The Financial Edge™ — WebPortal™
Take accounting processes to the web

With WebPortal from The Financial Edge, you can get a clear view into your organization’s invoicing, check requests, travel and entertainment, purchasing, and spending, enabling you to obtain an unprecedented view into how money is being spent within your organization. WebPortal manages everything electronically and takes your accounting processes to the web. In addition to providing an online window into spending, you can eliminate time- and resource-consuming manual, paper-based processes, while automatically ensuring your organization’s spending policies are applied and enforced.

WebPortal includes WebPurchasing™ for purchasing requisitions and WebInvoicing™ for invoice requests, check requests, and expense reports. You can purchase one or both modules to control spending, streamline processes, and reduce costs in your organization.

THE FINANCIAL EDGE — WEBPURCHASING
“create requisition, get approval, submit PO” becomes “point, click, done”!

Nonprofit organizations with traditional paper-based purchasing systems often have difficulty making strategic and timely purchases and holding suppliers accountable for transactions. Employee purchases frequently deviate from organizations’ spending policies, leading to lengthy order fulfillment cycles and overspending or duplicate payments. In addition, approval processes can get lengthy and costly if approval signatures need to be obtained by sending purchase requisitions, purchase orders, and invoices to multiple office locations.

WebPurchasing for The Financial Edge streamlines the purchasing process by managing everything electronically. Its automated requisition system is designed to keep you on budget while ensuring your organization’s policies and procedures are followed.

And because WebPurchasing brings the requisition and approval process online, it gives users and reviewers a central place to request items and approve purchases. It provides user-friendly navigation, so searching for products is quick and easy. At the same time, it gives you an efficient approval process that can be customized for your organization.

THE FINANCIAL EDGE — WEBINVOICING
manage invoice requests, check requests, and expense reports effortlessly by taking processes online

Because invoice requests, check requests, and travel and entertainment (also known as T&E) are often the second largest expense area for organizations, they are one of the first places organizations look to control costs. Organizations that operate on paper-based reporting systems often struggle with controlling and monitoring expenses. And just like purchasing, approval processes can be drawn out and costly if approval signatures need to be obtained by sending requests to multiple approvers and/or multiple office locations.
By taking requests online using **WebInvoicing™**, you will realize a significant reduction in associated costs. **WebInvoicing** is intuitive, scalable, and easy to deploy. The end results are reduced cost, reduced time spent off task, greater visibility to spending and trends, and improved compliance with your organization’s spending policies and regulatory compliance.

The Financial Edge™ WebInvoicing Process:

1. **Establish control and security**
2. **Employee logs in**
3. **Create and submit request**
4. **Get approvals**
5. **Invoice created in The Financial Edge**
6. **Generate payment**

### THE BLACKBAUD DIFFERENCE

**WebPurchasing™** and **WebInvoicing** also provide the following benefits:

- Users can log in using their Windows® user name and password.
- Passwords can be reset without human intervention.
- Requesters and approvers can receive automatic email notifications.
- When multiple approvals are required, the requisition or invoice requests are automatically forwarded to the appropriate person.
- For out-of-office situations, you can route the requisition automatically to someone else.
- The software is easy to install and configure.
- You can use the Administration area to edit "My Account" for all users, check the email queue, and see connected users.
- **WebPortal** has real-time integration with **The Financial Edge™**. As soon as a requisition or request is added, it’s automatically present in **The Financial Edge**.
- **WebPortal** is compatible with Macintosh® using Mozilla Firefox® and with PCs using Firefox® or Internet Explorer® 7 or higher.