

# Customer Success

*The Diocese of Jefferson City, MO shares their experiences with Mateo - Cloud Diocesan Savings and Loan Software*

Kathy Smith, Finance Manager at The Diocese of Jefferson City, MO came on board with Mateo in April, 2021. The Diocese had converted to Sage Intacct - Cloud Accounting Software and was looking for a modern cloud based solution that would fully integrate. They were previously on DLS. Kathy mentioned that one of her biggest frustrations with their previous system was the lack of automation and integration. The double entry was not only taking a significant amount of time, it was also increasing the chances for errors, and making reconciliations more time consuming. Creating manual statements was very time consuming and resulted in customers not receiving information in a timely manner. Kathy spent roughly 4-5 hours a month reconciling the sub ledger, and a whole day to print out and manually mail statements each quarter. She is now saving up to 2 days per month! She also enjoys the security of a cloud-based system like Mateo; no longer needing to back up her data and knowing the information is secure, gives her peace of mind.

The selling points of Mateo for Kathy were the full integration with her accounting system (Sage Intacct) and the seamless user interface between Mateo and Sage Intacct, making it easy to move from one system to the other; "it feels like the same system".

Her favorite features are the ease of use, integration, reporting capabilities, and peace of mind, knowing that her data is always safe and secure. Her ultimate favorite feature is being able to send people their statements in a timely manner via email at the touch of a button; no more stuffing envelopes! She looks forward to giving users access to the system, so that they may access their information at any time; further reducing demands on her time. Kathy really appreciates that Mateo has helped provide more work/life balance and provides her with more freedom the first few days of the month.

Lastly, Kathy really appreciates the Customer Service. She stated, "The team has a get it done and problem solving attitude that is really helpful"



Mateo

*"Now that we are on Sage Intacct and Mateo I can actually take a vacation the first few days of the month."*

*"My ultimate favorite thing is being able to send people their statements in a timely manner via email, I don't miss stuffing those envelopes!"*

**Kathy Smith**



**Finance Manager -  
Diocese of Jefferson  
City, MO**