

Streamlining Success: Integrating ADP, Sage Intacct and Yooz

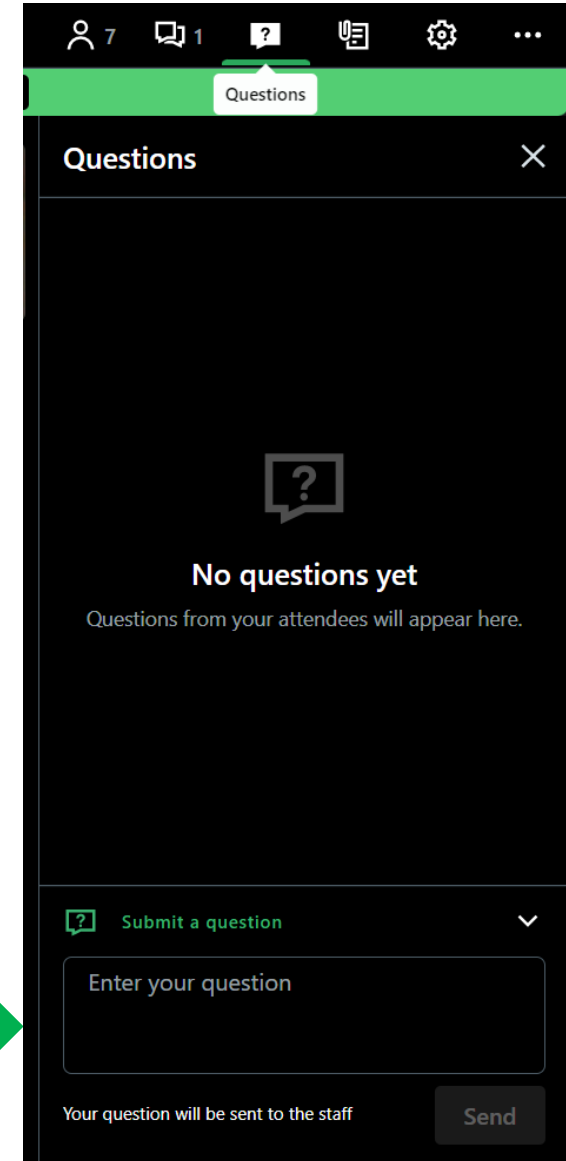


Meeting Preparedness

- Our session will be 1 hour with Q&A at the end
- We will be asking polling questions. It is important that you participate!
- Certificates for participation will be issued via email
 - CPE eligibility depends on your state's NASBA requirements
- Survey will follow the session, please provide feedback
- This session will be recorded, and a link will be sent to all participants

Your Input is Encouraged!

- Interactive functions are found in the Controls:
- Submit your questions using the Question/Comment Box.
- We will answer as many questions as possible at the end of the presentation.
- Don't worry! You are muted and your video cameras are not visible to the presenters or participants.



Our Panelists



Bradley Belesky
UHY Advisors, Inc



Dan Krishman
AcctZen



Raquel Ek
ADP



Jonathan Barnett
Yooz

Snapshot of Yooz



Born in the Cloud
in **2010**



40%+
growth/year

Offices in the **US** and
in **Europe**



1,000+
R&D man-years

100+ AI & ML
scientific publications

1 single focus:
automatic document
processing

25% of income reinvested
in R&D annually



40+
countries

5,000+
clients

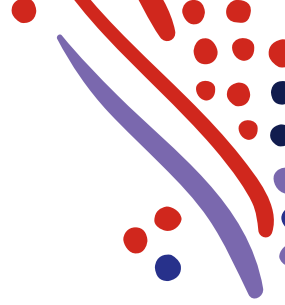
200,000
companies

300,000
users

200,000,000
documents



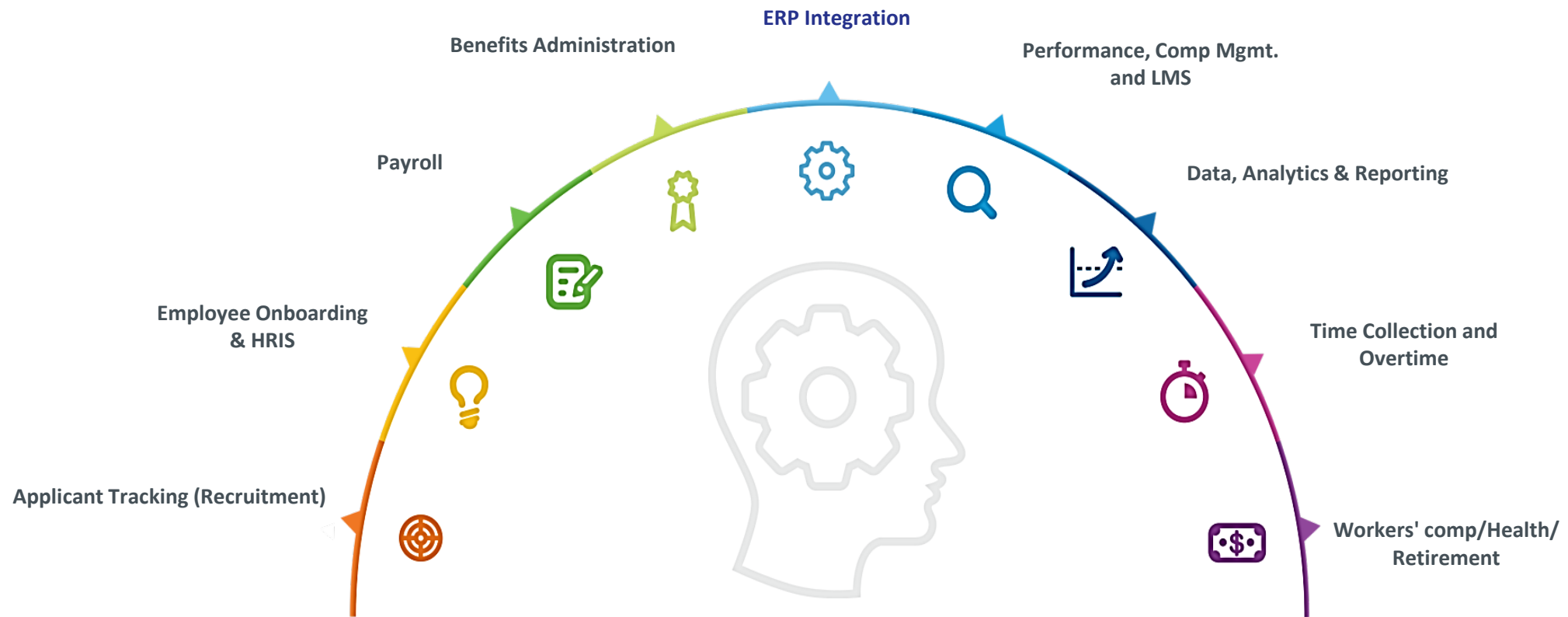
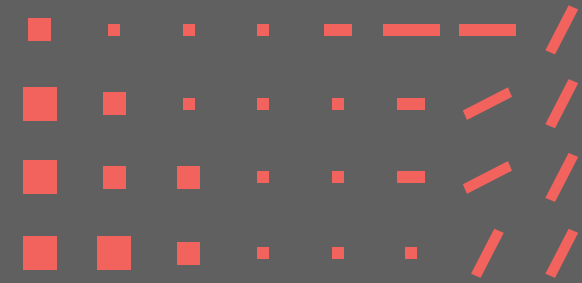
The UHY & ADP/Intacct Partnership



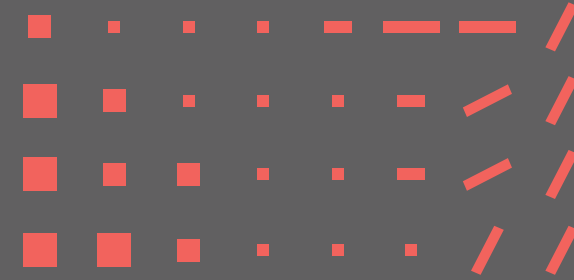
- Complete end-to-end ERP & HCM cloud solution that's fully integrated and automated
- Proven track record of UHY & ADP collaborative premier customer service and implementation experience
- Partner with the leader in HCM industry on the #1 Payroll and HR platform, Workforce Now
- Integration costs included in payroll module with no hidden fees and no future increased prices on the Sage MP unlike the other featured APIs
- ADP & Sage are invested in the long-term partnership and have a roadmap for future enhancements and integrations



More Than Just Payroll...



Sage Intacct Payroll Modules



Enhanced HR

- PTO Accrual Tracking
- **New Hire Onboarding**
- Employment Verification
- Policy Acknowledgements
- **Secure Document Storage**

Time

- Mobile or Online Access
- PTO management
- Job transfer for project tracking capabilities
- **Mobile, Computer, Kiosk, Clock Options**

Benefits Administration

- Enrollment Dashboard
- Electronic Enrollment
- ACA Reporting
- **Invoice Auditing**
- **1095-C Forms and Filings**

Service & Support

- **Dedicated ADP Sage Intacct team** Implementation Team
- **Dedicated ADP Sage Intacct Account Manager** for service requests post implementation
- **Training and System Education**
- **7-year historic data conversion**

Payroll

- **Custom report writer**
- Wage Garnishment Processing
- Mobile App
- Direct Deposit / Total Pay
- Intelligent Employee Case Resolution through conversational virtual assistant
- **All quarterly and year end processing (W2 & 1099s)**
- **Grant tracking, labor distribution, salary allocation, union payroll, certified payroll, job costing, etc**
- New State Tax ID Registration Service

DataCloud & Analytics

- **Workforce Analytics** tailored to your organization for HR, Payroll, Time & Labor, Benefits, Recruitment and Demographics
- **Turn data into action and business outcomes**
- Leverage the **most powerful dataset** to know where you stand amongst your peers

Performance & Comp Management

- Custom Performance Review Templates
- **360 Degree Peer Review**
- **Performance Scheduling**
- Employee Goal Management
- Manager Dashboard

Recruitment

- **Career site for applicants**
- Candidate communication
- **Applicant Tracking**
- **Industry and Geographic Compensation Benchmarks**

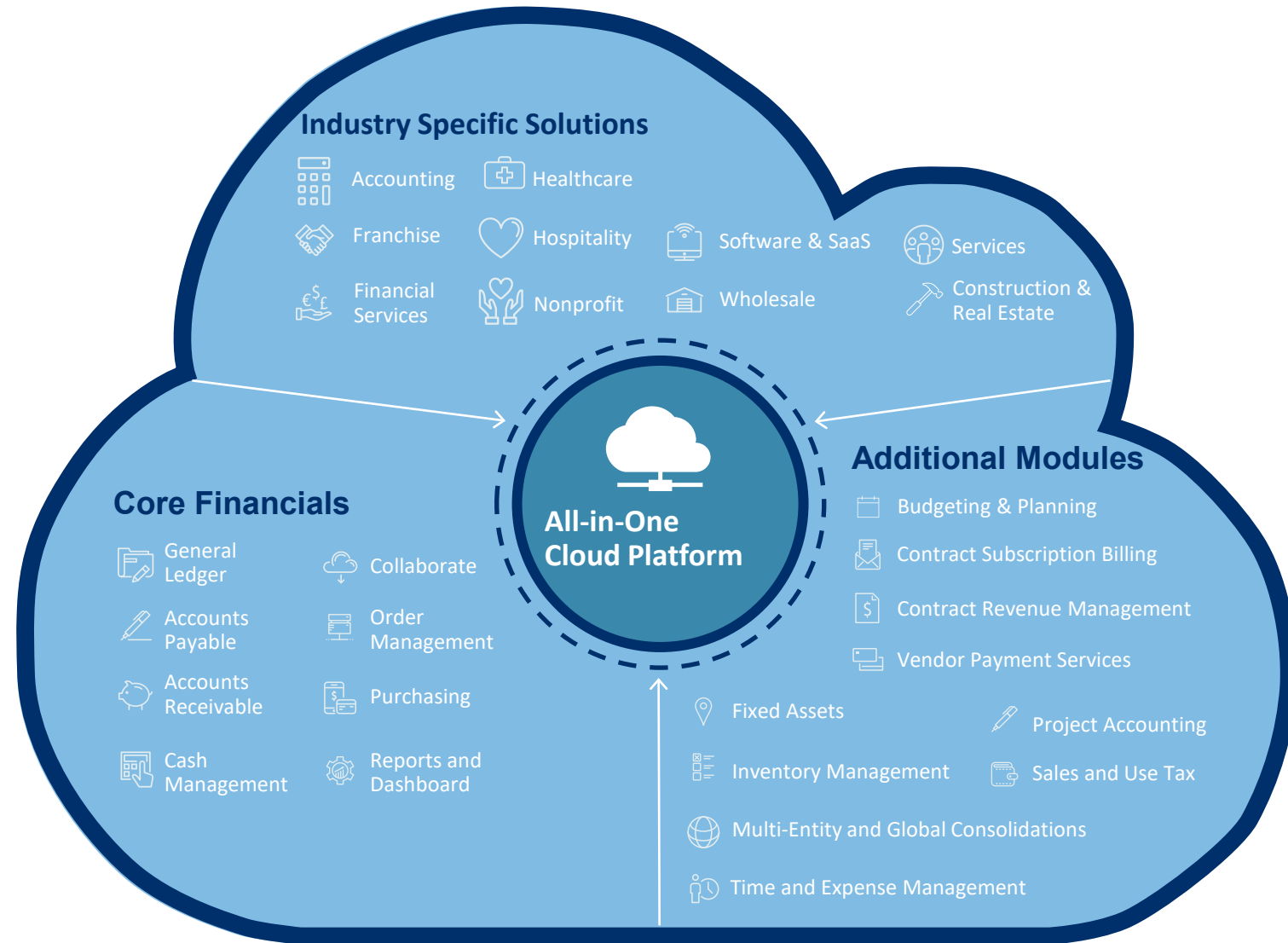
Learning Management

- **50+ Pre-packaged training courses for compliance and development** with options to buy up to **10,000+ courses**
- Upload company specific content
- **Track certifications & course content that integrates with employee HR profile**

Powerful 'Born in the Cloud' Solution

Sage Intacct

- Native Cloud from the 1st line of code
- Deep multi-dimensional accounting & automation for efficient financial operations
- Sophisticated visibility for real-time decision making
- Best of breed, easy integration to other solutions
- Fresh & modern user interface
- Designed for CFOs and professional finance teams looking for a powerful solution



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Questions

Submit all post webinar questions to:

CAAS-Support@uhy-us.com

If interested in a demo of any of the software mentioned in today's webinar: please indicate "Demo – Sage Intacct; Demo – Yooz; Demo – ADP or Demo – All" in the Q&A or in the CAAS-Support@uhy-us.com email

Submit Your Questions in the Question Box!