

# Transition to Weel: one of our top choices for expense management



## ► Why do we recommend Weel for non-profits?

With over a decade supporting non-profit clients in their expense management processes, we've seen numerous tech solutions implemented (with varying levels of success!).

One of our top choices for NFPs now is Weel.

As an official Weel Partner, we've helped a range of clients see the benefits of this system, so we're well qualified to help you achieve a successful transition.

## ► Which non-profits are better suited to Weel's 'Starter Package'?

In our view, Weel's Starter Package is most beneficial for organisations that:

- Have less than 15 users / cardholders
- Need a better way of managing debit cards
- Want to avoid lost time dealing with the bank
- Want to reduce the practice of card sharing amongst individuals
- Want more transparency





## ► Benefits of Weel

- **Weel keeps the wheels of an organisation turning!** It automates finance document processing and expense management, making transacting easier.
- **Virtual debit cards** – this is a big-ticket benefit, saving loads of time dealing with banks in the sign-up process for debit cards. Virtual cards also enable more efficient (and controlled) access to funds, to meet project & operating costs (including the ability to set budgets by expense & project type).
- **Weel allows users to upload receipts** – it then extracts the relevant data and pushes it into your accounting system. This increased automation enables:
  - Reduced manual data entry, giving you greater data accuracy
  - Increased efficiencies in the end to end expense management process, leading to productivity savings for your Finance team
- **Stronger compliance outcomes** for your non-profit, through:
  - Automating record keeping & controls (in line with your delegations), making staff more accountable for expenditure
  - The highest levels of transparency, with invoice attachments for all transactions in your accounting system (auditors love this!)
- **Weel supports scalability as organisations grow**, adapting to increasing financial complexity (without more admin overhead).

## ► The implementation process

Purpose will manage your move to Weel, from start to finish. Working closely with your Finance Team, we carry out these steps:

- ✓ **We meet with your team** to understand your organisational context prior to commencing
- ✓ **We collaborate with your Finance Manager and wider team**, to understand processes, and gain access to current systems
- ✓ **We help you design the optimal workflow**, in consultation with key staff.
- ✓ **If needed, we guide you on updating your Delegation of Authority**, including providing greater granularity to sync with Weel's structure
- ✓ **We manage the transition to Weel, while ensuring your operations run without a hitch.** One of the main reasons organisations are hesitant to change is their concern around impacts on daily operations. We have tried and tested methods to help you move without interrupting your day-to-day.
- ✓ **We carry out these technical steps:**
  - Work with you to manage the Weel implementation end to end (and integrate with your accounting system)
  - We don't just 'plug and play'. We make sure that system settings are optimised and all integrations are working
- ✓ **We train your staff.** We won't just leave you to it once Weel is in place. Our transitions include initial user / management training, to ensure familiarity and confidence with Weel. ***New systems are only as good as the humans that use them*** – user training is key to successful rollouts.





## ► The implementation process: your investment

	Starter 'Essentials'	Starter 'Plus'
• Documented workflow	✓	✓
• System setup and integration with Xero	✓	✓
• Initial training videos and materials for users, to ensure familiarity with the system (up to a maximum of 2 hours)	✓	✓
• Setup of users (1-9)	✓	✓
• Basic budgets	✓	✓
• Setup of users (10 or more)		✓
• Advanced budgets		✓
• Guidance on updating your Delegation of Authority		✓
• Advanced training for admin staff (up to 1hr)		✓
	\$1,400	\$2,000

## ► Additional projects

Please note our project scope does not include the following elements. However, these can be provided as additional 'do and charge' services on request:

- Drafting or updating expense policies;
- Uploading historical data;
- Ongoing card administration after go-live (issuing, cancelling, limit changes); and
- Use of Weel for accounts payable automated payments



## ▶ Monthly subscription fees: your investment

Once you've implemented the system, you'll pay Weel directly for your monthly subscription fees.

We find the **'Starter Package'** is the most accessible, cost-effective subscription tier for NFPs with up to 15 users / cardholders.

If you find, over time, that you need more features, Weel offers higher-priced tiers (including 'Basic' and 'Premium'). However, for organisations focussed on the virtual debit card solution we suggest the **Starter Package**.



## ▶ Weel Starter Package: monthly pricing & inclusions

# Weel Starter Package



FROM

# \$39

2 users / month

- \$15 / mo for additional users
- Scales with their team
- 50 expense records included monthly (\$0.75 each after)
- No lock-in contract



### Card Issuing

Digital cards issued instantly



### Budget & Limits

Spend controls per card / team



### Receipt Capture

Complete expense reports via mobile app



### Receipt Reminders

Automated nudges - nothing goes missing



### AI Auto-coding

Auto-extract GST. Auto-categorise. Done.



### Xero, QB, MYOB

Native integrations + COA mapping



### 3 Subscription Cards

Track recurring spend from day 1



### 50 Expense Records

Included monthly - \$0.75 per record after



### Custom Fields NFP

Allocate expenses to tracking categories



### Basic Approval Rules NFP

Review transactions in Weel before syncing to Xero

