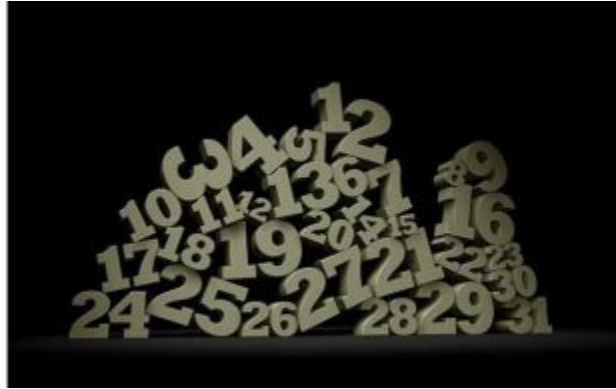


Using Intacct's Collaborate to help to tell a number's story



ARTICLE 01.18.17 DEAN DORTON

When I graduated college and started working in accounting, one of the senior accountants I worked with told me “Every number tells a story”. At the time, I thought that was silly. Maybe it was because he wore a bowtie, and I’ve always had a hard time taking anybody seriously who wore a bowtie. But as I spent more and more time in accounting, I came to realize just how true his statement was.

With the sophistication of today’s ERP systems, users can now view high-level information, and easily drill down to the exact screen where data was entered. But what about the supporting detail? Where can we go to find the rest of that number’s story? Up until recently, all of the supporting detail was captured on a paper document, attachments, or e-mails – mostly outside of the accounting system. When a user needed to see that information, they had to either pull out the paper records or ask somebody to send them the information. Phone calls, emails, and faxes flew back and forth until the information was gathered –all a great waste of time!

With [Intacct Collaborate](#), the users can now record all of the information about a transaction inside of Intacct!

No more searching through e-mail records to find information, no more digging through file cabinets for documents, no need to call somebody for details. Based on Salesforce’s Chatter function, users can post comments, attach files, and share links specific the accounting activity. If Salesforce is being used, Collaborate also allows the sales teams to share their information with the accounting staff.

By creating groups, Collaborate shares information to everyone who needs to be “in the loop”. Whenever details are needed, the user can simply enter a note in Collaborate and the others receive the notification. All messages and files reside within the Collaborate system, providing a robust audit trail. And because the information is stored in Intacct, it never gets lost in email archives or physical records stored off-site or destroyed. The best thing about Collaborate is that it is completely free to Intacct users! Using Intacct Collaborate, the user can finally give each number a chance to tell their story!