

Certified Public Accountants
Business & Financial Advisors

A blue brushstroke graphic that starts from the left and points upwards and to the right, ending above the 'i' in 'Insero'.

Insero & Co

The Sage Intacct logo is centered on a horizontal band with a background of white clouds against a blue sky. The word 'sage' is in a bright green, lowercase, sans-serif font. 'Intacct' is in a grey, uppercase, sans-serif font with a thin horizontal line underneath. Below this, the text 'Authorized IAP Partner' is written in a smaller, grey, sans-serif font.

sage Intacct
Authorized IAP Partner

Sage Intacct

Presented by Emily Hill, CPA



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Housekeeping

- ↗ This session is being recorded.
- ↗ Slides and recording will be sent to you after the session concludes.
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You are viewing Success Onboardin... 's screen View Options

Zoom Video Conferencing was Named a 2018 Gartner Peer Insights Customer's Choice for Meeting Solutions

Enter your work email

Gartner Zoom received a 4.69 out of 5 overall customer rating

[Read the Report](#)

Audio Settings Chat Raise Hand Q&A Leave Meeting

Q&A

You asked: 19:41
Type your questions and comments here!

Please input your question

Send Anonymously Send

Figure 1. Gartner Peer Insights "Voice of the Customer" Meeting Solutions Overall Ratings

Gartner Peer Insights "Voice of the Customer" Meeting Solutions Overall Ratings
As of January 31, 2018

Eligible Vendors	Gartner Peer Insights Customers' Choice	Gartner Magic Quadrant Position	Number of Reviews	Overall Customer Rating
Zoom Video Communications	customer's choice 2018	Leader	n=686	4.69
Highfive Technologies			n=30	4.40
Lifesize			n=30	4.40
LogMeIn	customer's choice 2018	Challenger	n=163	4.36
Teamviewer			n=42	4.33
BlueJeans Network	customer's choice 2018	Visionary	n=57	4.32
Google	customer's choice 2018	Challenger	n=131	4.27
Cisco	customer's choice 2018	Leader	n=380	4.21
Microsoft		Leader	n=293	4.16
Adobe		Challenger	n=72	4.14

Notes: Vendors with greater than 25 reviews on Gartner Peer Insights in the past one year as of January 31, 2018 are considered eligible vendors. Gartner Peer Insights Customers' Choice announced on February 13, 2018. Gartner Magic Quadrant for Meeting Solutions published on September 18, 2017. Number of reviews and ratings as of January 31, 2018. ©2018 Gartner Inc. All rights reserved.

Source: Gartner Peer Insights (January 31, 2018)

Mean overall rating for eligible vendors in this specific market: 4.33



Presented By

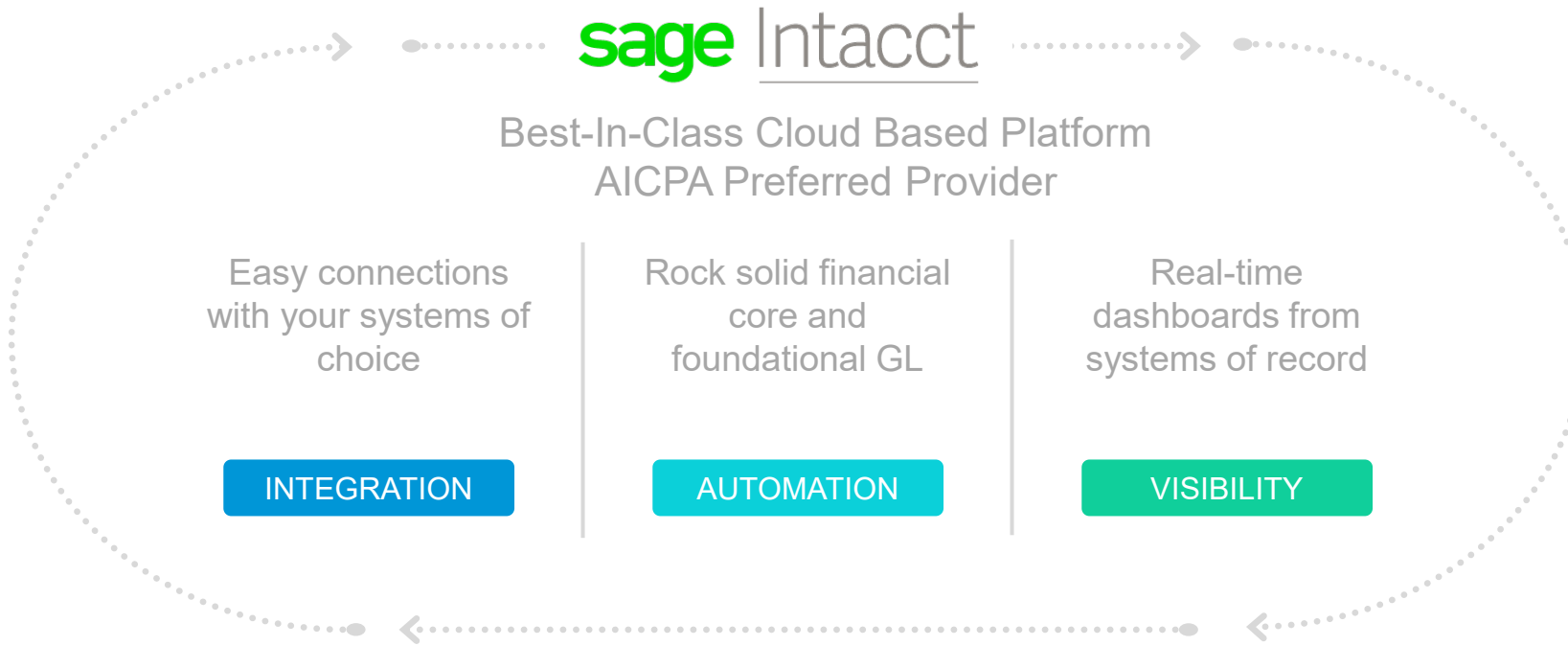
Emily Hill, CPA

Supervisor

Insero & Co. CPAs, LLP



What is Intacct?



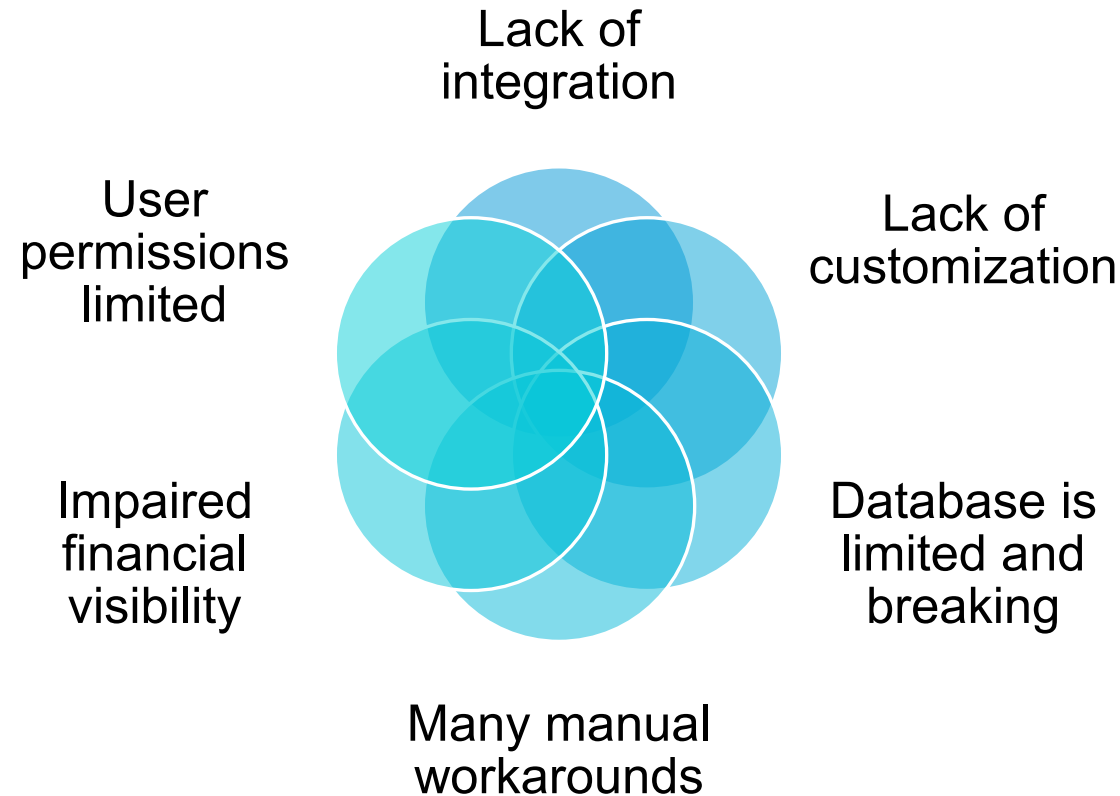
- 99.8% or greater uptime
- Automatically installed updates every 3 months

- System monitoring 24 hours a day, 7 days a week, 365 days a year

- Cloud-based infrastructure for maximum performance and functionality

Polling Question

Outgrowing your financial package?



Impact

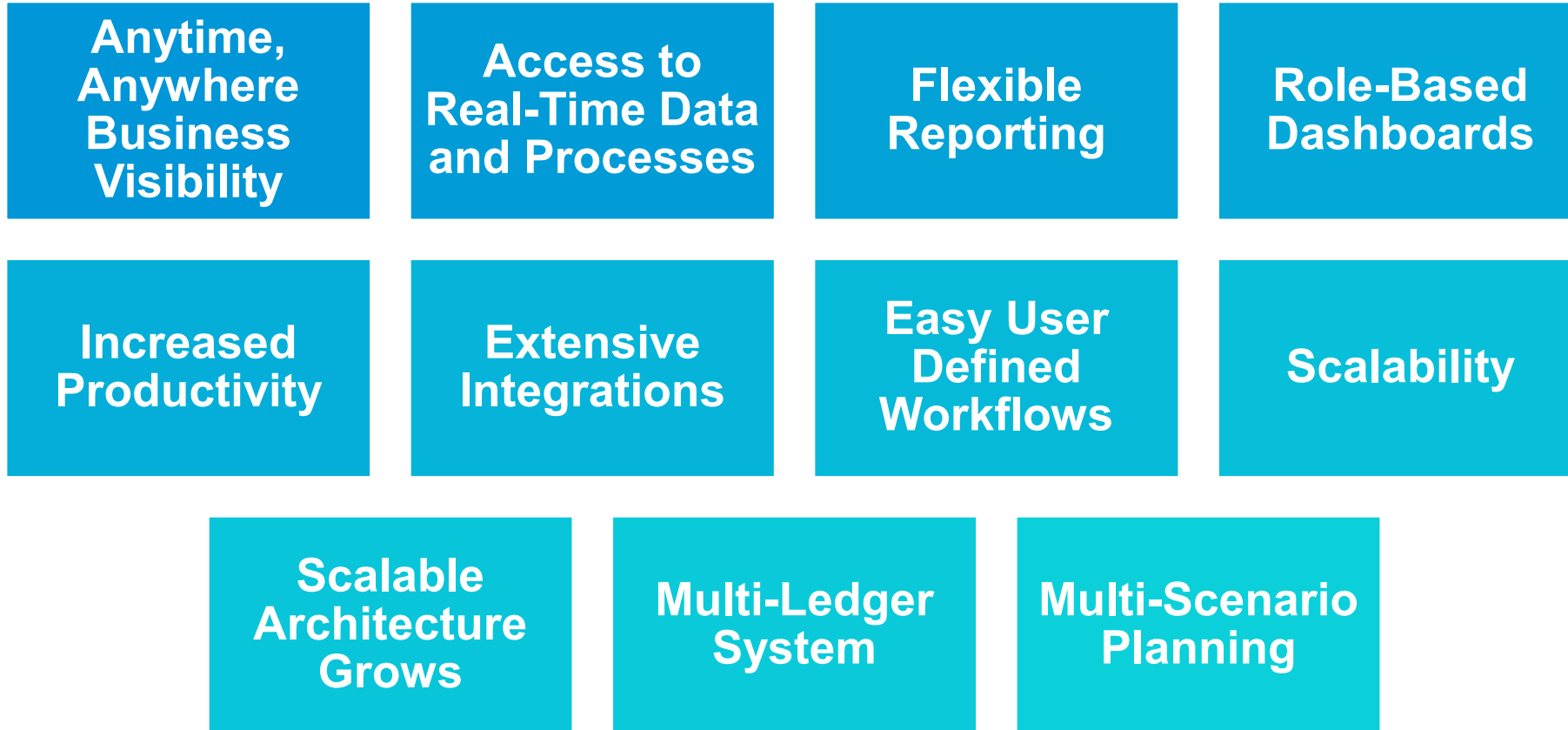
Time
consuming

Lack of
accuracy

Many
workarounds

Inefficiency

Complete Accounting Solution



Application Integrations

bill.com



sage Intacct
Authorized IAP Partner



Avalara

Polling Questions

Customization

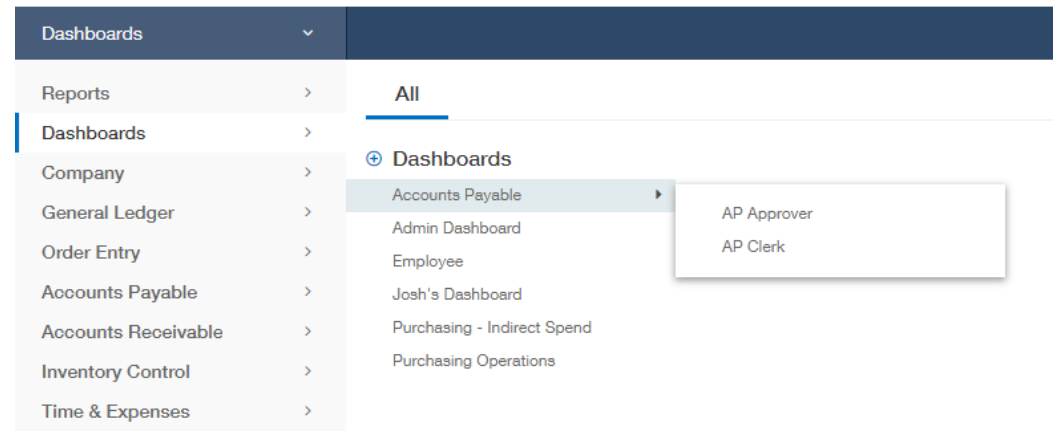
- Ability to customize templates
- Ability to change language, ex. donors or clients vs. customers
- Ability to customize accounts receivable and payable terms
- Ability to create role-based access and reports
- Ability to create customized dimensions such as location, project, departments

User Roles and Permissions

Granular Permissions


Access and delegation on a need-to-know basis

Accounts payable approvals



Benefits for Nonprofit Organizations

- Delivers immediate visibility
- Ensures control and compliance
- Maximizes stewardship
- Streamlines reporting and compliance
- Provides anytime anywhere access
- Reduces IT infrastructure
- Integrates seamlessly



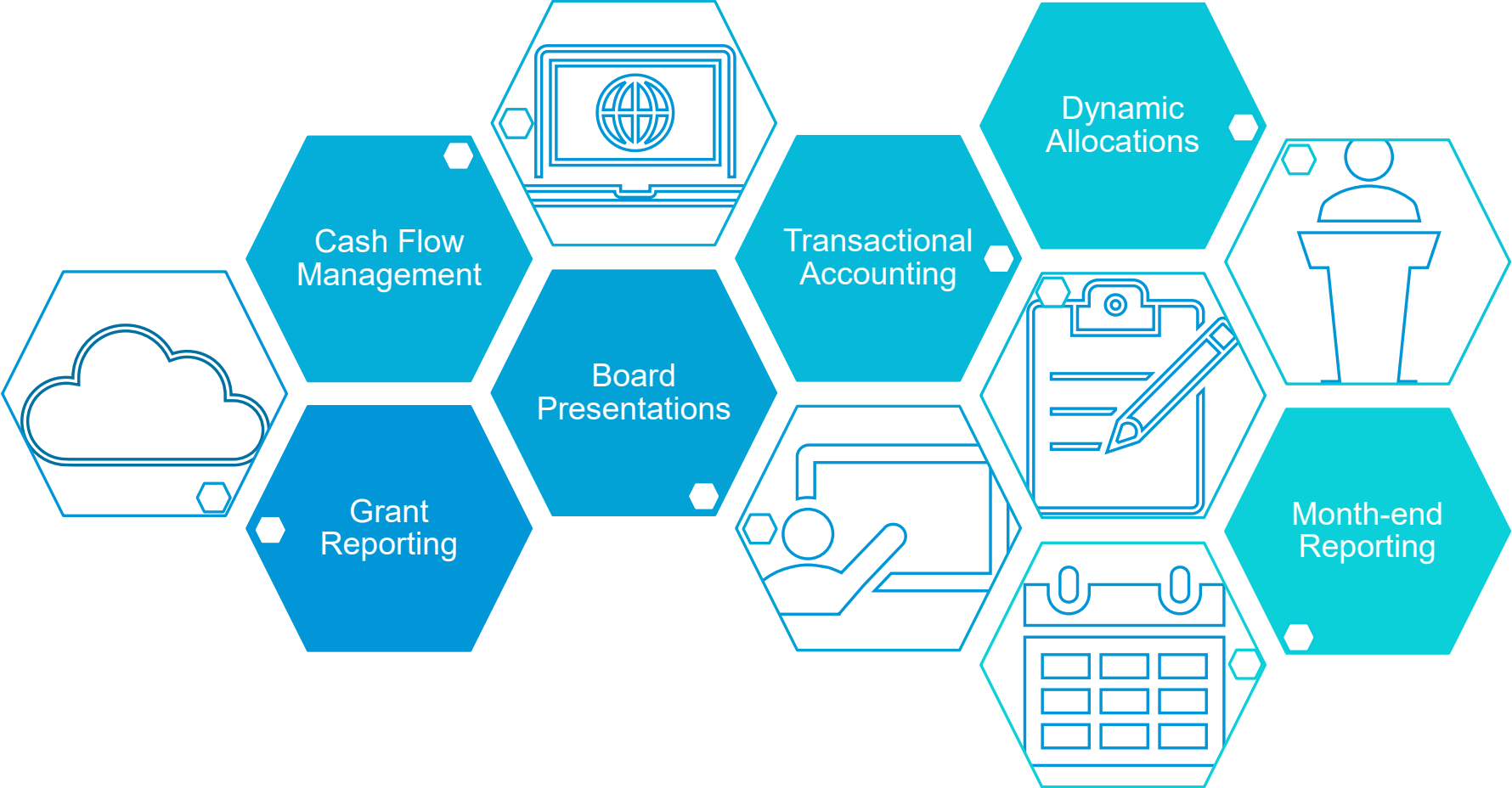
Streamlined Reporting

Real-Time Visibility

Seamless Integration

Paperless Automation

Flexibility

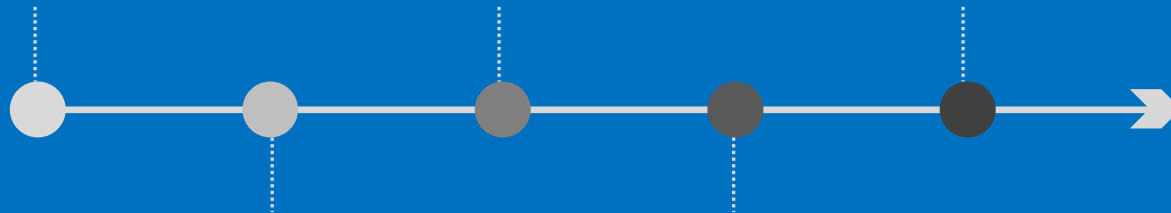


Moving beyond spreadsheets

Yields greater trust and accuracy

Security: The right insight to the right people with permissions

Proactive insights reduce one-off Q&A tasks

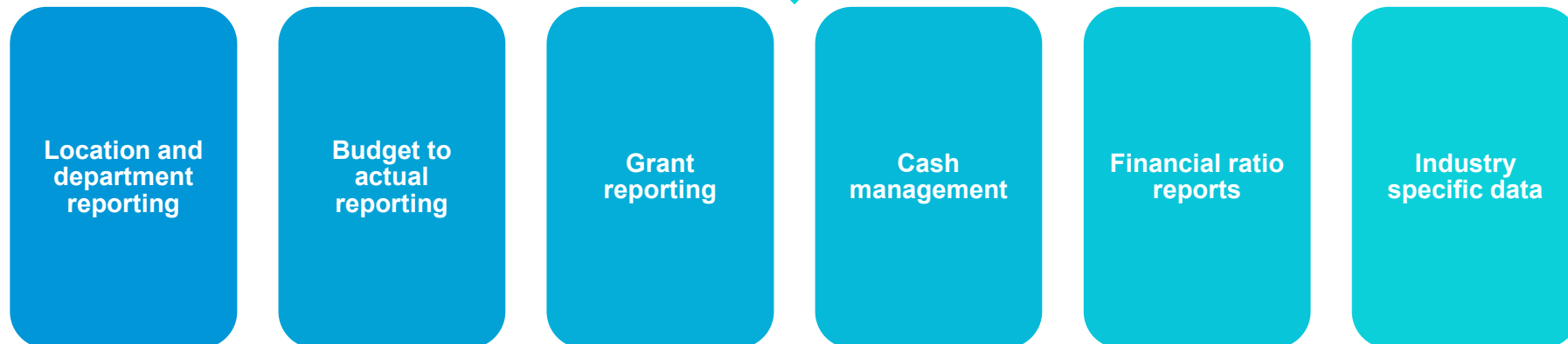


Drill-to-details—all the way down to the originating documents

Routine delivery of decision-making insight



In addition to basic financial statements, Intacct has the ability to provide customized reports, tailored to the needs of the organization.



Intacct Demo

How can we help you?

- Accounting Process Review
- Assist as a consultant to internal projects or integrations
- Handle front to back implementations and trainings



Upcoming Events

August 12, 2021 – Webinar: Dashboard and Executive Reporting

October 26, 2021 – Webinar: Budgeting and Payroll Automation

December 14, 2021 – Webinar: Receipt and Expense Management Automation

Visit inserocpa.com/events for more information

Thank You

Thank you for your attendance at today's program.

For more information regarding the topics discussed today,
please feel free to contact:

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