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Strengthening MIP Financial Reports: Crafting Internal and Audit Reports (3D)

Dagi Stanton

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THE EXPERTS IN
MISSION-DRIVEN
NONPROFIT FINANCE

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Housekeeping

- This session qualifies for 1 CPE credit.
- Please make sure you sign in on the sheet.
- You must complete the survey through the QR code at the end in order to receive your CPE certification.
- The survey can be completed using your mobile device. Optional paper surveys are available and must be turned in at the registration desk.
- Please silence your mobile device during the presentation.

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Introduction

Dagi Stanton

Manager, Education Services

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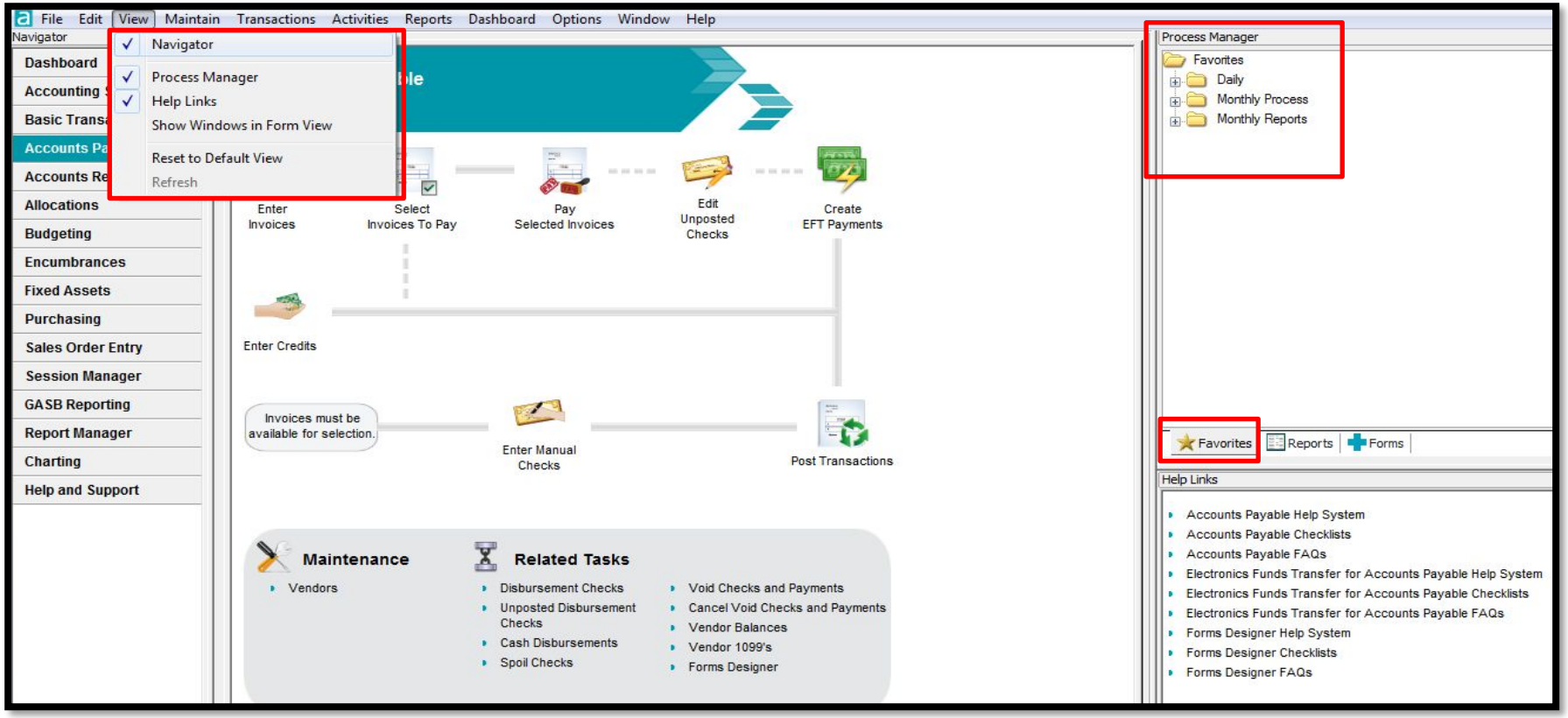
Classic View

Navigator

Process Manager & Favorites



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Financial Statement Report name & Statement Formats

There Are Two Parts to Every Financial Report

- Financial Statement report name which are the columns of the report
- Financial Statement Formats which are the rows of the report
- The Different Combinations Will Yield Different Reports.

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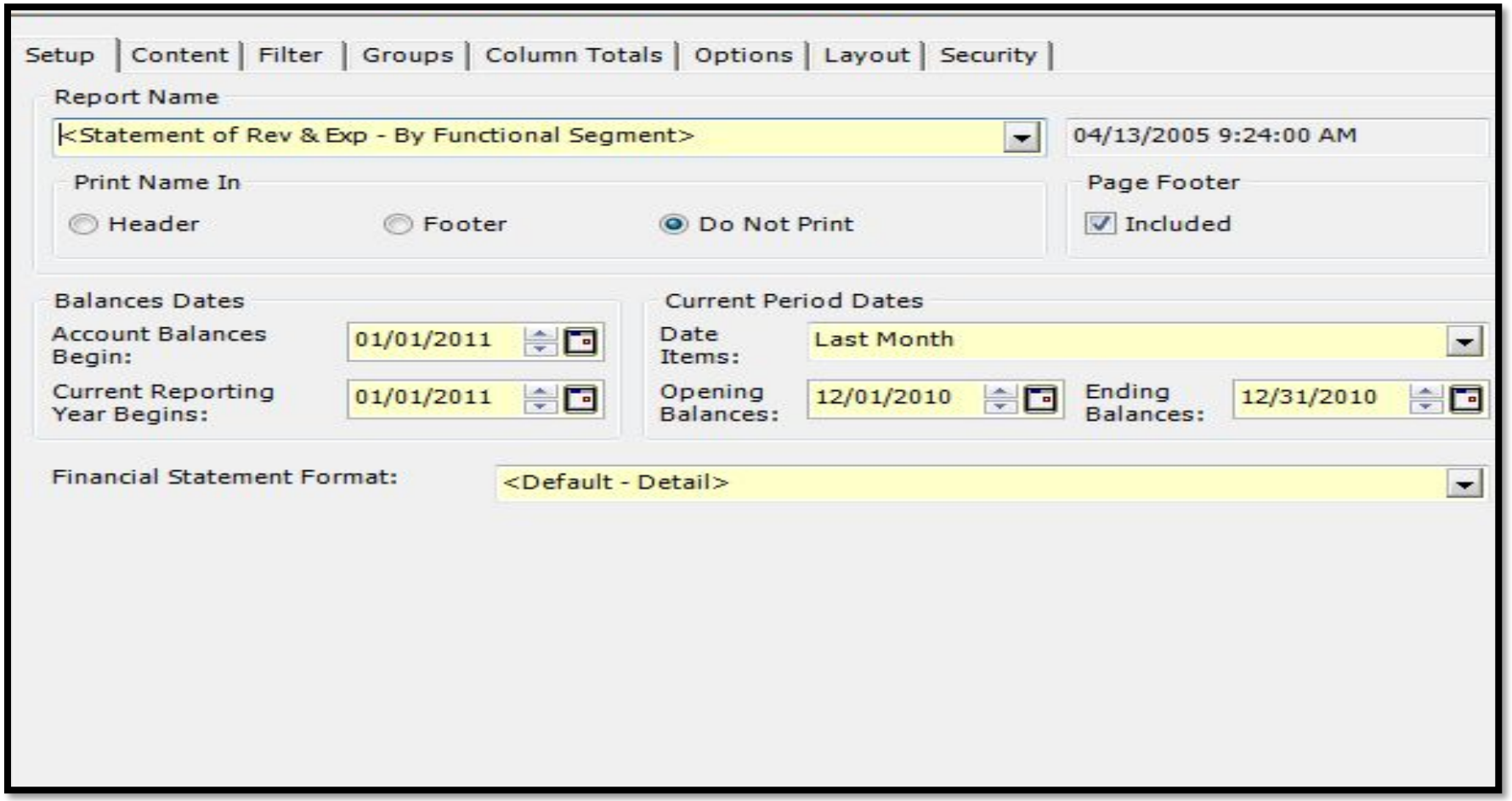
Financial Statement

Report Name –the Columns, Dates, Filter Criteria



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MIP Statement Formats

- Statement Formats are the rows of any report
  - Statement Format Types
    - S/P (Statement of Financial Position)
    - S/A (Statement of Activities)
    - B/S (Balance Sheet)
    - R/E (Statement of Revenues and Expenditures)
    - C/F (Statement of Cash Flows)

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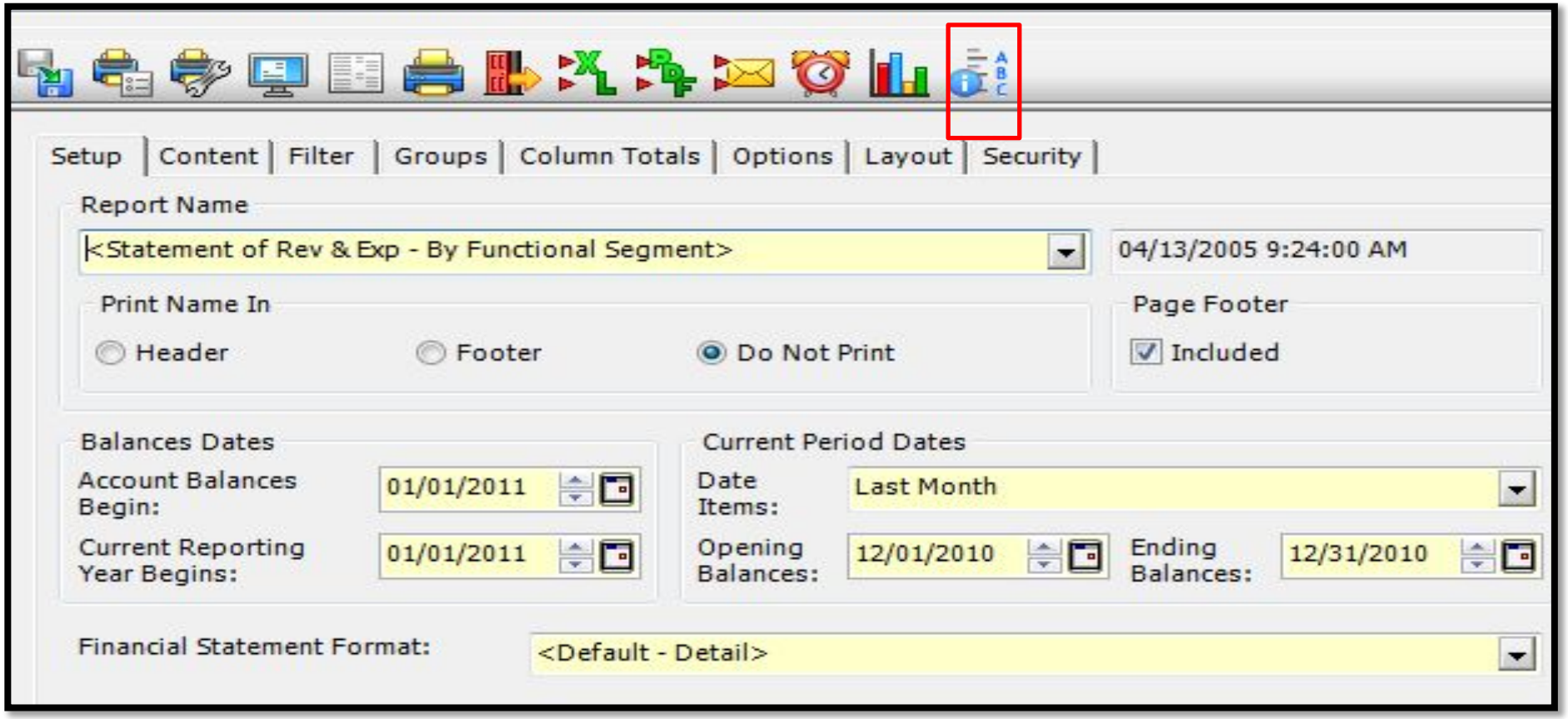
Financial Statement Formats

- **How to access financial statement formats**
  - **From reports manager menu**
  - **From within the financial report**



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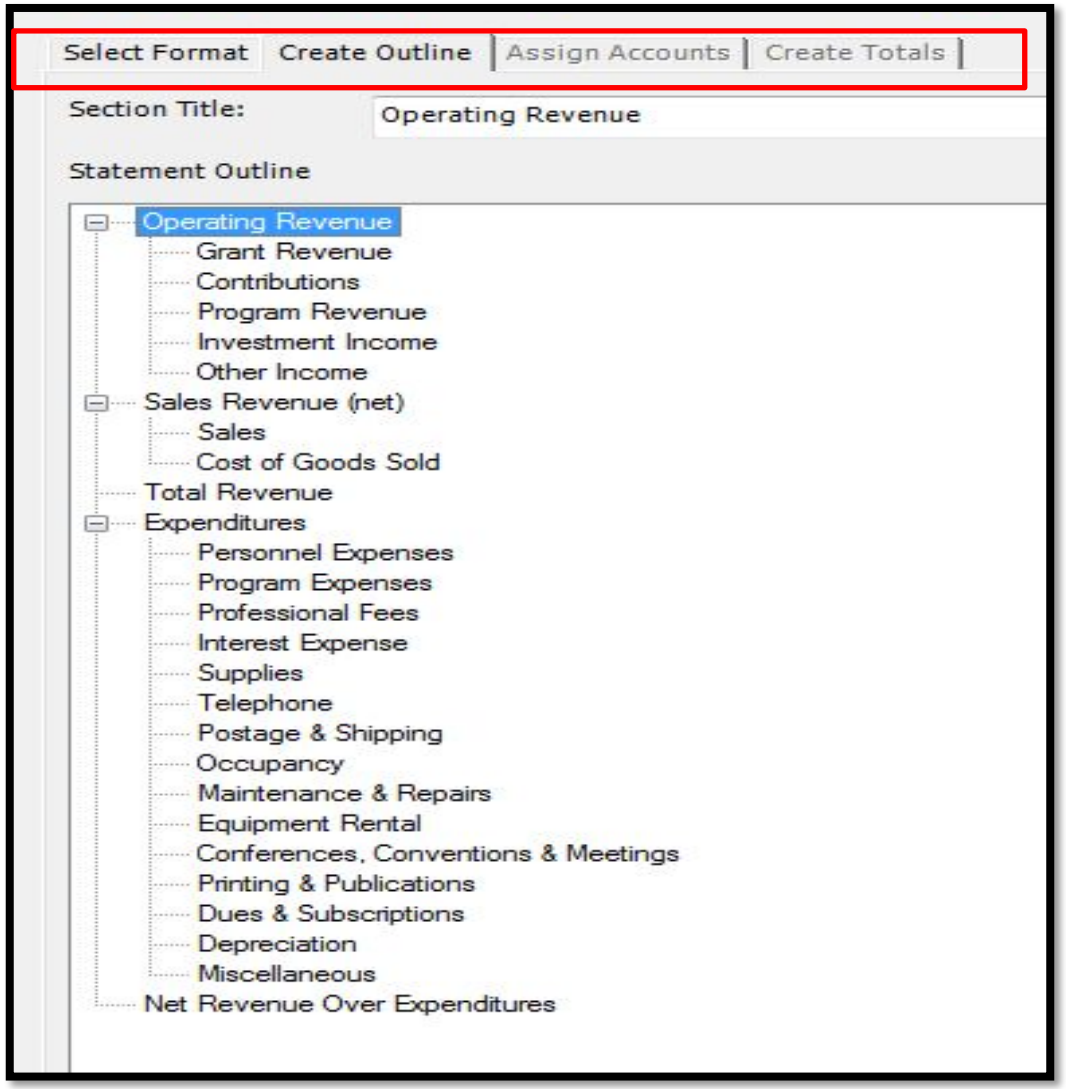

- Statement Format Tabs
- Four Tabs
  - Select Format
  - Create Outline
  - Assign Accounts
  - Create Totals

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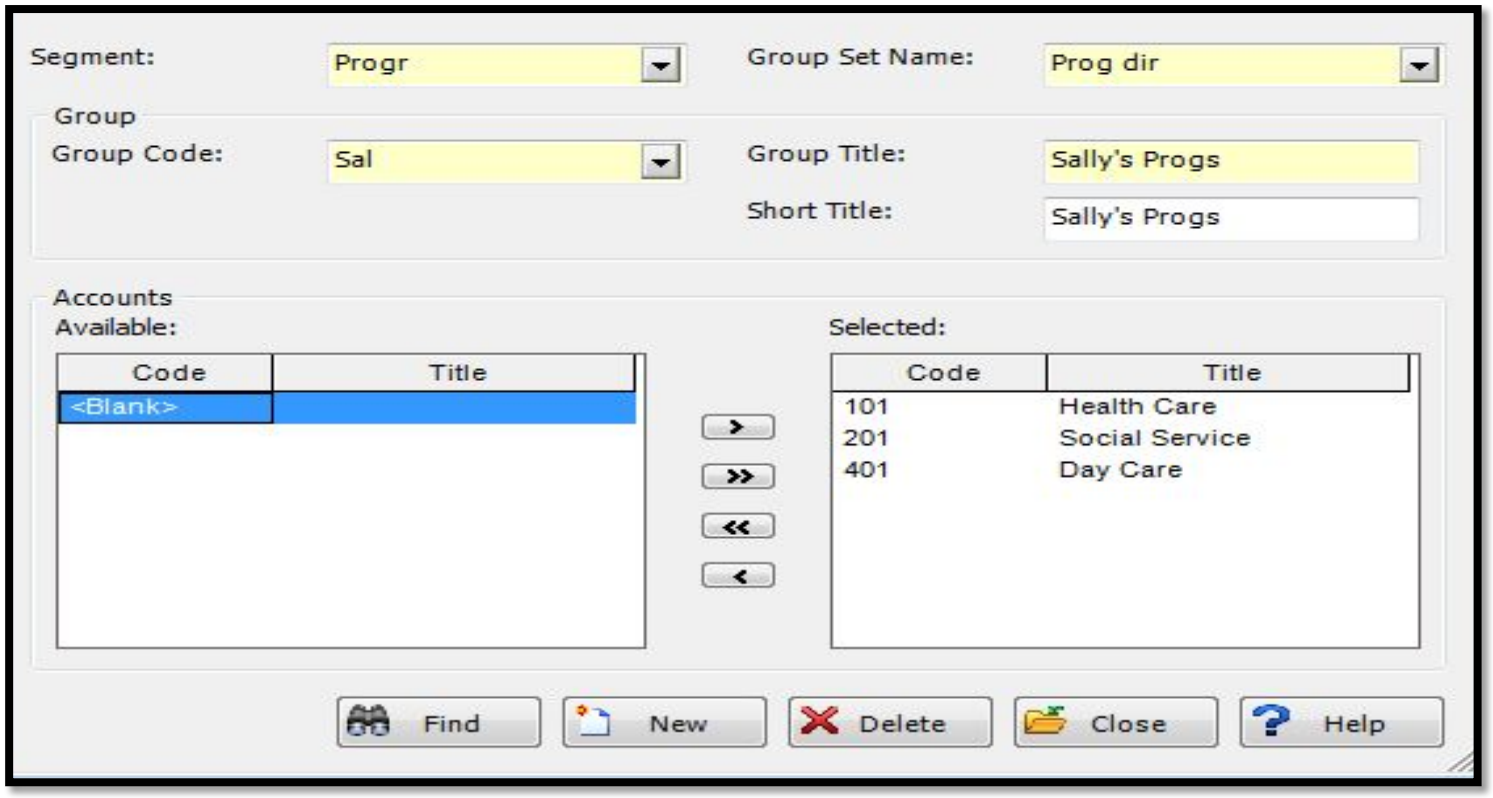
Report Groups



- **Report Groups**
  - **Segment**- Select the Segment you want to group
  - **Group Set Name** – Assign a name to the group
    - Group Code
    - Group Title

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Let’s create some reports in MIP….

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Session Name: Strengthening MIP Financial Reports: Crafting Internal and Audit Reports (3D)

CPE Credit QR Code

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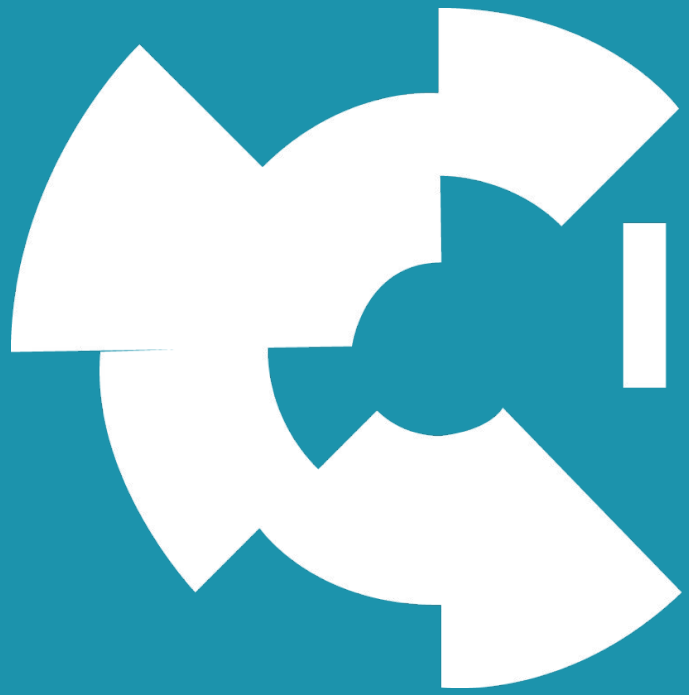

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