



## Overview

**Country:** United States

**Industry:** Not for Profit

### Customer Profile

With close to 17,000 priests and brothers worldwide, The Society of Jesus is the largest male religious order in the Catholic Church. The USA Northeast Province provides services in the Bronx-Fairfield, Manhattan, and New Jersey-Long Island Regions.

### Business Situation

The new Controller for the organization needed to get audit ready and realized that there were limitations with the financial system they were using. Based on previous experience she recommended Dynamics GP. The organization now has a robust integration with Raiser's Edge and additional reporting capabilities.

### Benefits

- Interface to Blackbaud Raiser's Edge
- Improved Analytical Accounting capabilities

### For More Information

Visit <https://www.jesuitseast.org/>

## Not for Profit Organization Excited About Dynamics GP's Interface Capabilities with Raiser's Edge

"The implementation of the GP cloud-based solution went smoothly and was completed on time."

Nyla Edwards, Controller, USA Northeast Province of the Society of Jesus

### Business Needs

In the process of getting ready for an upcoming audit, Nyla Edwards, the new Controller for the USA Northeast Province of the Society of Jesus realized that the financial system they were using had limitations. The organization had unique requirements to track allocations and donations for each priest within the Province using analytical accounting.

A major requirement of the Northeast Province of the Society of Jesus was the ability to interface smoothly with their Blackbaud Raiser's Edge solution.

Raiser's Edge is a cloud-based fundraising and relationship management application used by many faith-based ministries to manage funds, including grants and contributions along with monitoring organizational performance.

### The Solution

The organization chose to implement a Microsoft Dynamics GP solution. Based on the positive experiences and familiarity the Controller had with the application from working in another organization it was the right fit. After investigating several vendors, MIG & Co. was chosen as their implementation partner.



” As part of the Roman Catholic Church, we have unique requirements for day to day expense tracking for each priest. Dynamics GP provides a solution that gives us access to the analytical accounting features we need.”

Nyla Edwards,  
Controller – USA  
Northeast Province of the  
Society of Jesus

### Smooth Migration from Previous Accounting Solution

The accounting solution in use prior to installing Microsoft Dynamics GP didn't provide enough flexibility for the needs of the organization. They couldn't identify which funds applied to specific members. The system provided one combined profit and loss account and they were forced to manually figure out how to produce the data they needed for their balance sheet.

The implementation went smoothly and was completed on time.

The new solution has given the organization more flexibility and allowed them to set up their chart of accounts in a more efficient manner.

### Cloud Solution Eliminates Cost and Minimizes Support Staff

Implementing a cloud solution allowed the organization not only to manage implementation costs, but to ensure that they won't have to acquire and maintain new equipment or hire a large support staff as they grow.

This feature will become particularly important in the future as plans call for the Northeast Province to merge with the Maryland Province, creating the Eastern Province that will span the country from Maine to Georgia.

### Satisfies Not for Profit Need for Analytical Accounting

The staff of the USA Northeast Province of the Society of Jesus plays a key role in supporting and sustaining the mission of the larger organization.

In performing that role, they need to analyze and interpret data and create reports based on that data.

With Dynamics GP, they can define fiscal years, set up posting options and set up SmartList for analytical accounting. With these features they can track expenses by project and fund. They will be able to monitor how donations are being used at the diocese and individual priest level.

### Interface to Blackbaud Raiser's Edge

One of the major requirements of the USA Northeast Province of the Society of Jesus was the ability for the solution to integrate with their Blackbaud Raiser's Edge Software.

Raiser's Edge is a customizable fundraising and relationship management solution used to monitor donor engagement and retention and improve operational efficiency.

The Northeast Province will save time by first exporting their lists into a Microsoft Excel spreadsheet then copying and pasting the data into Microsoft Dynamics Great Plains.



MIG & Co. specializes in implementing and supporting industry leading financial and business software that offer the lowest total cost of ownership.

Since 1998, our company's passion is to empower organizations to automate business processes and maximize productivity.

[www.mig.com](http://www.mig.com)

1.855.MIG.CORP (644.2677)

[info@mig.com](mailto:info@mig.com)

## Summary

USA Northeast Province of the Society of Jesus decided to migrate from their previous financial system to Microsoft Dynamics GP. The system didn't do allocations or donations to the level that was needed.

They wanted a more robust system that would help them to be audit ready and they wanted more flexibility in their Chart of Accounts. The growth and expansion capabilities of Dynamics GP will be needed as the organization completes their plan to merge with another Province.

One of their requirements was that the new solution interface with the Blackbaud Raiser's Edge fundraising software they were using.

Based on her experience in a prior job, Nyla Edwards, Northeast Province Controller recommended Dynamics Great Plains. Ms. Edwards said "After seeing how Great Plains worked for other clients, I was very open to using it for our organization."

After investigating three vendors, the Northeast Province chose MIG & Co. as their implementation partner. The organization felt that MIG & Co. provided the right combination of skill and investment cost to meet their budget.

The solution went live with basic functions and customization was added after that.

The Northeast Province is excited about the solution, especially the ability to create Smart List Reports and using the analytical accounting features of Dynamics GP. They are able to distribute the accounting down to the donor and program level and can report on those dimensions.

They are also pleased with the ability of Dynamics GP to interface with their Blackbaud Raiser's Edge fundraising solution. They will be able to easily export data into an Excel file then copy and paste into Great Plains.

**For more information about Microsoft Dynamics GP, go to [www.mig.com/microsoft-dynamics-gp](http://www.mig.com/microsoft-dynamics-gp)**

**This case study is for informational purposes only. Document published February 2020**