel McMorland	Campaign Organizer
Hannah Tomio	Webmaster and IT coordinator
Azmal Thahireen	New people facilitator, e-blast newsletter editor

I worked closely with Ros Maholland (Ros) and Diane McMahon (Diane).

Most staff in the organization interacts with computer fairly well. The director and finance manager uses computers for their daily work. The office and project manager also takes care of the physical cash that comes into the organization and enters the details in an excel workbook. All the interns uses computers for their day-to-day activities. The fairly older employees apart from the director do not want to go out of their way to learn new technologies than they are already used to.

Technology Infrastructure

Two Wi-Fi connections serves the organization. One has a security passcode and the other is for guest usage.

The organization has various desktop computers which makes use of Microsoft Windows operating system. The director also uses a personal Apple MacBook computer using an OS X operating system along with her office desktop computer.

The organization makes use of the following software:

- E-blast: Used to make monthly newsletters
- Quickbooks: Used for finance management and Donations tracking
- Salesforce: Used for customer relationship management
- Excel: Used to enter daily donations and collated for the month
- Paypal: Used to receive online donations.

- Google Drive: Used to store company's files
- Google Docs: Used for collaboration of ideas needed for a project

The website of the organization is hosted by WordPress and can be found by clicking on this link: [Thomas Merton Center Website](http://thomasmertoncenter.org/). The URL of the website is <http://thomasmertoncenter.org/>.

One problem that the organization faced was the need for a new database to synchronize the different technologies the TMC used. A consultant was hired prior to the consultation from Carnegie Mellon University (CMU). The consultant initially advised TMC to purchase NEON CRM, but when an IT Consultant from CMU worked with the organization last year, he advised against this, researched a new product and made a proposal for Salesforce to be purchased by the organization. The purchase cost was high for the organization, a reason why the organization wants to ensure the software must be used to its full capacity.

Technical Management

Technology in the organization is managed by the interns and part time workers. A part time intern, Hannah Tomio acts as the Webmaster and IT Coordinator of the Thomas Merton center. She oversees the Thomas Merton Center's network, website, software and all technical and communication issues pertaining to the organization.

Azmal Thahireen is also a former intern who decided to continue with the organization. He is responsible for managing the monthly e-blast newsletter. He does the design and make sure it is ready for publishing every month.

The director, Diane backs up all her operational tasks on google docs and Dropbox and the financial coordinator has her financial documents secured on the cloud via QuickBooks Online. She has financial records of more than 12 years.

All other staff are responsible for managing their own personal technological materials. Making sure subscriptions are not expired and that all the software they interact with are performing optimally.

Technology Planning

The director is responsible for researching and introducing new technological advancement that will benefit the organization.

Although technological planning is rarely done in the organization (as not much technology is used to run the organization as a whole), the fairly new technology in the organization is Salesforce. This was introduced when the director needed a way to integrate all the information about the donors and events happening at the TMC in one place.

QuickBooks application used by the financial coordinator has been in place for more than 12 years and still works fairly well in organizing the finances of the organization.

Internal and External Communication

Files are shared internally within the organization using Google Drive and Google Docs page. Salesforce is also used for information sharing. The interns also have access to the new Salesforce platform. When an intern leaves the organization, the organization deletes the intern's access to the platform, this helps ensure data security. An updated website exist and most information about the organization and the projects they are currently embarking on can be found in the website. The organization also runs an active Twitter account and a Facebook group page.

Information Management

Information is managed individually by persons in the organization based on their duties to the organization. The information critical to the organization are donations, rallies and event bookings. Most of these rallies and events are managed by Gabriel, the events coordinator using Microsoft Office. The donations are managed by Ros, the financial manager using QuickBooks and PayPal.

These information is handled as a mix of both electronic and paper information. Daily donations are entered in excel and printed out monthly for entrance into QuickBooks, PayPal statements are also printed out monthly and entered manually into QuickBooks by the financial manager (Ros). Ros has a number of drawers in her office, used to keep track of historical data necessary to the nonprofit organization.

The short coming of the present information system is that QuickBooks is only good at keeping track of money and donations and does not include features for effective donor relationship management.

Business Systems

The accounting business system is managed by Ros and this is used to keep track of donations coming in and going out of the TMC. She enters this information accurately on a regular bases. The software she is using for this is well updated and does not pose any challenge in usage. This application (QuickBooks) is also used to create monthly reports and has a section where tax returns can easily be tracked. Salesforce is another business system used by the organization for customer relationship management.

Improving organizational efficiency by eliminating redundant data entry.

Motivation

The problem the consulting partnership needed to address is eliminate double data entry whilst ensuring Salesforce capabilities are exploited maximally.

This was done by synchronizing QuickBooks and Salesforce in such a way that when data is entered on QuickBooks, a middleware application which stands as a bridge between QuickBooks and Salesforce is triggered. Data is then extracted from QuickBooks and transferred to Salesforce. Minimal human effort is required to achieve this and data integrity is ensured.

QuickBooks is good for money management alone and not for relationship management. Integrating QuickBooks to Salesforce ensures a better donor management system. The value of a better donor management system is that it will help the organization forecast future donors and also help the organization to be able to pool together past donors for a similar project that has occurred in the past. And in turn this will ensure the company meets its mission in a less stressful manner.

Outcomes

Salesforce is a new technology purchased by the Thomas Merton Center. In order to fully exploit its use, it is necessary for QuickBooks to be integrated with the Salesforce system. This is because QuickBooks is the platform used mainly by the organization to keep track of all donations and transaction going in

and out of the organization. Relationship and appropriate communications with the donors that donates to the organization is necessary and this can be achieved fairly well with a customer relation management application like Salesforce.

In the process of finding a solution to do this integration, various applications were researched and explored. These solutions all had pros and cons of using them. Below is an initial product analysis of two major solution providers of QuickBooks – Salesforce integration.

Initial Product Analysis

There are three major providers of solutions to aid QuickBooks – Salesforce integration.

- Intuit, created by the company that also made QuickBooks, is a major provider of this solution but has been discontinued since December 2014.
- DBSync by “Ankavia Company” is also another major solution found on Salesforce app exchange. This provides a lot of capabilities and can also be customized, but it comes at a very expensive price.
- Autofy by “Propelware Company” provides most of the functionalities DBSync provides, but come at cheaper price. Below is the initial cost analysis matrix that was done for each of the product.

TECHNICAL AND COMMERCIAL ANALYSIS OF PRODUCTS																																									
Criteria	DBSync	Autofy																																							
Salesforce Support	Yes (Salesforce App Exchange)	Yes (Salesforce App Exchange)																																							
Data Flow	<table border="1"> <thead> <tr> <th colspan="2">Data Flow</th> </tr> <tr> <th>QuickBooks</th> <th>Salesforce</th> </tr> </thead> <tbody> <tr> <td>Customer</td> <td>Accounts</td> </tr> <tr> <td>Customer</td> <td>Contacts</td> </tr> <tr> <td>ItemInventory</td> <td>Products</td> </tr> <tr> <td>ItemNonInventory</td> <td>Products</td> </tr> <tr> <td>Invoice</td> <td>Opportunity</td> </tr> <tr> <td>Estimate</td> <td>Opportunity</td> </tr> <tr> <td>Sales Order</td> <td>Opportunity</td> </tr> <tr> <td>Sales Receipt</td> <td>Opportunity</td> </tr> <tr> <td>Credit Memos</td> <td>Opportunity</td> </tr> <tr> <td>Any Object</td> <td>Custom Objects</td> </tr> </tbody> </table>	Data Flow		QuickBooks	Salesforce	Customer	Accounts	Customer	Contacts	ItemInventory	Products	ItemNonInventory	Products	Invoice	Opportunity	Estimate	Opportunity	Sales Order	Opportunity	Sales Receipt	Opportunity	Credit Memos	Opportunity	Any Object	Custom Objects	<table border="1"> <thead> <tr> <th>QuickBooks</th> <th>Direction</th> <th>Salesforce.com</th> </tr> </thead> <tbody> <tr> <td>Customers</td> <td>↔</td> <td>Accounts or Contacts</td> </tr> <tr> <td>Sales Orders, Invoices, Estimates or Receipts</td> <td>←</td> <td>Opportunities</td> </tr> <tr> <td>Items</td> <td>↔</td> <td>Products</td> </tr> <tr> <td>Invoice Data (balance, date and more)</td> <td>→</td> <td>Opportunities, Accounts</td> </tr> </tbody> </table>	QuickBooks	Direction	Salesforce.com	Customers	↔	Accounts or Contacts	Sales Orders, Invoices, Estimates or Receipts	←	Opportunities	Items	↔	Products	Invoice Data (balance, date and more)	→	Opportunities, Accounts
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Pricing	Salesforce & QB online <ul style="list-style-type: none"> • \$795 (Non-customizable) • \$1495(customizable) 	Price Includes <ul style="list-style-type: none"> • \$595 per year Implementation • \$995 one time Customer success • Customization As quoted As quoted 																																							

Features	<ul style="list-style-type: none"> • Integrate Salesforce Opportunity with QuickBooks Account, Job and Contact • Synchronize Invoice, Estimate, Order, Payments and balance data from QuickBooks. • Run analytics from within Salesforce, on-line software update 	<ul style="list-style-type: none"> • Opportunities go to QuickBooks Orders, Invoices, Estimates, or Receipts • Customers and items sync both ways between QuickBooks and Salesforce • QuickBooks invoice details go to Salesforce Opportunities • Payments in QuickBooks update the open balance amount in Opportunities • Syncs on demand or scheduled
Benefits	<ul style="list-style-type: none"> • Improve productivity by reducing double data entry • Increase data visibility across multiple systems • Reduced A/R b automating payments, reports, workflows and alerts • has an automatic online update so you never have to manually upgrade your application 	<ul style="list-style-type: none"> • Autofy looks up your customer and products to prevent duplicates and ensure rock-solid integration • Autofy detects data that's new or has been changed, so it stays lightweight and reliable. • As a small, lightweight desktop application, it's easy to install, easy to use, and it's backed by experts in small business integration.
More information (Website)	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016bTHEAY	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JAGSEA4

The product analysis was presented to the director of the Thomas Merton Center, Diane. She liked both solutions provided but preferred Autofy solution because it comes at a cheaper price and still provides the needed functionality.

Autofy by Propelware for QuickBooks – Salesforce Integration

A 2 weeks free trial of the Autofy solution was started. This Autofy product was added as a plug in on both QuickBooks and Salesforce. Autofy was the middleware that stood as a means of communication between QuickBooks and Salesforce.

During the free trial period, the financial manager used QuickBooks normally to generate data, she was also shown how to use Autofy and how to choose the direction of synchronization. She liked the solution and commented that “I will find it easy to use, and it is not a complex solution to learn”.

8 days into the free trial period, the financial manager and I tested the product by carrying out a test synchronization of QuickBooks data to Salesforce. The outcome of this integration was that Autofy was able to extract some QuickBooks data to be synchronized with Salesforce, but it was not able to extract data from the functionality the financial manager used mostly for her accounting job.

This outcome could not be sustainable and it changed the course of the project drastically and also pushed the timeline for completion of the project. Further research on solutions that provides this functionality or a customized solution were researched.

Further Research and Options Explored

The research was with a focus of finding a product that will provide the synchronization of the bank deposit function in QuickBooks to the donations function in Salesforce. Below is a matrix of comparison of the new options that were explored:

Further Analysis of Customizable Solutions		
Product	Pros	Cons
Relational Junction: Used as a relational database. It stores QuickBooks information and makes it available to Salesforce if needed	Provides custom QuickBooks integration	Does not work with QuickBooks online
Expensify: Used to keep track of expenses in Salesforce. It synchronize expenses from Salesforce to Expensify for better financial management.	Acts as a middle application that stands between QuickBooks and Salesforce Syncs items needed by the organization from QuickBooks to Expensify It will sync items from Expensify to Salesforce	It only sync one way, from Salesforce to Expensify, and I needed to sync from Expensify to Salesforce
Workato: Serves as a tool to integrate various applications together	Allows you to create custom “recipes” and choose the data flow direction. A great solution to be explored	Complex solution. Creating a Workato recipe needs lots of technical abilities

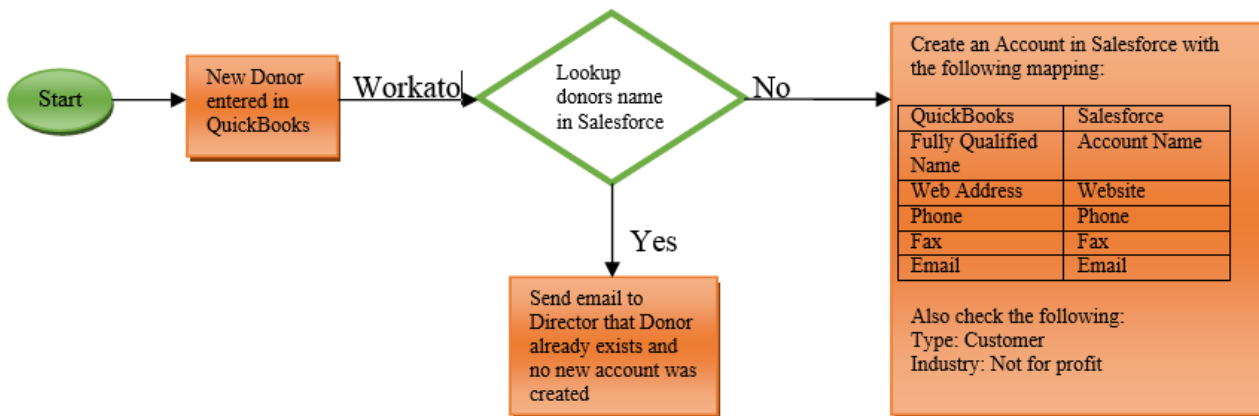
All three solutions were tried and Workato was found as the most useful of all solutions. This solution was not tried initially because it was assumed that Autofy and DBSync could synchronize QuickBooks bank deposits.

Workato allows a user to create a recipe. A recipe is a specification on how you want data to flow and also gives the option of choosing the functions in Salesforce and QuickBooks you want the data to flow from. Two Workato recipes were created and below is a description of them and their measurable outcome.

Workato for QuickBooks – Salesforce Integration

New donor in QuickBooks create a new account in Salesforce if it does not exist.

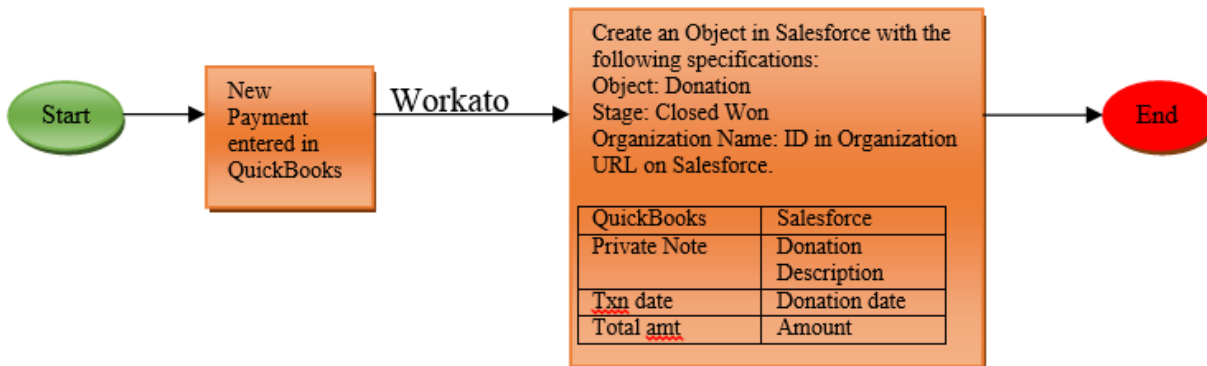
Methodology:



Results: 68 new customers were synchronized from QuickBooks to Salesforce within the 23 days that this recipe was active

QuickBooks Payment to Salesforce Donations

Methodology:



Results: Test payments were successfully synchronized from QuickBooks to Salesforce. If financial manager uses this function in QuickBooks, all payments by donors will be directly transferred from QuickBooks to Salesforce

Sustainability

The newly implemented Workato solution is sustainable because it is a free solution of QuickBooks – Salesforce integration and the director does not have to carry out any function to enable this solution to work. The director of already receives emails about data being synced between Salesforce and QuickBooks. The employed data entry staff now sees most of the data that was entered manually already in Salesforce and therefore have no need to re-enter the data.

The financial manager does not currently use the receive payments function in QuickBooks to receive donations from donors, rather she uses the bank deposit function. A recommendation is being made to assist the financial manager to use QuickBooks receive payment function. If this is used, the organization will not have need of the data entry staff anymore.

If data synchronization is not needed anymore, the director can Log in to the Workato application with Salesforce and stop the recipes.

IV. Recommendations

Vision

The future of the Thomas Merton Center should be one that cater for social justice and promotes human rights for persons from every race, gender and class irrespective of background or any external bias. In order to attain this level of social justice, effective relationship management (customers, donors and campaigners) and an innovated way of carrying out technical task is necessary.

Donations are the blood veins of Thomas Merton Center. The organization relies solely on donations from donors to carry out its activities. When every donation is treated as gold to the organization and every donor is appreciated, donors will be willing to give much more. Effective relationship management with donors, activists and customers cannot be under-emphasized in helping the organization achieve this vision and its mission.

QuickBooks is a necessary tool for tracking donations. It is used widely by non-profit organizations to keep track of all expenses and income going in and out of the organization. Salesforce has solved the problem of customer and donor relationship management. Using QuickBooks and Salesforce optimally should be foremost goal of the organization.

Using all QuickBooks functions correctly especially the function “receive payment” used to receive payments from donors will help the organization keep track of its donation better.

Also, synchronizing QuickBooks with PayPal will ensure the financial manager focuses more on the financial accounting job rather than consistent data entry. It will also ensure PayPal donations are visible in QuickBooks immediately they are received rather than waiting till the end of the month to enter the donation into QuickBooks.

Goals and Strategies

Goal 1: Improve use of organization financial application (QuickBooks)

a. Background

Thomas Merton Center thrives on the donations received from various donors and campaigns carried out are an effective way to attract more donors to the organization. Effective management and utilization of the tools used to carry out this crucial tasks that matter to the organization is therefore necessary to ensure the long term sustainability of the organization.

QuickBooks is a major accounting software that is widely used among nonprofits, small organizations and startups to manage their resources. QuickBooks is a Software as a Service tool and has various functions that assists non-technical employees or managers to keep the inflow and outflow of cash into their organization together.

The financial manager of the Thomas Merton Center, Ros Maholland, has utilized QuickBooks for more than 25 years to manage the expenses, income and donations of the organization. She has been very effective and accurate in using QuickBooks. She makes use of the banking function in QuickBooks to keep track of every donation coming into the organization. This function is supposed to only be used as a base for connecting to the organization's bank and not for entering incoming transactions.

Salesforce is a new platform the organization just acquired for managing relationship with donors. Exploiting the capabilities of Salesforce has been utmost on the organizations' goals. One of the ways to ensure this is by integrating Salesforce with QuickBooks.

b. Justification

QuickBooks provides various options that helps a user keep track of all the finances coming in and out of an organization. These functions are all supposed to be utilized. Utilizing these functions results in making finance management easier. Reports are supposed to be easily generated at the end of the month, forms for tax reports are supposed to be easily printed out from the software and integration of the software with other solutions becomes much easier.

The major task of this consultation was to integrate QuickBooks with Salesforce so that data entered on QuickBooks is automatically transferred to Salesforce. The purpose of this is to reduce redundant data entry and the cost accrued by employing an employee to enter the data. Finding a solution to the QuickBooks – Salesforce integration was difficult because the right functions in QuickBooks were not been used.

The likelihood of the financial manager implementing the recommendation of changing the way QuickBooks is being used is “very unlikely”. This is because she has been using QuickBooks in one way for more than 25 years and this has served her and her department well. But with a new vision of moving the organization forward in mind, QuickBooks need to be used differently.

c. Strategies

This following table is a breakdown of different functions in QuickBooks, how to use it and the purpose of the function. Following the details on how to use these functions given the purpose of the function helps utilize QuickBooks maximally.

Function	Details on how to use	Uses
Home	This is used to show a brief summary of all the company's transactions. It also tells if profit or loss was incurred during the month	This shows the overview of the organization's bank account details, recent activities, incomes (open invoices, overdue expenses, and money paid in the last 30 days)
Donors	A blue highlighted text box named new donor is used to create a new donor. When this box is clicked, it gives the user fields to enter information about the new donor. These fields are: Name, Email, Company, Phone no., Display name as, website, billing address and shipping address. It is necessary these fields are all filled to fully capture a donor's information.	This tab shows a list of all donors that has donated to the organization at least once. It also shows donors unbilled, unpaid and paid in the last 365 days.
Vendors	A blue highlighted text box named new vendor is used to create a new vendor. When this box is clicked, it gives the user fields to enter information about the new donor. These fields are: Name, Email, Company, Phone no., Display name as, website, billing address, shipping address, billing rate, terms, notes, opening balance as of, account no. and tax ID. It also gives the option of allowing one to track payments for 1099. It is necessary these fields are all filled to fully capture a donor's information.	This tab shows a list of all vendors that has had transactions with the organization at least once. It also shows unbilled, unpaid and paid vendors in the last 365 days. It gives a user the option to create a new vendor or prepare 1099 for an existing vendor.
Employees	In order to use this function, click on the add employee button. Enter the details of the new employee and choose whether to turn on payroll to track the employee salary.	This is used to keep track of all employees in the organization. It also gives the option to turn on payroll for employees and add a new employee
Transactions	This consists of banking, sales,	Banking is used to keep track of

	<p>expenses and chart of accounts.</p> <p>Banking: Click on Add account, enter the bank type and whether you want to import transactions from your bank or credit card to QuickBooks</p> <p>Sales: Click on new transaction or import transaction. Enter the date, type of transaction, type of transaction and transaction no., the donor name, due date, balance, total, status and action to be carried out.</p> <p>Expenses: Click on new transaction. Enter the date, type of transaction, transaction number, payee, category and the total amount.</p> <p>Charts of Account: Click on new, type in a number that can be used as a reference to the account, give the new account a name, link it to a bank.</p>	<p>the bank accounts connected to organization and the money periodically going from the organization to the bank</p> <p>Sales is used to keep track of goods sold</p> <p>Expenses is used to keep track of the daily expenses accrued in the organization</p> <p>Chart of Accounts is used to store the various accounts associated with the company.</p>
<p>Reports</p>	<p>Click on the type of report to be generated. QuickBooks automatically creates the report given using its stored data.</p>	<p>These is used to give summary of different types of transactions that the organization has carried out. Some reports that can be generated are profit & loss report, balance sheet report, company snapshot etc.</p>
<p>Sales Tax</p>	<p>This provides an interface to help manage sales tax used for business. Since this organization is not a Sales company, this function is not needed.</p>	<p>Used to manage sales tax for each Sale carried out in an organization. It track multiple tax rates and agencies and helps one see accrued sales tax at-a-glance. It keeps track of taxes charged on transactions</p>
<p>Apps</p>	<p>This enables a user to connect various applications to QuickBooks to ease use of this application in financial management. One of this application that is useful for</p>	<p>Right now the organization prints out PayPal statements. Integrating the PayPal application with QuickBooks reduces the time that is needed to print out and manually enter PayPal Statements</p>

Thomas Merton Center is PayPal. In order to use it, click on the app button and choose the app you need to connect to QuickBooks. If further help is needed, one can use the customer service contact given with most of this app to contact them for further help.

[4]

d. Expected Outcomes

Areas of Impact	Outcome (Positive / Negative / Neutral)
Organization	Positive <ul style="list-style-type: none"> • The finances in the organization are better managed. • Tax forms are easily printed out for employees • Organizational reports showing profit and loss are easily generated
Staff	Positive <ul style="list-style-type: none"> • Staff needed to enter salesforce data into QuickBooks is no longer needed • Payroll is easily managed and employees salary is better managed • Manager uses Salesforce easily because it is now synced with QuickBooks
Donors	Positive <ul style="list-style-type: none"> • Invoices for customers is easily printed and sent to them monthly. • Yearly reports are given to each donor to keep track of all their activity during the year
Campaigns	Positive <ul style="list-style-type: none"> • Money for campaign is easily allocated using the invoices function in QuickBooks

e. Resources

Some resources that are helpful for effective QuickBooks use can be found below:

- 1: How to enter customer payments and deposits in QuickBooks Online - the correct way
Link: <https://www.youtube.com/watch?v=4DT1IMuONMs>
- 2: Full Quickbooks Course Part 1 of 3 - Welcome To Quickbooks
Link: <https://www.youtube.com/watch?v=R247wAd7lko>
- 3: QuickBooks Training - Customers: Receive Payments -- Record Deposits
Link: <https://www.youtube.com/watch?v=DcvXO6HIFNk>

f. Budget

The Budget needed to implement this solution is zero dollars. This solution only suggests a better way of carrying out a task that is already being done. The software has already been purchased and no further cost is attached to this recommendation.

Goal 2: Integrate QuickBooks with PayPal

a. Background

The organization uses PayPal to receive donations. Right now, monthly PayPal statements are printed out and entered manually into QuickBooks. This can result in an error and time can be saved by integrating QuickBooks with PayPal so that these donations are automatically transferred into QuickBooks.

b. Justification

Integrating QuickBooks with PayPal will improve the organizations' way of handling finances. More PayPal payments can be encouraged and time will be saved by employee in charge of printing out this data and manually entering it into QuickBooks. The cost accrued by printing these PayPal statements monthly is also saved. It also helps the financial manager focus on business rather than data entry.

c. Strategies

Connect PayPal Sync to QuickBooks

- Log into QuickBooks
- Click App Exchange
- Click on PayPal Sync
- Click on get started
- Authorize PayPal Sync to retrieve your QuickBooks information
- Leads you to a page to log in with PayPal, Log In with PayPal
- Choose the type of transactions that you need to be integrated with QuickBooks
- PayPal Sync is now be ready to run
- Go back to QuickBooks and click on "My Apps", you should see PayPal Sync listed

Disconnect PayPal Sync from QuickBooks

- Log in to QuickBooks
- Click on Apps
- Choose PayPal Sync
- Click on disconnect
- Confirm that you want to disconnect
- Go back to QuickBooks and click on "My Apps", PayPal sync should no longer be listed.

d. Expected Outcomes

The outcome of this recommendation will be that once a donation is made via PayPal, this donation is immediately synchronized and can be seen in QuickBooks. This will improve the organizations way of carrying out technical task and the risk of entering the wrong data is greatly reduced.

e. Resources

Some further resources that are helpful for QuickBooks – PayPal integration are:

1: PayPal Sync from Intuit

Link: <https://www.youtube.com/watch?v=1tfUqeK4H84>

2: QuickTips™: Tracking PayPal in QuickBooks® by QuickBooks® Made Easy

Link: <https://www.youtube.com/watch?v=vmv8VjaPwOU>

3: How to Integrate PayPal Into QuickBooks

Link: <https://www.youtube.com/watch?v=LoRAEIYHSS8>

f. Budget

The budget needed for this recommendation is zero using PayPal sync. This is because it is a free application that comes with QuickBooks online subscription and it is provided by Intuit the provider of QuickBooks.

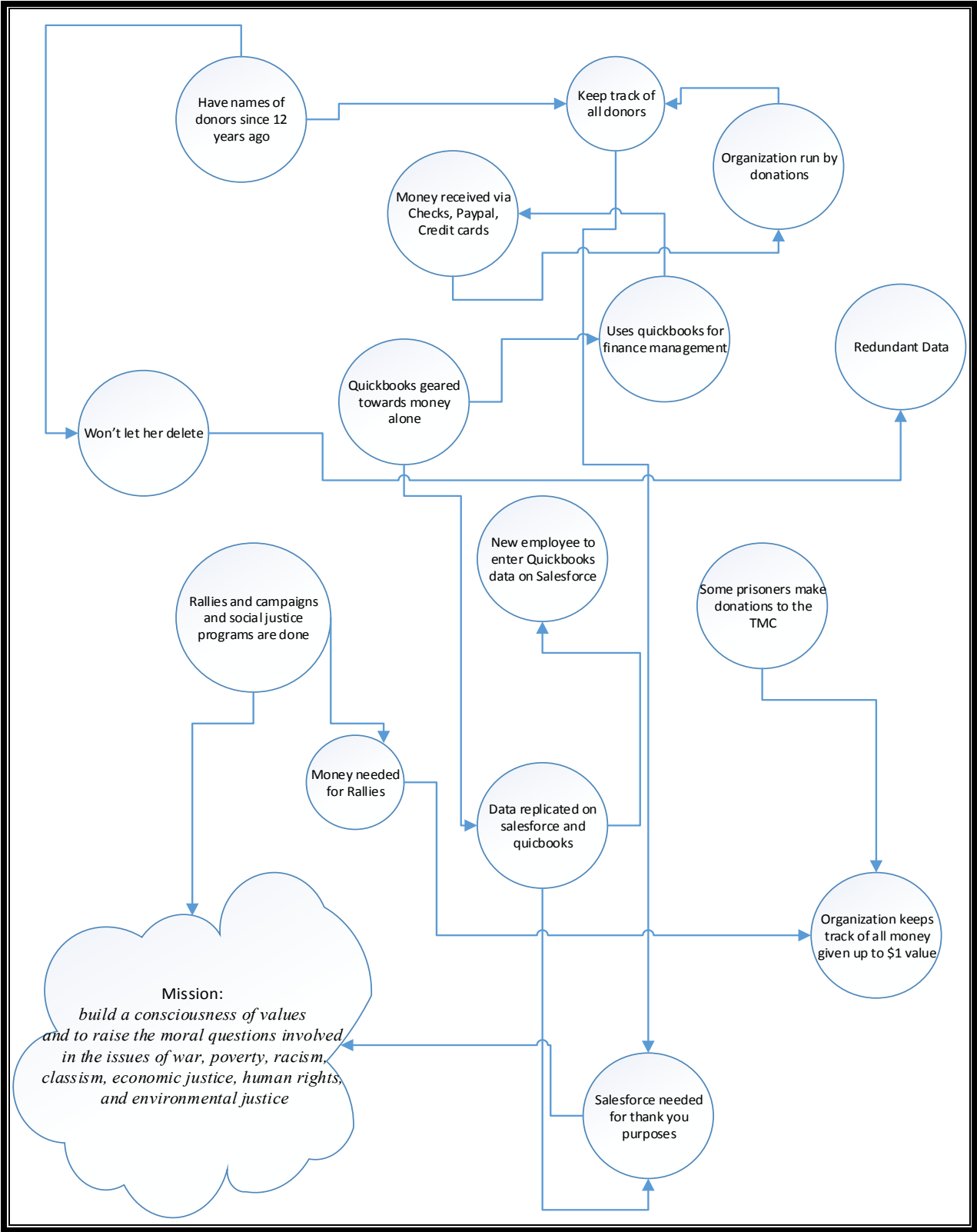
About the Consultant

Toluwani Awoyele is a Master of Information Systems Management Student. She is concentrating in the field of Business Intelligence and Data Analytics. She will be Interning at IBM Research, Nairobi over the summer and will be coming back to Carnegie Mellon University for her last semester in the Fall of 2015.

She has a passion for teaching mathematics. She graded student's differential equation scripts as an undergraduate for a year and the half. She also did a community service in Nigeria for a year where she coached high school students advanced mathematics and prepared them for college

Appendix

Mess Map showing how QuickBooks and Salesforce use helps the organization achieve its mission



References

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- [2] www.thomasmertoncenter.org
- [3] QuickBooks online. Extracted from <https://qbo.intuit.com/>