



# SAGE NONPROFIT SOLUTIONS NEWSLETTER

## In This Issue:

How Do I Track That?

How to Hire a Great Nonprofit Accountant

Nonprofit Resource Library

## How Do I Track That?

### The Value of User-Defined Fields in Sage Fund Accounting

When you originally implemented Sage MIP Fund Accounting, you probably made some important decisions about your chart of account structure, account segments, and other aspects of fund accounting and reporting. But what happens if your tracking and reporting needs have changed a bit since that time? What if you've started new projects or are involved in events that weren't accounted for originally? That's where User-Defined Fields come into play. Let's take a look.

### Puts the "User" (That's You) In the Driver's Seat

User-defined fields allow you to add your own custom fields to the Sage MIP data entry screens (and database). As the name suggests, these custom fields are defined by the user ... that's you. While a better name might be "customer-defined" fields, the point is that **you** can set them up without a bunch of technical support or knowledge of the Sage MIP database structure.

User-defined fields can be extremely useful for special projects, charity events, or anything else you want to track and report on separately. For instance, a community relief organization may want to add a "Number of Clients Served" column in each of their cash disbursement or check transactions. Or maybe you're holding a one-time charity event and would like to track contributions and expenditures separate from your "regular" everyday transactions. You can track it all with user-defined fields.

### Keeps Your Chart of Accounts Clean

One of the nice things about user-defined fields is that you can set them up and run detailed reports without adding new account numbers, segments, or anything else that might muddy up your chart of accounts. Using "disposable" user-defined fields keeps your chart of accounts from growing unnecessarily large and complex. Plus, the data you enter in your user-defined fields can be set up to carry through to reports. In the example above, user-defined field functionality would enable the community relief organization to track the "number of clients served" **and** even create a Performance Budget around service goals!

### Getting Started

User-defined fields are created in the **Administration Module**. You can specify the transaction type, field name and description (that appears on your data entry screens), and a variety of other characteristics that will help you control the data that's required in the newly-created fields.



**Questions?** [Contact us](#) if you'd like to learn all about working with user-defined fields or if you'd like help putting them to work for your next special event or project.

**sage**

Authorized Partner

# How to Hire a Great Nonprofit Accountant

A recent article posted on [BlueAvocado.org](http://BlueAvocado.org) discusses the challenge of finding and hiring a great accountant for your nonprofit organization. After all, finding someone who fully understands fund accounting AND is a good fit with your organization can be a challenge. Here are some helpful tips.

## Where Do We Find Applicants?

In addition to traditional methods like job postings and advertisements, it's a good idea to ask your auditor. He or she is not only connected with the accounting world, but also understands your needs. You should also try [Craigslist](http://Craigslist). You might think of Craigslist as nothing more than an online garage sale. But many folks don't realize that it's also a very active job search community. Try posting your job opening in both the [Accounting & Finance](#) AND [Nonprofit](#) sections.

## Besides Technical Knowledge, What Else Should I Look For?

Technical knowledge of fund accounting and experience with nonprofits is obviously crucial. Beyond that, it's also important that your candidate has the ability to communicate well with others, including organizational stakeholders who may not understand accounting "lingo." What's more, the accounting team is often tasked with getting staff to conform to regimented or unpopular procedures (like time-sheet submission) and to participate in planning discussions (like budget preparation for a grant proposal). So hiring someone with "people skills" can be an important factor.

## How Do We Decide What To Pay?

Start by calling other organizations and ask what they are paying. Many executive directors are happy to share this information, especially if you offer to reciprocate. You can also look at the Form 990 of organizations similar to yours at [Guidestar](http://Guidestar). Note: If the CFO is making over \$100,000, the salary will be listed in Part VII of Form 990.

## How Can I Sell An Accountant On Our Organization, Especially at a Lower Salary?

One of the biggest mistakes you can make when hiring an accountant is to **NOT** talk up your missions. For many accountants, doing meaningful work is exactly why they responded to your job announcement in the first place. Talk up your mission, your impact, your goals, and your connection to your constituencies. Plus, there may be stressful times, such as cash flow crunches, where a shared involvement with the mission (including the accounting staff) will form an important basis for teamwork.

Last but certainly not least, seeking candidates that have experience with your Sage MIP Fund Accounting software will help shorten the learning curve.

## SAGE NONPROFIT CUSTOMER HUB

Whether you're using Sage Fund Accounting, Fund-raising, or any other Sage nonprofit software, there's an online resource that you should know about at [www.sagenonprofit.com/customers](http://www.sagenonprofit.com/customers). You'll find links to customer support, a resource library of articles and training opportunities, information about user group meetings in your area, and a wealth of other information to help make the most of your software investment. Check it out at:

[www.SageNonprofit.com/Customers](http://www.SageNonprofit.com/Customers)

*"HELPING NON PROFITS MAKE MORE OF A DIFFERENCE"*

**ROGERS & COMPANY TECHNOLOGY CONSULTANTS**



125 Jericho Turnpike, Suite 200 | Jericho, NY 11753 | [info1@rcotech.com](mailto:info1@rcotech.com) | (516) 338-9500 | [www.rcotech.com](http://www.rcotech.com)