



## Jewish Community Center of San Francisco Handles the Holidays with Accounting Seed

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In this case study, we feature the Jewish Community Center of San Francisco (JCCSF), the oldest Jewish center on the West Coast, providing educational, social, cultural, and fitness programs to the community since 1877. Open to all, JCCSF programs and services include a 45,000 square-foot fitness center, three outstanding preschools, and more. We speak with Marina Peterson, Director of Accounting and Administration, about her experience with Accounting Seed and how the platform has benefitted the organization in more ways than one.



## WHY READ:

- Learn how Accounting Seed allows nonprofit organizations to thrive even in the busiest time of the year.
- Gain insight into how the Jewish Community Center of San Francisco streamlines its accounts payable process by utilizing a continuous accounting model.
- Learn how a nonprofit organization can become more efficient with their financial data and accounting cycle by choosing Accounting Seed.

The busiest time of the year for any nonprofit organization is without a doubt the holiday season. Donations are flowing in from all over the world. Annual reviews, financial reports, and budget projections are the talk of the office for a month straight. Holiday events and virtual gatherings are happening every night of the week. And finally, we mustn't forget about finding that perfect gift and holiday card to send to all of our friends and family! It all adds up and can contribute to a heavy load of holiday blues.

It's often around the holidays that many organizations realize they need to change their accounting system or that they need help with their back-office. That's why it's important this holiday season to [give the gift of better accounting!](#)

## EARLY SALESFORCE ADOPTERS

Stress from the holiday season is nothing new to the Jewish Community Center of San Francisco (JCCSF.) The JCCSF was an early adopter of the [Salesforce Nonprofit Success Package \(NPSP.\)](#) In fact, they've been using Salesforce for the last six years. By January, they will be 100% on Salesforce for all member and participant transactions. With the addition of Accounting Seed earlier this year, they're well on their way to completing their goal.

"It's exciting. We're still growing. There have been a lot of changes. We're moving a lot of our legacy systems to cloud-based systems," says Marina Peterson, CMA, Director of Accounting and Administration at JCCSF.

With all of the changes, Marina soon realized they needed to move their accounting operations onto Salesforce, "Our accounting software was sitting on an old server-based platform on-prem, and it was coming near the end of its life," Marina says.

The search for a new accounting system on Salesforce wasn't hard, as Marina knew of Accounting Seed's platform, "I had been watching Accounting Seed for years. I really made the push for our accounting team to break out of their comfort zone and move the accounting operations onto Salesforce, so we can actually meet our accounting records with our source data, which is in Salesforce," Marina goes on to say.

## SINGLE SOURCE OF TRUTH WITH PRECISE FEATURES

The JCCSF decided to go with Accounting Seed because of our precise, real-time reporting features and the simplicity of the platform. Accounting Seed, with the [power of Salesforce](#), has given the JCCSF one single source of truth by providing them with their accounting data and their qualitative data in one location.

For example, the reporting functionality allows them to run financial reporting on the same dashboard as their qualitative data. "We're building dashboards that have our financial information right against our registration records, our new sales, and our membership levels. You can have Accounting Seed there and the data that backs up all your records in one place for people to see," Marina says.





## CONTINUOUS ACCOUNTING MODELS CLEANS UP MONTH-END PROCESSES

Secondly, Accounting Seed allows the accounting team at the JCCSF to interact with their data more often. Marina believes that by utilizing a continuous accounting model and actually interacting with the data more often, the data is more accurate and actionable.

“By putting Accounting Seed into Salesforce, along with where all of our data and transactions live, we can work towards having more real-time analysis and accurate, forward-looking predictions. From cash-flow predictions to enrollments, and registrations. It also streamlined our month-end process for reconciling data and turned that into a continuous accounting model,” Marina adds.

## ACCOUNTING SEED STREAMLINES ACCOUNTS PAYABLE PROCESS

This year has been especially difficult for many nonprofit organizations. Unfortunately, some had to close or pause their work. The JCCSF was impacted heavily by the pandemic this year. They had to close their fitness center for an extended period of time forcing them to make changes to their accounts payable process.

“We were closed for six months. So we had to change our whole accounting policy around payables, which was predominantly paper-based,” Marina states. Their antiquated accounts payable process involved sending paper invoices around with signatures and other forms. But, thanks to Accounting Seed’s connected accounts payable features, the JCCSF was able to adopt a new, streamlined process that is proving to be quite efficient.

“By having Accounting Seed on Salesforce we are able to leverage approval processes and routing,” Marina says.

The JCCSF also implemented AP Smart so that they can send their invoices to an OCR reader and have those records created in Salesforce. “We took our whole AP process and changed it. So, we have the record start in Accounting Seed right off the bat, and people can collaborate on the same record, and add their information, and then do their approvals which leaves a nice audit trail,” Marina adds.

## ACCOUNTING SEED HELPS JCCSF IMPROVE EFFICIENCY

Many hopeful Accounting Seed customers are shocked when they find out how much time our platform can truly save their team. The JCCSF is no exception. They immediately noticed the efficiency, “Each month, as we open a new accounting period, we’re seeing improvements in our processes. After just four months, our accounting process has improved by 50-60%,” says Marina.

In fact, this year, Marina was able to give Salesforce access to their auditors to save precious time during their audits with moving files back and forth.

“This is my goal for our Accounting Department. Within one fiscal year, I’m projecting that we save 80% of the daily repetitive task time and get those processes cleaned up. The data entry, the data modeling, and the procedures are all streamlined now so that we can save time with our core accounting,” she says.

## ACCOUNTING SEED IS PART OF THE NPSP

As the new year approaches, there is still one trend that continues projecting upwards: Investing in cloud-based accounting technology.

If your nonprofit organization is looking for a solution to help balance the load of holiday stress and the pandemic, look no further than Accounting Seed. Our platform is part of the [Nonprofit Success Pack from Salesforce](#) because, as you can see, it really does wonders for these nonprofit organizations.

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- Marina Peterson, CMA, Director of Accounting and Administration at JCCSF



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