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CPAs | CONSULTANTS | WEALTH ADVISORS

What's All the Hype About? Elevate Your General Ledger – Sage Intacct

Reporting, Dimensions – Time to Benefit

January 23, 2024



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What tools are you using for reporting today?

1. Excel Spreadsheets

2. Third party reporting tools

3. Combination of tools

4. We are clueless!



Time for a poll!



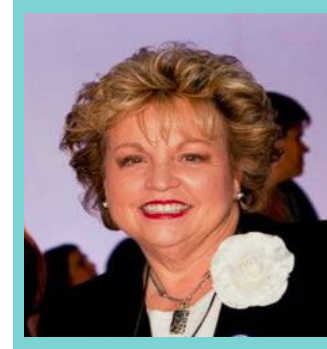
Welcome and Introductions



Andy Harleman
CLA
Director, Digital



*Kimberly
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CLA
Director, Digital



Linda Pinion
Sage Intacct
Principal Solutions
Consultant



The HealthCare Environment is Changing

**Increase in need
and demand for
services**



**Coupled with
changing
reimbursement
structures**



**Continuous
changing
compliance
requirements**



**Has led to greater
focus on real-time
data to focus on
controlling cost**



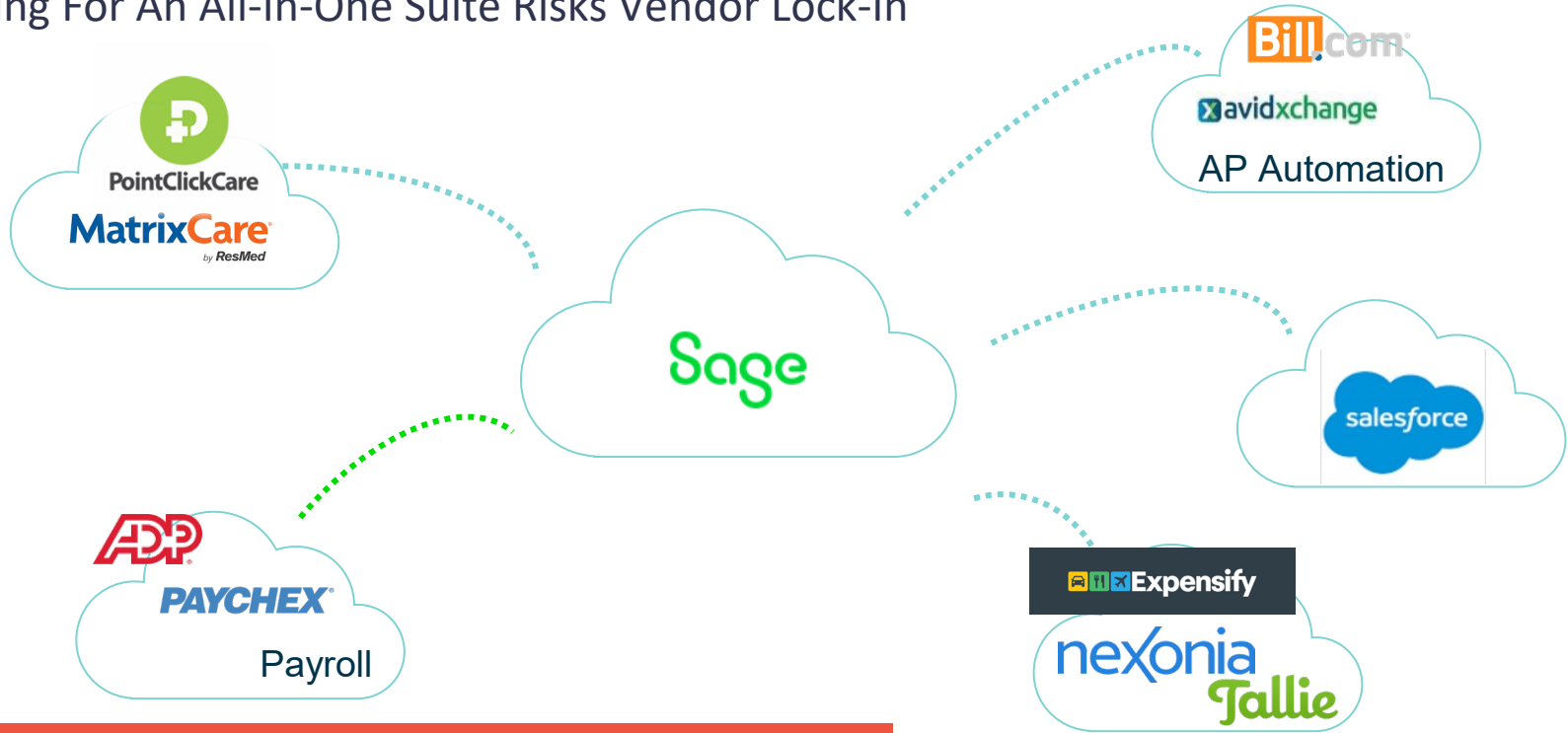
Top Technology Trends in 2022/2023

- Automation
- Cloud Computing
- Cybersecurity
- Data Analytics
- Cognitive Technology (AI)



Choose Best-In-Class

Settling For An All-In-One Suite Risks Vendor Lock-In



“Postmodern ERP represents a fundamental shift away from a single vendor megasuite” - Gartner



Hundred of Integration Partners

Welcome to the Sage Intacct Marketplace!

Best-in-Class business applications to extend your success in the cloud.

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CATEGORIES

**Sage Recommended Solutions

*New Marketplace Listings

AP Automation

AR Automation & Collections

Budgeting & Planning

Business Management

CRM

Document Management

eCommerce

EDI

Expense Management & Time Tracking

Finance & Administration

Fixed Asset & Leasing

HCM & Payroll

Inventory Management


Manufacturing

Point of Sale

Project Management

Healthcare

Sage Recommended Solution




Global Multi-Entity Payables Automation

Tipalti
by: Tipalti

Tipalti provides one end-to-end cloud-based global accounts payable automation solution.

Sage Recommended Solution




MineralTree TotalAP: AP Automation & B2B Payments for Sage Intacct

by: MineralTree

MineralTree integrates with Sage Intacct APIs to provide advanced invoice & payment processing

Sage Recommended Solution




Stampli Accounts Payable Automation

by: Stampli

The only AP automation that doesn't require rework to your ERP or changes to your AP processes.

Sage Recommended Solution




Quadient Accounts Payable by Beanworks

by: Quadient

360° AP Automation From Purchase To Payment

Sage Recommended Solution




Fortis - Payments as a Platform

by: Fortis

The Public address identifies the account

Sage Recommended Solution



Sage Intacct EMRConnect

by: Sage Intacct

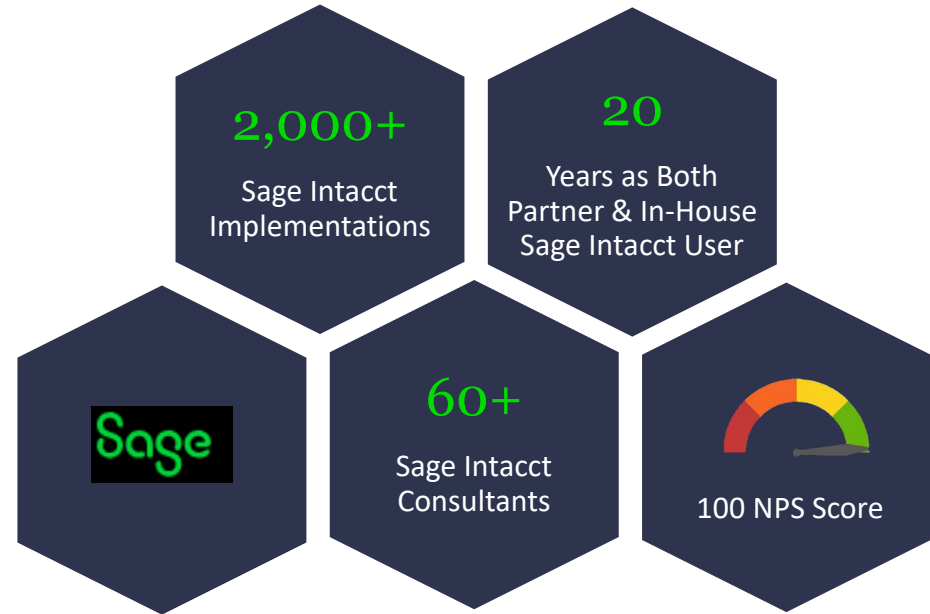
Sage Intacct EMRConnect for Deeper Financial Insights

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CLA's Partnership with Sage Intacct

- Sage Intacct Partner since 2001
 - Premier Partner and President Club distinctions
- Sage Intacct's Partner of the Year (2008, 2012, 2013 and 2018)
- Pioneer Partner of the Year (2017)
- Momentum Partner of the Year (2016)
- Highest Net Promoter score ever earned – a **perfect 100!**
- Deep industry expertise with resources (Finance/Intacct) rivaled by few



CLA Healthcare Experience

We currently serve more than **10,200 health care clients** which include:

3,200+

senior living providers including nursing facilities, CCRCs, assisted living facilities, HUD housing, etc.



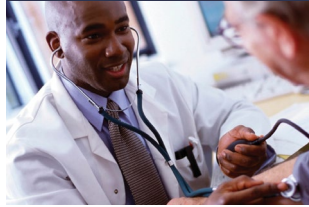
200+

home care, hospice, and other community-based providers



900+

hospitals and health systems, including approximately **80** critical access hospitals



5,800+

physicians, dentists, and medical practices



150+

other health care entities (therapy providers, managed care entities, health care management companies, mental health providers, etc.)



Upcoming Presentations

- Reporting – In depth view of financial reporting and dashboard to provide real-time effective business insight.
- Multi Entity functionality – How it streamlines daily processing as well as reduces intercompany reconciliations at month end.
- Dynamic Allocations – How to automate month end close and improve timely reporting.
- Cash Management – Use of bank feeds as well as rules and rules sets to streamline cash posting.
- EMR connect – Connection with current AR subledger can assist with automatic financial capture.



Which best fits your current state?

I'm looking for new system today!

I'll be considering a new system in 3-6 months

Our current system isn't working – but I don't know how to fix it

We need someone to provide guidance



Time for a poll!



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