Automation Workbench

AccuFund Onsite

Harness the Full Power of Your Data

AccuFund's Automation Workbench is a timesaving, data-driven engine that lets you automatically check internal controls, allocate expenses, send alerts, create Accounts Receivable invoices, perform account reconciliations, distribute budgets, and more.

Automations Workbench can retrieve data from any other AccuFund module and use it to make calculations, send alerts, make updates, and more. The module can also combine data from multiple modules to perform tasks. For example, it can access a work order, retrieve an address from Utility Billing, and send the contact information via email to the work crew leader.

The module can even integrate via API with other software systems—CRM, Case Management, Travel Management, Recruitment, etc.—and manage data mapping, retrieval, posting automatically.

Automation Workbench Online Version

Looking for the cloud online version of this module?

[Show Me the Online Version](#)

Deliver Data and Guide Decision Making

Automation Workbench gives you powerful capabilities that streamline your workflow. Use it to:

- Query the general ledger history from any module and perform calculations based on data retrieved from other modules.
- Perform complex allocations of overhead/indirect expenses, including those based on approved indirect and fringe benefit rates, direct expenses, and direct labor.
- The system supports endowment allocations of income and gains/losses based on units or amounts.
- Schedule tasks to run automatically at defined intervals, or as needed.
- Generate and send alerts via email.
- Create notes on tasks performed.

Let AccuBot Work for You

Automations can also be configured to run as Bots within AccuFund. The AccuBot feature lets you run a task from within a transaction browse screen. For example, you can create a Bot within the Pay Employees screen that emails the Treasurer the total amount of a posted payroll run.

Multiply Efficiencies with Built-in Integrations

Take advantage of the Automation Workbench throughout the AccuFund Accounting Suite:

- The General Ledger—Put general ledger information to work for you, enabled by information from other modules.
- Human Resources—Access HR data, such as allocations of employer health insurance costs.
- Budget—Allocate budget entries between periods.
- Accounts Receivable—Automatically create bills using information from other modules.
- Client—Use client information to create transactions, such as Accounts Receivable invoices.
- Work Orders—Send alerts to work crews; use work order activity/hours to create bills.
- General Ledger Reconciliations—Use the Automation Workbench to scan completed reconciliations and create invoices. This is popular with programs that bill for expenses as incurred.
- Utility Billing—Generate late notices and email them to clients.
- Task Scheduler—Automations Workbench can be scheduled to run in the background, at specific intervals defined by users.

Let's Get Started

AccuFund supports your mission with a full suite of financial management applications for nonprofit and government organizations. To learn more and arrange a demo, contact AccuFund at 877-872-2228 or sales@accufund.com or visit www.accufund.com.

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