



# Demystifying Artificial Intelligence for Nonprofits

presented by

**sylogist**<sup>™</sup>  
mission

and

 **Nonprofit Tech for Good**





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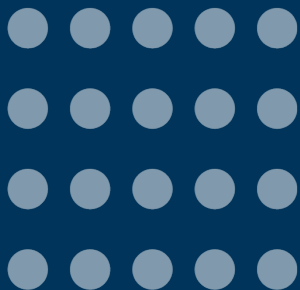
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# Agenda

-  Attitudes towards AI
-  Solve pressing issues
-  Practical AI applications
-  Choosing the right tools



## Attitudes towards AI



# 75%

of workers are using AI\*

AI helps...

90% Save time

85% Focus on most important work

84% Be more creative

83% Enjoy their work more

79% of leaders say AI is necessary to stay competitive

59% worry about quantifying the value of AI tools

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\*Source: 2024 Work Trend Index Report from Microsoft & LinkedIn



**68%** Struggle with the pace and volume of work

**46%** feel burned out\*

**53%** worry that using AI on important work makes them look replaceable

**BUT**

**66%** of leaders say they wouldn't hire someone without AI skills

Internal

External



**Complex financial systems**



**Lack of standardized reporting**



**Limited resources**



**Poor communication**



**Complex revenue streams**



**Lack of financial expertise**



**Fragmented data systems**



**Fear of misinterpretation**

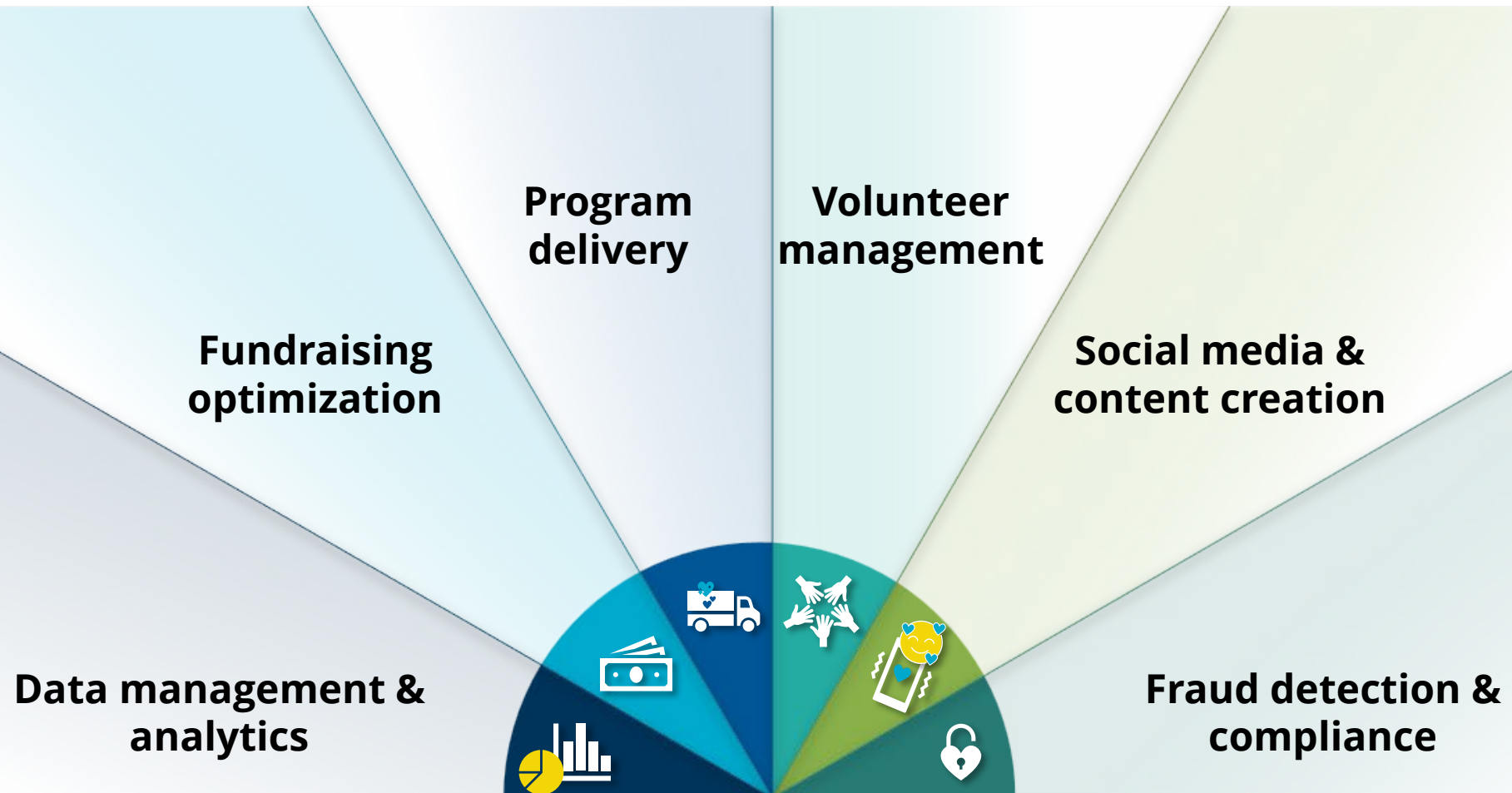


**Confidentiality concerns**



**Limited donor education**

# Why do you even need AI tools?





How can AI help nonprofits?

### **AI for ERP accounting**

- Automated Data Entry & Reconciliation
- Predictive Cash Flow Analysis
- Grant and Award Tracking

### **AI for CRM fundraising & donor management**

- Donor Segmentation & Targeting
- Predictive Donor Engagement
- Fundraising Forecasting

### **AI for reporting and analytics**

- Automated reporting
- Advanced analytics
- Impact analysis

### **AI for business process automation**

- Process automation
- AI created custom workflows

Practical AI applications





# Narrowing down the list

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# About SylogistMission



**sylogist**<sup>™</sup>  
mission | **CRM**

**sylogist**<sup>™</sup>  
mission | **ERP**





**Copilot**

**What can AI powered Copilot help me with today?**



# Sample AI Uses



General Ledger Entries | | | | Analysis 1 | **Analyze g/l account** | +

G/L Account No.	Description	Sum(Amount (\$))	2 ↑ Posti...
> 61500 (4)		101,000.00	
> 60700 (15)		15,000.00	
▼ 60100 (15)		15,000.00	
3/1/2022	March 2022	1,000.00	February
2/1/2022	February 2022	1,000.00	January
1/1/2022	January 2022	1,000.00	December
12/1/2021	December 2021	1,000.00	November
11/1/2021	November 2021	1,000.00	October
10/1/2021	October 2021	1,000.00	September
9/1/2021	September 2021	1,000.00	August
8/1/2021	August 2021	1,000.00	July
7/1/2021	July 2021	1,000.00	June
6/1/2021	June 2021	1,000.00	May
5/1/2021	May 2021	1,000.00	April
4/1/2021	April 2021	1,000.00	March
3/1/2021	March 2021	1,000.00	February
2/1/2021	February 2021	1,000.00	January
1/1/2021	January 2021	1,000.00	December
60100		15,000.00	

**Context Menu:**  
Create new analysis  
Show in page

**Right Panel:**  
Pivot Mode:   
Search:   
Analysis Filters:  
 Posting Date  
 Posting Date Year  
 Posting Date Quarter  
 Document Type  
 Description  
 Document No.  
 G/L Account No.  
 Amount (\$)  
 Department Code  
 Customergroup Code  
 Gen. Posting Type  
 Gen. Bus. Posting Gro...  
 Gen. Prod. Posting Gr...  
 Posting Date Month  
 Source Currency Code  
Row Groups:  
G/L Account No.   
Values:  
Sum(Amount (\$))   
Sum(Source Curren...

## Bank Account Reconciliations

Search  Analyse  + New Manage  Reconcile with Copilot  Post

Bank Account No. ↑	Bank Account Name	Statement No. ↑	Statement Date
<u>CHECKING</u>	World Wide Bank	24	21/03/2023

sylogist<sup>™</sup> mission | ERP



Copilot G/L Account Transfer Proposals Preview AI-generated content may be incorrect Terms of use Learn more

Auto-matched ..... 2 of 14 lines (14.3%) Statement Ending Bala... 0.00

Copilot matched ..... 2 of 14 lines (14.3%) Post if fully applied

28.6% of lines are matched. Review match proposals.

Match proposals Delete Line

Transaction Date	Description	Amount to Apply	Proposal
→ <u>7/14/2023</u>	Bank charges JULY	-15.00	Post payment to account 67100 (B... Save...
<u>7/15/2023</u>	Fuel Stop U54	-45.00	Post payment to account 62110 (P... Save...

Keep it



Sylogist Mission Financial Reporting (3) • Last saved: 10/31/2023 at 8:40 AM

Richard Richards

File Home Insert Modeling View Optimize Help

Clipboard: Paste, Copy, Format painter

Data: Get data, Excel workbook, OneLake data hub, SQL Server, Enter data, Dataverse Recent sources

Queries: Transform data, Refresh data

Insert: New visual, Text box, More visuals

Calculations: New measure, Quick measure

Sensitivity, Share, Copilot

Share

Auto recovery contains some recovered files that haven't been opened. View recovered files

for Fiscal Year 2023

### Budget to Actuals

Fiscal Year	2023			
Account Category	Budget	Actual	Budget Remaining	Budget Remaining %
<b>Income</b>	<b>36,458,738.00</b>	<b>\$20,378,261.32</b>	<b>16,080,476.68</b>	<b>44.11</b>
<b>Expense</b>	<b>36,458,738.00</b>	<b>\$20,688,946.21</b>	<b>15,769,791.79</b>	<b>43.25</b>
Salaries Expense	3,192,484.00	\$1,681,845.47	1,510,638.53	47.32
Payroll Expense	35,194.00	\$7,988.17	27,205.83	77.30
Grant Expense	32,817,503.00	\$18,158,292.06	14,659,210.94	44.67
General and Admin. Expense	471,904.00	\$256,968.55	214,935.45	45.55
Fundraising Expense	617,718.00	\$234,428.85	383,289.15	62.05
Benefits Expense	588,703.00	\$323,167.78	265,535.22	45.11
	-1,264,768.00	\$26,255.33	-1,291,023.33	102.08
<b>Total</b>	<b>72,917,476.00</b>	<b>\$41,067,207.53</b>	<b>31,850,268.47</b>	<b>43.68</b>

### Expense Budget to Actuals by Global Dim 1

Fiscal Year	2023			
Fund Type	Current Year Actuals	Prior Year Actuals	Var%	
<b>Fundraising Funds</b>	<b>477,653.59</b>	<b>776,982.25</b>	<b>38.52%</b>	
<b>Fundraising Fund</b>	<b>477,653.59</b>	<b>776,982.25</b>	<b>38.52%</b>	
Benefits Expense	30,531.50	25,524.22	-19.62%	
Fundraising Expense	234,425.70	382,039.83	38.64%	
General and Admin. Expense	22,631.55	31,403.33	27.93%	
Payroll Expense		3,429.72	100.00%	
Salaries Expense	190,064.84	234,757.05	19.04%	
<b>Overhead Budget Center Funds</b>	<b>951,414.91</b>	<b>2,030,109.31</b>	<b>53.13%</b>	
<b>Program Funds</b>	<b>19,259,877.71</b>	<b>31,647,045.11</b>	<b>39.14%</b>	
<b>Total</b>	<b>20,688,946.21</b>	<b>34,454,136.68</b>	<b>39.95%</b>	

### Top 10 Revenue Ratio by Global Dim 2

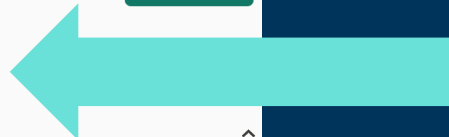
Expense Budget to Actuals by Global Dim 1

Visualizations: Build visual, Filters, Values, Drill through, Cross-report, Keep all filters, Add drill-through fields here

Data: Search, GLDatesTable, SYZ\_ChartofAccount, SYZ\_DimensionValueList, SYZ\_FundClasses, SYZ\_Funds, SYZ\_FundTypes, SYZ\_GeneralLedgerEnt..., SYZ\_glDimension

Financial Activity | Rev Exp Report Summary | Balance Sheet Report | Revenue Drill Through | Rev Exp Acco +

Page 1 of 6 | 66%



- Microsoft Business Central Release Plans: [Microsoft Dynamics 365 - Release Plans](#)

Copilot and AI innovation		
Complete bank account reconciliation faster with Copilot		General Availability Oct 2024
Create product information faster with Copilot		Public Preview Oct 2024
Create sales lines easily with Copilot	UPDATED	Public Preview Oct 2024
Experience enhancements to analysis assist with Copilot	UPDATED	Public Preview Oct 2024
Start using Copilot without having to set things up		General Availability Oct 2024
Suggest number series with Copilot	UPDATED	Public Preview Oct 2024
Automate tests for your Copilot extensions with the Business Central Test Toolkit	UPDATED	Public Preview Dec 2024
Start creating Power Automate flows with Copilot	UPDATED	Public Preview Dec 2024





## What's next?

Read more:

**Demystifying Artificial Intelligence for Nonprofits:**

***Why you should care about artificial intelligence for your nonprofit right now, not later***

<https://sylogist.com/blog/demystifying-artificial-intelligence-for-nonprofits/>

**Schedule a demo**

<https://calendly.com/madelyn-ellis>



# Questions?

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