Coyote Valley Band of Pomo Indians

Consulting Services: Financial Edge NXT

THE CUSTOMER

The Coyote Valley Band of Pomo Indians is a federally recognized Tribe located in the heart of Mendocino County in Redwood Valley, California. After more than 140 years of displacement, the band regained their status as a recognized tribal group in 1976.

Following the recognition, the Coyote Valley Tribal Council was organized for the purpose of regaining their land base and to promote the economic and social welfare of its members. Today, the Band's services have grown to include: Health & Human Services, Environmental Protection, Education, Housing, Tribal Police, and Administration & Finance.

THEIR CHALLENGE

The Band had been utilizing Financial Edge 7 since 2018, but their balance sheet never fully balanced. With the goal of resolving their balancing issue and upgrading their system to Financial Edge NXT, the Band hired NPact to migrate its data and implement them on the cloud-based solution.

Once FE NXT was ready for use, the project also included creating templates to allow for EFT debits, setting up custom reports to share with the Tribal Council and its members, as well as preparing them for their upcoming annual audit by The Office of Management and Budget (OMB).

OUR RESULTS

The NPact consultant listened to the Band's challenges and undertook addressing their list of needs. By cleaning up inactive projects, correctly categorizing funds by departments and projects, and adding a segment to track information under project numbers, each project now successfully balances. The consultant also set up the EFT module and trained the team on how to import payroll and journal entries, as well as add debit cards for over 250 vendors they pay multiple times per month.

The consultant also set up customized reports to streamline other processes for the organization. The project was completed on time. Not only was the Band now able to utilize their upgraded system, but they were well prepared for their annual audit. With the success of the initial project with NPact Consulting, they extended their contract to 12 months to continue to partner with their consultant to optimize FE NXT.

CUSTOMER VIEW

RACHEL WHETSTONE

Chief Financial Officer,
Coyote Valley Band of Pomo Indians

BEFORE

"We needed to do an upgrade on our FE 7 software to be hosted on the cloud. It was set up in 2018, and everything was in there, but the balance sheet wasn't balancing. We needed that to happen to streamline our annual audit with The Office of Management and Budget (OMB), which manages accounting regulations for Federal funding."

AFTER

"Before working with NPact, we barely scratched the surface of FE's features. Now our accounting team uses its full capabilities and we feel comfortable in the system. Our tech skills have improved and it has definitely saved us time. People don't know how easy using Financial Edge can be when you are well trained."

Interested in working with NPact?
Our deeply experienced team of professional consultants will provide you with powerful tools and know-how to drive philanthropy in your community. There is no project too big or too small, and work can be performed on-site or remotely. Start the conversation today by visiting www.npact.com/consulting.