

The JPB Foundation Moves Finance to the Cloud With Sage Intacct Management

Sage




Vision33

ABOUT

Created in 2011, The JPB Foundation (JPB) is an engine of the non-profit world. Grants from its large endowment fuel charitable organisations to carry out their missions.

JPB's mission is to advance opportunity in the United States through transformational initiatives that empower those living in poverty, enrich and sustain our environment, and enable pioneering medical research.

Visit them at www.jpbfoundation.org



THE JPB FOUNDATION

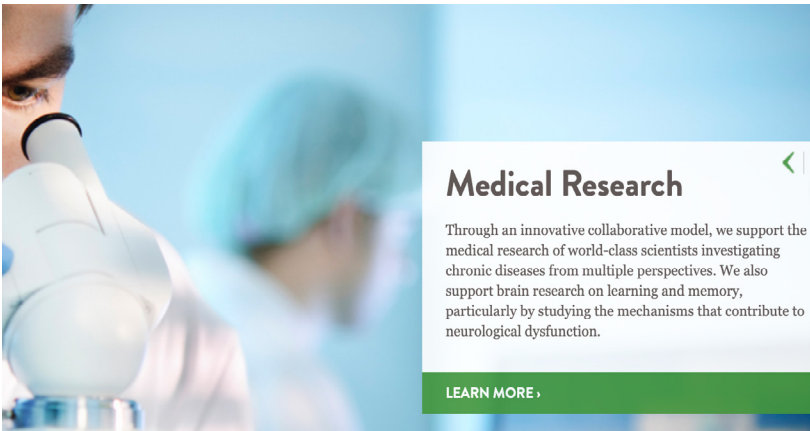




Poverty

We promote opportunities for people to move and stay out of poverty by supporting work in the areas of health equity, democracy, and economic justice.

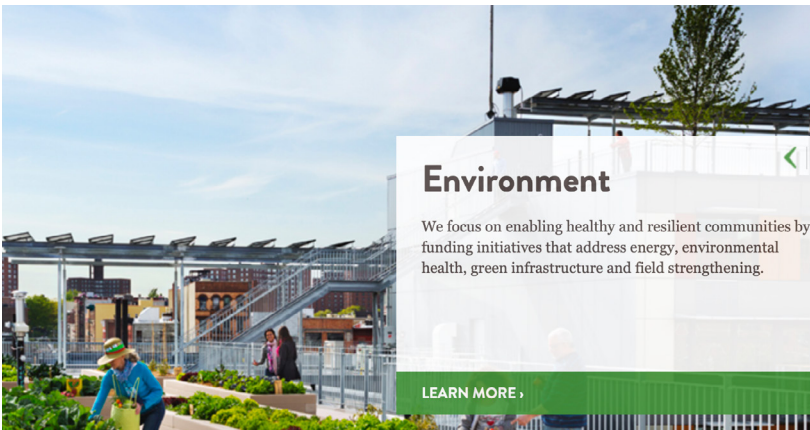
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Medical Research

Through an innovative collaborative model, we support the medical research of world-class scientists investigating chronic diseases from multiple perspectives. We also support brain research on learning and memory, particularly by studying the mechanisms that contribute to neurological dysfunction.

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Environment

We focus on enabling healthy and resilient communities by funding initiatives that address energy, environmental health, green infrastructure and field strengthening.

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Challenges With a Legacy System

When JPB hired Michael Vaccaro as its controller (he's now CFO) in 2014, the foundation was using Sage 300. The system wasn't configured correctly, and simple accounting tasks were challenging.

"A journal entry was several steps", Michael explains. "If someone asked how to do one, the answer was to hand them three pages of instructions".

Michael moved the foundation to Sage 50. "It worked fairly well", he says. "We could drill down into invoices, and journal entries and research were much quicker".

But there were drawbacks. As file sizes grew, the system became cumbersome to boot up. And when the pandemic forced global lockdowns, accessing Sage 50 remotely was difficult.

Time to Take Flight to the Cloud

JPB needed a cloud solution to carry out its mission without interruption. Michael evaluated a few options. During his research, he spoke to an auditor who provided some initial feedback on what to look for and focused on user-friendly solutions.

"I didn't want something overly complicated", Michael says. "I wanted an interface my team would be familiar with".

Sage Intacct was the natural next step for Michael and his team to enjoy a modern financial management solution while sticking with the Sage brand.



Finding the Right Partner

The right solution is only half the equation of a successful technology implementation. The other—more important—half is the partner. Michael did his due diligence and narrowed his search to a few providers.

“Vision33 had a lot of good reviews and the most interactivity with other systems”, Michael notes. That interactivity was a tipping point, as JPB plans to integrate Sage Intacct with two of its other mission-critical applications. Not only is Vision33 an expert in Intacct and enterprise resource planning (ERP) solutions, the firm developed The Saltbox Platform, a cloud-based integration platform as a service (iPaaS) solution that seamlessly integrates organisations’ entire tech stacks.

JPB and Vision33 collaborated to implement Sage Intacct within an aggressive time schedule. “Vision33 hit every deadline”, Michael says. “And that’s a good thing, because as CFO, I wanted to get it done”.



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Sage

The Sage Intacct Difference

As soon as JPB's historical data was transferred to Intacct, Michael and his team began reaping the benefits of a robust financial management solution.

Because Sage Intacct runs in the cloud, JPB's staff can access it from anywhere, on any device. "It's easy to log on and get information", Michael says. "I just go to the cloud and type in my credentials to access information, like my trial balance, quickly".

Intacct makes it fast and easy to upload JPB's data in large batches, including investment transactions and payroll.

Up-to-the-second information is accessible with a few clicks.

"The reporting is superior", Michael notes. "There are a lot of options".

Michael's co-workers appreciate Sage Intacct's simplicity. "They like this system, and it was easy for them to learn", he says. "They're doing more in Sage Intacct than they ever did in our old system".

Sage Intacct works the way JPB works—not the other way around. Its configurable design has delivered flexibility and automation to the foundation's critical financial functions, freeing up time to continue helping non-profit organisations. Intacct's scalability will support JPB's mission well into the future.



Vision33 (www.vision33.co.uk) helps growing companies deliver on the promise of technology through enterprise resource planning (ERP) solutions, including SAP Business One and Sage Intacct, automation, and integration solutions. Vision33 has the people, processes, and technology to help businesses solve everyday challenges and seize new opportunities for growth and transformation. With proprietary solutions such as iDocuments and Saltbox, Vision33 helps businesses leverage the right transformative technology for their digital transformation journeys.

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