

Customer Success

The Diocese of Springfield, MA shares their experiences with Mateo - Cloud Diocesan Savings and Loan Software

Colleen Dimarzio-Richards, Director of Accounting at the Diocese of Springfield, MA was our beta tester for Mateo - Cloud Diocesan Savings and Loan Software. Her organization came on board with Mateo in February of 2020. The Diocese had converted to Sage Intacct - Cloud Accounting Software in 2017, and was looking for a modern cloud based product that would fully integrate. They were previously on a homegrown product that was supposed to integrate with Epicor (their previous accounting system), but couldn't keep up with subsequent updates. Colleen mentioned that one of their biggest frustrations with that previous system was the lack of integration with their accounting system. When they adopted Sage Intacct there was really no reason to stay with it. The product didn't allow for the transactions their customers do such as transferring money between accounts, merging parishes, it simply couldn't handle the complex needs of a diocese.

Colleen mentioned wasting roughly 10 hours a month on

her previous system because of the intricacies of manipulating it to work the way they wanted it to. Also she didn't feel comfortable allowing lower level clerks to handle basic transactions in the system, because simple errors could not be easily corrected. She has since recovered that 10 hours, and can now pass on basic tasks to lower level clerks instead of having to do it herself, leaving her to perform management level functions as she should.

The selling points of Mateo for her were the full integration with her accounting system (Sage Intacct), and the ability to use current processes to perform functions in Mateo, without having to know a different system. She loves that reconciliation is built right in, and verifications are easy. No need to log into a different system or know something different.

Her favorite features are the ability to attach documentation right to the corresponding transaction, also the ability to give customers their own access to view their information, pull down statements...etc.



Mateo+

"Moving to the cloud is a no-brainer, I take that for granted now. Especially after this past year (2020).

With employees all over the country, or working from home, they can handle transactions from anywhere. Why would you do anything else?"

**Colleen
Dimarzio-Richards**



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Roman Catholic Diocese of Springfield

**Dir. of Accounting-
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