

## Services for the Unexpected: Real-Time Visibility

### Dopkins CAAS Team COVID-19 Deliverables

Part 2 of 4

*April 15, 2020 - This is the second installment of our four-part series on our Client Accounting & Advisory Solution (CAAS). Now more than ever, the need for strategic decision making and seamless access to data is critical. Our team can help you protect your business, enabling you to survive this crisis and continue to thrive when the crisis is over.*

In light of recent events, corporate operations will become more complex than ever before. The way people do business, where they do it, and the role technology plays has and will continue to increase the level of sophistication required by those involved in the accounting/finance function of most organizations. There are specific areas that are driving the demand or willingness of business owners and organizational leaders to consider outsourcing/co-sourcing all or part of their accounting and finance function.

Dopkins full-scope CAAS solution enables us to serve as your virtual accounting department, with the complete accounting/finance function being performed within our four walls, all while providing access to valuable financial information in real time.

Our CAAS team implements a streamlined process, through which financial data is aggregated and accounted for in real time. Electronic Bank Interface or bank feeds are utilized to connect accounting software applications (QuickBooks Online/Sage Intacct) securely to your bank and credit card accounts. This connection allows us to efficiently download transaction information while ensuring your information in the accounting application is current and enables real-time analysis.

The services our CAAS team provides are tailor-made based on each client's business needs. As you select transaction processing up to CFO level services, the advantages and business value also increase organically. To alleviate time consuming tasks such as manual transaction processing, which typically provide minimal strategic value to a business, our approach is to strategically utilize technology to record a significant portion of transaction processing through automation.

#### In this series:



**Part 1**  
The Right People



**Part 2**  
Real-Time  
Visibility



**Part 3**  
Connected Data



**Part 4**  
Scalable Processes  
and Controls

Our CAAS solution better positions our firm to advise our clients in a more dynamic way with timely information as it happens. We believe our solution will provide Real-Time Visibility to your leadership team by providing dynamic dashboards and reports that give you a clear picture of your financial standing.

To further explore how we can help, please contact one of our team leaders below.  
Please stay safe and healthy!

**[Albert A. Nigro CPA, CVA](#)**

Partner

Email: [anigro@dopkins.com](mailto:anigro@dopkins.com)

Tel: 716.634.8800 x203

[vcard](#)

**[Kevin W. Stackman CPA](#)**

Manager

Email: [kstackman@dopkins.com](mailto:kstackman@dopkins.com)

716.634.8800 x224

[vcard](#)

**[Stephen C. Studley, CPA CVA CFP ChFC CLU](#)**

Director

Email: [sstudley@dopkins.com](mailto:sstudley@dopkins.com)

716.634.8800 x226

[vcard](#)