

### Executive Summary

#### Previous Solution:

- QuickBooks

#### Results with Sage Intacct:

- Sped monthly close by a couple of weeks
- Eased reporting for several international entities in multiple currencies
- Avoided multiple full time employee hires

“Sage Intacct gives us a financial hub that works perfectly in tandem with our sales hub—Salesforce. Rarely do you see such valuable, seamless integration between two software packages, without which we would have needed to add headcount to our team just to keep pace with Pentaho’s growth.”

—Jerome P. Kelliher, Director of Finance & Accounting, Pentaho

### Gaining Support for Multiple Entities, International Currencies

Pentaho Corporation is a rapidly growing software company that’s delivering the future of business analytics. Over the past decade, Pentaho has expanded from its headquarters in Orlando, Florida, to new international operations—increasing the complexity of the company’s financial processes and reporting. Consequently, Pentaho decided to make the switch to a sophisticated cloud-based system that would automate its accounting and financial management processes, especially surrounding the company’s complex revenue scenarios and global consolidations.

“As a rapidly growing worldwide company in a hot market, we knew we needed a more robust financial system than QuickBooks. We liked that Sage Intacct offered cloud-based software that had all the functionality of traditional on premises mid-market systems,” said Doug Johnson, executive vice president and chief operating officer of Pentaho. “When we evaluated competing financial management solutions, we felt Sage Intacct was best suited to meet our needs in several key areas, including multi-entity and multi-currency management and advanced revenue management.”

Ever since Pentaho brought in Sage Intacct, the best-in-class solution has successfully supported the company’s continued growth—as it significantly increased revenue, more than doubled headcount, acquired new businesses, and secured \$23 million in Series C funding.

### Automating Complex Revenue Management and Global Consolidations

Sage Intacct now underpins Pentaho’s five-entity general ledger with a shared chart of accounts across the company’s four subsidiaries, making it easy to add new entities as needed over time. By implementing Sage Intacct and undergoing several internal process improvements, the finance team was able to streamline accounts payables and receivables workflows, and reduce the company’s monthly close by a couple of weeks—while producing more accurate financial information. The

business can now view fully consolidated reports across worldwide operations within five to ten days of the month end.

With Sage Intacct, Pentaho has streamlined the entire quote-to-cash process, which saves a significant amount of time and money now that new sales orders flow directly from Salesforce into Sage Intacct's streamlined revenue recognition workflow. The financial system effortlessly connects with other best-in-class business applications as well, including Sage Intacct partner solutions such as Avalara for sales tax calculations and compliance and Adaptive Insights for cloud-based revenue planning, budgeting and forecasting. In addition, Pentaho is able to utilize its own software, Pentaho Business Analytics, to access, blend, and analyze data from all of the applications.

Sage Intacct's advanced Revenue Management software fully automated everything from revenue reallocations using fair value pricing for multiple element arrangements (including related amortization) through to invoicing. With the revenue recognition process triggered instantly from Salesforce, the team can more easily handle multiple transactions, separate out various bundled items in order to account for them using the appropriate values, timing and accounts, and generate reports as needed.

## Maximizing Business Performance Through Greater Financial Insight

By revamping all of its financial processes, Pentaho gained much greater confidence in the reliability and accuracy of its GAAP accounting and overall financial data, and now has critical insight to help drive the company forward. Not only does its finance team regularly review core financial reports in Sage Intacct, it also pulls financial information from Sage Intacct into the Pentaho analytics platform to conduct deeper analysis on key business trends.

The company leverages data from Sage Intacct for its business health check metrics, and also blends this financial information with data across multiple functions such as sales, support, and engineering to create Pentaho's Customer 360 Degree view. Sage Intacct's seamless integration with Salesforce provides Pentaho's sales team with access to valuable information that had been siloed in QuickBooks before, such as invoice and payment history.

### About Pentaho

Pentaho's open source heritage drives continued innovation in a modern, integrated, embeddable platform built for the future of analytics, including diverse big data requirements. Powerful business analytics are made easy with Pentaho's cost-effective suite for data access, visualization, integration, analysis and mining.



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