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CPAs | CONSULTANTS | WEALTH ADVISORS

Streamlining Salary and Wages Budgeting with Sage Intacct Planning

August 26th, 2025



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Session CPE Requirements

- You need to attend 50 minutes to receive the full 1 CPE credit.
- 4 Attendance Markers that read: “I’m Here,” will be launched during this session. You must respond to a minimum of 3 to receive the full 1 CPE credit.

****Both requirements must be met to receive CPE credit****



Learning Objectives

- *At the end of the session, you will be able to:*
 - *Review the fundamentals of salary and wages budgeting within Sage Intacct Planning.*
 - *Review recommended practices for automating and streamlining the budgeting process.*
 - *Recognize techniques for setting up taxes to budget with salary and wages.*





Fundamentals of Salary and Wages within SIP



Why Focus on Salaries and Wages?

- Largest Expense in most budgets
- Complex with variables like benefits, taxes, raises, bonuses
- High Impact on financial forecasting





Company

Q Search

Employee information

Print list Edit Duplicate Done Show settings

Employee information

Contacts

Cost rates

Reimbursement information

Cost rate history

	Start date	Hourly rate	Annual salary
1	08-16-2013	---	235,000.00



Employee Entry with proper dimensions for precise reporting and effective budgeting

History Scenarios ▾ Main Model **Tables**

Employees General Fields All Headcount ▾ All Geographies ▾ All Departments ▾ **+ Add Employee**

<input type="checkbox"/>	NAME ↓	Q	ROLE	START DATE	END DATE	BASE SALARY	CURRENCY	TERM	BONUS	ADVANCED BENEFITS	EMPLOYEE ID	GEOGRAPHY	DEPARTMENT	ACTIONS
<input type="checkbox"/>	Admin assistant			05/2015	MM/YYYY	90,000	USD	Yearly	8.5	%		USA	G&A	
<input type="checkbox"/>	CEO			01/2015	MM/YYYY	200,000	USD	Yearly	8.5	%		USA	G&A	
<input type="checkbox"/>	COO			02/2015	MM/YYYY	130,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	Marketing manager			MM/YYYY	MM/YYYY	220,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	New Employee			MM/YYYY	MM/YYYY		USD			%				
<input type="checkbox"/>	QA engineer			06/2016	MM/YYYY	135,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	R&D manager			03/2015	MM/YYYY	200,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	Sales associate			MM/YYYY	MM/YYYY	190,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	Sales associate			MM/YYYY	MM/YYYY	185,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	Sales associates		Sales associate	01/2016	12/2017	120,000	EUR	Yearly	8.5	%				
<input type="checkbox"/>	Software engineer			04/2015	MM/YYYY	170,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	Software engineer			05/2015	MM/YYYY	170,000	USD	Yearly	8.5	%				
<input type="checkbox"/>	Software engineer			05/2015	MM/YYYY	180,000	USD	Yearly	8.5	%				

Create New Employee

Name: New Employee Type: Employee

Budget Line: Salary & wages (700000) + 4 mar Basic Salary: \$ USD

Term: Select Start Date: MM/YYYY End Date: MM/YYYY

Role: Employee ID: |

Benefits: 10 % Employment Taxes: %

Payment: Same month Yearly Increase: -HR assumptions + 2017 %

Yearly Increase On: Fiscal year start Yearly Vacation Days: 20

Accrual Vacation: 30 % Max Accrued Vacation: 30 days

Bonus Period: Annual Bonus: 8.5%

Bonus Payment After: months



Salaries and Wages Grouping

History Scenarios ▾

Main Model Tables

Budget Lines ▾

Long-Term Care > Operational Expenses > Salary & Wages

Salary & Wages (60000) + 4 more | Type: Salary & Wages

Preview of P&L ▾ Budget ▾ Summary ▾ By Month ▾

	JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024	OCT 2024	NOV 2024	DEC 2024	TOTAL
Number of employees	9	9	10	10	10	10	10	10	10	10	10	10	10
Total	(\$84,393)	(\$84,393)	(\$97,307)	(\$95,807)	(\$95,807)	(\$86,619)	(\$86,619)	(\$86,619)	(\$86,619)	(\$86,619)	(\$86,619)	(\$86,619)	(\$1,064,037)

EMPLOYEE ASSUMPTIONS

Benefits 12	%	\$	Employment Taxes 10	%	\$
Payment	▼		Yearly Increase 5	%	\$
Yearly Vacation Days 14		\$	Avg Accrued Vacation 10	%	\$
Bonus Period Annual	▼		Bonus 15	%	\$

Yearly Increase On Fiscal Year Start

Max Accrued Vacation 20 days

Bonus Payment After months

ADVANCED BENEFITS

401k (from settings) [Icon] [Icon] [Icon]

HealthCare Family (from settings) [Icon] [Icon] [Icon]

HealthCare Single (from settings) [Icon] [Icon] [Icon]

On Call Cell Phone (from settings) [Icon] [Icon] [Icon]

+ Add benefit

Employee Planning (Collaborati...

Long-Term Care

Revenues

Cost of Revenues

Operational Expenses

Salary ... (60000) + 4 more

Israel Barry

Gregory Le

Roger Parks

Deandre Norris

Brenna Gallegos

Hallie Mata

Olivia Hayes

Charles Mullins

Ronin Hughes

Aylin Tapia

Laptop

Office Supplies

Business Licenses a... (67000)

Photo and Equipment rentals



Salaries and Wages Grouping by Type

History Scenarios ▾

Main Model Tables

Budget Lines ▾

Long-Term Care > Operational Expenses > Salary & Wages > Office Supplies

Office Supplies Type: Per Employee Expense ⓘ

Preview of P&L ▾ Budget ▾

	JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024	OCT 2024
Number of employees	9	9	10	10	10	9	9	9	9	9
Total	(\$900)	(\$900)	(\$1,000)	(\$1,000)	(\$1,000)	(\$900)	(\$900)	(\$900)	(\$900)	(\$900)

Occurs Monthly ▾

Spread Same amount each month ▾

Amount 100

Payment months after ▾

Expensing Period months

SELECT HEADCOUNT

Employees from ...Care > Operational Expenses > Salary & Wages (60000) + 4 more ▾

Department Location Role

Tags Type: Employee ▾

Cost of Revenues

Operational Expenses

Salary & W... (60000) + 4 more

Israel Barry

Gregory Le

Roger Parks

Deandre Norris

Brenna Gallegos

Halle Mata

Olivia Hayes

Charles Mullins

Ronin Hughes

Aylin Tapia

Laptop



Adding Model Assumptions to Budget for Bonus and Taxes

Employee Taxes

▼ FIXED ASSUMPTIONS (4)

+ Add Assumption

Name	Oklahoma	Value	1.5	%	▼	Comment
Name	Wisconsin	Value	3.25	%	▼	Comment
Name	California	Value	7.4	%	▼	Comment
Name	Minnesota	Value	6.3	%	▼	Comment

MODEL LINE

+ Add Model Line

Bonus Ratings

▼ FIXED ASSUMPTIONS (4)

+ Add Assumption

Name	Exceeds Expectations	Value	15	%	▼	Comment
Name	Meets Expectations	Value	10	%	▼	Comment
Name	Needs Improvement	Value	5	%	▼	Comment
Name	Below Expectations	Value	0	%	▼	Comment



Using Functions

History Scenarios ▾

Main Model Tables

Budget Lines ▾

Q salary X

Sage Future Test Budget

2025-Medical

Operating Expenses

Salary

Lola Akinuli Employee

Lesia S. Alleyne Lamor...

Jasser Alvarez

Quitel Andrews

Aiamuddin Azizi

Regina Chandler

Uyanga Damdinbazar

Melissa Erana

2025-Medical > Operating Expenses > Salary > Lola Akinuli

Lola Akinuli Type: Employee

Preview of R&E ▾ Summary ▾

	JAN 2025	FEB 2025	MAR 2025	APR 2025	MAY 2025
Total	(\$12,500)	(\$12,500)	(\$12,500)	(\$12,500)	(\$12,500)

Role Director of Grants and Contracts * Employee Id 004040

Term Yearly ▾

Payment Auto ▾

Yearly Vacation Days f_x

Bonus Period Annual ▾

Benefits % f_x

Yearly Increase % f_x

Avg Accrued Vacation f_x

Bonus -Salary and Wages Calculations > John ... % f_x

Salary and Wages Calculations > John Smith Daily Salary > ✓

Salary and Wages Calculation > Bonus and Tax Assumptions > Meets Expectations

MODELS

SALARY AND WAGES CALCULATIONS

John Smith Daily Salary Headcount

SALARY AND WAGES CALCULATION > BONUS AND TAX ASSUMPTIONS

Meets Expectations

Grid entry

Month ▾

1 2 3 + > =

4 5 6 - < <>

7 8 9 x >=

0 ÷ <=

IF MIN MAX

Cancel Done

employment taxes % f_x

Yearly Increase On Fiscal year start ▾

Max Accrued Vacation days f_x

Bonus Payment After months f_x

TOTAL (\$150,000)



Adding Models to Budget for 26 Pay Period

History Scenarios ▾

Main **Model** Tables

Models +

- Salary and Wages Calculations
 - Salary and Wages Calculation
 - Bonus and Tax Assumptions
 - Fixed Payroll Assumptions
 - Per Pay Period
 - Salaries And Wages Model**
 - Medicare
 - Social Security

Salary and Wages Calculation > Salaries And Wages

Salaries And Wages

FIXED ASSUMPTIONS

+ Add Assumption

MODEL LINE

+ Add Model Line

Monthly

	JAN 2025	FEB 2025	MAR 2025	APR 2025	MAY 2025	JUN 2025	JUL 2025	AUG 2025	SEP 2025	TOTAL
Pay Period Per Month <input type="text" value="Input"/>	2	2	3	3	2	2	2	2	2	26
Employee 1-Salary	2,000	2,000	3,000	3,000	2,000	2,000	2,000	2,000	2,000	26,000
Employee 2-Salary	4,000	4,000	6,000	6,000	4,000	4,000	4,000	4,000	4,000	52,000
Employee 3-Salary	6,000	6,000	9,000	9,000	6,000	6,000	6,000	6,000	6,000	78,000



Adding Models to Budget for per Day Salary

Models

Bonus and Tax Assum...

Fixed Payroll Assumptions

Per Pay Period

Salaries And Wages

Medicare

Social Security

Per Day Salary

Bonus and Tax Assumptions

Fixed Payroll Assumptions

Per Pay Period

Salaries And Wages

Medicare

Social Security

Statistical Accounts

Per Day Salary > Salaries And Wages

Salaries And Wages

FIXED ASSUMPTIONS

+ Add Assumption

MODEL LINE

+ Add Model Line

Monthly

	JAN 2025	FEB 2025	MAR 2025	APR 2025	MAY 2025	JUN 2025	JUL 2025	AUG 2025	SEP 2025	TOTAL
Working Days Per Month	20	21	20	20	21	23	22	19	19	191
Employee 1-Salary	2,000	2,100	2,000	2,000	2,100	2,300	2,200	1,900	1,900	19,100
Employee 2-Salary	40,000	42,000	40,000	40,000	42,000	46,000	44,000	38,000	38,000	382,000
Employee 3-Salary	60,000	63,000	60,000	60,000	63,000	69,000	66,000	57,000	57,000	573,000

Add to dashboard



Adding Models to Budget for 26 Pay Period: Social Security

Models

Bonus and Tax Assum...

Fixed Payroll Assumptions

Per Pay Period

Salaries And Wages

Medicare

Social Security

Per Day Salary

Bonus and Tax Assumptions

Fixed Payroll Assumptions

Per Pay Period

Salaries And Wages

Medicare

Social Security

Statistical Accounts

Per Day Salary > Salaries And Wages

Salaries And Wages

FIXED ASSUMPTIONS

+ Add Assumption

MODEL LINE

+ Add Model Line

Add to dashboard

Monthly

	JAN 2025	FEB 2025	MAR 2025	APR 2025	MAY 2025	JUN 2025	JUL 2025	AUG 2025	SEP 2025	TOTAL
Working Days Per Month	20	21	20	20	21	23	22	19	19	191
Employee 1-Salary	2,000	2,100	2,000	2,000	2,100	2,300	2,200	1,900	1,900	19,100
Employee 2-Salary	40,000	42,000	40,000	40,000	42,000	46,000	44,000	38,000	38,000	382,000
Employee 3-Salary	60,000	63,000	60,000	60,000	63,000	69,000	66,000	57,000	57,000	573,000



Adding Advanced Benefits

Group Level

Salary ... 07-1+4 +

Salary & Wages

R&D manager

Software engineer

Software engineer

Software engineer

QA engineer

To be hired

Potential New Employee

Equipment (700020)

Programs (700030)

> Sales & M...

EMPLOYEE ASSUMPTIONS

Benefits 10

Payment Same month

Yearly Vacation Days 20

Bonus Period Annual

ADVANCED BENEFITS

401K

Healthcare Family

+ Add benefit

Employee Level

Salary & Wages

Clint Eastwood Employee

John Wayne

Foster, Jodie

Grace, Karla

Affleck, Ben

Danes, Claire

Hopkins, Anthony

Klum, Heidi

Lambert, Miranda

Lively, Blake

Reynolds, Ryan

Rivers, Melissa

Shelton, Blake

	JAN 2022	FEB 2022
Total	(\$7,085)	(\$7,085)

Role

Term Yearly

Payment Same month

Yearly Vacation Days 60

Bonus Period Annual

ADVANCED BENEFITS

401K Employee

Dental Insurance

+ Add benefit



Adding Models to Budget Lines

The screenshot displays the Sage Future Test Budget interface, specifically the 'Seminars & Training' budget line. The interface is divided into several sections: a left sidebar for navigation, a main content area for budget details, and a right sidebar for model selection.

Left Sidebar: Contains a 'Budget Lines' section with a search bar and a list of categories including Clinical Professionals, Communications, Contractors & Consultants, Other Expenses, Professional Fees, Software Maint & License, Supplies, Office Supplies, Training & Development, Travel, and Salary. The 'Training & Development' category is selected, and 'Seminars & Training' is highlighted.

Main Content Area: Displays the 'Seminars & Training' budget line details. It includes a 'Preview of Cash' table showing monthly cash flows from January 2025 to July 2025, all with a value of (\$1,782). Below this, the 'Occurs' is set to 'Yearly', the 'Spread' is 'Same amount each year', and the 'Amount' is '\$21385'. The 'Payment' is set to 'months after' and the 'Expensing Period' is 'GENERAL'. The 'Date Range' is from 01/2025 to 12/2025. The 'Amount' field is circled in red, and a green checkmark is visible next to it.

Right Sidebar: Shows a 'Models' section with a search bar and a list of models including JOHN SMITH. The 'John Smith Daily Salary' model is selected, and the 'Headcount' field is set to '21385'. A green checkmark is visible next to the 'Headcount' field.

Bottom Section: A smaller version of the 'Seminars & Training' budget line details is shown, highlighting the 'Amount' field with the value '\$21385 * John Smith * Headcount'.



Account Mapping

EXP | Budget Line Models

Dashboard

Sheets

Inputs

Actuals

Summary

Details

Mapping

Accounts

Dimensions

ACCOUNTS

Profit & Loss

Balance Sheet

Statistical

<input type="checkbox"/>	ACCOUNT	ACCOUNT DESCRIPTION	MAPPING TYPE	BUDGET LINE
<input type="checkbox"/>	4010	GRant Revenue	Multiple budget lines	Dimension Name > Revenues > Simple Income
<input type="checkbox"/>	401K Matching	401K Retirement	No mapping	
<input type="checkbox"/>	Health Benefit	Health Insurance	Multiple budget lines	Dimension Name > Operational Expenses > Salary & Wages - HealthCare Dimension Name > Operational Expenses > Salary & Wages - Benefits
<input type="checkbox"/>	Payroll Taxes	SUI, Medicare, FICA, FUTA, ETC	Multiple budget lines	Dimension Name > Operational Expenses > Salary & Wages - Copy of Monthly %
<input type="checkbox"/>	Salaries	Salaries, Wages, & Bonus	Multiple budget lines	Dimension Name > Operational Expenses > Salary & Wages - Salaries Dimension Name > Operational Expenses > Salary & Wages - Bonuses



Account Mapping: Category

Budget Lines		JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024	OCT 2024
Number of employees		9	9	10	10	10	10	10	10	10	10
Salary		(\$65,865)	(\$65,865)	(\$75,069)	(\$75,069)	(\$75,069)	(\$67,920)	(\$67,920)	(\$67,920)	(\$67,920)	(\$67,920)
Other		(\$900)	(\$900)	(\$2,500)	(\$1,000)	(\$1,000)	(\$900)	(\$900)	(\$900)	(\$900)	(\$900)
Total Benefits		(\$17,895)	(\$17,895)	(\$20,006)	(\$20,006)	(\$20,006)	(\$18,067)	(\$18,067)	(\$18,067)	(\$18,067)	(\$18,067)
Total		(\$84,661)	(\$84,661)	(\$97,575)	(\$96,075)	(\$96,075)	(\$86,887)	(\$86,887)	(\$86,887)	(\$86,887)	(\$86,887)
Date Range		01/2024		12/2024		Currency USD		Tags			
DIMENSIONS											
Department											
Location		Long-Term Care									
Category		Salaries	Salaries & Benefits → Salaries								
		Benefits	Salaries & Benefits → Benefits								
		Vacation days	Salaries & Benefits → Vacation days								
		Bonuses	Salaries & Benefits → Bonuses								
		Employment Taxes	Salaries & Benefits → Employment Taxes								
		401k	Salaries & Benefits → 401k								
		HealthCare Family	Salaries & Benefits → HealthCare Family								
		HealthCare Single	Salaries & Benefits → HealthCare Single								
		On Call Cell Phone	Salaries & Benefits → On Call Cell Phone								
COMMENTS											



Employee Allocations

History
Scenarios
Main
Model
Tables

Budget Lines

Search

Employee Planning (Collaborati...

Long-Term Care

Revenues
Cost of Revenues
Operational Expenses

Salary & W... (30000) + 4 more

Israel Barry

Gregory Le

Roger Parks
Deandre Norris
Brenna Gallegos
Halle Mata
Olivia Hayes
Charles Mullins
Ronin Hughes
Aylin Tapia

	JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024
Salary	(\$5,561)	(\$5,561)	(\$5,561)	(\$5,561)	(\$5,561)	(\$5,561)	(\$5,561)	(\$5,561)	(\$5,561)
Total Benefits	(\$1,545)	(\$1,545)	(\$1,545)	(\$1,545)	(\$1,545)	(\$1,545)	(\$1,545)	(\$1,545)	(\$1,545)
Total	(\$7,106)	(\$7,106)	(\$7,106)	(\$7,106)	(\$7,106)	(\$7,106)	(\$7,106)	(\$7,106)	(\$7,106)

Yearly Vacation Days 14

Avg Accrued Vacation 10

Bonus Period Annual

Bonus =Employee Planning > Bonus Ratings > Exceeds Expectatio...

ADVANCED BENEFITS
401k (from settings)

Add benefit

GENERAL

Hire Date
09/2016
End Date
MM/YYYY
Tags
401k

DIMENSIONS

Department
Clinical Services

Location
Long-Term Care

75

Patient Care

25

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20

Other Allocation Types

History Scenarios

Main Model Tables

Budget Lines

Q Save

Employee Planning (Collaborative)

Behavioral Care

Operational Expenses

Salary & ... (60000) + 4 more

Savannah Woodward

Laboratory

Operational Expenses

Salary & ... (60000) + 4 more

Savannah Woodward

Behavioral Care > Operational Expenses > Salary & Wages > Savannah Woodward

Savannah Woodward Type: Allocated employee

Preview of P&L Budget Details

By Month

	JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024	OCT 2024	NOV 2024	DEC 2024	TOTAL
Allocated From: Medical and Health Ser	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$248,326)	(\$2,979,916)
Salary	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$7,674)	(\$92,089)
Total Benefits	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$116,489)	(\$1,397,869)
Total	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$124,163)	(\$1,489,958)

Allocated From: Laboratory > Operational Expenses > Salary & Wages

GENERAL

Date Range 01/2024

DIMENSIONS

Department

Location Behavioral Care

Other Employee Line Types

Multiple employees: Manage groups of employees for both new and existing

Allocated employees: Share all employee costs between two business centers by %

Transferred employees: Transfer all employee costs between two business centers by date

Per employee expense: Calculate employee costs based on the number of employees

Per new employee expense: Calculate one-off payments based on the hire date of employees



Adding Scenarios

Growth 2026

×

:

Main

Model

Tables

Budget Lines

×

Q Search

Close

Sage Future Test Budget

2025-Medical

Revenues

Operating Expenses

Salaries & Wages

TBH Staff S&W (\$802)

Existing Staff Salaries and Wages

Employee Salaries

John Smith

Sam Adams

To be Hired 2026

Multiple Employ...

×

✓

Clinical Professionals

Communications

Contractors & Consultants

Other Expenses

Professional Fees

Software Maint & Licensing

Supplies

2025-Medical > Operating Expenses > Salaries & Wages > Employee Salaries > To be Hired 2026

To be Hired 2026

Type: Multiple employees

Line was added for scenario Growth 2026

Preview of R&E

By Month

	JAN 2025	FEB 2025	MAR 2025	APR 2025	MAY 2025	JUN 2025	JUL 2025	AUG 2025	SEP 2025	OCT 2025	NOV 2025	DEC 2025	TOTAL
Number of employees	1	1	1	1	1	1	1	2	3	4	4	4	4
Total	(\$6,250)	(\$6,250)	(\$6,250)	(\$6,250)	(\$6,250)	(\$6,250)	(\$6,250)	(\$12,500)	(\$18,750)	(\$25,000)	(\$25,000)	(\$25,000)	(\$150,000)

Type

New hires

×

✓

2025/01

1

2025/02

2025/03

2025/04

2025/05

2025/06

2025/07

2025/08

1

2025/09

1

2025/10

1

2025/11

2025/12

Role

Base Salary

\$75,000

USD

fx

Term

Yearly

Benefits

%

fx

Employment Taxes

%

fx

Payment

Auto

Yearly Increase

%

fx

Yearly Vacation Days

%

fx

Avg Accrued Vacation

%

fx

Max Accrued Vacation

days

fx

Bonus Period

Annual

Bonus

fx

Bonus Payment After

months



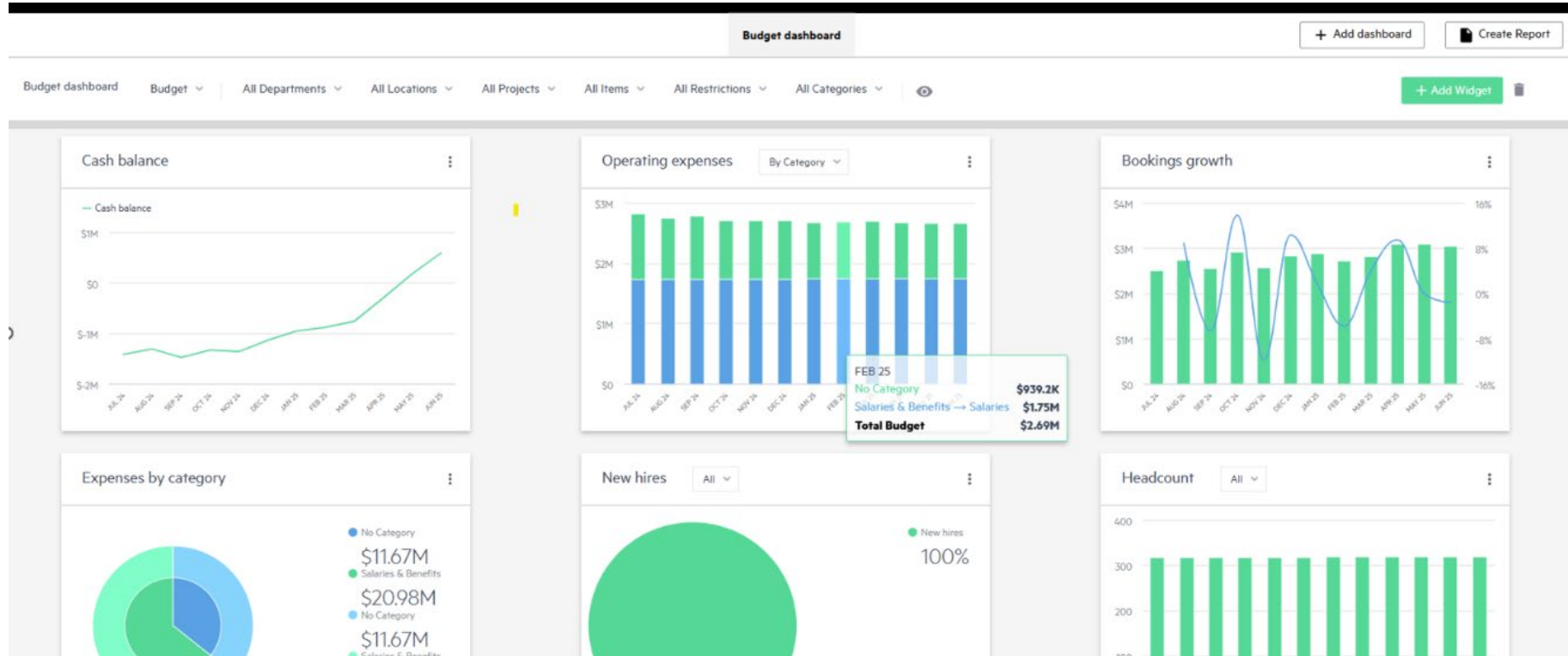
Reporting

													Cash	Profit & Loss	Balance Sheet	Bookings	Headcount	Model		
Budget													Monthly	Numbers	All Departments	All Locations	Salaries & Benefits → 401k	All Tags	All Accounts	
		JAN 2024	FEB 2024	MAR 2024	APR 2024	MAY 2024	JUN 2024	JUL 2024	AUG 2024	SEP 2024	OCT 2024	NOV 2024	DEC 2024							
Operating ex...	By Category	\$9,785	\$9,785	\$10,337	\$10,337	\$10,337	\$10,337	\$10,337	\$10,948	\$10,948	\$10,948	\$10,948	\$10,948							
Salaries & Benefits		\$9,785	\$9,785	\$					Cash	Profit & Loss	Balance Sheet	Bookings	Headcount	Model	Create Report					
401k		\$9,785	\$9,785	\$												Custom Views				
Long-Term Care		\$1,208	\$1,208																	
Dental Practice		\$2,220	\$2,220																	
Behavioral Care		\$1,952	\$1,952																	
Laboratory		\$2,517	\$2,517																	
Surgical Center		\$1,887	\$1,887																	
Net profit/loss		(\$9,785)	(\$9,785)	(\$																

		JAN 2024	Average	FEB 2024	Average	MAR 2024	Average	APR 2024	Average	MAY 2024	Average	JUN 2024	Average	TOTAL	Budget
Long-Term Care	Headcount	9	(\$9,307)	9	(\$9,307)	10	(\$9,508)	10	(\$9,508)	10	(\$9,508)	9	(\$9,554)	9.25	(\$114,017)
Operational Expenses	Headcount	9	(\$9,307)	9	(\$9,307)	10	(\$9,508)	10	(\$9,508)	10	(\$9,508)	9	(\$9,554)	9.25	(\$114,017)
Salary & Wages	Headcount	9	(\$9,307)	9	(\$9,307)	10	(\$9,508)	10	(\$9,508)	10	(\$9,508)	9	(\$9,554)	9.25	(\$114,017)
Pharmacist, Israel Barry	Headcount	1	(\$5,945)	1	(\$5,945)	1	(\$5,945)	1	(\$5,945)	1	(\$5,945)	1	(\$5,945)	1	(\$71,338)
Medical Assistant, Gregory Le	Headcount	1	(\$7,061)	1	(\$7,061)	1	(\$7,061)	1	(\$7,061)	1	(\$7,061)	1	(\$7,061)	1	(\$85,272)
Physical Therapist, Roger Pat...	Headcount	-	-	-	-	1	(\$11,314)	1	(\$11,314)	1	(\$11,314)	1	(\$11,314)	0.83	(\$155,772)
Registered Nurse (RNO, Dean...	Headcount	1	(\$7,658)	1	(\$7,658)	1	(\$7,658)	1	(\$7,658)	1	(\$7,658)	1	(\$7,658)	1	(\$91,894)
Brenna Gallegos	Headcount	1	(\$6,934)	1	(\$6,934)	1	(\$6,934)	1	(\$6,934)	1	(\$6,934)	1	(\$6,934)	1	(\$83,213)
Radiologic Technologist, Haik...	Headcount	1	(\$11,391)	1	(\$11,391)	1	(\$11,391)	1	(\$11,391)	1	(\$11,391)	1	(\$11,391)	1	(\$156,696)
Medical Technologist / Medic...	Headcount	1	(\$10,825)	1	(\$10,825)	1	(\$10,825)	1	(\$10,825)	1	(\$10,825)	1	(\$10,825)	1	(\$128,898)
Home Health Aide, Charles ...	Headcount	1	(\$9,088)	1	(\$9,088)	1	(\$9,088)	1	(\$9,088)	1	(\$9,088)	-	-	0.42	(\$109,057)
Licensed Practical Nurse (LP...	Headcount	1	(\$14,266)	1	(\$14,266)	1	(\$14,266)	1	(\$14,266)	1	(\$14,266)	1	(\$14,266)	1	(\$171,988)
Dental Hygienist, Aylin Tapia	Headcount	1	(\$10,547)	1	(\$10,547)	1	(\$10,547)	1	(\$10,547)	1	(\$10,547)	1	(\$10,547)	1	(\$126,561)
Dental Practice	Headcount	10	(\$169,549)	10	(\$169,549)	11	(\$174,456)	11	(\$174,456)	11	(\$174,456)	11	(\$174,456)	10.83	(\$2,084,412)
Operational Expenses	Headcount	10	(\$169,549)	10	(\$169,549)	11	(\$174,456)	11	(\$174,456)	11	(\$174,456)	11	(\$174,456)	10.83	(\$2,084,412)
Salary & Wages	Headcount	10	(\$169,549)	10	(\$169,549)	11	(\$174,456)	11	(\$174,456)	11	(\$174,456)	11	(\$174,456)	10.83	(\$2,084,412)
Registered Nurse (RNO, Conn...	Headcount	1	(\$84,323)	1	(\$84,323)	1	(\$84,323)	1	(\$84,323)	1	(\$84,323)	1	(\$84,323)	1	(\$1,011,875)
Licensed Practical Nurse (LP...	Headcount	1	(\$190,989)	1	(\$190,989)	1	(\$190,989)	1	(\$190,989)	1	(\$190,989)	1	(\$190,989)	1	(\$2,291,864)
Nurse Practitioner (NP), Quin...	Headcount	1	(\$256,375)	1	(\$256,375)	1	(\$256,375)	1	(\$256,375)	1	(\$256,375)	1	(\$256,375)	1	(\$3,076,499)



Benefits of Accurate Mapping: Live Dashboards





Month Ending		
03/31/2025		
2025 MTC	Actual	Variance
814,746	110,925	(703,821)
814,746	110,925	(703,821)
4,000	4,796	796
334	720	386
2,125	2,440	316
10,000	10,000	0
14,615	14,615	0
31,074	32,571	1,498
1,197,618	395,519	(802,098)
372,328	327,965	44,362
32,049	27,510	4,539
30,992	24,913	6,079
435,369	380,388	54,980
6,568	13,835	(7,266)
611,214	48,358	562,855
20,000	0	20,000
16,139	18,503	(2,364)
1,755	376	1,378
18,856	18,856	0
14,490	12,882	1,609
19,278	21,332	(2,053)
17,622	15,678	1,943
108,140	87,627	20,513
2,461	969	1,493
1,163,756	531,177	632,575
33,866	(135,658)	(169,523)
(2,346)	30,042	32,388
31,519.66	(105,616.04)	(137,135.70)



Demo



Resources

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