

# FORVIS<sup>®</sup>

## How to Tell if Your Organization Has Outgrown QuickBooks

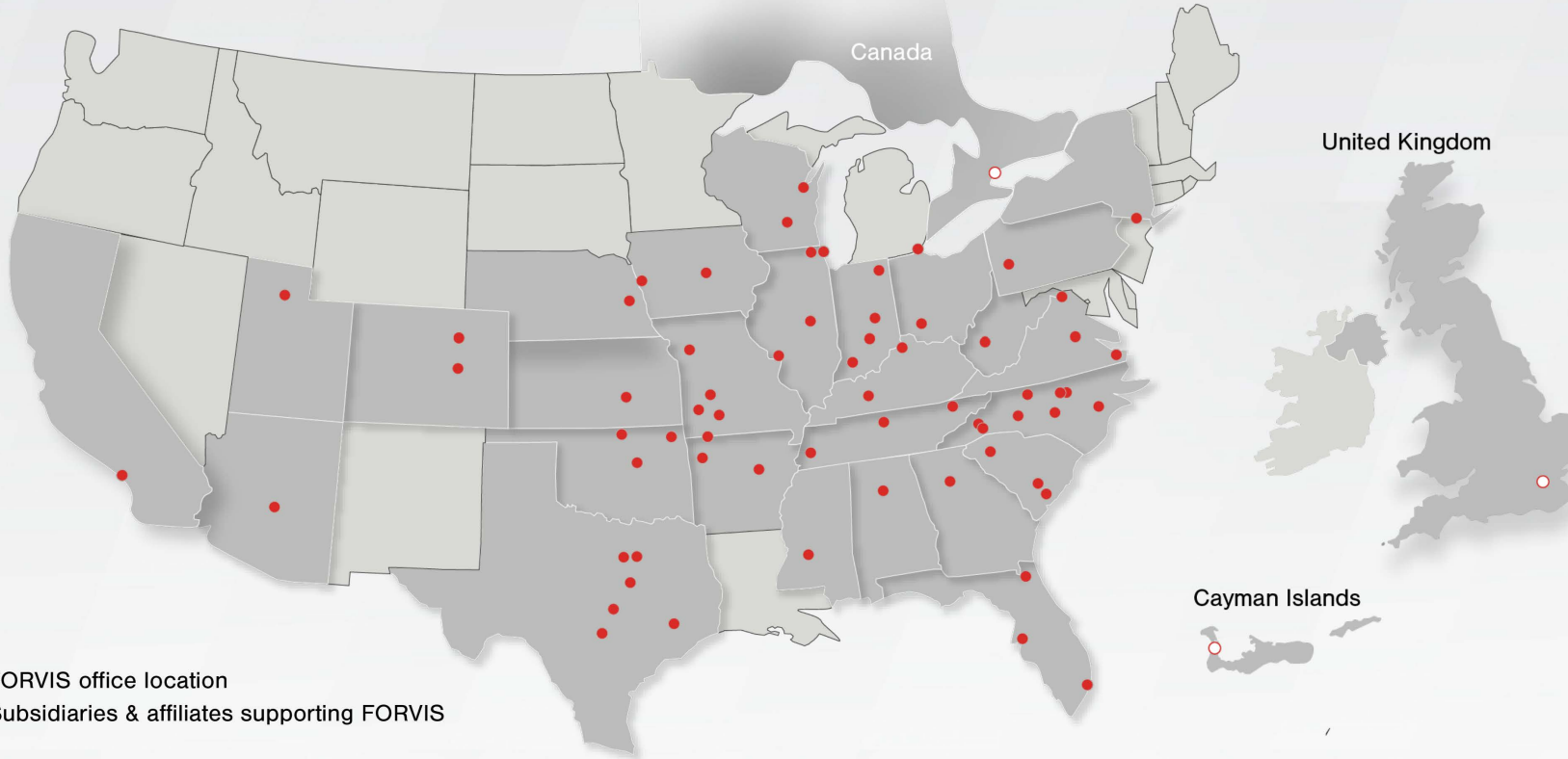
February 6, 2024

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Sage Partner

Business Technology Solutions

# Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

## Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Canada ULC\*\*
- FORVIS Global Advisory Ltd. UK\*\*
- TALENT SHIFT, LLC

**FORVIS**

## By the Numbers

**Top 10**  
U.S. Public Accounting Firm \*

**27**  
States + Canada, U.K., & \*\*  
Cayman Islands

**10+**  
Industries

**68**  
Markets

**500+**  
Partners & Principals

**6,000+**  
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.



# Business Technology Solutions

Business Technology Solutions at **FORVIS** provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.

**Sage Partner**

We are a Sage accounting and Sage Intacct software partner and value-added reseller (VAR).

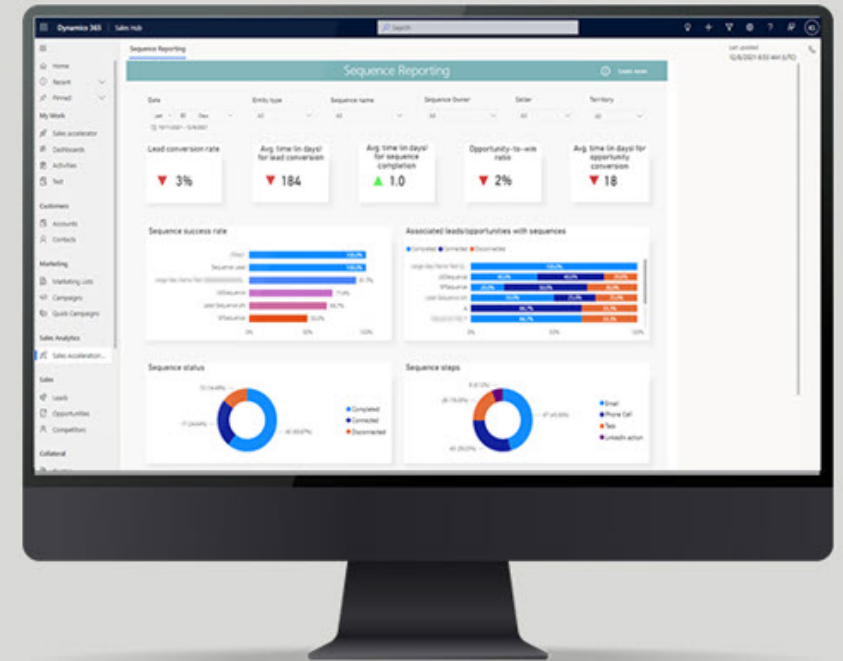
**FORVIS**

Microsoft  
Partner

Sage Partner

ORACLE  
NETSUITE  
Solution Provider

salesforce  
PARTNER



From sales forecasting to financial reporting,  
learn what CRM and ERP technologies can do.

# Meet the Presenters



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Consultant

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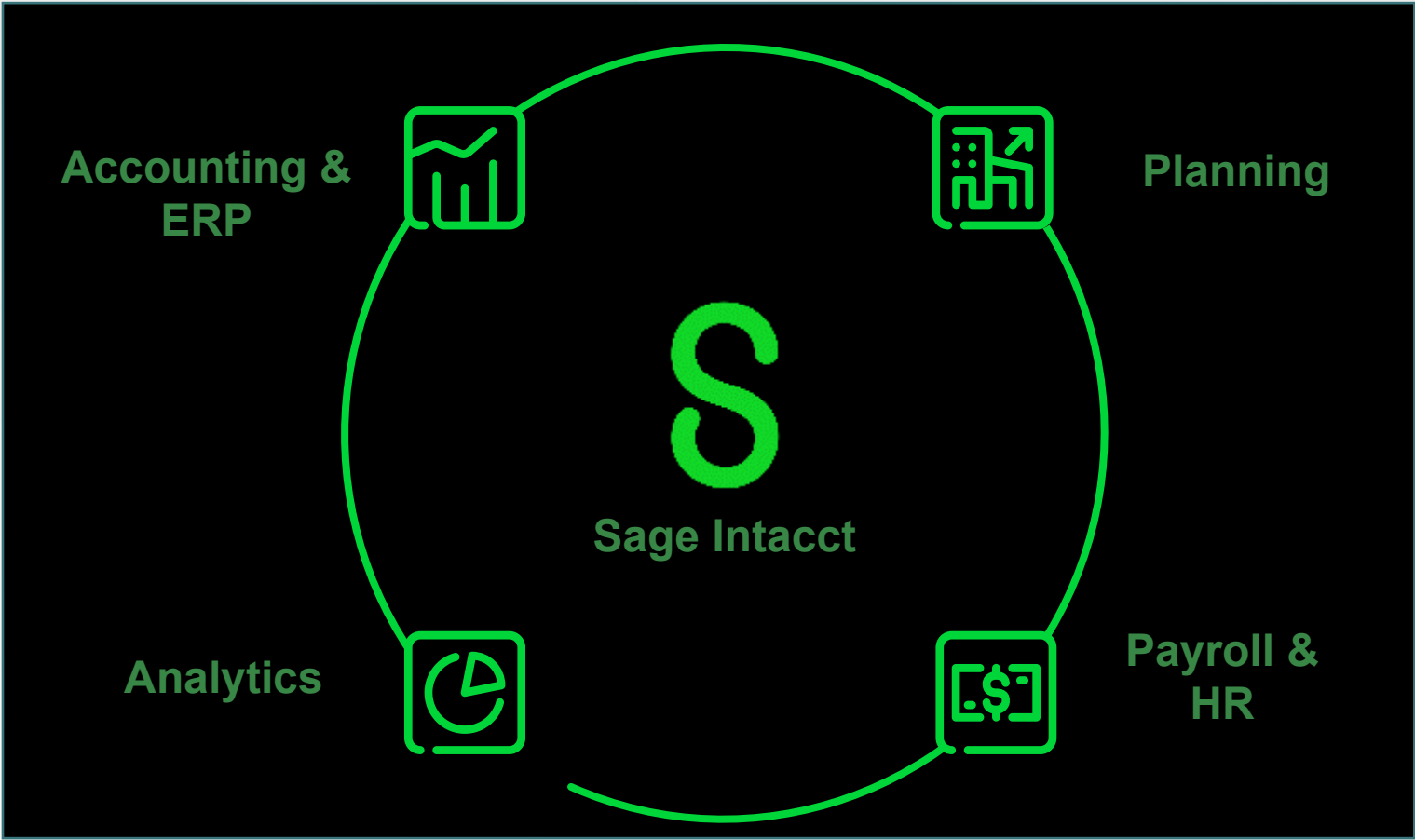
# Learning Objectives

- Identify key signs to evaluate if QuickBooks financial software is meeting your current & future needs
- Explain how to replace Excel-based processes with real-time, custom reports & dashboards
- Describe how to achieve anytime, anywhere access to financial information with Sage Intacct

# Insights From FORVIS

- Often, finance & accounting professionals **think about their chart of accounts monthly**—usually when doing monthly close processes in Excel
- In a recent FORVIS webinar, about **25% of participants responded that they rely on Excel too much** while using QBO
- **Process & technology assessments are considerably helpful** before planning an ERP implementation project

# Sage Intacct: Simplifying Business Processes

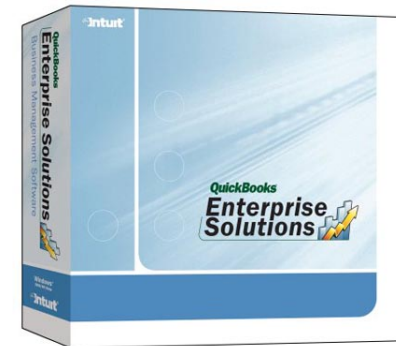
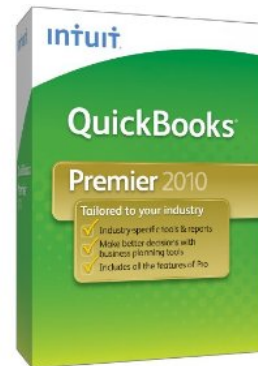
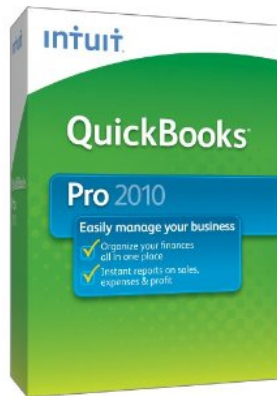


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# Signs You May Be Outgrowing QuickBooks

QuickBooks can be a great tool for many small businesses.



# But Small Businesses Can Become Big Businesses ...

## Growth = Transition Challenges

- Lack of reporting & real-time business visibility
- Lack of scalability, e.g., users, entities, data
- Lack of required accounting functionality
- Lack of integration to other business systems
- Over-reliance on manual processes & spreadsheets
- Increased risks around security, financial controls, auditability
- Lack of remote user access
- Extended month-end close times
- Reduced staff productivity

# Top Reasons for Migrating From QuickBooks

## A Need For

### Real-Time Visibility & Business Insights

- 24/7 remote access for all stakeholders

### Sophisticated, Robust Financials

- Additional functionality, *e.g.*, Revenue Management, Multi-entity, etc.
- Security & auditability
- GAAP, IFRS, etc. compliance

### Flexibility & Control

- Automated, flexible processes
- Deep integration to other business systems

### Scalability

- Cost effectively scale & adapt to business needs
- Concurrent, distributed use
- Large data files (customers, vendors, employees, etc.)
- System performance & reliability



# Introducing Sage Intacct

- Since we are into financials, let's do a little math ...



**Best-in-Class,  
Cloud-Based  
Financials**

**Advantageous  
ROI**

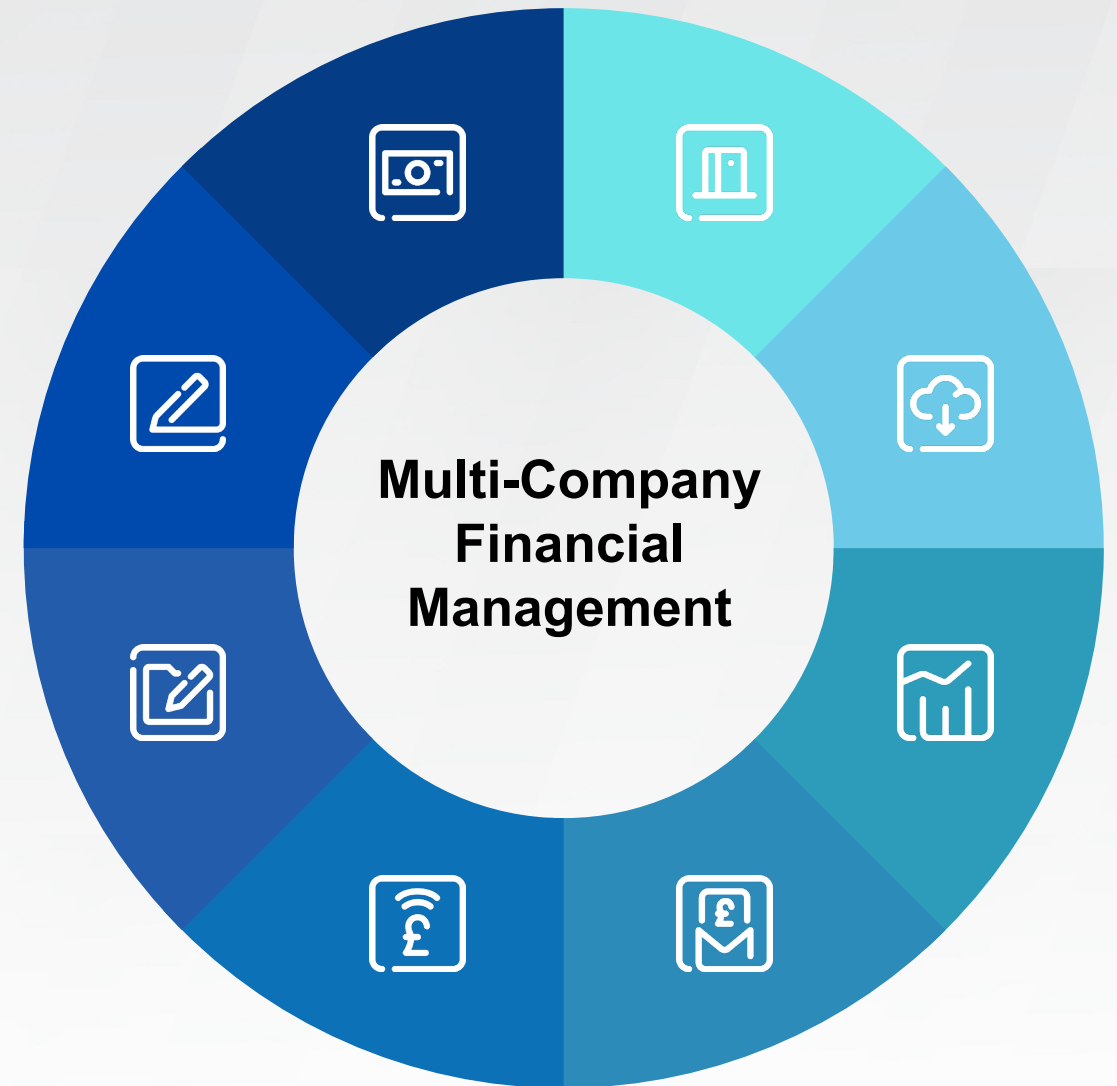
**Customer  
Satisfaction**

Deep Visibility      Flexibility & Control

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# Multi-Company Financials

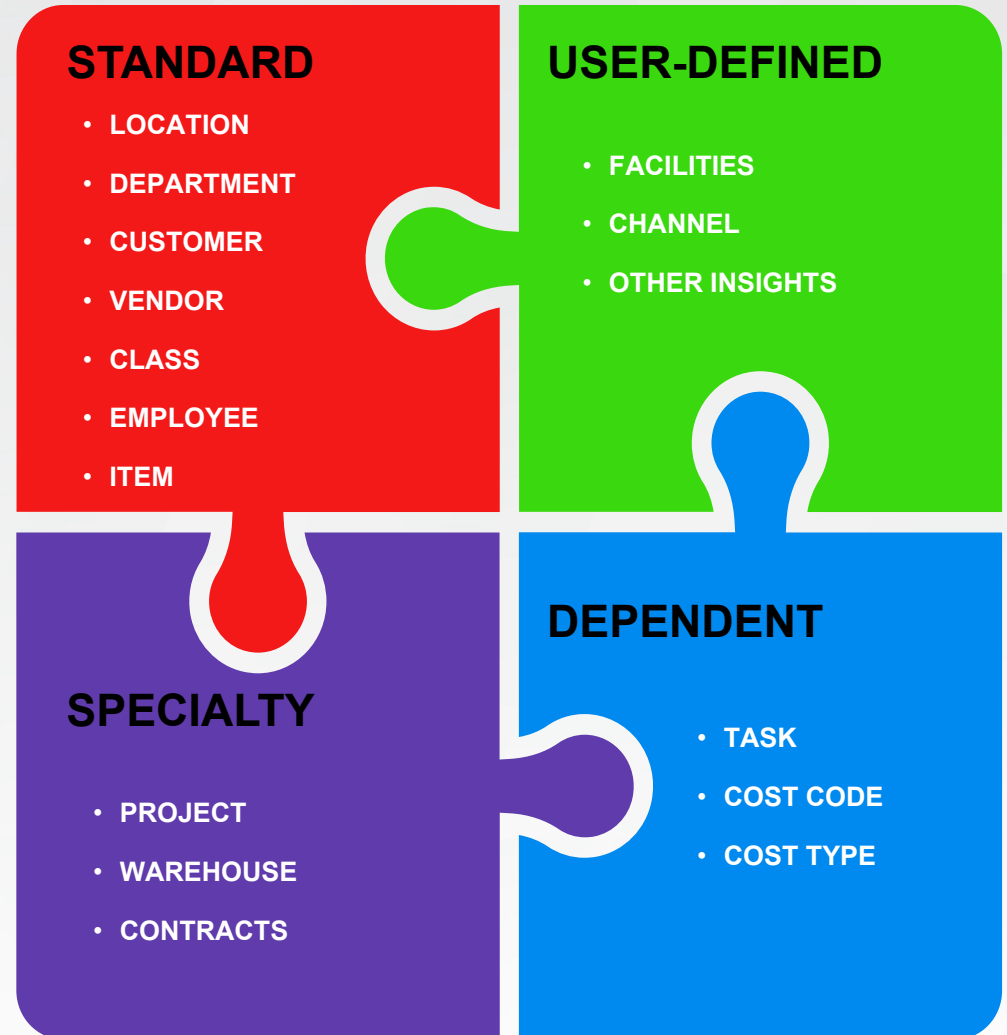
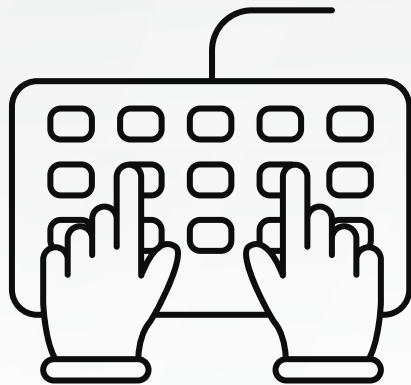
- Native cloud from the first line of code
- Deep, multidimensional accounting & automation for efficient financial operations
- Sophisticated visibility for real-time decision making
- Best-in-class, simple integration to other systems
- Fresh & modern user interface
- Designed for CFOs & professional finance teams looking for a powerful solution



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# Dimensions Are a Difference Maker

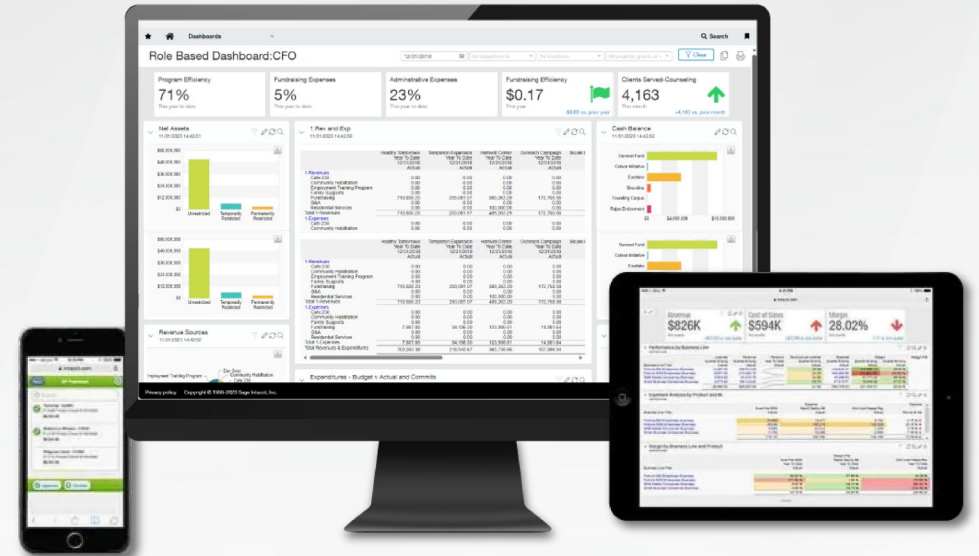
- Data entry is greatly enhanced by using independent dimensions versus a segmented string of account numbers because you get the freedom of separate lists, but you can still enforce data integrity through relationships





# What You'll See Today

- Visibility
  - Real-time, multidimensional dashboards, reporting, & analytics
  - Combining financial & non-financial data
- Flexibility
  - Straightforward transition from QuickBooks
  - Built-in features that can adapt to your business as you grow
- Automation
  - Workflow & approval routings
  - Automated process flows that match the way you do business



# Critically Acclaimed Cloud Accounting

Recognized by analysts

- Did you know that Sage Intacct has been ranked #1 in Customer Satisfaction by G2 for 9 years in a row ... & customer reviews have earned Sage Intacct over 100 awards? This is what it means to be trusted



\*Gartner, Inc., "Critical Capabilities for Cloud Core Financial Management Suites for Midsize, Large, & Global Enterprises"; Robert Anderson, John Van Decker, Greg Leiter; May 11, 2021 (ID: G00733936) (In the 2017 report Sage Intacct was recognized as "Intacct")

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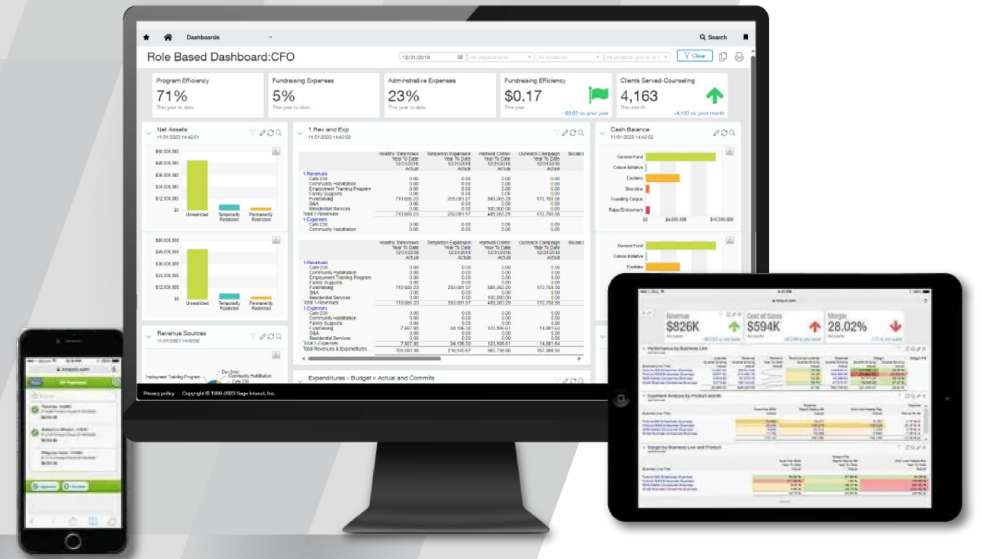
## Let's Take a Closer Look

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# Thank you!



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Assurance / Tax / Consulting