



**CURRENT &
EMERGING
TECHNOLOGIES**
CONFERENCE

Session 3B

2:10-3:00 PM



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LBMC Technologies
Sr. Implementation Consultant
Sage Intacct

USEFUL INTEGRATIONS TO BETTER SUPPORT YOUR CLIENTS

Experience:

Martha has been with LBMC Technology Solutions for two years. She came to LBMC with over 14 years experience in public and corporate accounting. Prior to beginning her Intacct consulting career, Martha held positions as Sr Auditor, Accounting Manager, Cash Management Mgr, Financial Reporting Sr. Manager, and Controller.

Education:

Martha holds a Bachelor of Science degree in Mathematics from Louisiana Tech University, and she completed her accounting coursework at Middle Tennessee State to become a licensed CPA. In addition, she holds an MBA from the University of Scranton, with concentrations in Accounting and Healthcare Administration. She is a certified Sage Intacct Implementation Specialist.

Personal:

Martha lives in Charlotte, NC with her husband. They have 4 children, 7 dogs and 3 cats. She was born and raised in Shreveport, LA and has lived in TN, GA and MS before coming to NC.

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Which type of accounting role do you currently perform?

ⓘ Start presenting to display the poll results on this slide.

After completing this course, you should be able to:

- Identify 3 ways software can improve CPA communication with clients
- Recognize the warning signs that manual processes are slowing down the accounting cycle
- Identify at least 5 routine tasks that can be automated through third party app integrations

How can software help your client communication?

- Be more accessible – video conferencing software
- Give instant feedback – cloud-based software
- Provide clearer information - visuals

What are signs that you or your clients need to automate more processes?

- Delays in getting bills approved and/or paid
- Long monthly closes
- Painful audits
- Finding many errors in the bookkeeping and spending a lot of time correcting them
- Tedious and time-consuming bank reconciliations

What tasks should my clients automate first?

- [Track Expenses](#) – Keep bills, receipts, invoices and statements organized
- [Make Payments](#) – Automate your accounts payable
- [Send Invoices](#) – Automate your account receivables
- [Receive Payment](#) – Get paid faster
- [Run Payroll](#) – Pay your employees on time and organize paperwork

What else can apps do for my clients on QBO?

- [Calculate Quotes](#) – Create and send estimates to your clients
- [Get Funded](#) – Grow faster with funding
- [Manage Customers](#) – Take control of your customer relationships
- [Manage Human Resources](#) – Take care of your employees
- [Manage Projects](#) – Keep the workflow going smoothly
- [Perform Analytics](#) – Get deeper insights on your business
- [Sync Data](#) – Enter data once across platforms
- [Track Inventory](#) – Avoid overstocking or running out of inventory
- [Track Time](#) – Track employees' time and simplify payroll

How do I know which apps are the best for my client?

➤ Do your research!

- Create a features comparison between apps in consideration
- Read user reviews
- Make a pros and cons list
- Determine which products are used by people like you

Where do I go for this research?

Technology Review Platforms:

1. G2
2. Gartner Digital Markets
3. Capterra
4. Software Advice
5. GetApp
6. Gartner Peer Insights
7. Trust Radius
8. PeerSpot
9. Trustpilot
10. SoftwareReviews

TrustRadius Example:

Finance and Accounting Categories

Accounting Software

Accounting and Tax Services Providers

Accounts Payable Software

Accounts Receivable Software

Blockchain Payments Systems

Budgeting and Forecasting Software

Crypto Accounting Software

Crypto Tax Software

Cryptocurrency Mining Software

Cryptocurrency Wallets

Digital Banking Platforms

Expense Management Software

FinTech Software

Financial Close Software

Financial Research Platforms

Financial Risk Management Software

Investor Relations Software

Invoicing Software

Nonprofit Accounting Software

Online Trading Systems and Platforms

Payment Gateway Software

Payment Hubs Providers

Payment Orchestration Platforms

Revenue Management Solutions

Spend Management Software

Subscription Management Software

Tax Compliance Software

Travel Management Software

Treasury Management Software

[See all categories](#)

Thank you!

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Additional resources may be found in the CETC Market Guide:

<https://www.ncacpa.org/cetc-market-guide/>