

# EUNAVERSE

## Bridging the Gap: Integrating ERP Expense Actuals into Euna Grants

G119C



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09.10.2025

**01. Unlocking Value through Integrating**

**02. How to Make it Happen**

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# What value has the expense integration delivered for Absentee?

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# Unlocking value through integrating

What we hear from our customers



## Transparency

- Clear and consistent reporting
- Access across teams



## Accountability

- Maximize spend down
- Improve compliance
- Expand ownership

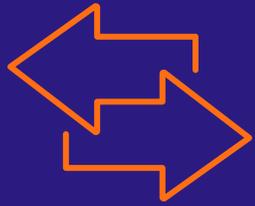


## Efficiency

- Real-time visibility
- Streamlined funder reporting
- Reduced reliance on personalized excel files

# How to Make it Happen

## Critical Elements



Connection Options



Chart of Accounts



Grant Identification



Budget Mapping

# Grant Seeker Expense Integration – Source Data Access

## API

When available, leverage an existing API from your financial system solution provider

AmpliFund **requests** the data for each import batch, using parameters defined during discovery (e.g., Posted Date)

## Flat File Transfer via SFTP

Alternatively, leverage a Flat File generated from the financial system via scheduled export or report

- AmpliFund **receives** a file containing the transactions to be processed for each batch

# Grant Seeker Expense Integration – Product Configuration

## Understanding your chart of accounts – Grant Financial Code

For a given Journal entry (expense record) what element(s) in your chart of accounts indicate which *Grant* the expense is associated with?

Segment_0	Segment_1	Segment_2	Segment_3	Segment_4	Segment_5				
Program Code	Fund Code	Grant Code	Year/Location Code	GL Code	Dept/Employee # Code	Date_Posted	Amount	Date_Transaction	D
9999	60	6033	19	100	999	9/13/2019	1,600.00	8/27/2019	e
9999	60	6033	19	100	999	9/27/2019	1,585.00	9/10/2019	0

Grant Settings	
Budget Reporting Period	None
Performance Reporting Period	None
HR Actual Entry Method	Manual or Import
GL Actual Entry Method	Manual or Import
Add Expenses To Payment Requests By	Date Range
Financial Code	603319

In the example above, Segment\_2 and Segment\_3 are combined to create the Grant Financial Code, the unique identifying element for the **Grant** stored in AmpliFund.

# Grant Seeker Expense Integration – Product Configuration

## Understanding your chart of accounts – GL Accounts

For a given Journal entry (expense record) what element(s) in your chart of accounts indicate which *Budget Item (cost category)* the expense is associated with?

Segment_0	Segment_1	Segment_2	Segment_3	Segment_4	Segment_5				
Program Code	Fund Code	Grant Code	Year/Location Code	GL Code	Dept/Employee # Code	Date_Posted	Amount	Date_Transaction	D
9999	60	6033	19	5100	999	9/13/2019	1,600.00	8/27/2019	e
9999	60	6033	19	5100	999	9/27/2019	1,585.00	9/10/2019	0

Direct Cost: \$ 10,000.00

Cash Match Amount: 0.00 %

In Kind Match Amount: 0.00 %

GL Account: Supplies - 5100 - 999

Allocate:  Equipment - 5131 - 999

Other - 5130 - 999

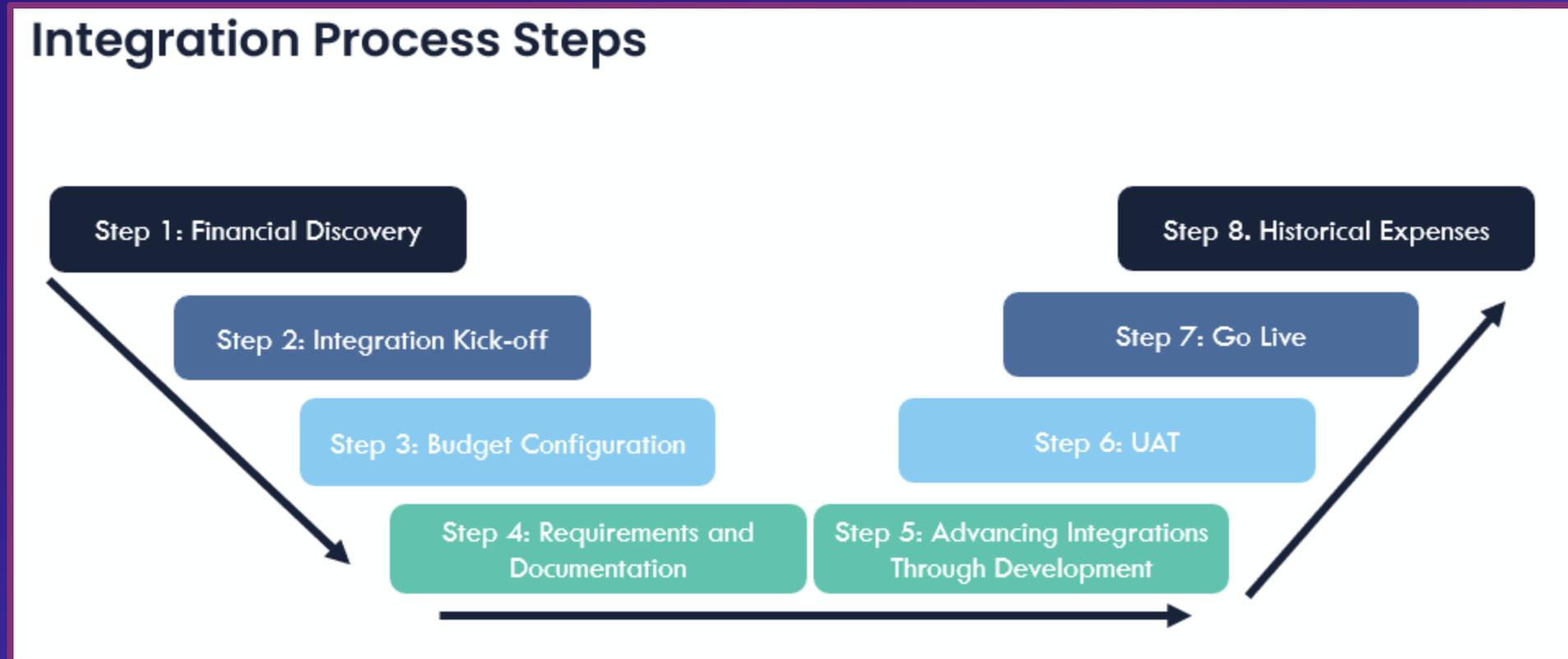
Grant Year:  Supplies - 5100 - 999

1 2023 \$ 10,000.00

In the example above, Segment\_4 and Segment\_5 are combined to create the GL-Account, the identifying element for the **Grant Budget Item** in AmpliFund

# How to Make it Happen

## The Set-Up



# How to Make it Happen

The Maintenance



Reconciliation

Timing



Encumbrances

# How did Absentee gain buy-in to integrate?

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# Gaining Buy-In

Getting Support from Finance, IT and Executive Teams

- Combatting bias towards existing systems
- Balancing competing priorities
- Addressing security concerns
- Collaborating with ERP

**What advice would you share  
with others just starting to  
integrate or considering an  
integration?**

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# Lessons Learned

## Achieving Success

- Alignment on Effort
- Expertise in Data
- Prioritizing and keeping up while grants keep moving
- Training

# Emerging Use Cases

Where else can we integrate?



## Grant Maker Payment

Moves Approved Sub-Recipient payment request data from GMS to ERP and brings payment details back into GMS.



## Grant Data

Automate creation of grant records



## Other Financials

Bring in Chart of Accounts, Encumbrances, Payment Details or Budget Line Items.

# Q&A

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**Thank you!**

Let's reach for the stars!

