

Sage

YMCA Canada Transforms
Non-Profit Finance in the
Cloud With Sage Intacct




Vision33



About

The YMCA is a charity that delivers a wide variety of programmes and services that empower people of all ages and life stages to overcome barriers and rise to their full potential. In Canada, the YMCA is comprised of 37 YMCA Member Associations, supported by YMCA Canada, the national office, working together so all Canadians can shine on.





A Software Tipping Point

YMCA Canada was at a technology crossroads: Support for its accounting software was ending.

Vicki Siwic, YMCA Canada's CFO, was eager to find a new solution.

The accounting software was installed on-premises, requiring a VPN to access the system. And as Vicki explains, extracting information was cumbersome and time-consuming.

Vicki was also frustrated with the software's lack of visibility. When she ran a trial balance report, it was massive. Every department and GL was individualized, so she couldn't see a clean consolidation at the trial level.

The organisation needed a powerful accounting solution to improve visibility and free staff to focus on mission-critical activities.

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"If a department head wanted to know what was in their GL, they had to send an email," Vicki says. "Finance would run a report, send it back in Excel, and answer questions."

Robust Non-Profit Functionality

Vicki and her colleagues evaluated five accounting systems and chose Sage Intacct, the number one cloud fund accounting software for non-profit organisations.

The financial management powerhouse provides core fund accounting, a dimensional general ledger, and accounts payable automation. It also includes comprehensive grant tracking and billing, automated non-profit revenue recognition, and role-based dashboards.

A rock-solid audit trail empowers non-profit finance leaders to make data-driven decisions and confidently demonstrate financial responsibility to boards, communities, and volunteers. And because non-profits like YMCA Canada handle confidential, valuable data, including donor information and beneficiary records, they appreciate Sage Intacct's iron-clad security.

Vicki notes Sage Intacct's drill-down capabilities, real-time reporting, and native cloud platform as additional selling points.



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"Sage Intacct is a really user-friendly system," Vicki says. "As an accountant, my biggest frustration with our old software was it wasn't very intuitive, even for entering basic items. Sage Intacct is very easily laid out, and you don't have to be a finance expert to figure out some of the basic functionalities."



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“He was fantastic,” Vicki says. “I couldn’t say more good things about him. I really appreciated how quickly he would jump on calls with us.”

A Trusted Technology Partner

The right technology consultant is as important as the right software—and YMCA Canada partnered with Vision33, a multi-award-winning Sage Intacct partner and Sage Intacct Platinum Club member.

With hundreds of successful Sage Intacct implementations, Vision33 transforms non-profit accounting frustrations into mission success and strategic growth.

YMCA Canada’s Sage Intacct implementation was achieved in just three months. Vicki credits Vision33’s lead Sage Intacct implementation consultant—a certified public accountant—for the project’s success.

The Non-Profit Finance Office, Transformed

Vicki cites Sage Intacct's dimensional accounting as one of the system's key benefits. Using dimensions provides many advantages, from keeping a chart of accounts at its core minimum to allowing easy filtering, slicing, and dicing of financial reports.

Now, if she wants to run a trial balance report, Vicki can see what she wants to see.

"With Sage Intacct, we can play around with the reporting or pull things so we can see it all consolidated or by department or by project," she says.

"If we want to create a customised report, we have that functionality", Jaime Whitell, YMCA Canada's financial controller, adds. "It's nice to have drill-down capabilities. Even the account naming function is smoother than our old software's format".



Sage Intacct has also streamlined YMCA Canada's approval process. Department heads no longer need to worry about signatures or coding; they simply send invoices straight to the finance team, where employees receive an email notification that something is awaiting approval in the system.

Jaime notes how easy it is to record payments and move them into an EFT format.

"I really like that we can take a file and upload it to the bank," she says. "We don't have to worry about it or do it manually. It's automated, and that's a great feature to have."

YMCA Canada has Sage Intacct employee licences for its budget holders, who can see in real-time what has been entered, what has been paid, and what has hit individual departments. Vicki calls this "a huge benefit" for YMCA Canada's team.



In addition to her everyday CFO duties, Vicki participates in several Canadian YMCA Federation committees, groups, and networking initiatives. Thanks to the power of cloud financials, she has the freedom to access up-to-the-second data wherever she is.

“One of the biggest improvements is Sage Intacct’s cloud functionality and the speed,” Vicki says. “Being able to access the system anywhere, anytime, is fantastic.”

By leveraging the strategic benefits of a cloud financial management solution, YMCA Canada has boosted operational efficiency, gained much-needed visibility, and ensured transparency.

And with a future-proofed finance office, YMCA Canada can focus squarely on its impact: Helping Canadians find health, friendship, jobs, purpose, and connection.





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 500 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.co.uk

Contact your nearest Vision33 sales office to discuss how we can help transform your business.

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