The Rise of AI in Modern Finance for Nonprofits

Practical tips on how finance leaders can find, implement and improve financial processing using AI



Grant Gevers
Senior Solutions Consultant



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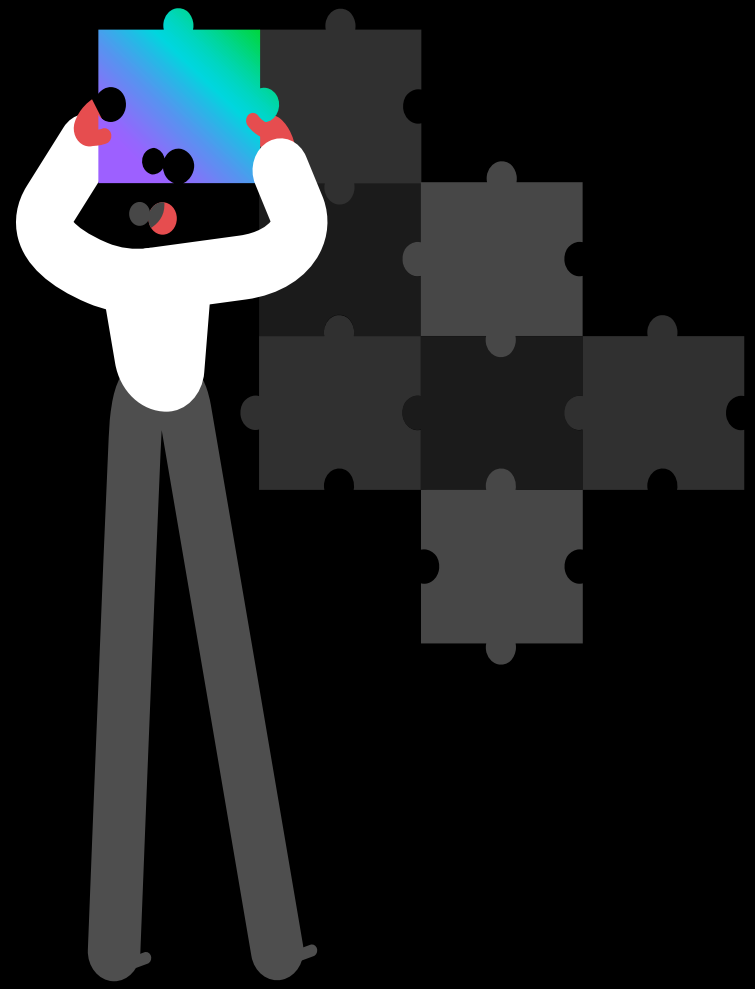
What we will be discussing . . .

- The state of AI in modern finance
- Specialised AI finance tools versus general AI tools
- How AI is transforming Finance
- Summarising the benefits of harnessing the power of AI for finance
- 10 essential tips for implementing AI



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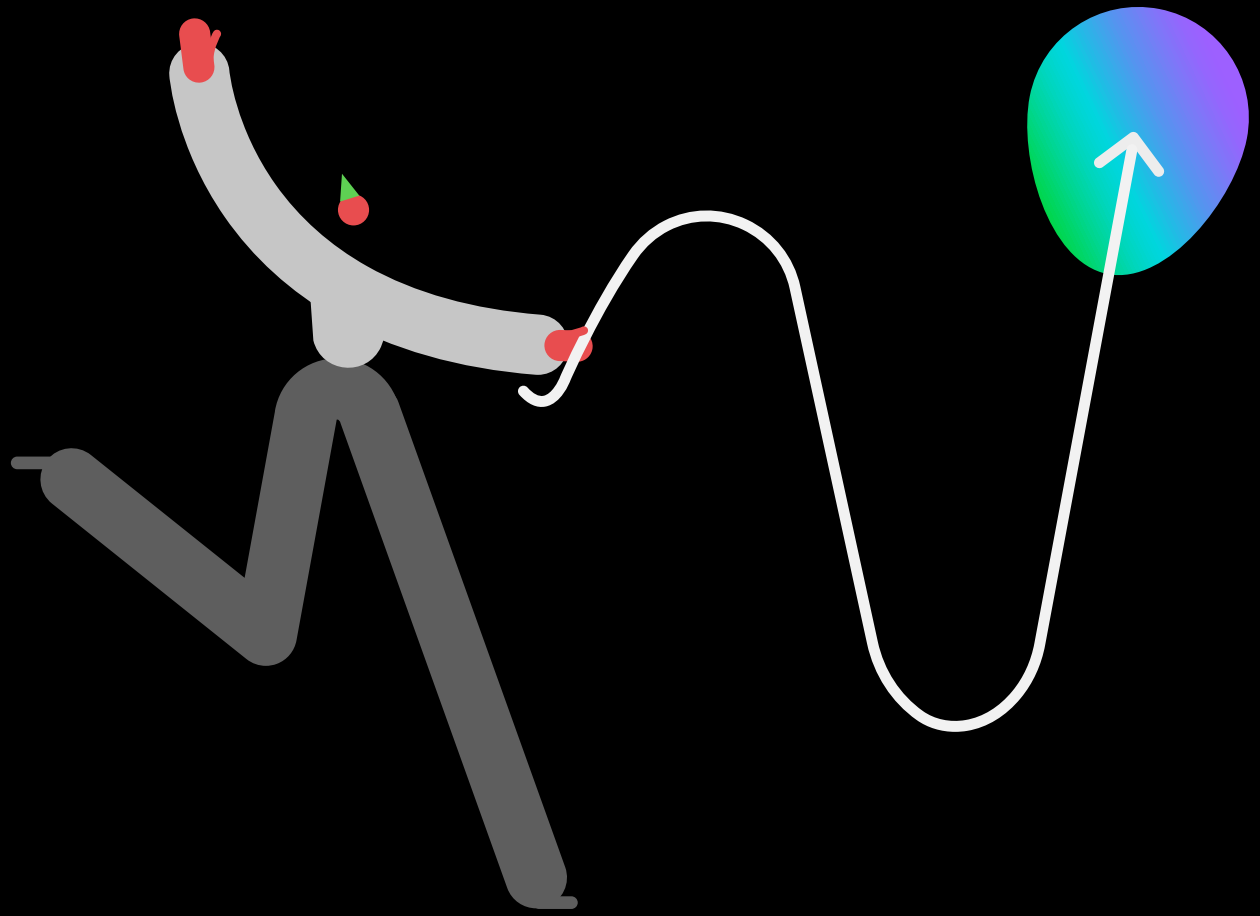
Audience Poll

“Is your finance team currently leveraging AI to support financial processes?”



The State of AI in Modern Finance



86%

of finance leaders have incorporated AI into their operations in some capacity.

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The State of AI in Modern Finance

AI Should be built on a Trust framework



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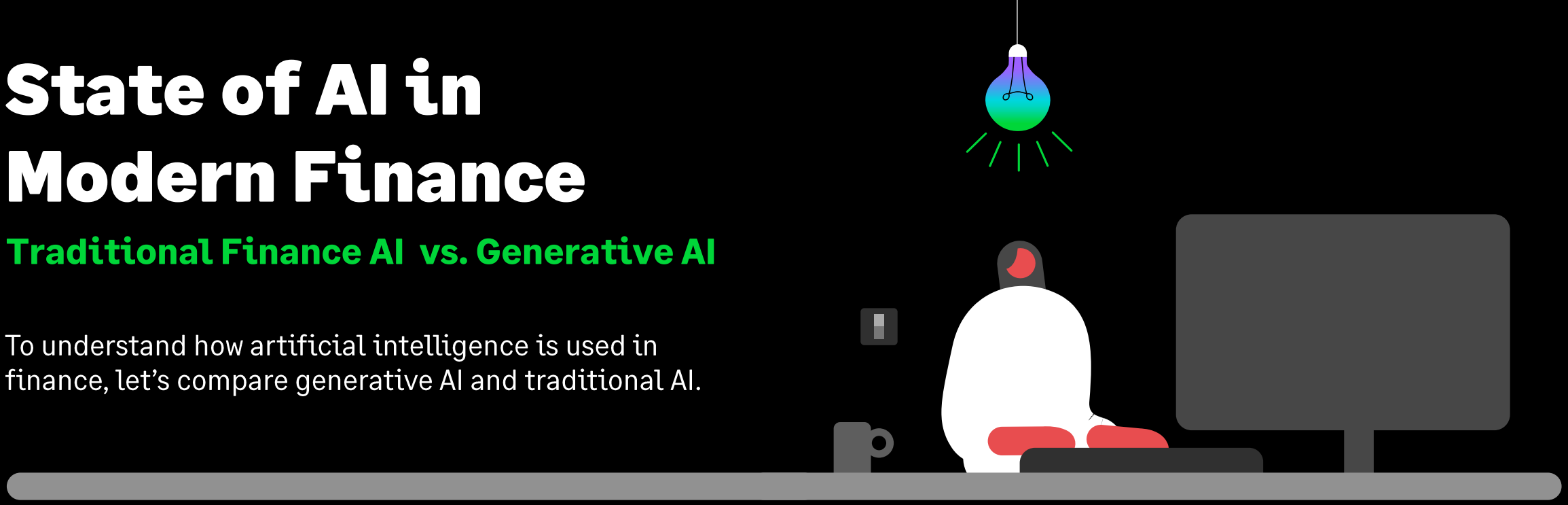
State of AI in Modern Finance

Traditional Finance AI vs. Generative AI

To understand how artificial intelligence is used in finance, let's compare generative AI and traditional AI.



Generative AI

Traditional AI

The key takeaway: both generative and traditional AI are essential for enhancing financial operations and driving growth.

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How is AI Transforming Finance?

Smoother, faster close

Close Automation*
Phased launch

Streamlines and accelerates the month-end close by tracking tasks, flagging issues, and guiding teams through each step — reducing manual effort and helping you close faster with confidence.

Boost efficiency, save time

AP Automation*
Available

Uses AI to streamline vendor invoice processing. It automatically creates draft bills, matches them to purchasing transactions, reduces manual entry, and improves accuracy.

Intelligent Time*
Available

Uses AI to suggest timesheet entries based on calendar, email, and app activity, making time tracking faster and more accurate.

Spot opportunities and problems early

Outlier Detection
Available

Flags unusual journal entries in real time, helping approvers spot potential errors by comparing new entries against historical patterns.

Cash Prediction & Optimization*
Coming Soon

Forecast short-term cash flow and suggest actions to improve liquidity, helping finance teams manage cash more accurately and proactively.

Get instant answers

Search Help
Available in English-speaking geos

Providing users with direct, conversational answers to product or help related questions

Advanced Search*
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Smoother, Faster Close

Close Automation

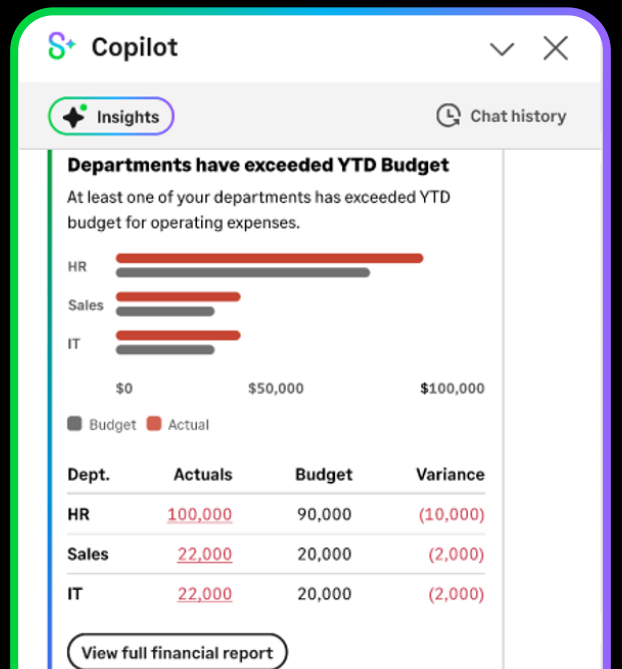
Close Automation is a collection of Sage Ai-powered tools that modernizes your month-end close, helping teams move faster, stay aligned, and surface issues before they cause delays.

Why It Matters:

Most finance teams still manage their close with spreadsheets, emails, and disconnected systems. Close Automation transforms that into a structured, proactive process that's more efficient, insightful, and collaborative.

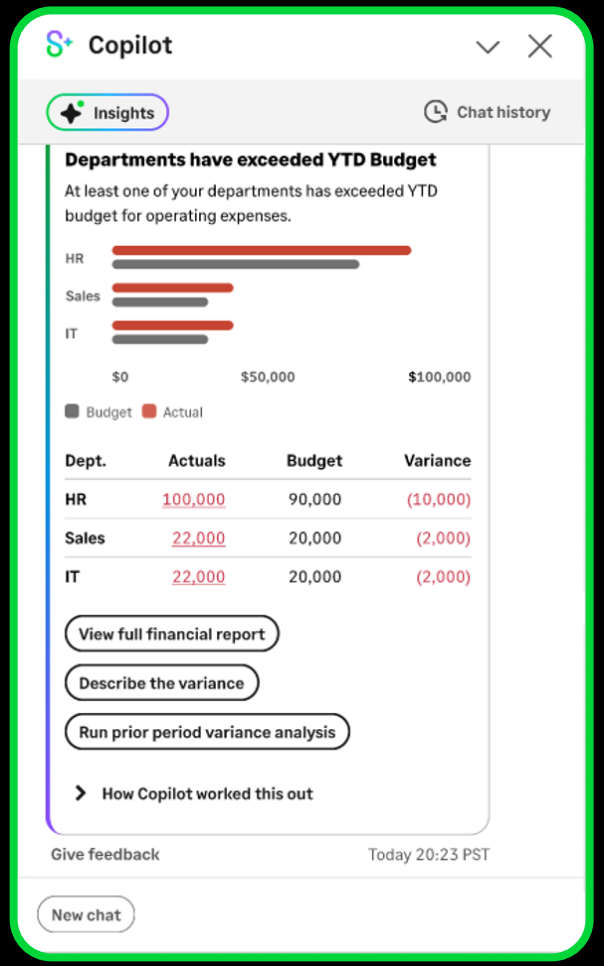
Customer Benefits:

- Save hours every close with automated reconciliations and real-time task tracking
- Spot issues early through continuous variance analysis
- Keep teams in sync with shared checklists, dashboards, and in-task collaboration



Smoother, Faster Close

Variance Analysis



Business leaders and budget managers with Copilot

- **Deliver intuitive, actionable insights:** Deliver insights for non-accounting stakeholders
- **Detect variances early:** Enable faster decisions and resolve spending issues before they escalate

Accounting with Copilot

- **Increase accuracy:** Better stakeholder engagement
- **Drive better financial outcomes**: Address unfavorable variances ahead of the close

Continuous review means fewer corrections, stronger accuracy, and faster closes. Everyone can trust the numbers — and move forward with confidence.

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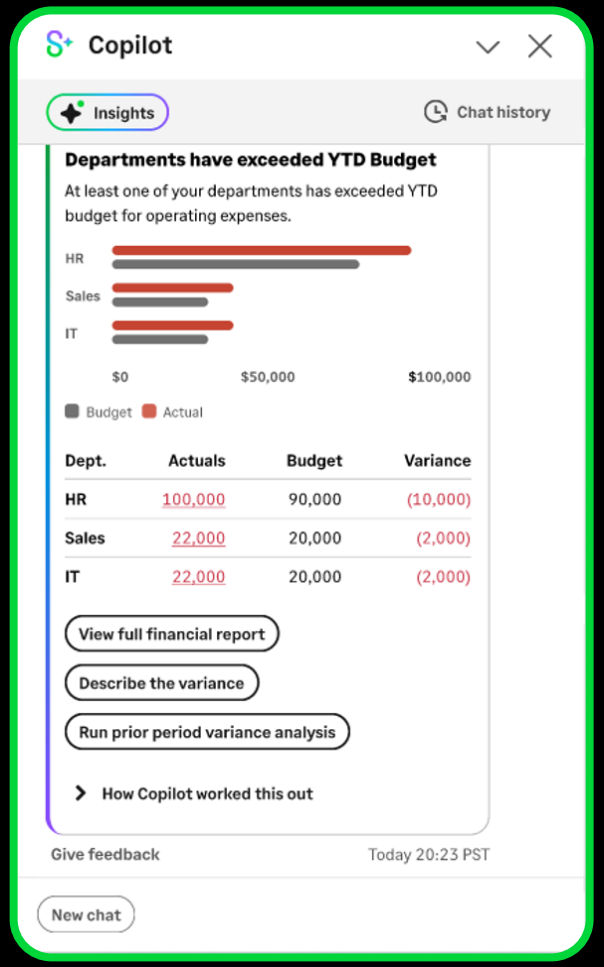
Smoother, Faster Close

Variance Analysis



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View Example

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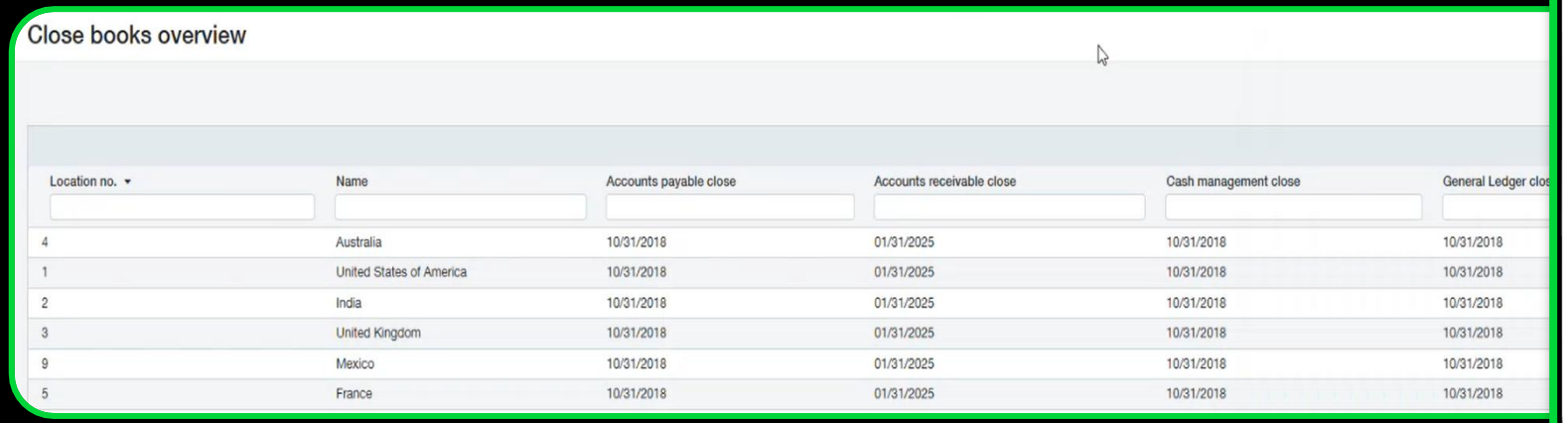
Smoother, Faster Close

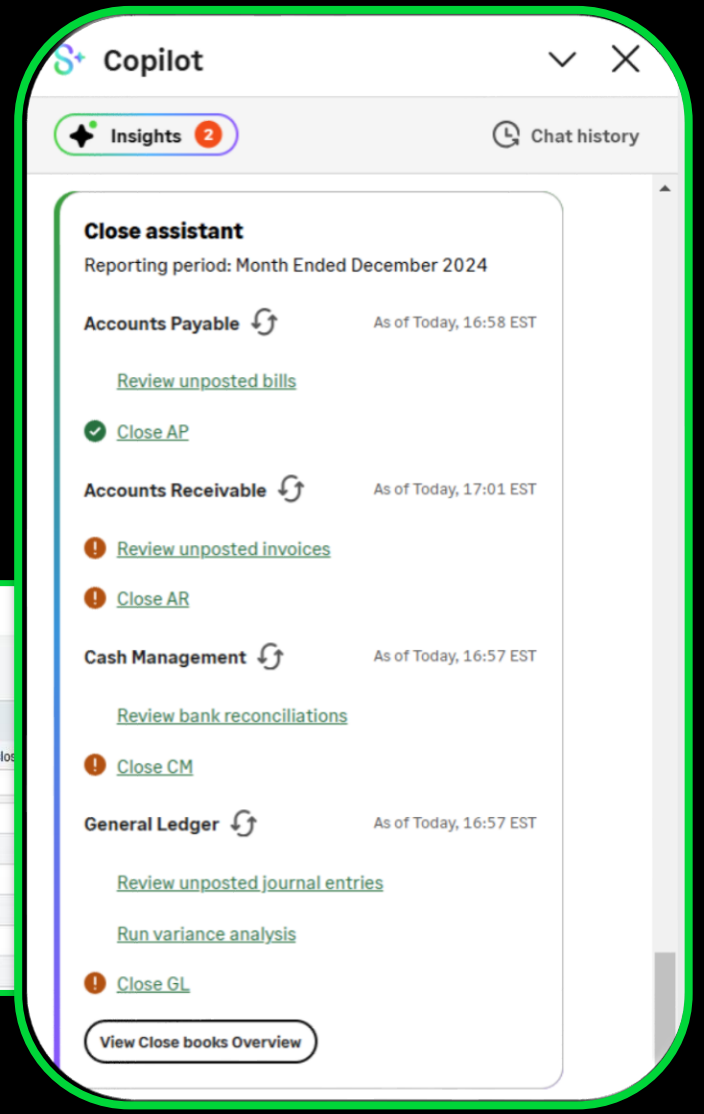
Close Assistant

Close management with Copilot

Visibility and ease of navigation for standardized month-end close tasks, including:

- Unposted transactions in AP, AR, and GL
- Bank reconciliations in Cash Management
- Subledger and GL close status





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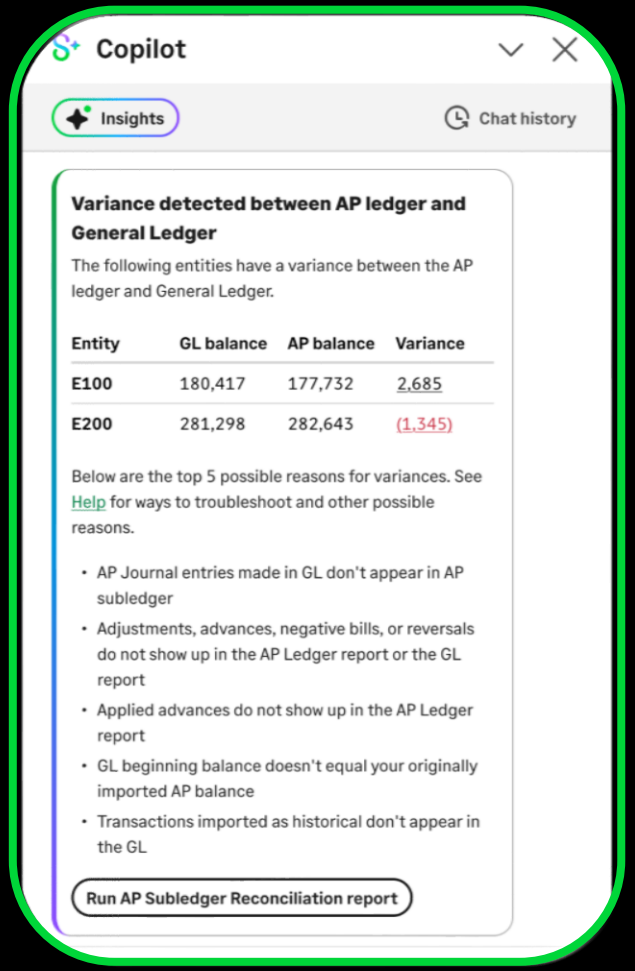
Smoother, Faster Close

Subledger reconciliation



- **Automated reconciliation reports**–Automatically generate GL to subledger reconciliation reports
- **Variance visibility**–Quickly identify discrepancies across entities
- **Drill-down insights**–Access detailed transaction-level visibility for faster resolution

View Example

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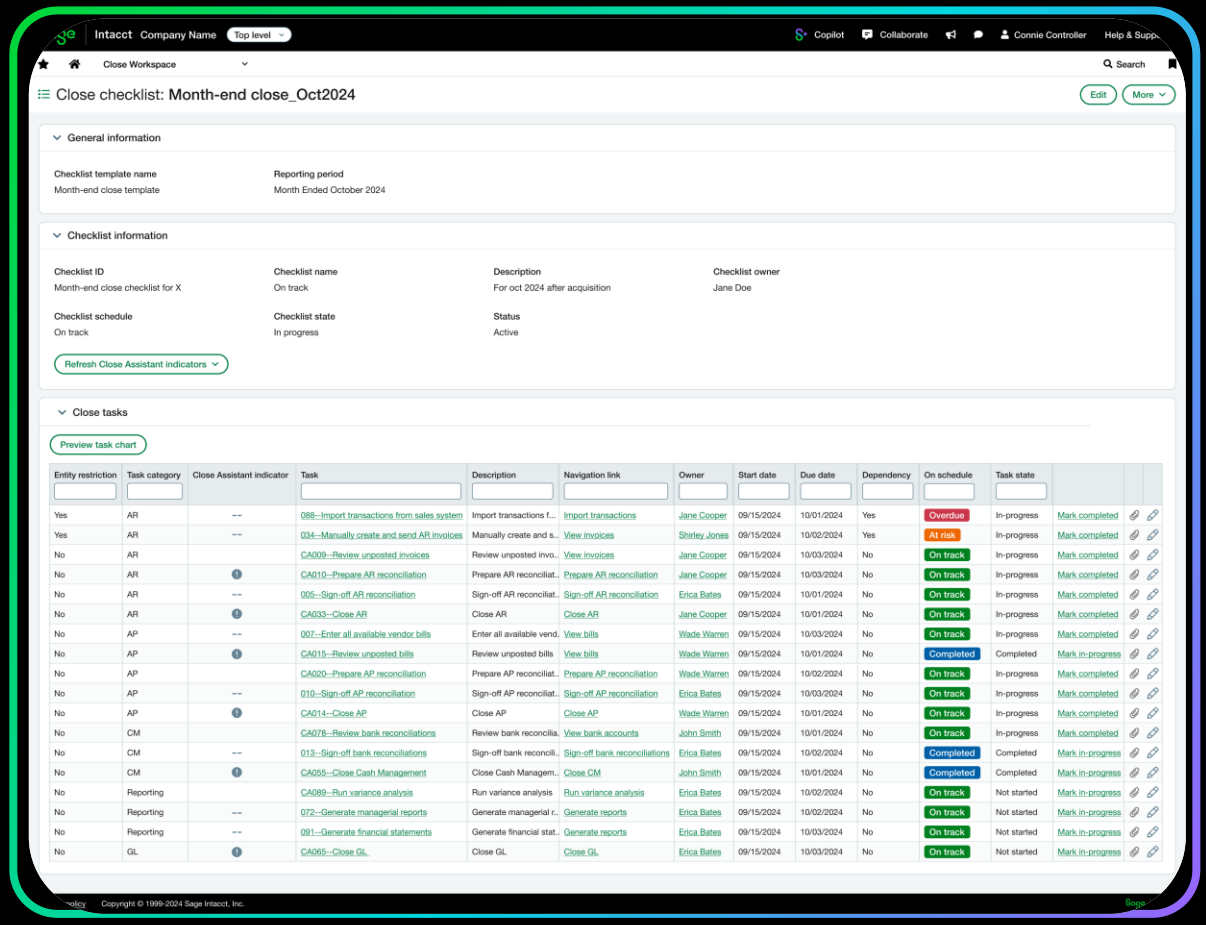
Smoother, Faster Close

Close Workspace

Standardize. Track. Stay ahead of the close.

- **Template-based workflows**: Establish repeatable close procedures with customizable task templates
- **Checklists with accountability**: Track every task, owner, and status for a consistent and complete close
- **Proactive notifications**: Surface due dates, dependencies, and outstanding tasks—before they become blockers



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Smoother, Faster Close

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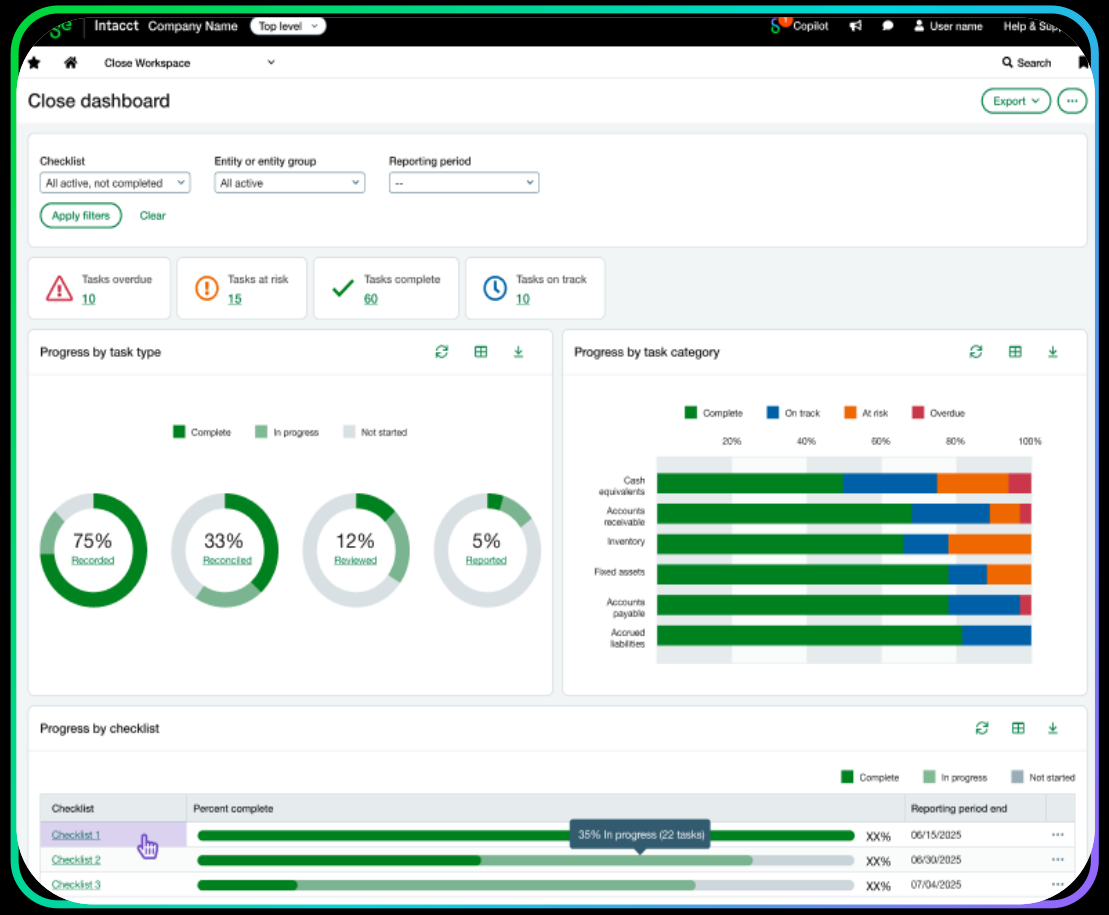

Streamlined financial close management

- **Real-time visibility** – Proactive management of financial close process across checklists, tasks, entities
- **Intuitive visual charts** – Spot delays and bottlenecks at a glance with intuitive charts
- **Enhanced collaboration** – Communicate directly within the close tasks to reduce friction and keep teams aligned

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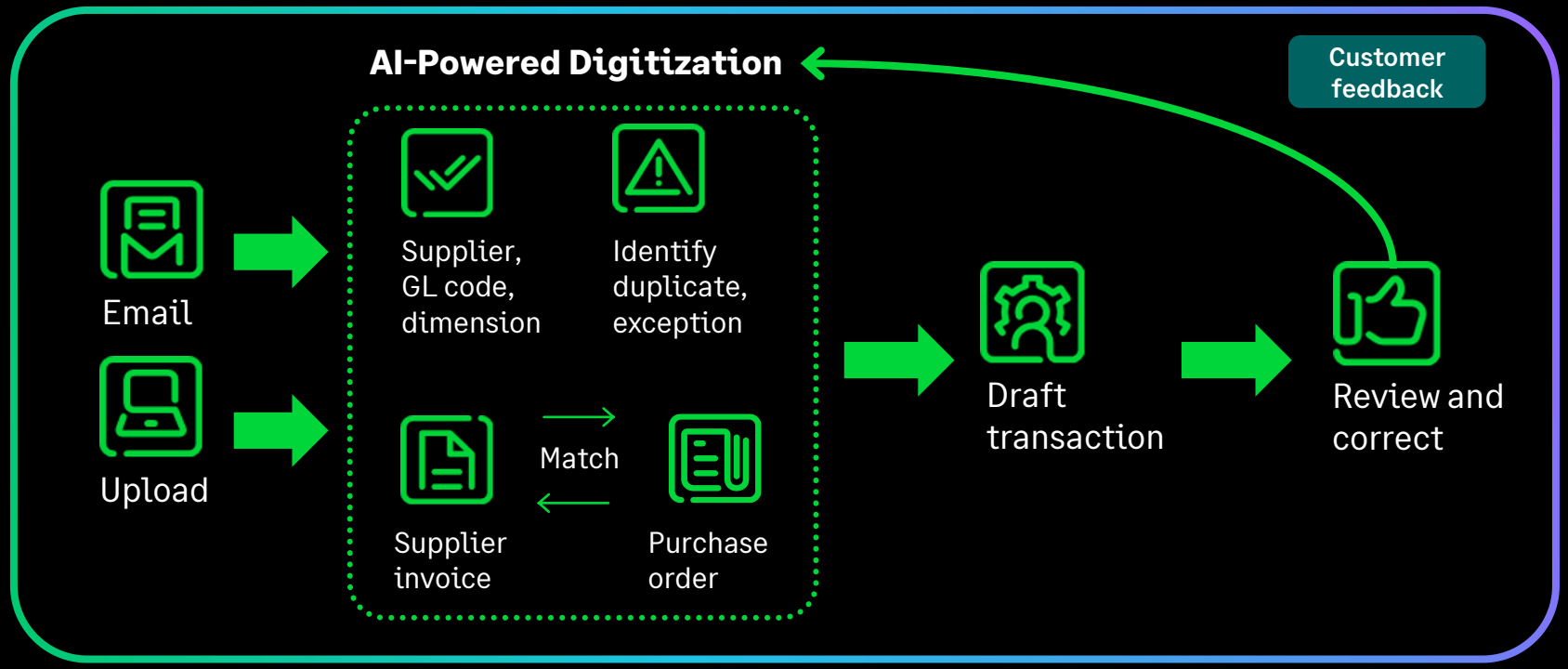

- **Simplified processes:** Extend AP Automation into Purchasing to ensure streamlined workflows.
- **Automated invoice creation:** Import or email supplier invoices and Intacct auto-creates them in Purchasing.
- **AI-powered matching:** Automatically match uploaded documents to POs for faster, more accurate processing.
- **End-to-end connectivity:** Connect automated purchasing and payables seamlessly with one list for a single source of truth.
- **Unparalleled efficiency:** Reduce manual tasks, save time, and improve accuracy with AI/ML-driven automation.

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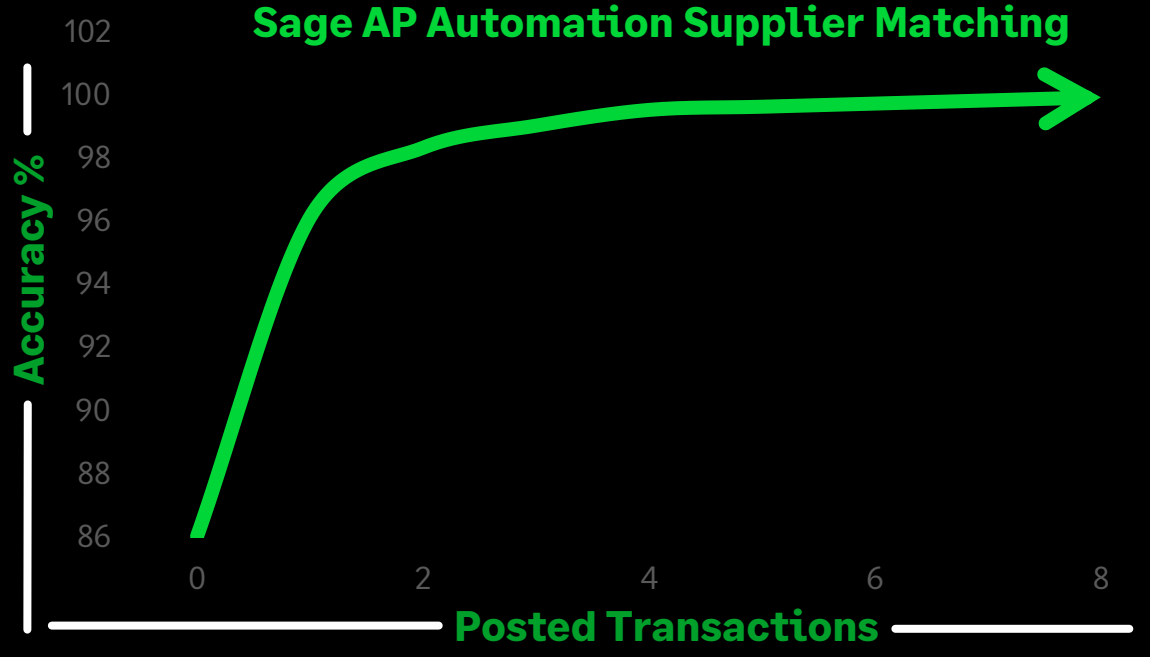
Boost efficiency, Save time

AP Automation

The more you use it **the better** AI/ML becomes

Post the invoices / submit for approval for AI/ML to **learn**

Create invoices on different days as AI/ML is retrained every **24 hours**



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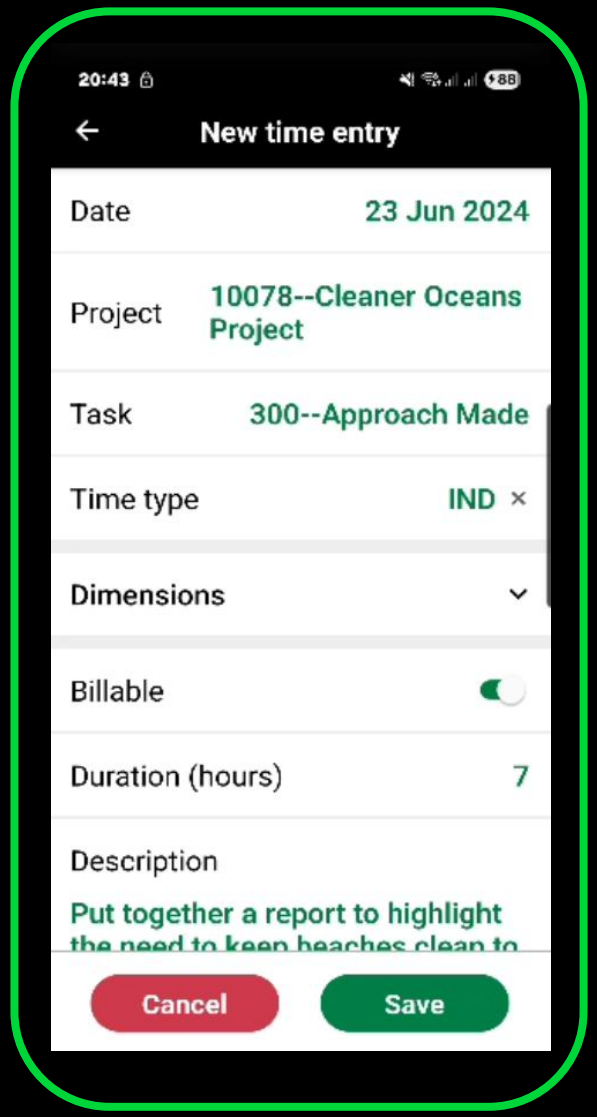
Boost efficiency, save time

Sage Intelligent time



More accurate time tracking

- **AI** suggests entries from real activity data (emails, meetings, calls).
- **Reduces** missed or forgotten billable hours, improving revenue capture.

Increase productivity

- **Cuts** down manual admin so employees can focus on meaningful work.
- **Makes** time entry faster and easier, which improves adoption and compliance.

Better project visibility & costing

- **Provides** managers with a real-time view of how time is being spent.
- **Supports** smarter planning and resource allocation for future projects.

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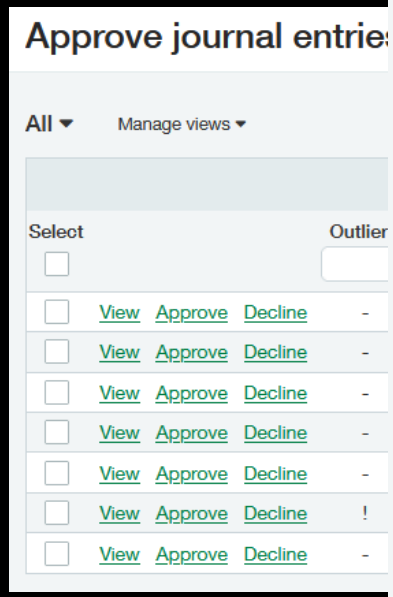
GL Outlier Detection



Payroll Journal - Journal entry

Approve | Decline | Edit | Print | Excel

Unusual historical matches were found. Review the indicated outlier lines. Total outlier count = 2

Transaction | History

Transaction number
311

Books	Journal	Posting date
Accrual	PYRJ	2021/11/16

Description
Payroll - Salary, Payroll Tax, and compensation

Reference number	Source entity	Attachment
--	100--Helpline	--

Last modified by	Last modified date and time	State
kgrace	2021/11/16 02:52:13 PM	Submitted

Entries

	Doc	Outlier	Account	Transaction debit	Transaction credit	Allocation	Class	Location	Department	Site	Grant and Project	Base debit	Base credit	Memo
1	--	-	1120--Payroll Cash	--	20,241.07	--	--	100--Helpline	--	--	--	--	20,241.07	PYRJ
2	--	A Amount	5125--Retirement Matching	220,003,792.83	--	--	3--Unrestricted	100--Helpline	100--Vale & West	Brighton	999--Non-Project or Grant Related	220,003,792.83	--	PYRJ
3	--	-	5126--Health Ins. Premiums	7,043.83	--	--	3--Unrestricted	100--Helpline	100--Vale & West	Brighton	999--Non-Project or Grant Related	7,043.83	--	PYRJ
4	--	- The Amount is unusual	s	32,808.67	--	--	3--Unrestricted	100--Helpline	100--Vale & West	Brighton	999--Non-Project or Grant Related	32,808.67	--	PYRJ
5	--	-	5128--Payroll Tax	8,127.49	--	--	3--Unrestricted	100--Helpline	100--Vale & West	Brighton	999--Non-Project or Grant Related	8,127.49	--	PYRJ
6	--	-	5124--Life Insurance Premium	1,690.74	--	--	3--Unrestricted	100--Helpline	100--Vale & West	Brighton	999--Non-Project or Grant Related	1,690.74	--	PYRJ
7	--	-	5127--Other Employee Benefits	2,794.27	--	--	3--Unrestricted	100--Helpline	100--Vale & West	Brighton	999--Non-Project or Grant Related	2,794.27	--	PYRJ
8	--	-	2140--Payroll Taxes Payable	--	8,127.49	--	--	100--Helpline	--	--	--	--	8,127.49	PYRJ
9	--	-	2140--Payroll Taxes Payable	--	10,809.57	--	--	100--Helpline	--	--	--	--	10,809.57	PYRJ
10	--	-	2130--Fringes Payable	--	15,321.71	--	--	100--Helpline	--	--	--	--	15,321.71	PYRJ

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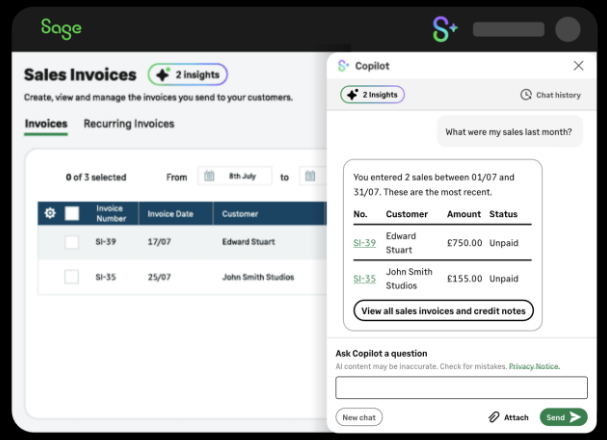

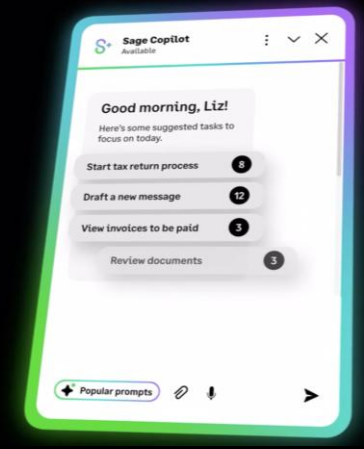

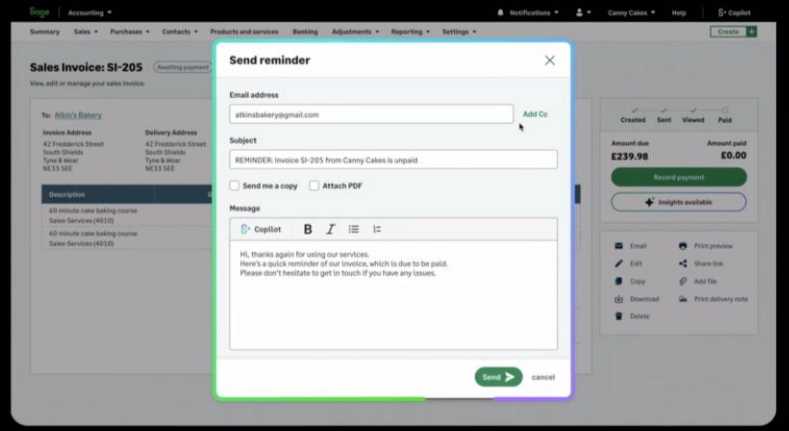

Key features

- Handling admin & repetitive
- Automating workflows
- Identifying errors
- Forecasting
- Cashflow management
- Generating & sending invoices.

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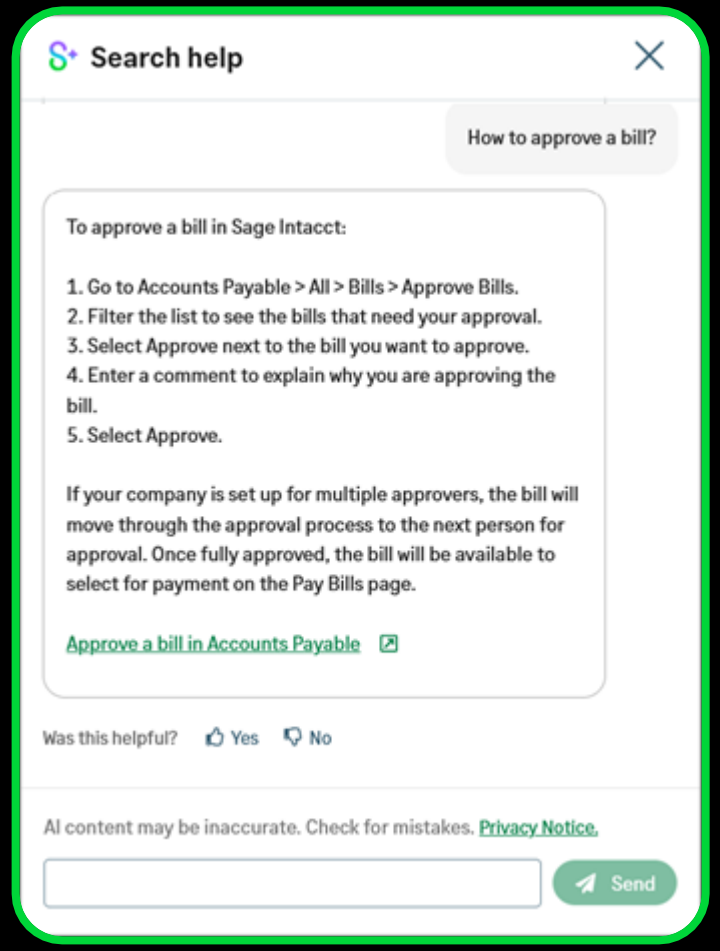

AI-powered search

- **Natural language understanding:** Copilot understands the nuances of Sage Intacct terminology and can interpret complex queries.
- **Intelligent recommendations:** Receive suggestions for related topics and articles to expand your knowledge.

Streamlined self-service

- **Find answers on your own:** Save time and eliminate the need to contact support.

Increased efficiency

- **Significantly cut search time:** Reduce the need for multiple searches by quickly delivering more relevant results.

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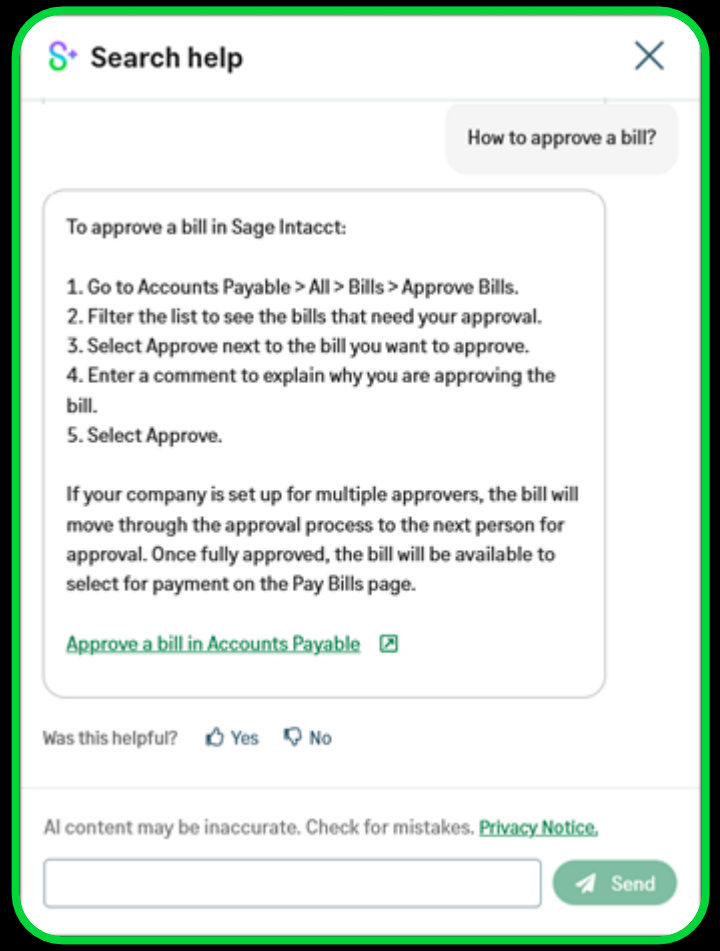

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View Example

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Summarising benefits

Harnessing the power of AI

Save up to 5 days per period-end with AI-powered automation and get trusted insights all month long.

- **Reduce processing time by 50%** with AI-powered data entry.
- **Catch errors continuously** to streamline month-end close.
- **Ensure accurate reports** by proactively managing discrepancies.
- **Share financial insights** with budget owners throughout the month.
- **Gain real-time visibility** into financial close progress.



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Summarising benefits

Harnessing the power of AI

- Increased efficiency
- Enhanced accuracy
- Real-time insights
- Productivity
- Compliance
- Scalability
- Cost savings
- Improved supplier relationships
- Enhanced security

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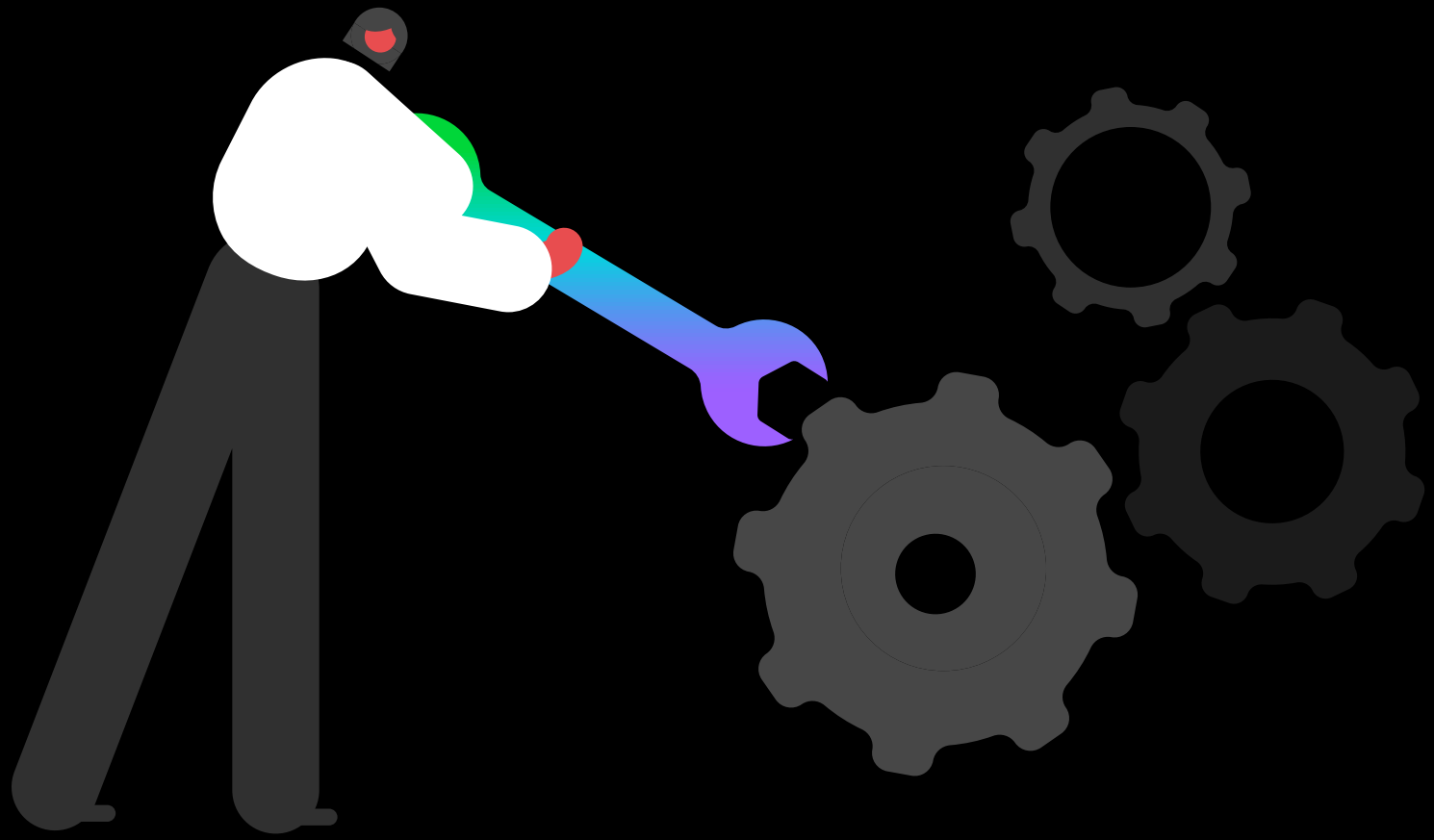
10 essential tips for implementing AI

1. Define the pain point.
2. Understand available tools.
3. Set realistic expectations.
4. Find a single-solution tool.
5. Improve external relationships.
6. Collaborate with IT and legal.
7. Track and fix issues.
8. Over-communicate results.
9. Start small.
10. Expand for broader impact.



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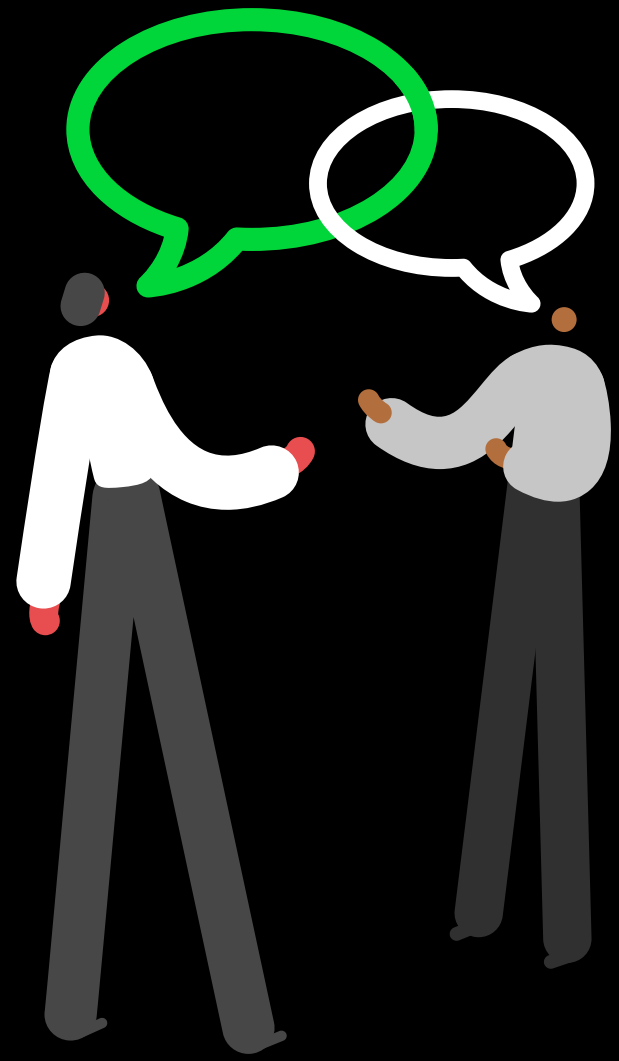
Q&A



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