

Success Story

Sage Intacct Mateo helps the Diocese of Jefferson City save six days of manual work each quarter

Diocese of Jefferson City

“Now that we are on Sage Intacct Mateo and Sage Intacct, I can actually take a vacation the first few days of the month.”

Kathy Smith

Finance Manager, Diocese of Jefferson City

Company overview

The Diocese is an ecclesiastical territory or diocese of the Catholic Church in the state of Missouri in the United States. The diocese consists of 38 counties in mainly rural northeastern and central Missouri.

Results with Sage Intacct

- 24 days saved annually by eliminating time-consuming manual tasks.
- Intacct-Mateo integration reduces risk of errors and inefficient reconciliation.
- Sage Intacct's cloud-based system consistently keeps data security strong.
- Problems solved swiftly by Sage Intacct support team.



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Jefferson City

Sage

Company
Diocese of Jefferson City

Location
Missouri, US

Industry
Nonprofit

Sage Products
Sage Intacct
Sage Intacct Mateo





Sage Intacct Mateo has helped provide more work/life balance for the team at Diocese of Jefferson City.

Rising frustrations with manual tasks and wasted time

After the Diocese of Jefferson City, MO, implemented Sage Intacct cloud accounting software, Finance Manager Kathy Smith began looking for a modern, cloud-based solution for their savings and loans program that would fully integrate.

Kathy's two biggest frustrations with their previous solution was the lack of automation and integration. The double entry was not only taking a significant amount of time but also increased the chances for errors and inefficient reconciliations.

Creating manual statements was tedious and time-consuming and resulted in customers failing to receive information in a timely manner. Kathy spent roughly 4 to 5 hours each month reconciling the sub-ledger and an entire workday to print out and manually mail statements each quarter.

Another essential element in Kathy's search for a solution was the safety and security of their data. Constantly needing to back up their data was inefficient but necessary.



Finding a complete solution with Sage Intacct Mateo

After thorough research, the Diocese of Jefferson City ultimately chose Sage Intacct Mateo for their savings and loans solution. The key feature that ultimately led to their final decision was the full integration between Sage Intacct Mateo and Sage Intacct, making it easy to move from one system to the other. “It feels like the same system,” Kathy stated.

Her favorite aspects of the system are the ease of use, integration, reporting capabilities, and peace of mind in knowing that with a cloud-based system, her data is always safe and secure, and she no longer needs to spend time constantly backing up her data. Additionally, being able to send statements in a timely manner via email at the touch of a button is the feature that has made the biggest difference for her. No more stuffing envelopes. She also loves the ability to give users access to the system, so that they can access their information at any time, further reducing demands on her time.

Lastly, Kathy’s experience with the Sage Intacct customer service team was incredibly positive. She stated, “The team has a get-it-done and problem-solving attitude that is really helpful.”

Kathy is grateful that Sage Intacct Mateo has helped provide more work/life balance and provides her with more freedom the first few days of the month. With Sage Intacct Mateo, she has eliminated time-consuming, inefficient, manual tasks and is now saving up to 2 days per month thanks to the expediency of integration and automation.

Overall, Kathy is happy the Diocese of Jefferson City made the decision to switch to Sage Intacct Mateo for their savings and loans program and recommends Sage Intacct Mateo to other Roman Catholic Dioceses looking to optimize and improve their savings and loans solution.

