

# Large Foundation

30-50% less prep work, less tedious work, more reliable data

“C-TRAC is very user friendly, easily navigable. Support is great. We get quick answers. This is a solid solution for nonprofit. The team is great. Rollover to the new tax year is quick, often within the day. All we do is hit refresh on our browser and the new tax year information can be entered. It’s not just pretty good. It’s better than pretty good.”

**30-50%**

Less prep work

**MORE**

Reliable data



## Challenge

**Manual editing** of 990-PF returns

Using an enterprise solution but **difficult getting signatures**

**Forced to use Adobe editor** to make returns look right



## Research

Network referrals and **recommendations led to C-TRAC**

My management team was **open to innovation**



## Outcomes

### Time-savings

Since using C-TRAC, **prep work has been cut by 33% to 50% if not more**

Ability to **upload information** helped **streamline 990 processing**

Exploring accounting systems integration with C-TRAC

### Accuracy/reliability

“Before C-TRAC I used to have to update and double-check my information in multiple places to make sure the math came out right on my forms. Now I **make the entry once and it applies everywhere**. I know **my statement front page will agree with the supporting schedule information.**”

### Quality of life

**Less mind-numbing, less tedious work**

Goal is to spend **less time receiving information**