From Manual to Fast and Easy: USET Simplifies Non-Profit Finance With Sage Intacct

Sage

Vision33

About

Established in 1969, the [United South and Eastern Tribes, Inc.](#) (USET) is a non-profit, inter-Tribal organization serving 33 federally recognized Tribal Nations from the Northeastern Woodlands to the Florida Everglades and across the Gulf of Mexico.

USET is dedicated to enhancing the development of Tribal Nations, strengthening the capabilities of Tribal governments, and improving the quality of life for Indian people through various technical and supportive programmatic services.

"Some of these communities have done well financially, but the majority are underserved communities," explains Steve Adams, USET's finance director of over 30 years. "The majority of our work is in the health field. We work with epidemiologists and focus on nutrition, diabetes, cancer, and dental care."

USET believes that elevating the health status of Tribal citizens is integral in restoring and maintaining the heart, spirit, and soul common to every USET Tribal Nation.

From Servers to the Cloud

Today's non-profit finance leaders use modern technology to shift from reactive bookkeeping to proactive financial management—and Steve and his team of five finance professionals are no exception.

USET's legacy software, Abila (now MIP Fund Accounting), ran on in-house servers. *"It was actually on DOS when I started over 30 years ago," Steve notes.*

When support and updates for the server-based system ended, USET had two options to move to the cloud with Abila: strictly web-based or via an app.

"We would have lost quite a bit of functionality with the web-based version," Steve explains. "We opted to go with the app. That came with challenges we didn't anticipate."

Abila's app required a virtual private network (VPN) for remote access, and uploading and downloading files was tedious.

Steve says, "There were times when someone would say, 'I'm just uploading a PDF as a backup, and it's taking me five minutes'."

In addition to accounting software, USET's finance team used Microix, a third-party requisition solution. Attachments were stored in Microix, but it was difficult to get them into Abila.

An Invitation Leads to a Strategic Partnership

Steve began a search for new cloud-based accounting software with robust non-profit functionality. While he was evaluating options, he received email invitations for a Sage Intacct demo hosted by Vision33.

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"To be honest, I saw the email a few times and ignored it," Steve laughs. "But another reseller had suggested Sage Intacct, so we attended Vision33's demo. We really liked what we saw."

Vision33 is an award-winning global Sage Intacct partner with over 20 years of experience and world-class local support. The company partners with non-profit organizations to transform finance with the AI-powered financial management solution designed by accountants for accountants.

Sage Intacct's non-profit features include core fund accounting, a dimensional general ledger, comprehensive grant tracking and billing, automated revenue recognition, and easy-to-use reporting and dashboards.

USET partnered with Vision33 to implement and support Sage Intacct. *"I really liked the approach the Vision33 folks offered,"* Steve says. *"They had some innovative and economical solutions for getting our data and attachments into Sage Intacct."*

Speed, Dimensions, and User-Friendliness

With Sage Intacct, USET has eliminated time-consuming manual processes.

"Speed is one of the biggest things I've noticed," Steve says. "Uploading, downloading, and printing documents to PDF or Excel is so much faster and easier."

Sage Intacct's dimensional accounting is another benefit for USET. In traditional accounting, the chart of accounts is segmented to allow subaccounts, whereas dimensional accounting detaches the subaccounts from general ledger accounts.

Using dimensions provides many advantages, from keeping an organization's chart of accounts at its core minimum to allowing easy filtering, slicing, and dicing of financial reports.

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> *The dimensions and reporting in Sage Intacct are very powerful," Steve says. "And you can choose how you set them up."*

USET's disconnect between accounting software and a third-party requisition system is no longer an issue. Previously, the finance team had to transfer information from Microix to Abila to create a PO. *"With Sage Intacct, we have the ability to do these workflows in one system and not have a third-party feed into it,"* Steve says. *"I now have an actual requisition workflow, and it turns into a PO bill and gets converted. Sage Intacct offers an accrual system that makes sense."*

Steve appreciates Sage Intacct's user-friendliness and says he was surprised by how easy it is to upload budgets to the system. He's also happy with the seamless connection between Sage Intacct and Paylocity, USET's payroll provider. And because Sage Intacct is a cloud-native solution, USET's finance professionals enjoy anytime, anywhere system access.

"I've got a very experienced AP manager, and my assistant finance director has been with me for a very long time," Steve says. *"Sometimes people don't like change, but overall, everyone has very positive things to say about Sage Intacct and they're really buying into it."*

Trusted Answers
From a Trusted Partner

With USET's Sage Intacct implementation complete, Vision33 is implementing the solution for a smaller company owned by USET.

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We've had a great experience with Vision33," Steve says. "Anytime we have a question, they're right on it. Like anything else, when you start using something new, you have questions. It's been nice to lean on Vision33 for answers."

Sound Advice for Non-Profit Finance Leaders

Whether they have a small footprint or a global reach, non-profit organizations make a difference. Their finance professionals deserve tools that empower them to focus on strategy, growth, and mission success.

When asked if he has any advice for his non-profit finance peers, Steve states, *"If you're not on a true cloud environment, you should be."*

He concludes, *"A lot of USET's smaller Tribal organization members are either using or have used Abila. They ask me, 'How did your Sage Intacct implementation go? Should we move to it?' And the easy answer is, 'Yes, you should move to Sage Intacct.'"*

Vision33 transforms business processes and results for customers by delivering value through the promise of technology and its benefits for growing businesses. For over 30 years, Vision33 has helped companies integrate and automate their business processes and applications to better serve their customers, employees, and stakeholders. The technologies may have changed drastically in 30 years, but Vision33's mission has never wavered.

With over 1,000 customers worldwide, Vision33 helps manufacturers, distributors, service firms, and SaaS businesses outperform their competition and lead their industries with successful technology investments.

With nearly 400 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether a global company with 100 subsidiaries or a small business, Vision33 works alongside every customer to meet their goals.

Vision33 also has formal partnerships to resell, implement, and support leading ERP applications, is a leader in cloud deployment, and has developed exclusive products, including Saltbox and iDocuments.

For more information about Vision33,
*visit **www.vision33.com***

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United States
7545 Irvine Center Drive,
Suite 200
Irvine, California 92618
Tel: +1 949 420 3300
contact@vision33.com
www.vision33.com

Canada
210 Water Street, Suite #400
St. John's, NL A1C 1A9
Tel: +1 709 722 7213
contact@vision33.com
www.vision33.com

Europe
1 Heathgate Place,
Agincourt Road
London, NW3 2NU
Tel: +44 (0) 20 7284 8400
contact@vision33.co.uk
www.vision33.co.uk

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