



Equation Technologies Helps CASA of Los Angeles Prepare for the Future

Customer

CASA of Los Angeles

Industry

Nonprofit

Challenge

The organization's previous accounting application was difficult to access remotely and didn't provide adequate reporting tools.

Solution

Equation Technologies migrated CASA/LA to Sage Intacct, a true cloud-based financial solution ideal for nonprofits.

Results

- Transition was rapid, with zero down time
- Remote accessibility keeps staff working productively
- Dimensions simplify and shorten chart of accounts
- View-only software licenses provide budget-friendly access

CASA of Los Angeles (CASA/LA) mobilizes community volunteers to advocate for children who have experienced abuse and neglect and are placed in the foster care system. The name is an acronym for Court Appointed Special Advocates, and the LA branch is one of 900 throughout the country. When the organization's finance director began considering retirement, he wanted to ensure that CASA/LA was in the most vital financial position possible to continue its critical mission. So, he turned to the organization's long-time technology partner, Equation Technologies, for direction.

Sage Advice From An Experienced Partner

"We first met Equation Technologies in 2014," recalls Robert Berman, CFO for CASA/LA. "I wanted to implement Sage 300 for the organization, and I was introduced to them as experts in that solution. They are experts — in all things technology."

Berman chose Sage 300 in 2014 in part because he had used the solution in another position and knew it could meet the needs of the nonprofit. "Equation Technologies did a fantastic job of configuring the software for us, and it worked well for many years," he says. "So when it was time to implement a new, modern, cloud-based financial management software, we knew we wanted Equation involved."

CASA/LA outlined the organization's priorities. "We needed seamless remote access capabilities," Berman says. "No screen-within-a-screen or multiple logins. We also wanted streamlined reporting on our funds and grants and integration with Bill.com, our AP automation software."

Equation Technologies helped Berman review multiple accounting applications before recommending CASA/LA migrate to Sage Intacct. "We took their advice," Berman says. "Sage Intacct is ideal for a nonprofit like us. It's a true cloud application, it has a dimensional GL, and it integrates seamlessly with Bill.com."

"We've been able to economically extend the use of the software throughout the organization, keeping everyone informed and accountable."

Robert Berman, CFO, CASA/LA

Rapid, Cost-Effective Conversion

Accounting system conversions can be disruptive and time consuming, but Berman notes that CASA/LA's conversion was straightforward and on time.

Equation Technologies has developed a conversion tool that facilitates the conversion from Sage 300 to Sage Intacct. The tool's speed and simplicity mean it can significantly reduce the cost of a typical data conversion project. "It worked beautifully," Berman says. "They were able to migrate all of our transaction data, not just balances, so we were productive right from the start and could include historical detail on our reports."

Sharing Data Across the Organization

Sharing financial data was a particular pain point for the organization previously. In order to allow department heads to generate budget reports, for example, CASA/LA would have had to purchase additional software user licenses. "That discouraged us from doing it," Berman says. "Instead, I'd print the reports and send them to each manager. That was just not a good use of my time."

With Sage Intacct, CASA/LA can purchase view-only software licenses. The licenses allow department heads to log in to Sage Intacct and instantly view customized dashboards showing the data and reports they are authorized to view. "We've been able to economically extend the use of the software throughout the organization, keeping everyone informed and accountable," Berman says.

Monthly closing is another workflow Sage Intacct is helping streamline. "Getting the reports that I need

for monthly closing is much faster using Sage Intacct," Berman says. "Previously, I had to download the report data and bring it into Excel to get what I needed. Now, I have the precise reports I need in a single step. As a result, we can complete the whole monthly close process much more quickly, using the time we save for other tasks."

A New Dimension to Reporting

Nonprofit organizations like CASA/LA must carefully track fund and grant activity and provide detailed reports to donors, board members, and other stakeholders. Before, in order to obtain the necessary granularity, CASA/LA had a chart of accounts that numbered in the thousands. "We had to create a unique account for every combination of account, department, and fund prior to recording any transactions," explains Berman. "It was time-consuming and unwieldy."

Sage Intacct's dimensional chart of accounts means that CASA/LA only needs to set up its primary account codes, while departments and funds are represented by dimensions. During posting, the system combines them on the fly. "Our chart of accounts setup is much cleaner and posting accounting activity is simpler and much less time-consuming," Berman adds.

Prepared for the Future

"My goals for this project were to provide my successor with a modern accounting solution that would eliminate workarounds, provide real-time insight and analyses, offer simple remote accessibility, and streamline our payables processing," concludes Berman. "We've achieved our goals with Sage Intacct and our partnership with Equation Technologies."

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