

March 12, 2025

# Sage Intacct Professional Services Automation (PSA) & Project Intelligence



# Today's Presenters



**Lindy Antonelli**

Partner  
Technology Consulting



**Annie Evans**

Director  
Technology, Sage Intacct



**Shannon Santistevan**

Sage Intacct Solution Architect



ARMANINO

# Firm Overview

*Count on Armanino to think strategically and provide sound insights that lead to positive action. We address not only your compliance issues, but your underlying business challenges.*

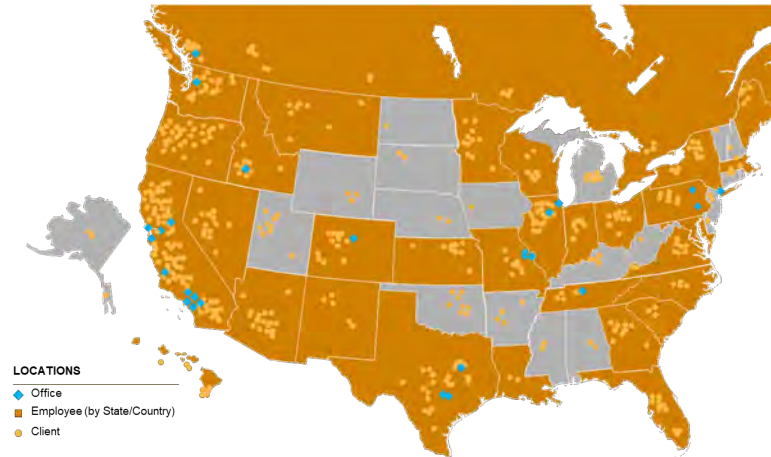
## Purpose

To be the **most innovative** and **entrepreneurial firm** that makes a **positive impact** on the lives of our clients, people and our communities.

## Snapshot

2500+ Employees  
 Team Members in 23 States  
 18th Largest CPA & Consulting  
 Largest Niche: Technology

## Locations



- CALIFORNIA**
  - San Ramon
  - San Jose
  - San Francisco
  - Los Angeles (2)
  - Irvine
  - El Segundo
  - Woodland Hills
  - San Luis Obispo
  - Torrance
- WASHINGTON**
  - Bellevue
- COLORADO**
  - Denver
- IDAHO**
  - Boise
- TENNESSEE**
  - Nashville
- TEXAS**
  - Austin (2)
  - Dallas
- ILLINOIS**
  - Chicago
  - Naperville
- MISSOURI**
  - St. Louis
  - St. Charles
- PENNSYLVANIA**
  - Philadelphia
  - Scranton
- NEW YORK**
  - New York City
- CANADA**
  - Vancouver

## AFFILIATE COMPANY



## RECOGNITION & AWARDS





# Demo Highlights

Get a real-time view of workload and resource capacity

Ensure the right skills and resources align with client needs

Replicate successful project with AI-driven insights

Gain a comprehensive view of project performance

Scope tasks, add phases and manage workflows in one platform



# Sage Intacct Professional Services Automation (PSA)



# Professional Services Automation

- Features and Functionality
- Time and Resource Management
  - Scheduling and Capacity Management
  - Resource Demand and Assignment
- Summary of Frequently Asked Questions



# Time and Resource Management Scheduling

Sage My Work Projects Resourcing Admin

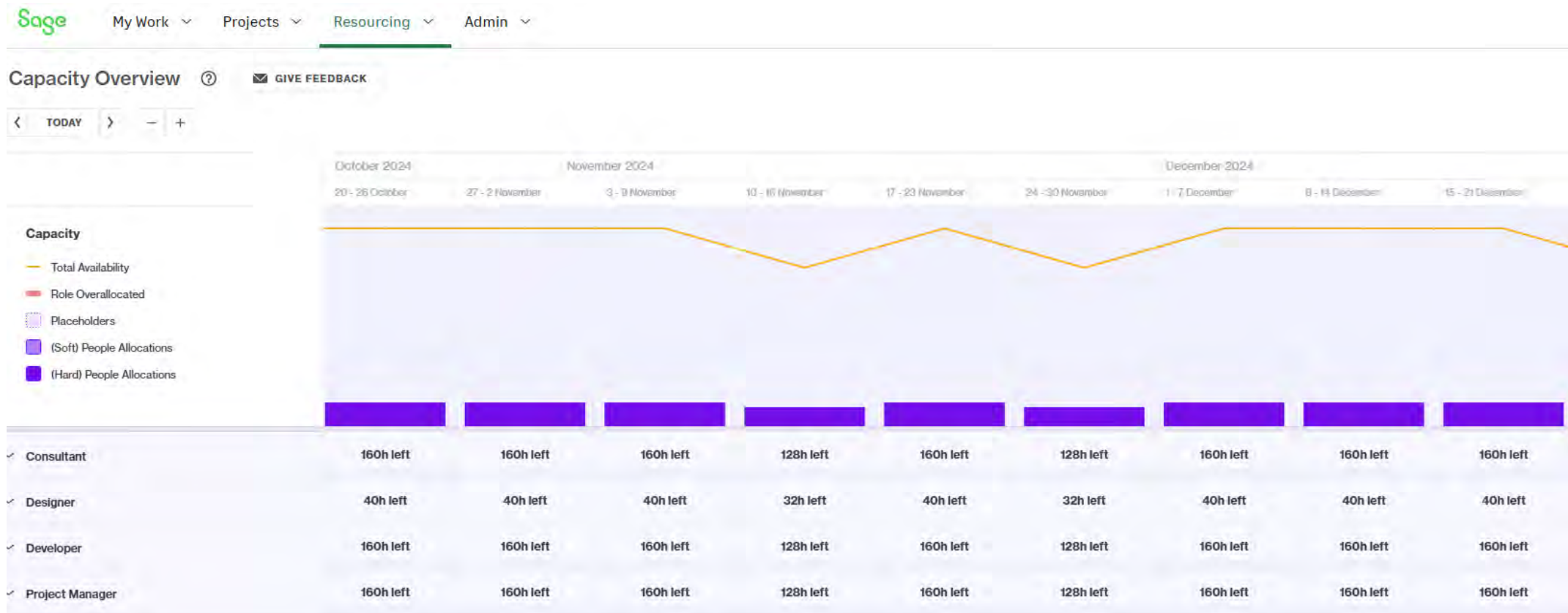
People Schedule

Combined view Heatmap in hours TODAY - + FILT

	June 2024	July 2024			August 2024				
	23 - 29 June	30 - 6 July	7 - 13 July	14 - 20 July	21 - 27 July	28 - 3 August	4 - 10 August	11 - 17 August	18 - 24 August
<b>Total Resource Utilization</b>	800h left	672h left	840h left	840h left	840h left	840h left	840h left	840h left	840h left
✓ <b>AW</b> Amy Wallace Developer	40h left	32h left	40h left	40h left	40h left	40h left	40h left	40h left	40h left
✓ <b>AE</b> Annie Evans Project Manager	40h left	32h left	40h left	40h left	40h left	40h left	40h left	40h left	40h left
✓ <b>CG</b> Chandra Gupta Scientist	40h left	32h left	40h left	40h left	40h left	40h left	40h left	40h left	40h left
✓ <b>CE</b> Chelsea Evans Developer	40h left	32h left	40h left	40h left	40h left	40h left	40h left	40h left	40h left
✓ <b>CR</b> Christian Reyes Project Manager	40h left	32h left	40h left	40h left	40h left	40h left	40h left	40h left	40h left
✓ <b>CD</b> Chuck Darwin Senior Consultant	✓ Full	✓ Full	✓ Full	✓ Full	✓ Full	✓ Full	✓ Full	✓ Full	✓ Full
✓ <b>DP</b> Derek Peters Developer	40h left	32h left	40h left	40h left	40h left	40h left	40h left	40h left	40h left



# Resource Capacity Overview







# Sage Intacct Project Intelligence



# Project Intelligence Dashboard

- Profitability Dashboard
- Project Analytics
- Realization
- Utilization
- Summary of Frequently Asked Questions



Additional Questions?  
Reach out to us!

**Lindy Antonelli**

[Lindy.Antonelli@armanino.com](mailto:Lindy.Antonelli@armanino.com)

**Annie Evans**

[Annie.Evans@armanino.com](mailto:Annie.Evans@armanino.com)

**Shannon Santistevan**

[Shannon.Santistevan@armanino.com](mailto:Shannon.Santistevan@armanino.com)

Armanino is a brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.