



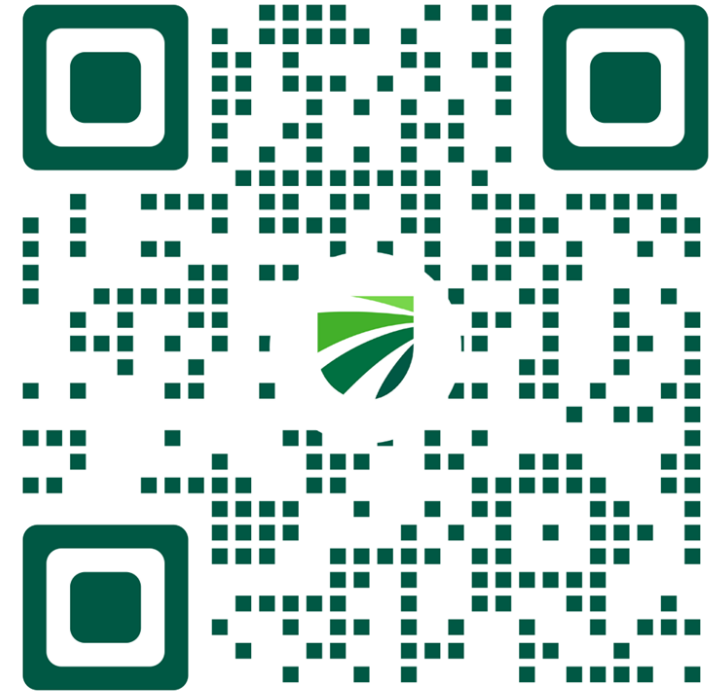
UHY Sage Intacct & Software Partner Showcase

Wednesday, August 27, 2025



Welcome

Thank you to our sponsors!

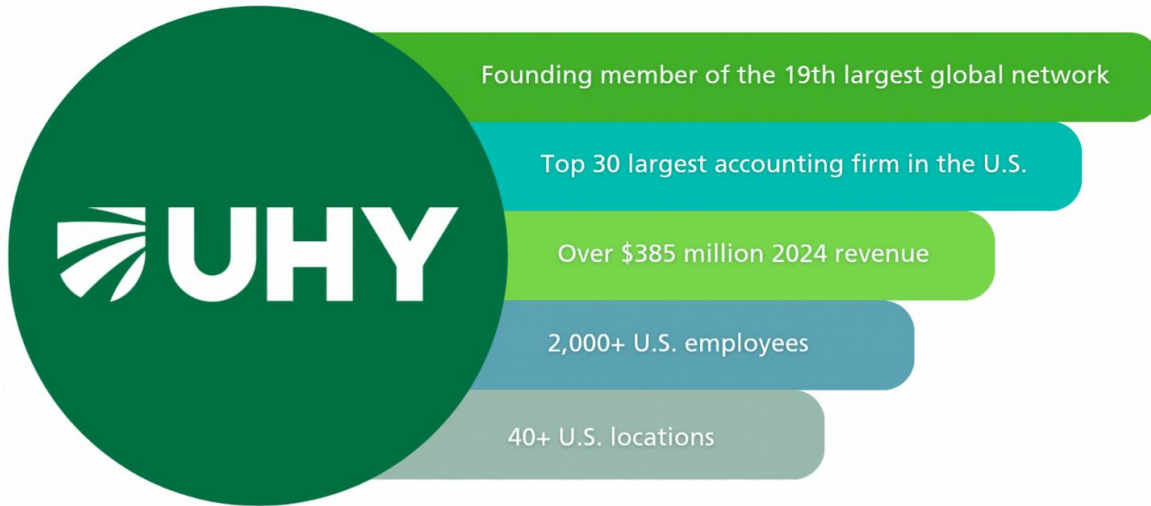


Agenda

Session:	Speaker (s)	Start	End
Arrival & Lunch	All - UHY Marketing to lead registration	Noon	12:45
Booths open for ISV Discussions			
Welcome Address	Bradley	12:45	12:55
Sage Intacct Panel	Linda, Kenita, Pam, Dan	1:00	1:50
Break		1:50	2:00
Yooz	Sara, Jennifer	2:00	2:50
Break		2:55	3:05
Avalara	Jeremy, Marianne	3:05	3:25
Break		3:25	3:35
Sage Intacct Dashboards & Reporting	Linda	3:35	4:00
Break		4:00	4:10
FailForward By Jacob Brown	Jacob	4:10	5:00
Networking		5:00	7:00
Cocktails			
Apps			
Booths open for ISV Discussions			



About UHY



UHY Sage Intacct Team



Rhonda Sauer
Software Solutions
Senior Manager

rsauer@uhy-us.com



Amber Josefosky
Software Solutions
Senior

ajosefosky@uhy-us.com



Ravi Atluri
Integration Specialist

ratluri@uhy-us.com



Bradley Belesky
Business Development
Manager

bbelesky@uhy-us.com



John Browning
Software Solutions
Specialist

johnbrowning@uhy-us.com



Sandy Cremona
Software Solutions Specialist

scremona@uhy-us.com



Dan Krishman
Consultant/Engineer

dkrishman@uhy-us.com



Michael Avraham
Integration Specialist

mavraham@uhy-us.com



Felicia Clement
Consultant/Engineer

fclemet@uhy-us.com



Karen Natale
Consultant/Engineer

knatale@uhy-us.com



Clare Garcia
Consultant/Engineer

cgarcia@uhy-us.com



Cindy Crawford
Consultant/Engineer

ccrawford@uhy-us.com



Brian Bentley
Consultant/Engineer

bbentley@uhy-us.com



Shanthisri Atluri
Consultant/Engineer

satluri@uhy-us.com



UHY Sage Intacct Team Highlights

- Currently servicing 30 clients on Sage Intacct & growing
- Implementation timelines are on average 3 – 6 months
- UHY Intacct Team averages 15 plus years of experience in Accounting, Finance, and ERP implementations
- UHY Intacct Team stays current on all Sage Intacct certifications & releases
- Standard Practice is to provide each client with a white glove approach to software implementation & support
- Dedicated Ticketing system for post go live support
- Integration partners across all software segments:
 - Accounts Payable – Yooz
 - Accounts Receivable – Versapay
 - Tax Automation – Avalara
 - Operations – Service Titan
 - Expense Management – Fyle
 - Payroll – ADP



The Best of Sage Intacct



Dashboards



Reporting



Foundation



*Configurable
Business Processes*



Integrations



Linda Pinion



Kenita Harris



Pam Kleinschmidt



Dan Krishman

Sage Partner

Sage Intacct Dashboards & Reporting

Sage Intacct Dashboards & Reporting



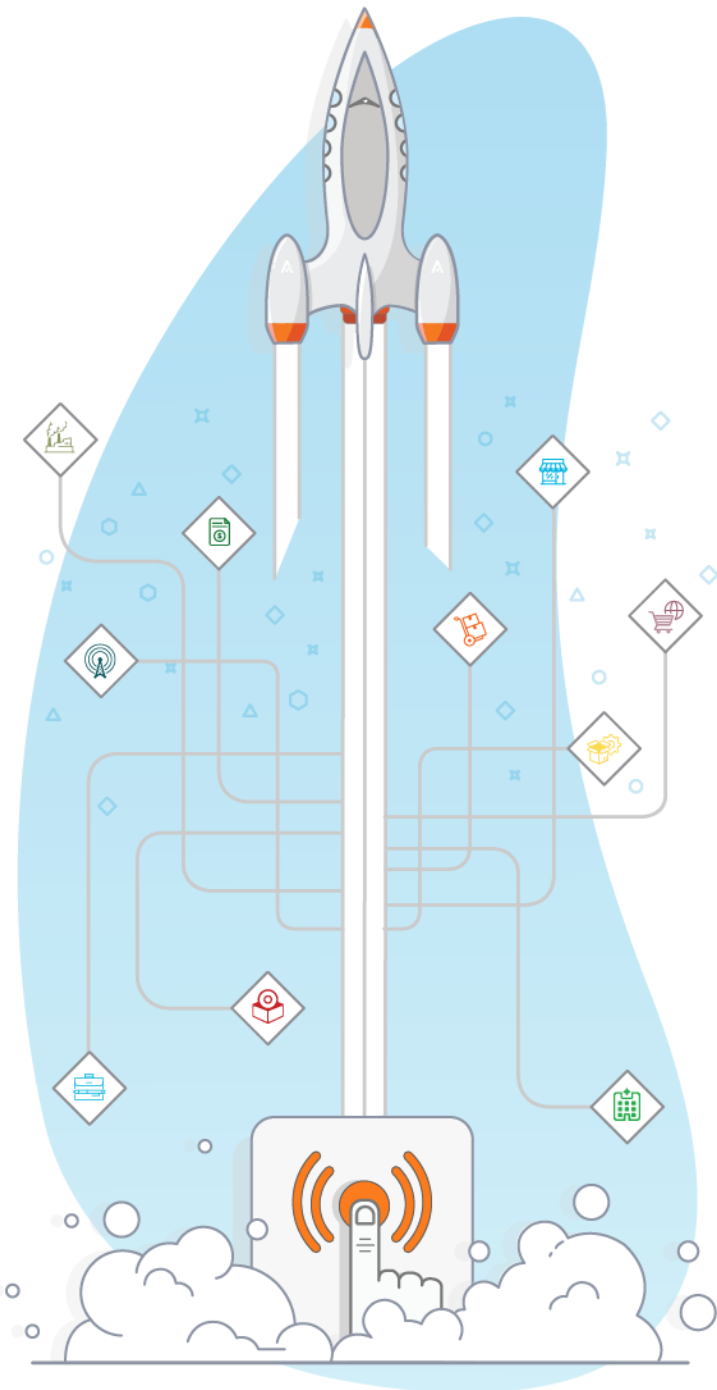
Dashboards

- Unlimited
- Secure
- Designed by Business User
- Component Driven
- Real time, comprehensive
- Drill down to source transaction



Reporting

- Reports Center
- 150 Pre-defined Reports
- Financial, On Demand, Custom
- Dimension, Account Group driven
- Metrics/KPI's
- Interactive Custom Report Writer
- Interactive Visual Explorer



Avalara

 **UHY**

**Sage Intacct &
Software Partner
Showcase**

Sage Partner





Jeremy Luiten

Strategic Alliance Manager,

Jeremy Luiten

- Based in Seattle, WA
- 10+ years of experience, 3+ years at Avalara



Marianne Fisher

Sr. Operation and Strategy Leader
Accountant Channel

Marianne Fisher

- Based in Detroit, MI
- 16+ years of experience, 4+ years at Avalara

About Avalara

Key facts and figures



In operation
since **2004**



More than **31 million**
documents /
certificates managed
by Avalara in 2022



More than **1,400**
signed partner
integrations



48 billion AvaTax API
calls were made by
customers in 2023



More than **6 million**
returns prepared by
Avalara in 2023



Serving **41K+**
customers from
75 countries

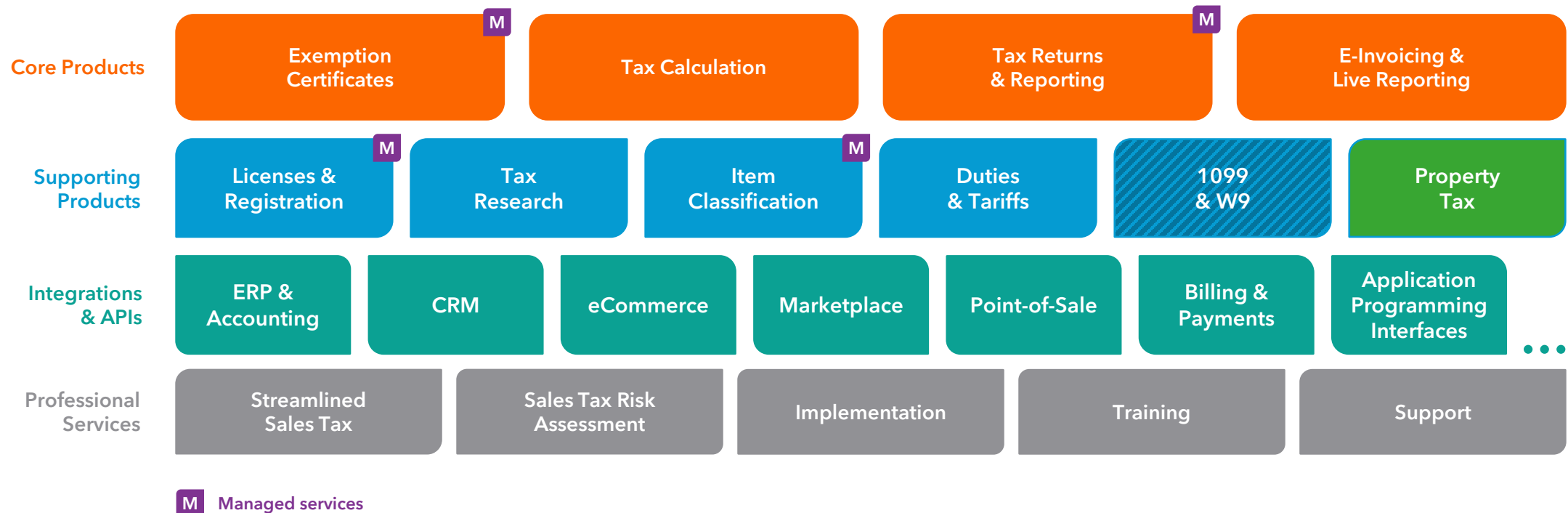
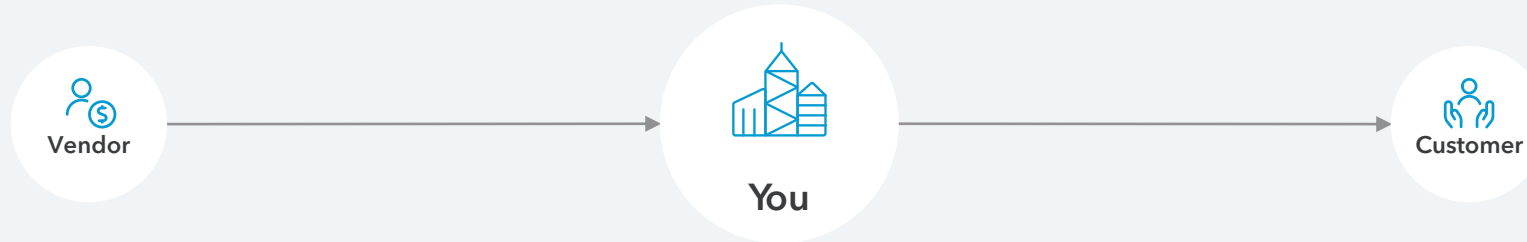
Global presence



15 offices **4,700+** employees

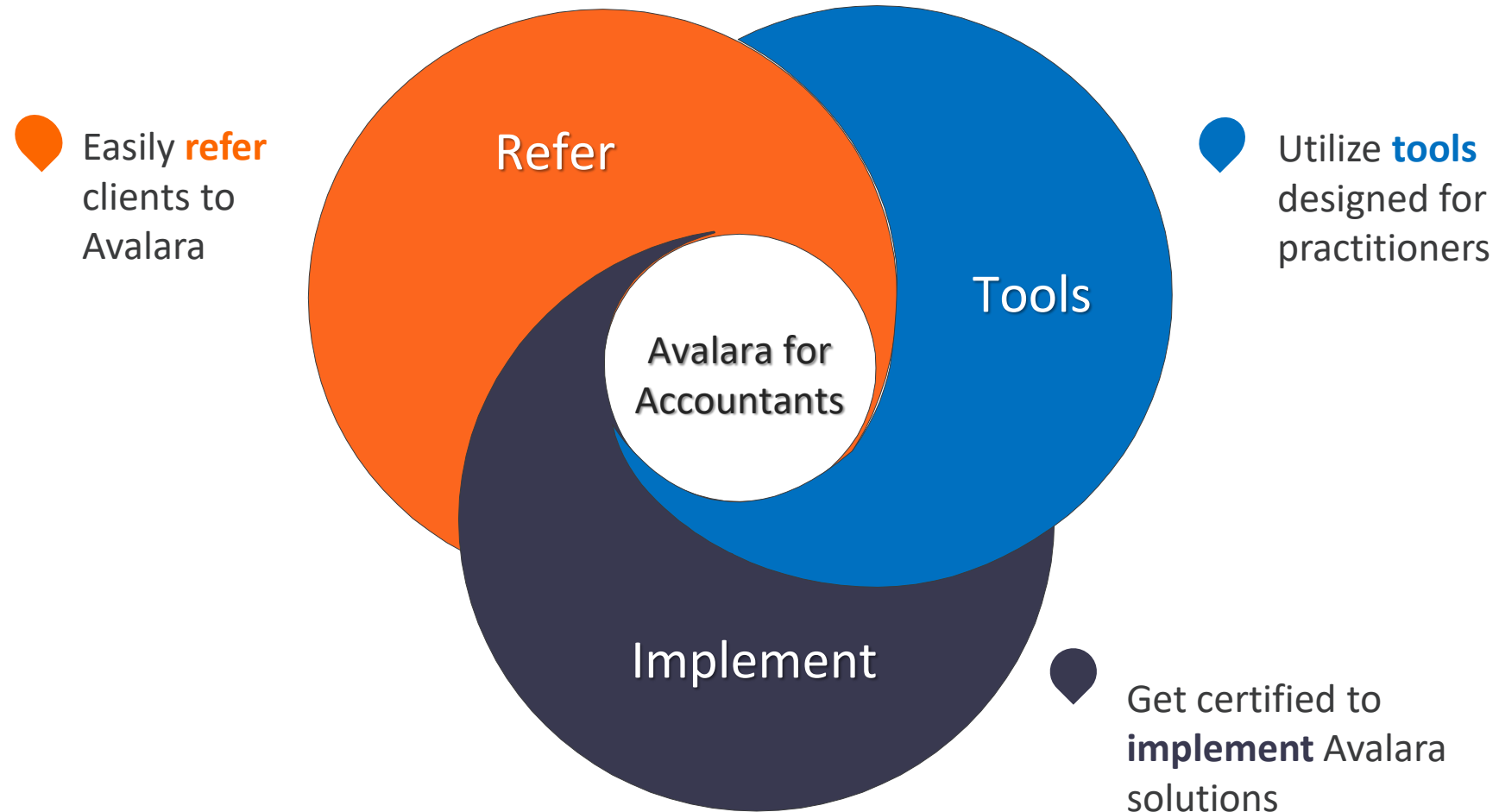
Largest tax technology company in the world

Avalara products and services



Avalara for Accountants

Three ways to engage with Avalara



Why Do Companies Need Avalara Tax Automation?

- Small Staff doing manual process
- They got an audit letter
- They owe the states back taxes
- Growing through Acquisition (acquired new tax problems)
- Has multiple locations or entities
- Doing business in multiple states
- Seeking funding/received funding
- Upgrading/changing their ERP or shopping cart
- Adding new products and services
- Has multiple products/services
- Adding employee headcount
- Don't know where they need to register based on what/where they sell



Why customers buy from us

- Achieve compliance and reduce risk
 - Automatic updates to rules, rates and jurisdictions in Sage Intacct
- Drive efficiency and reduce cost
 - Prebuilt integration in every instance of Sage Intacct
 - Easy button - just turn it on
- Accommodate growth and change
 - Expansion ready tax liability in Sage Intacct
- Enhance buyer experience
 - Accurate rates throughout entire buying experience

Business growth and trigger events

Can change tax compliance needs and processes

Companies can be:

- Seeking funding
- Recent recipients of Series C funding
- Going through a merger or acquisition
- Expanding their business
- Adding new products and services
- Adding employees

* *Great discussion for Annual Review Calls*



Qualification made simple

1. **Qualifiers for Sage Intacct paper** - the customer must be invoicing out of Sage Intacct
2. **Qualifiers for Avalara referral** - the customer is invoicing out of 3rd party products.
3. **Qualifiers for Avalara referral** - Customers that do not manage sales tax but have exemptions
4. **Not qualified** - Don't invoice at all

Qualification questions to ask on account reviews, check-in calls or renewals

CAM/CAE: How do you invoice your customers today?

Customer: We use Sage Intact for invoice

CAM/CAE: How are you managing sales tax?

Customer: We do it manually using tables



CAM/CAE: Based on your current process would it make sense to introduce you to Avalara who has been our partner for more than a decade and helping hundreds of Intact customers automate this process. I'll arrange a time to get together with an Avalara Consultant for a deeper discussion on your overall sales tax needs.



AvaTax On Sage

More accurately calculate sales and use taxes based on regularly updated tax data



REDUCE RISK

Reduce your audit risk with more accurate sales and use tax information updated regularly across every state



DRIVE EFFICIENCIES

Instead of expensive human resources you can simplify tax research and maintenance with automated technology



INTEGRATE SEAMLESSLY

Integrate seamlessly across 1,200+ signed partner integrations and connect to customer applications through our API



We want to deal with the best. Avalara is the leader in the sales tax industry, and I don't have to worry.

Working with both Avalara and Sage, Set Solutions has saved more than \$300,000 annually and 30 hours per week on tax compliance tasks.

Missy Basone
Chief Financial Officer



Accounts Payable

Automate the complex, tedious tasks that take up your finance teams' time and resources to manage use tax from your procure to pay process



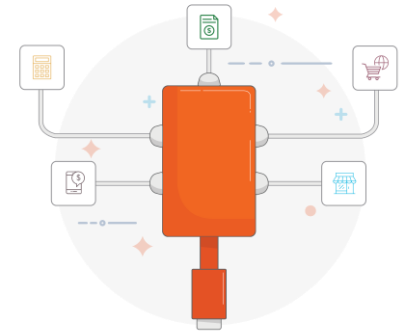
Identify and correct **overcharged and undercharged** vendor tax



Centralized configurations within AvaTax will apply to both **real-time and batch transactions** with a hybrid design



Provides a single location in which to **view, act, and report** on transactions flowing through the system



Seamlessly **works with your business applications**, including other Avalara solutions

How we do it - Exemption Certificate Management (ECM) Pro



Shifts onus from seller to buyer



Eases need for tax expertise



Allows web-based automation and process centralization

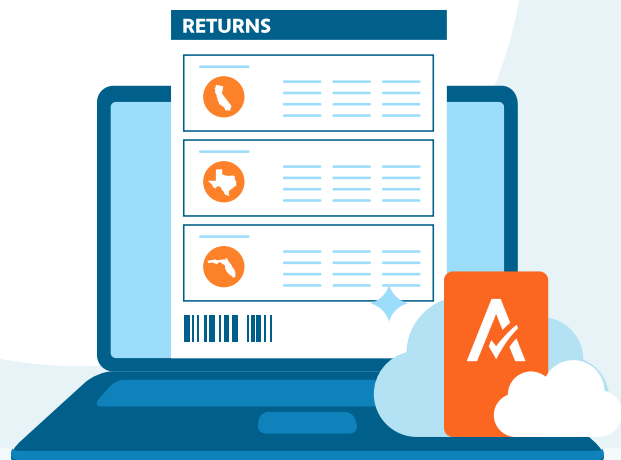


Provides Omni-channel solutions



Improves buyer experience and seller employee satisfaction





Managed Returns

Improve efficiency and bolster compliance by automating sales tax prep, filing, remittance, and notice management



SAVE TIME AND LOWER COSTS

Automate the end-to-end process of tracking obligations, filing returns, and remitting payment



STAY COMPLIANT

File returns in every jurisdiction where you have an obligation



INTEGRATE SEAMLESSLY

Export sales data from the ecommerce, marketplaces, and ERP/accounting systems you use today



We answer with such confidence and authority now; the auditors have moved on to someone else.

\$100k+ savings
in back taxes, interest, and penalties per year.

Lois Browne
Vice President of Finance



Avalara

Tax compliance done right



15-Minute Refreshment Break



Lean Financial Operations Only with Yooz

The fittest finance operations





Sara DeMond
Account Executive @ Yooz



Jennifer Andreas
Head of Channel Partnerships @ Yooz

Agenda

- Yooz

- Yooz + UHY

- What we solve for with Lean Financial Operations

- Q&A



Born in the
cloud in
2010

40%+
Growth/year

Offices in the
US and
Europe

7,000+
clients across
44+
countries

300k+
companies

600k+
users

300M+
documents

9/10
Customer
satisfaction

1,000+
R&D man-
years

100+
AI & ML
scientific
publications

25%
Of income
reinvested in
R&D annually

One
Single focus:
automatic
document
processing

yooz



Sage

Partners for 4 years

Turn AP from a cost center into a strategic value engine for everyone on the finance team
Maximize cash flow visibility, reduce risk, drive finance agility and strategic forecasting

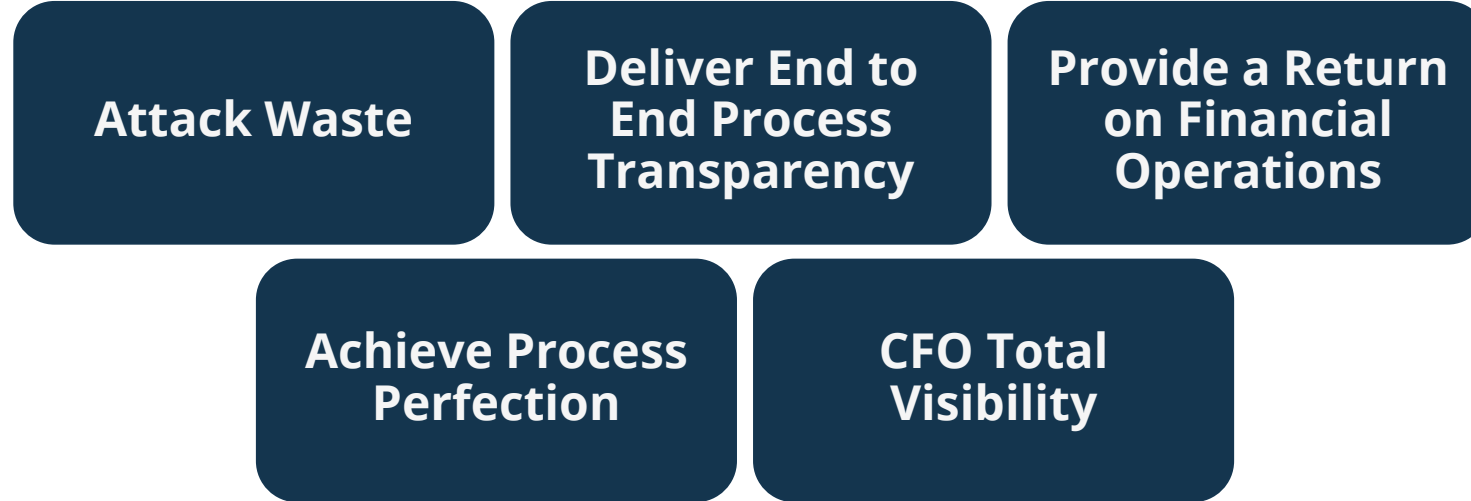
Challenges:

- Fragmented systems = poor cash flow forecasting
- High processing costs drain margin
- Risk of fraud or compliance exposure
- Difficulty accessing real-time spend data

Desired Outcomes:

- Up to 80% cost reduction
- Real-time visibility into liabilities
- Digital audit trails for compliance
- Control over working capital with early pay options

5 Principles of Lean Financial Operations™



Lean Financial Operations™: The Next Step Forward

At Yooz, we help them do better things by eliminating four core sources of operational waste:

Lost Productivity:

Manual data entry, routing, and reconciliation consume time and resources that could be allocated to higher-value strategic tasks.

Process Inefficiencies:

Disconnected systems, multiple approval channels, and paper-based processes slow down operations, reduce accountability, and inflate operational costs.

Compliance & Control Waste:

Weak compliance and inconsistent controls increase risk of mistakes, duplicate payments, and undetected fraud leading to costly rework and operational slowdowns.

Lack of Operational Clarity:

Lack of visibility into the AP process and approval status creates bottlenecks, delays, and missed deadlines, directly increasing the risk of late payment penalties.

The Result: Smarter, faster, and more strategic financial operations

84%

84% of firms still rely on paper or semi-automated processes.

1 in 3

1 in 3 invoices has errors or missing information.

60%

60% of finance teams cite chasing invoices as their top bottleneck.

Inefficient & Costly Processes

Cost to process a single invoice

Time spent on manual invoice retrieval

Days from invoice receipt to pay

Cost to cut a check

Vendor Statement reconciliation

Cost to process a T&E report

Manual Cost

\$10 - \$15

5 – 10 min/invoice

15 - 28 days

\$4 - \$9.34

.25–1.5hrs

\$18 - \$26

Return on Automation

\$2 - \$3

0.5 – 1 min

3 - 6 days

\$1 - \$2

3 – 18 min

\$5 - \$8

Savings

70 - 80%

80 – 90%

80%

25 – 80%

80%

65 – 70%

Staff time spent per day handling supplier calls



ROA: Reduce time spent by
50 – 80%

% of payments that are late



8% penalty on avg
2% invoice value for
forfeited discounts

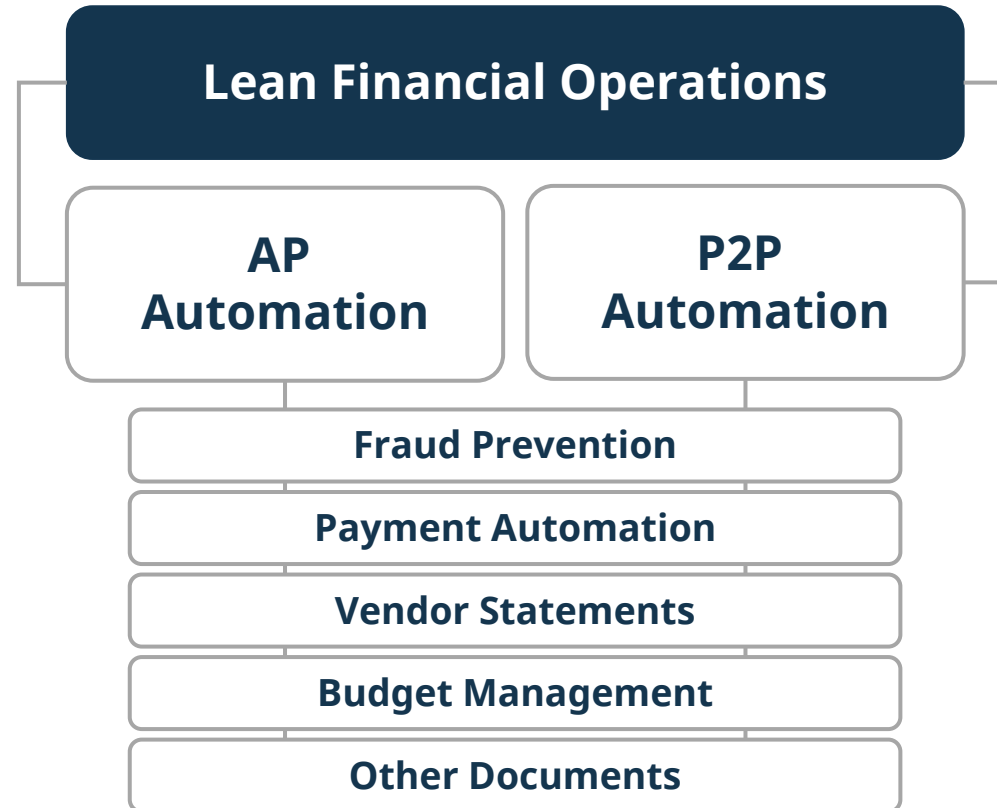
ROA: 80% improvement

Duplicate or mistaken payments

3 – 4%

.5% to 1.5% loss of
annual spend

ROA: Reduce to 0.1 – 0.5%





AI Driven Technology
(Not outsourced/Not templated)



Unlimited
Users/Entities/Support



Multi Language
Support



Multi – Capture
Functionality



Customizable
workflow



PO Matching



Fraud Detection
& Audit Trail



Dashboard &
Reporting



Mobile
Functionality

Expert AI Knowledge – Deepest document understanding and functional expertise powered by our powerful proprietary AI

Over 10 years of
experience

Purpose built for
financial operations

Continuous learning –
300M+ documents

True intelligence to
understand the full
context

90% of U.S. companies were targeted by cyber fraud, up from 79%*

The threat is real:

\$10 Billion
losses in 2023*

The threat is evolving

- Vendor impersonations and fake invoices
- AI & digital counterfeiting

AP teams need solutions:

- Fraud affects your financial operations!
- It's not a matter of if, **but when**



The most efficient AI-powered AP fraud prevention

- Identify fake documents with AI powered fraud detection
- Automatically spot atypical vendor behavior
- Prevent vendor impersonation
- Strengthen access controls to your financial systems
- Standardize workflows and segregation of duties
- Gain a robust audit trail and complete control

Highest Return on Financial Operations Automation

Expert AI Knowledge

Financial processes and functional expertise powered by our intelligent, proprietary AI

Ops Transparency

AP data insights to improve flow, cut errors and drive productivity by 80% or more

Simple Process Flex

Our unique, flexible workflow engine for easy process configuration and change, as well as the ability to handle your wildest routing dreams

Secure Financial Ops

The most comprehensive AP fraud protection on the planet powered by data, insights, and AI

Questions?



Thank You!

Jennifer Andreas

Jennifer.Andreas@GetYooz.com

Sara DeMond

Sara.DeMond@GetYooz.com



EMBRACE FEAR & FAIL FORWARD

Sage Partner

YOOZ 
Powering & P2P Automation. Easy. Powerful. Smart.

 UHY®

Avalara

versapay®

JACOB BROWN

Keynote Speaker

  @officialjakebrown

 jacob@failforwardbrown.com



Thank you!



[uhy-us.com](https://www.uhy-us.com)

Audit | Tax | Advisory | Consulting

"UHY" is the brand name under which UHY LLP and UHY Advisors, Inc. provide professional services. The two firms operate as separate legal entities in an alternative practice structure. UHY LLP is a licensed independent CPA firm that performs attest services. UHY Advisors, Inc. provides tax and business consulting services through wholly owned subsidiary entities. UHY Advisors, Inc. and UHY LLP are U.S. members of Urbach Hacker Young International Limited (UHY International), a UK company, and form part of the international UHY network of legally independent accounting and consulting firms. Any services described herein are provided by UHY Advisors and/or UHY LLP (as the case may be) and not by UHY International or any other member firm of UHYI. Neither UHY International nor any member of UHY International has any liability for services provided by other members.

©2024 UHY. All rights reserved.

