

PICO California

Streamlines and Automates
Non-Profit Accounting
With Sage Intacct

Sage Business Partner



ABOUT



[PICO California](#) is the largest faith-based community organization network in the state. It includes nine local affiliates organized across 18 counties, representing 500 congregations and nearly 650,000 Californians.

Founded in 1994 as a fiscally sponsored national Faith in Action Network project and spun off as an independent 501(c)(3) non-profit in 2021, PICO California's mission is to create systemic change for the most vulnerable, so all Californians thrive.

The organization's structural campaigns include making affordable housing a human right, funding schools and communities, and creating conditions for low-income workers to thrive in family-sustaining jobs.





I wanted more capacity to do some long-term planning and projections using actual data, not numbers in Excel that became stagnant,” Anthony says.

A Quirk in the System

When PICO California was part of Faith in Action, its accounting software was Sage Intacct. But when it became an independent non-profit organization, PICO California switched to Xero because it was less expensive.

The issues were immediate and problematic. “There were limitations we couldn’t accept,” says Anthony Gamblin, PICO California’s COO. “We needed more out of our accounting system.”

Xero’s accounts payable system had a quirk that prevented vendors from showing up as vendors until an invoice was paid.

“We had to create fake invoices to pay real invoices,” Anthony explains. “The process was cumbersome. It was confusing and unnecessary.”

Reporting was lackluster and time-consuming. And budgeting and forecasting was a tedious exercise of data manipulation in spreadsheets.



Anthony Gamblin
CHIEF OPERATING OFFICER



Back to a Tried-and-True Solution

Anthony and his colleague, Soua Vang, PICO California's operations and events manager, searched extensively for a new accounting solution.

They researched options online and sought recommendations from their non-profit finance peers—and their quest brought them full circle to Sage Intacct.

“We came back to Sage Intacct because of the financial reporting and capabilities that far exceed Xero's,” Anthony says.

Sage Intacct is a modern, cloud-native financial management solution perfect for organizations like PICO California. It offers the specialized accounting, tracking, and reporting non-profits need to streamline grant, fund, and donor accounting.



We had really good conversations with Jay and the team and felt they would be a good partner," Anthony says.

Experience Matters

Anthony and Souza's next step was finding an experienced Sage Intacct partner for implementation and support. After speaking with a few candidates, they chose Vision33.

Vision33 is an award-winning Sage Intacct partner with hundreds of successful implementations. Its team loves helping non-profits transform accounting frustrations into mission success. Anthony agreed that he'd had a good experience working with the Vision33 team.



Soua Vang
OPERATIONS AND
EVENTS MANAGER



Streamlined, Automated Processes

Following a smooth three-month implementation, PICO California realized Sage Intacct's immediate, tangible benefits.

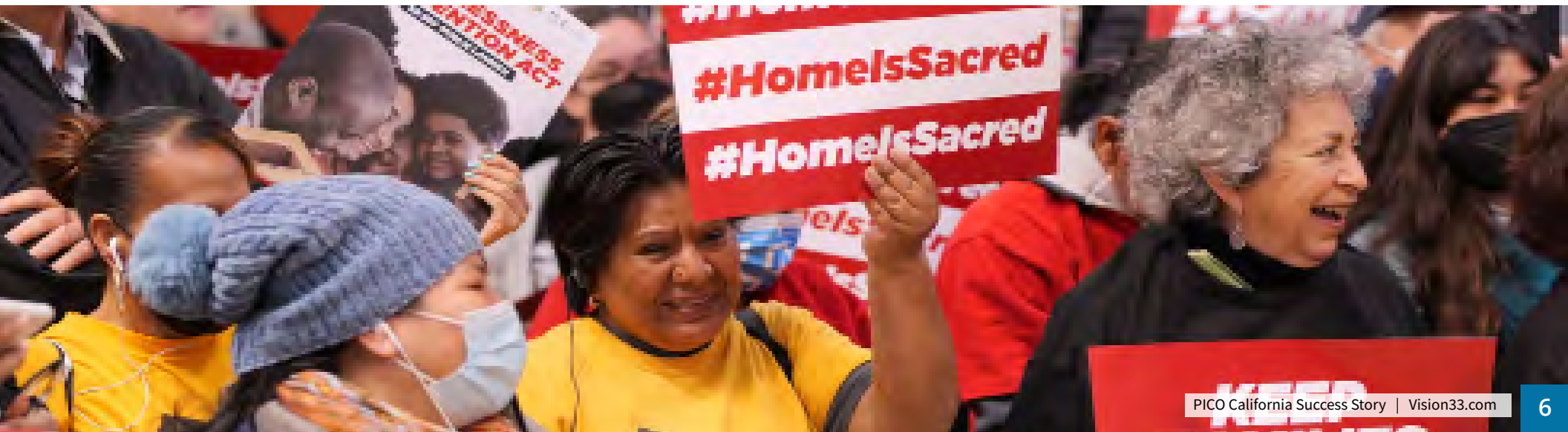
Anthony and Soua no longer need to work with stale data or worry about updating spreadsheet formulas for financial forecasting. Sage Intacct's budgeting and planning module automates the process and delivers reports and forecasts with a few clicks.

Now that PICO California has simplified and modernized non-profit accounting, the organization can more efficiently pursue its goal of acting for racial and economic justice in California.



The payment processing was the most immediate, huge, glaring area where we saw a difference," Anthony says.

"Invoices are sent to, approved in, and paid out of Sage Intacct. It's much simpler."





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 1,500 customers worldwide, Vision33 helps professional and financial services firms, non-profit organizations, and SaaS businesses outperform their competition and lead their industries with successful technology investments.

With nearly 500 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether it's 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 The Saltbox Platform (saltbox.io) and iDocuments (idocuments.io).

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

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