

Sage Intacct Webinar

# AI in nonprofit finance:

AI's growing impact on  
your mission

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# Housekeeping

- If you have a question, please type it into the Q&A box to submit it to our team.
- Please include your email address along with your question. If we are unable to get to your question, we will follow up with you afterwards.
- A copy of the presentation and webinar recording will be emailed to you after the webinar (the following day).
- Please take a few minutes to fill out the survey at the end of the webinar.



# Introductions



**Katherine Bandeniece**  
Sage NFP Industry Lead - Canada



**Marija Temelkovski**  
Sage NFP Sr. Solutions Consultant

# Land acknowledgement



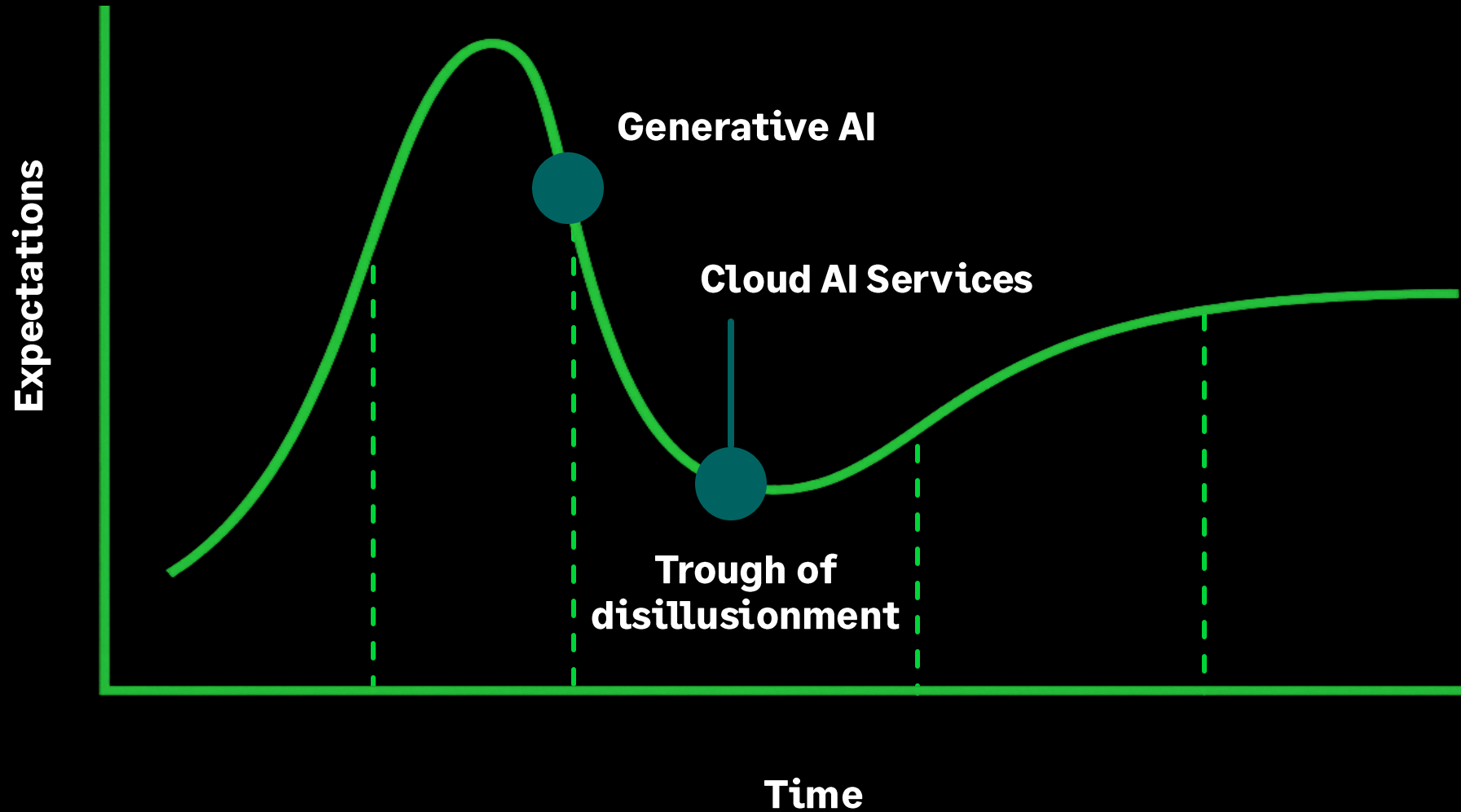
***Sage acknowledges that it is situated on the unceded traditional territories of the Musqueam, Squamish, and Tsleil-Waututh Nations.***

# Agenda

- **Understanding AI fundamentals**
- **The state of AI in nonprofit finance today**
- **Practical applications for nonprofits**
- **Getting started**
- **Q&A/Closing**



# AI Hype Cycle



# Polling Question #1

How would you rate your level of understanding when it comes to AI?

- **Novice**
  - *"I have heard of AI but have little to no understanding of how it works or is used."*
- **Beginner**
  - *"I understand basic AI concepts and can recognise common applications (e.g., chatbots, recommendation systems)."*
- **Intermediate**
  - *"I have a working knowledge of AI principles and can explain how some AI models function or are trained."*
- **Advanced**
  - *"I understand technical aspects of AI, including model architectures, training processes, and ethical considerations."*
- **Expert**
  - *"I have deep expertise in AI and can design, build, or evaluate AI systems professionally."*



# AI fundamentals: Demystifying AI for nonprofit finance

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# Types of AI: Traditional vs. Generative



## Traditional AI:

- Analyzes existing data
- Identifies anomalies
- Reduces risks
- Use-cases: error or fraud detection, risk assessment
- example: machine learning

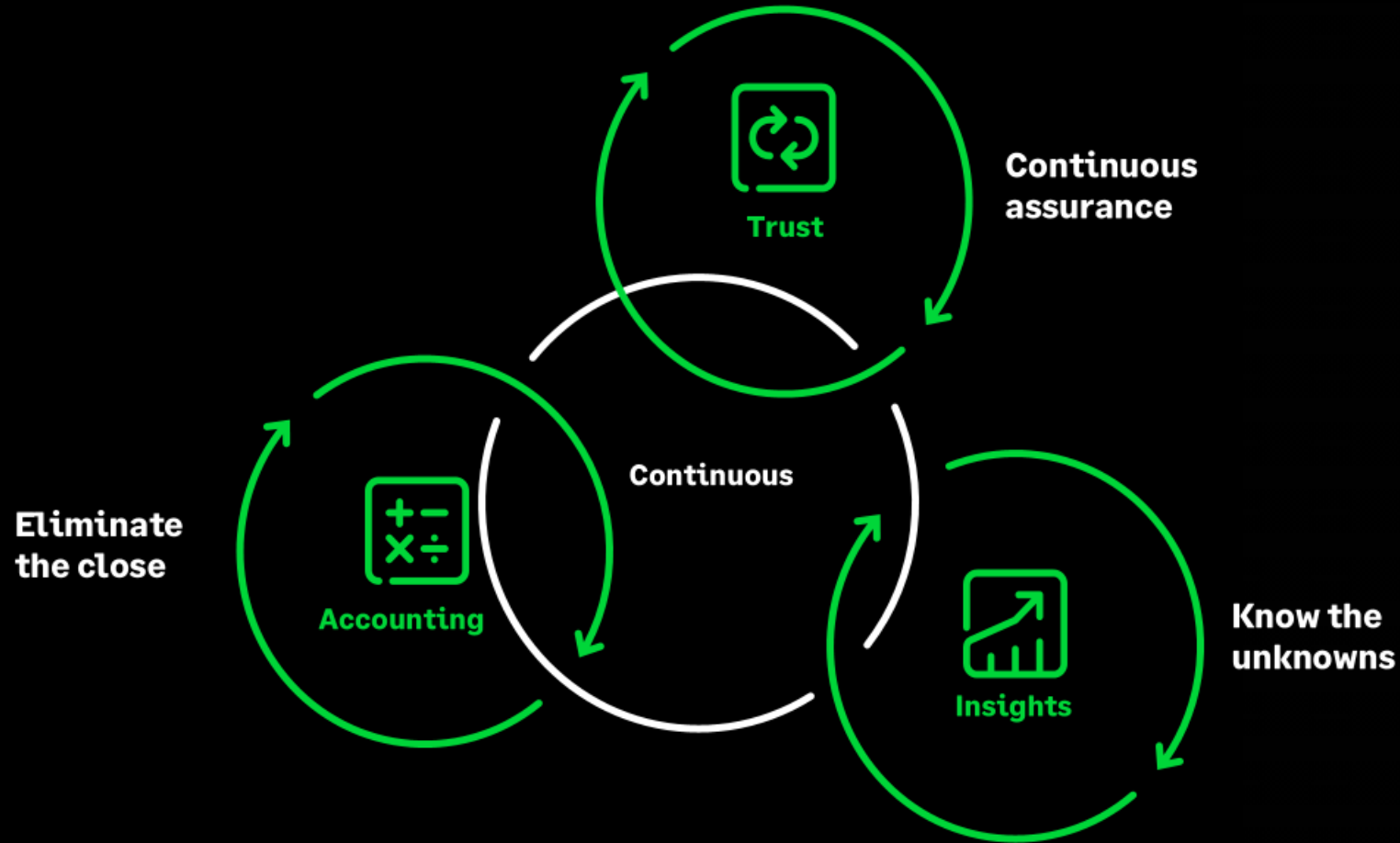


## Generative AI:

- Creates new content
- Develops forecasts
- Enhances reporting
- Use-cases: report writing, board presentations, research?
- example: LLMs, AI agents



# Generative AI **accelerates** and **humanizes** our tech strategy



# Polling Question

## #2

Are you using any generative AI tools, such as chatGPT or Microsoft Copilot in your day-to-day work today?

- Yes
- No



# State of AI in Nonprofit Finance / Leadership

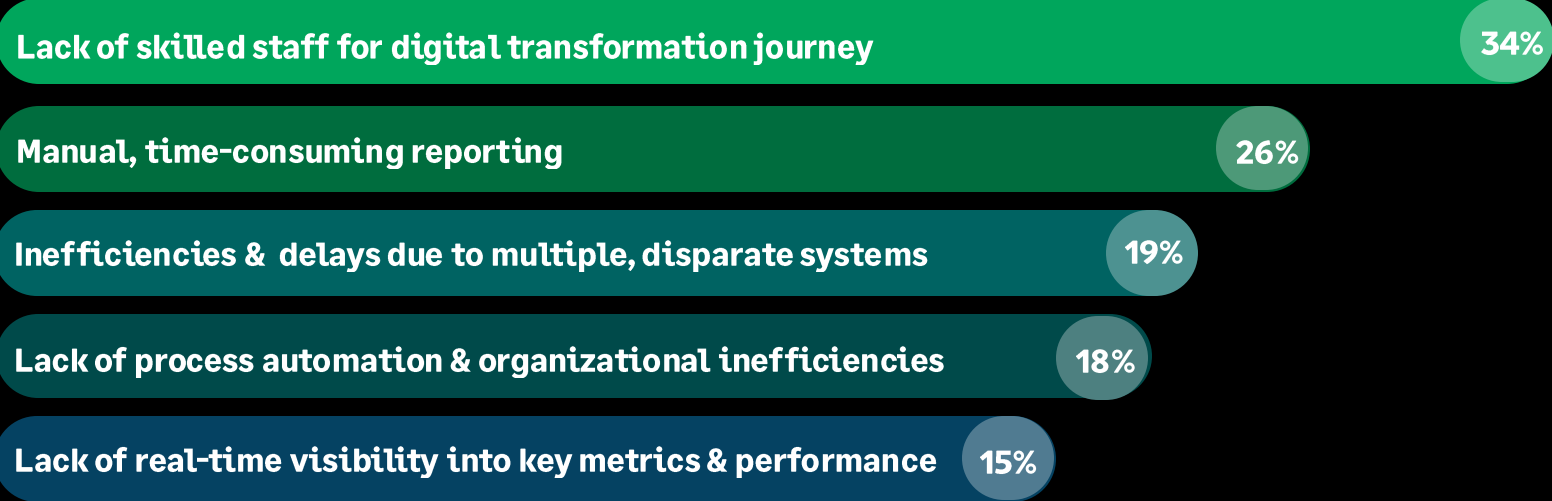
Taken from Sage's 2025 Nonprofit Tech Trends Report

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# There's an opportunity for AI

What are the biggest internal operational challenges your organization faces today?



**Top 2  
External  
Challenges**

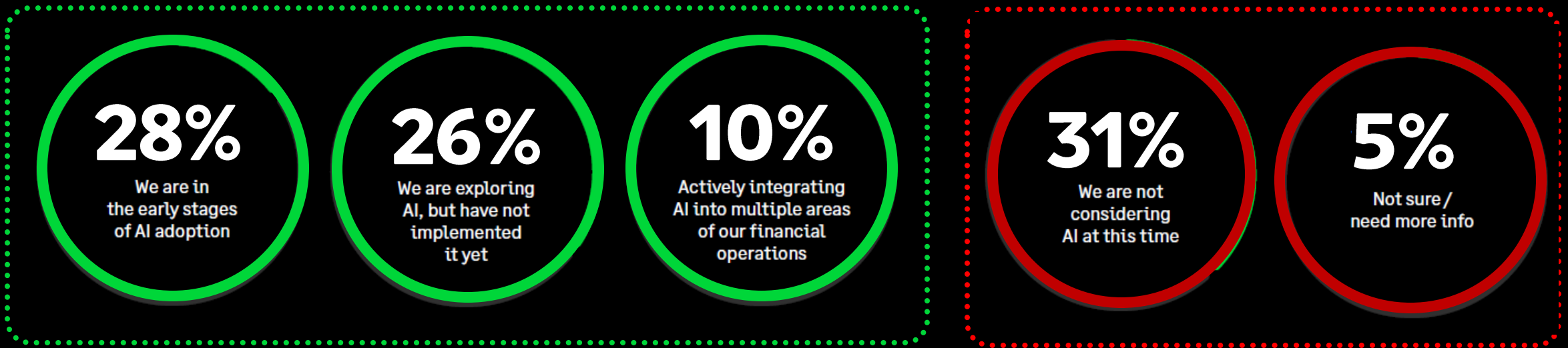
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**FUNDING &  
STAFFING**

Source: Sage 2025 Nonprofit Technology Trends Report

# AI adoption in NFP is low

Where is your organization on its journey to utilizing AI?



Surprisingly, Canadian Nonprofit Orgs are ahead of the US in AI adoption...

In our Secrets of Successful CFOs research, we found that 91% of organizations (including for-profit industries) have embraced AI.

Source: Sage 2025 Nonprofit Technology Trends Report

# AI among tech priorities

- 1 Automated financial reporting
- 2 Ability to integrate with other systems
- 3 Ability to manage multiple funds through fund accounting
- 4 Ability to automate tracking and reporting of outcome metrics
- 5 Automated consolidation of multiple entities
- 6 Automated purchasing and spend control
- 7 Automated processes with AI

Source: Sage 2025 Nonprofit Technology Impact Report

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# Practical finance applications today



**Intelligent  
Automation  
(existing systems)**

**End-user  
'conversation'**

# Conversational AI tools

End-user  
'conversation'

Use Case	Example Prompt
<b>1. Reporting and Analysis Narratives (Grants, forecasts, etc.)</b>	"Generate a first draft of our Q2 narrative report for the XYZ Foundation using these financial data and outcome metrics."
<b>2. Board-Ready Financial Summaries</b>	"Write a summary of this month's financials highlighting key trends, variances, and risks for the board packet."
<b>3. Compliance and Regulation Monitoring</b>	Summarize any changes to CNCA Act or other regulatory guidance into readable formats.
<b>4. Budget Justification Drafting</b>	"Explain the need for a 15% increase in program staff costs in a tone appropriate for a government grant."
<b>5. Policy &amp; Procedure Drafting</b>	"Draft a procurement policy update that reflects new federal grant compliance rules."
<b>6. Audit Prep Assistance</b>	"Draft responses to the auditor's question about our restricted funds reconciliation."
<b>7. Donor Reporting Support</b>	"Turn our Q1 financial report into a donor-friendly summary that highlights program success and financial stewardship."
<b>8. Internal Communications</b>	"Write a short email to program managers summarizing current budget status and next steps."
<b>9. Training &amp; Onboarding Materials</b>	"Create a 1-page explainer on how to code expenses by grant and department."
<b>10. Data Cleaning Assistance (with AI tools)</b>	"Identify unusual expenses in this GL export and summarize patterns."

Source: Sage internal metrics

# Automation and month end close

## Get instant answers

### Search Help

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

## Mitigate risk

### Outlier Detection

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

## Save time

### Purchasing & AP Automation

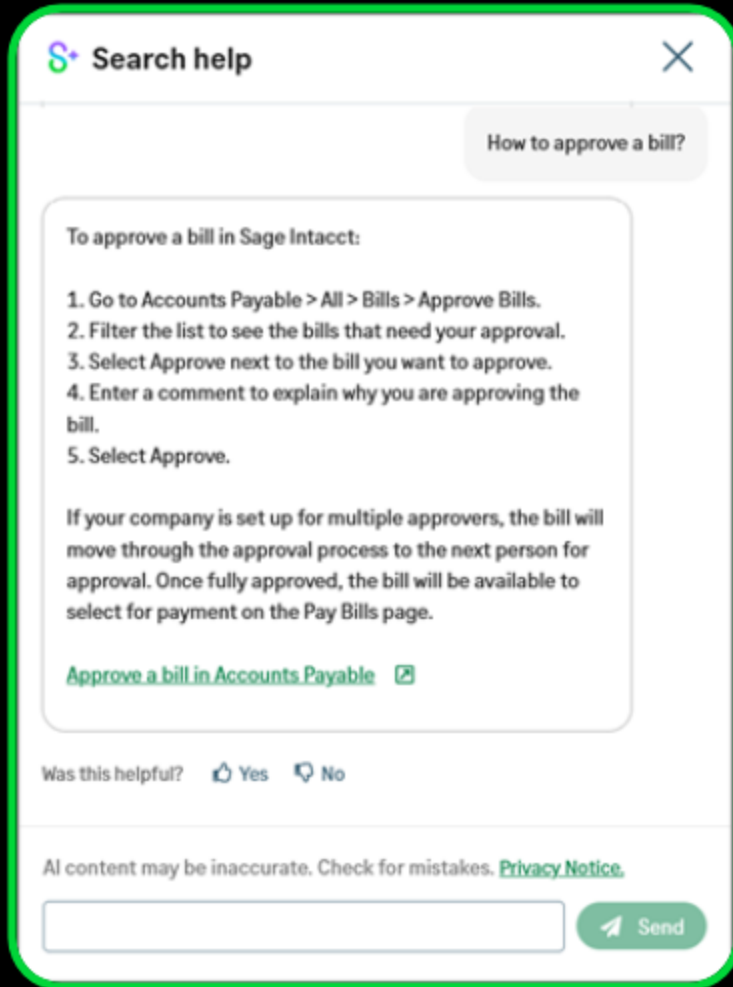
Uses AI to reduce manual entry by automatically creating draft bills, matching them to purchasing transactions, and improves accuracy.

## Boost efficiency

### Intelligent Time

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

# Embedded Copilot Search help



## 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.

# GL Outlier Assistant

Harness AI/ML review to speed your time to accurate journal entries

General Ledger

### Audit Adjustments Journal - Journal Entries

Unusual historical matchdate have been found; review the indicated outlier line(s). Total outlier count = 2

Transaction History

Transaction number: 9  
State: Submitted  
Description: Adjustments  
Book(s): ACCRUAL  
Journal: AAJ  
Posting date: 03/31/2019  
Reference number: --  
Source entity: 100-operating  
Attachment: Audit-JE-001  
Last modified by: Kgrace  
Last modified date and time: 04/25/2019 13:30:12

**For submitters to review outliers before sending to approvers**

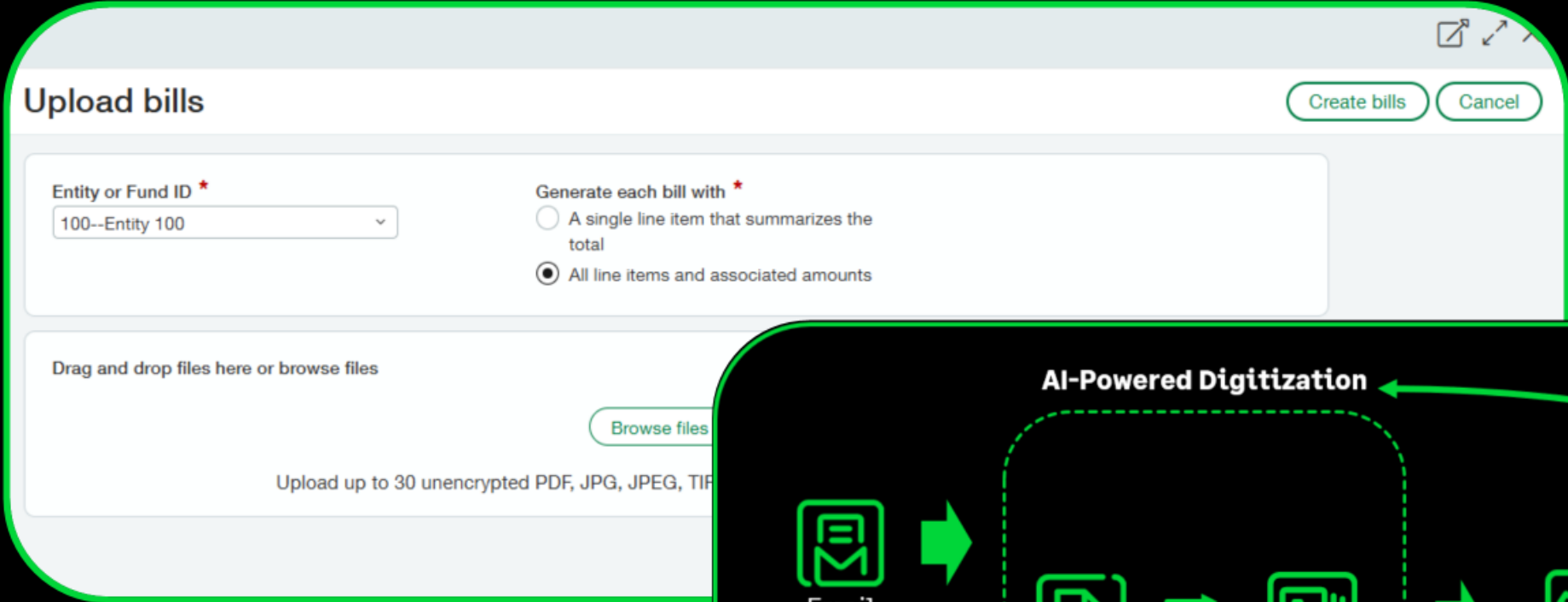
Doc	Outlier	Account	Allocation	Project or Grant	Department	Entity or Fund	Restriction	Site	Debit	Credit	Memo
1	--	1000--Sterling Bank - Checking	--	100--Stride for Sight	SP--Support	100--Operating	3--Unrestricted	Main	10,000.00	--	adjustment
2	--	5010--Data Center Fees	--	--	PS--Professional Service	100--Operating	--	Main	--	12,000.00	adjustment
3	--	6000--Benefits- Health Insurance	--	100--Stride for Sight	ENG--Engineering	100--Operating	--	Main	--	1,100.00	adjustment
4	--	6010--Benefits- Life Insurance	--	100--Stride for Sight	SA--Sales	100--Operating	--	Main	--	750	adjustment

Submitted Entries

No Outliers – Routed to Approver

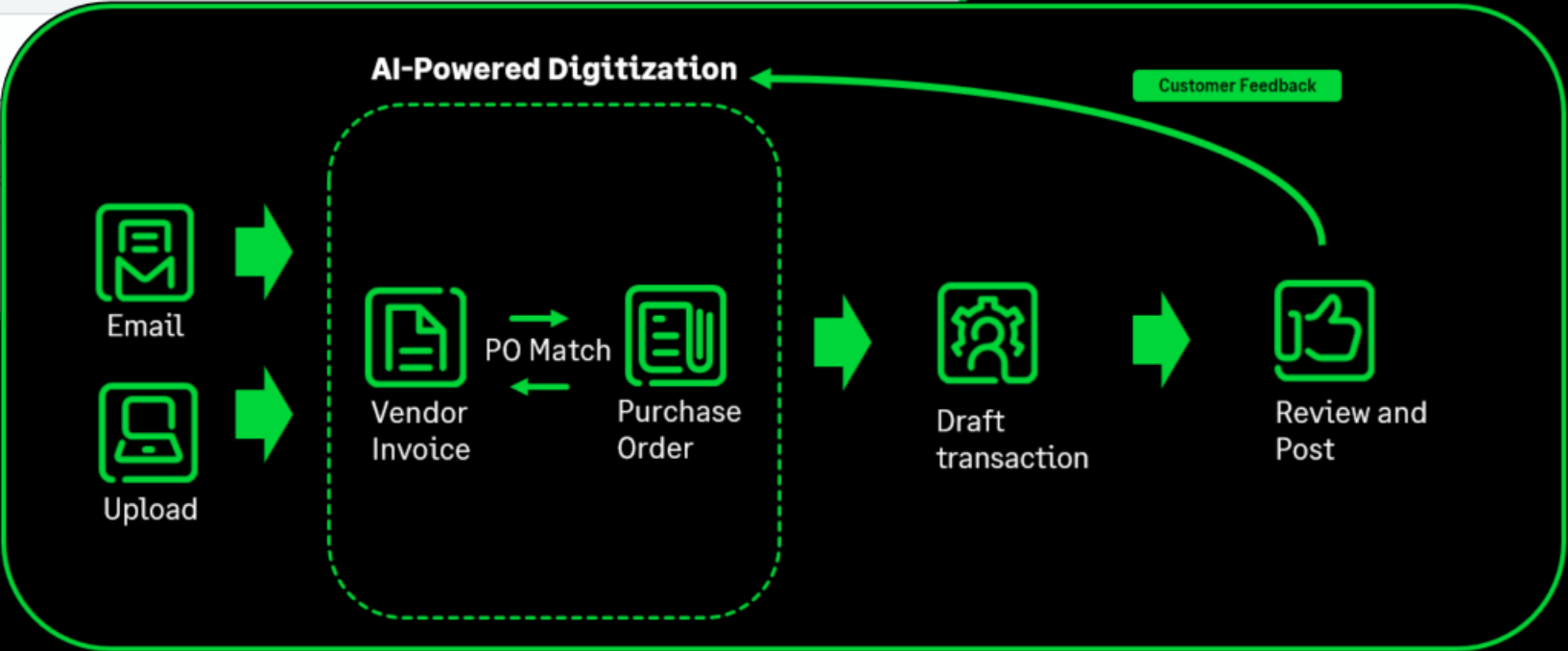
Outlier Detected – Return for Review

# AI-powered AP and PO Automation



- ✓ PO and Vendor Invoice matching
- ✓ Exception and duplicate identification
- ✓ Approvals

- ✓ AI-powered Purchasing and AP Automation
- ✓ OCR technology
- ✓ Avoid manual data entry



# Project staff shifts from reconstructing their week to reviewing timesheet entries

The screenshot shows a timesheet application interface. On the left, a sidebar titled 'Cards' displays a list of tasks for 'Wednesday, July 10th'. A red box highlights this list, and a green arrow points from it to a green callout box. The main area shows a summary of '4 Entries' and '16.00 Hours' for the period 'July 8th, 2019 - July 12th, 2019'. Below this are three summary cards: 'NOT BILLABLE' (0 Items), 'DID NOT ATTEND' (0 Items), and 'TRASH' (0 Items). A table below allows filtering by Client, Project, and Task, and shows a grid of hours for each day from Monday to Friday. The table includes a 'TOTAL ESTIMATED' row and a 'TOTAL ALLOCATED' row, with 'Submit' buttons at the bottom.

	MON Jul 8	TUE Jul 9	WED Jul 10	THU Jul 11	FRI Jul 12
ACME		4.00			
XYZ Software	4.00				
XYZ Software	4.00	4.00			
<b>TOTAL ESTIMATED</b>	8.00	8.00	5.25		
<b>TOTAL ALLOCATED</b>	8.00	8.00	0		

A time assistant gathers the work

# Saving our customers' valuable time

**“AI helps our team do everything faster and smarter”**



**Michael A Smith,**  
SVP of Finance & Accounting,  
Operation HOPE

**“The AI learns from you, saving us a lot of time”**



**Pauline Boivin, CFO,**  
Ranor Mechanical

**With AI it's two or three times faster for our team”**



**Christian Mulvihill, CFO,**  
Greenidge Generation Holdings

# Polling Question

## #3

Which piece of the AI examples just provided will you find most beneficial?

- Search Help
- Outlier detection
- Purchasing & AP Automation
- Intelligent time
- All of the above
- None of the above – I am an AI skeptic!



# Implementation roadmap: Your path to AI

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A decorative graphic consisting of several concentric, curved green lines that sweep across the bottom right portion of the slide, creating a sense of motion and depth.

# Define your starting point

## 1 Start exploring conversational AI

## 2 Identify pain points

- Which manual processes consume the most time?
- Where do errors commonly occur?
- What strategic initiatives lack resources?

## 3 Evaluate readiness

- Data quality and accessibility
- Team capacity and skills
- Technology infrastructure
- Budget considerations



# Questions?



# Closing

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A decorative graphic consisting of a series of concentric, curved green lines that sweep across the bottom right portion of the slide. The lines are of uniform thickness and are set against a solid black background.

# Trust the leader in nonprofit financial management

**#1** Trusted by thousands of Nonprofit organizations



G2 Leader in Nonprofit Accounting Software for 5+ consecutive years



First and only preferred financial management solution of the AICPA



Increase your time spent on strategic work by 75%

# Sage Ai drives high performance for finance and organizations

## Trust

**AI you can rely on.** Built with transparency, accuracy, and the highest standards of security and compliance.

## Control

**AI that works for you.** Keeping you informed, empowered, and always in charge of key decisions.

## Trusted by thousands of nonprofits including:



## Trusted by thousands of nonprofits across:

- ✓ Human Services
- ✓ Healthcare
- ✓ Education
- ✓ Faith-based organizations
- ✓ International NGOs
- ✓ Foundations
- ✓ Professional associations

# Thank you!

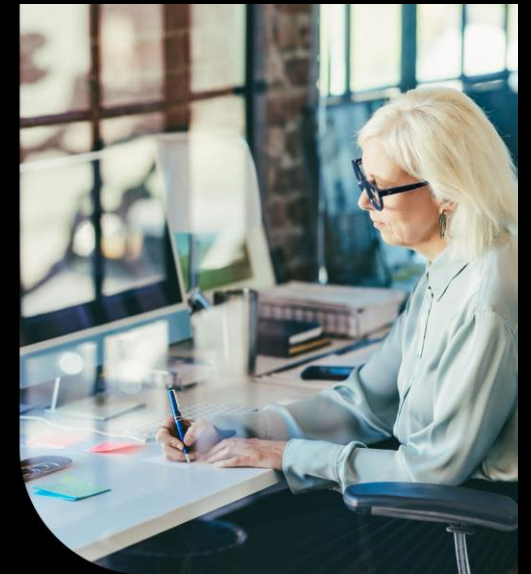


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E-book

**How nonprofits  
can drive greater  
mission impact with  
AI and intelligent  
automation**



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