

WISE INFORMATION PACK

NOT-FOR-PROFIT



PRACTICAL
ENTERPRISE
GROUP

FOCUS ON WHAT MATTERS MOST

Running a not-for-profit (NFP) is no easy task. Being able to manage and report on multiple grants, funding sources, programs, cost centres and expenses, in a timely manner is difficult for any not-for-profit.

The time and effort it takes to produce detailed reports, gain approvals for purchase orders, or keep track of expenses is costly. Being able to accelerate your reporting cycle and drill down to the detail is critical in providing clarity on the health of your programs, projects and overall organisation.

As a not-for-profit you're constantly looking for ways to do more with less, all while trying to attract clients and keep them happy.

So, whether you're looking to save time and do more with your reporting, better manage funds, clients and campaigns or simply understand how your projects and programs are really performing, Wiise is designed to help.



Streamline how you work

Get in touch today

BUILT ON MICROSOFT. MADE FOR NOT-FOR-PROFITS

Wiise is clever accounting and operations software created by KPMG, built on Microsoft and supported by Commonwealth Bank. With everything in one hub, Wiise is designed to handle the complexity that comes with managing funds, clients and reporting as a not-for-profit. Wiise allows you to easily connect campaigns to finances, see when grants and funds are needed and understand how your programs and projects are performing.



Get Clarity over your organisation

Tag, track and report funds you receive in real-time

Dimensional tagging lets you track the source of funds and grants by allocating funding to one or many programs or projects. See actual funds received and funds budgeted to be received.

Know what and when you're spending on programs

Raising purchase orders against programs and projects allows you to track and report on committed costs, plus any unconsumed commitments.

Automate your reporting

Being able to report in real-time is important for not-for-profits and their Boards. Wiise lets you prepare detailed reports for acquittals, such as which grant source the funds came from and which programs the funds are allocated to. You can also compare your actuals to budgets to track and monitor the financial performance of your programs.

Streamline your purchase orders and approvals

No matter where your staff are located, they can easily raise a purchase order directly from within Wiise. Plus, with the right approval process in place, our purchase order approvals are streamlined in an instant.

Manage project costing and jobs

See just how profitable your projects and jobs are with job and resource tracking. Understand your true performance and raise PO's with one-click.

CHANGE THE WAY YOU RUN YOUR NFP

Wiise will streamline the way you manage your not-for-profit organisation. From program costing, detailed reporting and customer campaigns, Wiise meets the needs of organisations like yours.



“Wiise gives us access to real-time information to help us make more accurate decisions on a timely basis.”
Ben, Finance Manager at CGVT

THE WIISE DIFFERENCE

- Connects natively to Microsoft Office and Dynamics 365
- Edit your data in excel and push changes directly into Wiise
- See client / supplier insights and send invoices directly in Outlook
- Integrated with payroll so you're Single Touch compliant
- Personalise views without coding, simply drag and drop
- Intercompany transactions and consolidations
- Up to 6 dimensional tags so you can tag and track every item
- Customise workflows and map them back into your journals

LINK YOUR ACCOUNTING AND BANKING

- Accounts receivables/payables with month/year end closing
- Bank feeds and automatic reconciliation with Simplify
- Connect any major bank to Wiise (no fees)

CRM AND PAYMENTS

- Quote generation and sales invoicing with e-payments
- Contact management
- Approval workflows to authorise purchasing based on amount

PROGRAM AND PROJECT COSTING

- Capacity planning and resource management including WIPs
- Budget versus actuals to understand any cost overruns

STOCK MANAGEMENT

- Manage any inventory that you use with clients
- Procurement and vendor management
- Foreign exchange

REPORTING AND INSIGHTS

- Customer insights
- Detailed self-serve reports and built-in intelligence
- Interactive dashboards
- Real-time forecasts to see your cash flow clearly

MADE FOR NOT-FOR-PROFITS

Wiise will streamline the way you manage your not-for-profit organisation. From program costing, detailed reporting and customer campaigns, Wiise meets the needs of organisations like yours.

WHAT'S INCLUDED?

Perfect for growing not-for-profit's who need clarity. Get an integrated solution that handles banking, accounting, invoicing and basic inventory for multiple entities. Transact and consolidate between companies you own and compare budgets versus actuals to see the complete picture of your organisation.

- Accounting (Full AR/AP/GL)
- Accounting for all your companies
- Sales and purchasing
- 6 reporting tags to categorise
- Financial reporting
- Intercompany transactions
- Budgeting and cash flow forecasting
- Costing of projects
- Integrated banking
- Comparison of budgets v.s. actuals
- Microsoft suite integration
- Basic sales opportunity management
- Employee information maintenance
- Personalised fields
- Basic inventory
- Foreign exchange
- Automated approvals with workflows
- Accounting for all your companies
- 6 reporting tags to categorise
- Intercompany transactions
- Costing of projects
- Comparison of budgets v.s. actuals

Email info@thepeg.com.au to find out more about our special NFP pricing and packages



TEAM MEMBER LICENCES

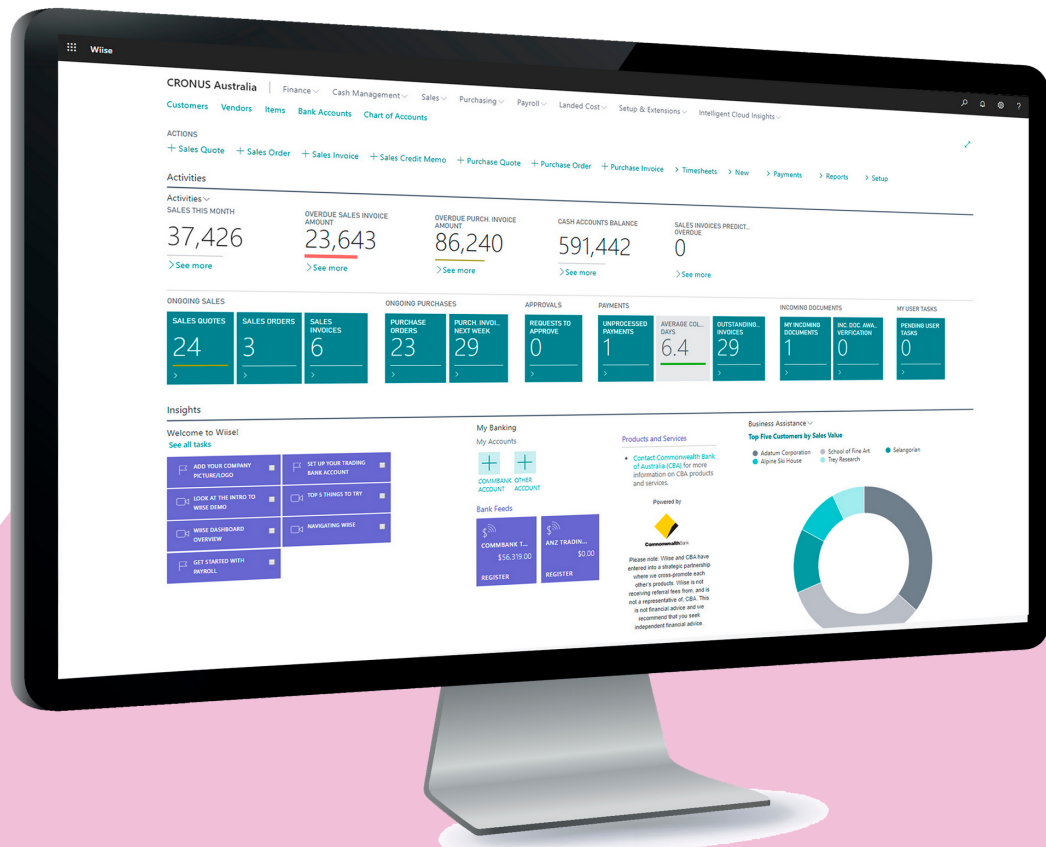
Get clarity and see what is happening at every level of your business with a team member licence.

As a team member, you've got full capability to see anything with your system based on the user's security permission.

See anything in a Wise Lite, Business or Premium package, PLUS:

You can create quotes, enter timesheets and approve or reject tasks. If you need to do more in the system, you can simply upgrade your licence to a full user.

Team member licences are great for any employee within a business who only need limited access, helping save costs on your monthly subscription.



PAYROLL

Get everything you need to pay your employees accurately and effortlessly in one integrated solution that's Single Touch Payroll compliant. You can change your subscription to include more employees and functions as you need it.

ESSENTIALS

- Deductions
- Expenses
- Timesheet reporting
- Salary sacrifice handling
- Reporting
- User dashboard
- Employee self-service
- Approvals and workflows
- Automated pay, leave and termination (ETO) calculations
- Automated super payments*
- Cost centre allocation and breakdown
- Access to prior year information
- Cost centre allocation and breakdown

PLUS

All Essential features, PLUS:

- Time and attendance
- Rostering
- Mobile app
- Awards library and interpretation
- Mobile app for timesheets, rostering and expense claims



**Have a question? Get in touch
with The PEG today**



GET IN TOUCH TODAY

Wiise helps you see your business clearly so you can focus on what counts. Get Wiise and connect your people, processes, and data like never before.

Chat with us

Email: info@thepeg.com.au or call +61 3 8548 1830



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