

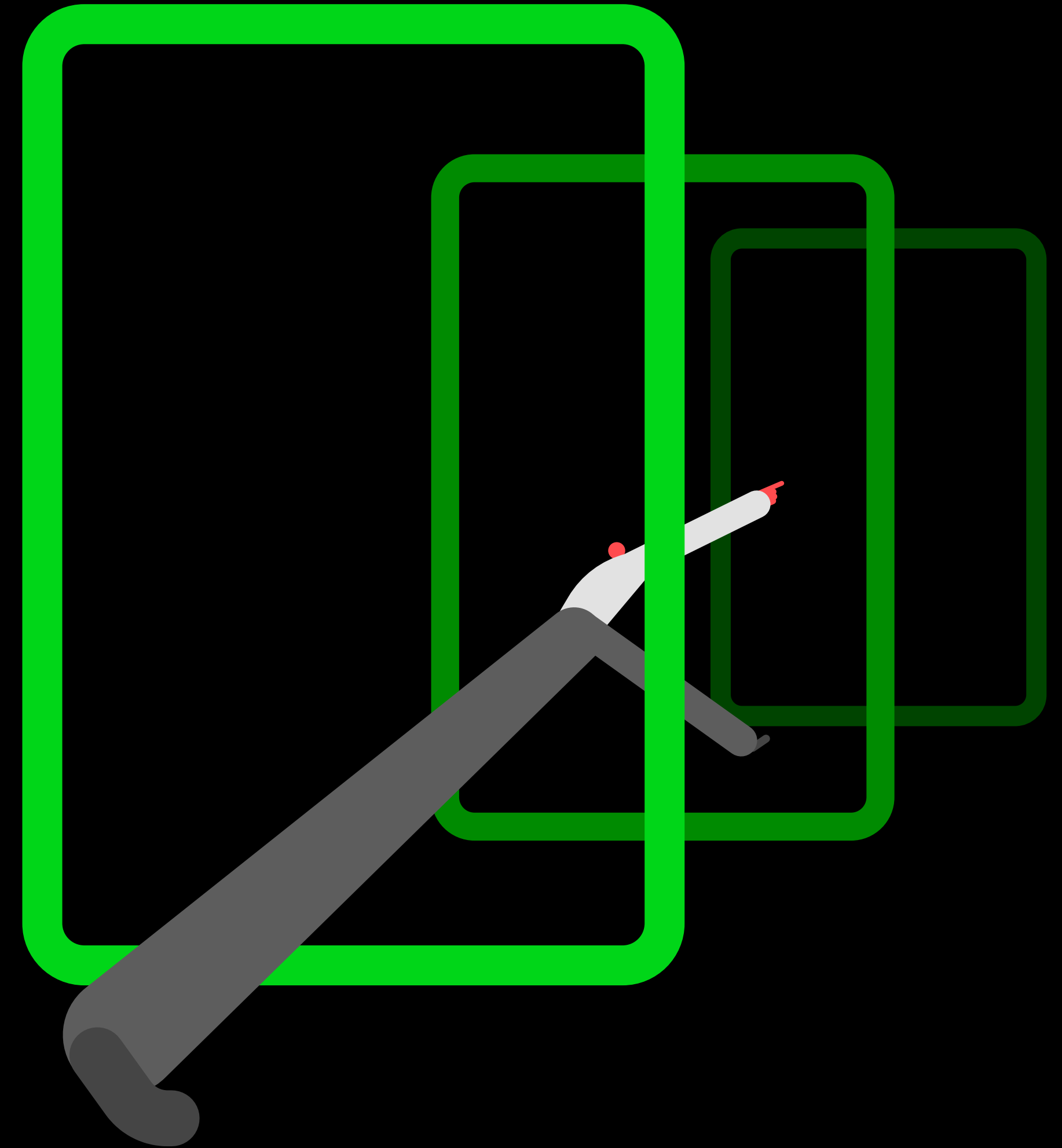
E-book

# Why Growing Businesses Choose Sage Intacct

Sage

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# Tracking KPIs with dashboards and multi-entity reporting

Effective key performance indicators (KPIs) are vital signals that help indicate if your business is functioning according to plan and on track for growth. Leaders are leveraging KPIs to spot trends, compare to benchmarks, drill down into the source data, and make faster decisions.

For organisations with multiple locations or entities, things like decentralised payables, intercompany billing, different tax regulations and multiple currencies create increased complexities. Those companies may want to easily see combined data from different entities or only view metrics within a single entity.



With Sage Intacct financial reports, you have the agility and flexibility to quickly slice and dice the details that matter and get them to key stakeholders in real time.

And when you have new questions, you'll have the ability to analyse operational and financial data together with custom reports, dashboards, or visualisations.

## KPIs, dashboards, and reports

**Certus Energy Solutions** gains granular insight into department and location performance.

**“Our locations and departments are the lifeblood of our business, and we use Sage Intacct’s dimensions to dissect our P&L 32 different ways—such as by different types of rental equipment or inspection services. We can slice and dice every little expense or revenue item to specific areas and run low-level detailed income statements or roll it all up to get an overall view into our key performance indicators.”**

~ **Eric Williamson, CFO, Certus Energy Solutions**

Based in Houston, Texas and backed by Intervale Capital, Certus Energy Solutions was launched in 2013 with a diversified portfolio of drilling specialties. The oil country tubular goods company offers high-performance tubing rentals, inspection services, and proprietary tubular lifecycle management and analytics technologies.

**Regenesis** boosts revenue and project profitability through key insights.

**“Sage Intacct allows us to put the right data in the right people’s hands and dimensional reporting has been a game changer. We’re able to look forward and pull-out meaningful cost and revenue information by region, district, department, or even employee. By identifying regions where sales were a little light, we were able to add staff in the right places and increase our revenue by 250%.”**

~ **Andrew Stajduhar, Regenesis’ Director of finance and IT, Regenesis**

Regenesis is the global leader in the research, development, and commercialisation of technology-based solutions for the environment. The company specialises in scientifically proven product- and services-based solutions for groundwater and soil remediation at contaminated sites.



# Finding savings and efficiencies



Today's accounting and finance leaders are expected to not only keep track of past transactions but also provide a vision for how to move forward.

They are making concerted efforts to use their resources as efficiently as possible. Streamlining and optimising finance processes is one of the most important investments a business can make to help ensure long-term sustainability.

By automating repetitive tasks such as purchase ordering workflows, vendor payments, and bank reconciliations, you can begin to spend

your time on the work that matters and help the organisation meet its broader goals.

Sage Intacct helps finance teams focus on strategic initiatives and drive growth.

## Companies that found savings and efficiencies

**Dapple** frees up management time to focus on rapid scale.

**“Agility and insight are essential for a small, rapidly-growing company like Dapple. Sage Intacct has made a huge impact on both, by reducing the time we spend on finance housekeeping and freeing us up to focus on things that are actually growing the business.”**

~ **Jeremy Pertman, CEO, Dapple**

Dapple is a leading innovator and producer of non-toxic, hypoallergenic, and plant-based cleaning products for families with young children. The company's products can be found online and on the shelves of Target, Walmart, Buy Buy Baby, Babies R Us, and many other leading U.S. and international retailers.

**Woodfin Heating Inc.** increases team efficiency via automated processes.

**“Thanks to Sage Intacct’s powerful workflows, we’re 60% more productive overall, and as a result, we’ve been able to shift 25% of the energy we spent on bookkeeping and data entry into more strategic projects, like supporting the business with analytics or adopting new accounting best practices.”**

~ **Jennifer Loving, CFO, Woodfin Heating, Inc.**

Located in Richmond, Virginia, Woodfin Heating, Inc. is one of the area's best heating and air conditioning providers. The company is a market leader in fuel oil delivery, 24-hour emergency service, service agreements, and home energy audits.



# Outgrowing QuickBooks and Xero



Many small and mid-sized businesses utilise QuickBooks & Xero in their early days. However, virtually every growing organisation soon realises the software's limitations and compromises.

From inflexible processes, data accessibility issues, inadequate security, and primitive reporting, QuickBooks can hamstring your company because it simply isn't designed to scale and provide the professional financial management capabilities you expect.

Fortunately, Sage Intacct cloud-based solution offers a better way, with sophisticated—but still easy to use—functionality such as fast

consolidations, multi-entity support, currency conversions, smart revenue recognition, and more.

That's why we're the AICPA's first and only preferred provider of financial applications. In fact, Sage Intacct is ranked as the #1 alternative to QuickBooks and #1 in customer satisfaction by G2.

## Companies that graduated from smaller solution providers

**Purple Wave** builds on success with core accounting.

**“As we expanded and our transaction volume grew, it slowed down the QuickBooks system a lot. If we tried to download a large file to Excel, it would error out. We had definitely outgrown the system. It was time to shift to a new solution. An upgrade to Sage Intacct solved those problems.”**

~ **Lea Briscoe, Controller, Purple Wave**

Purple Wave specialises in connecting sellers and buyers through no-reserve Internet auctions of used agriculture, construction, and fleet equipment, with more than 30,000 items sold per year.

**East Malling Trust** grows productivity with Sage Intacct.

**“It has halved the time. It used to take me 16 hours every quarter to do our partial exemption VAT return; using Sage Intacct, it now only takes me 8 hours once a quarter.”**

~ **Karyn Hood, Management Accountant and Company Secretary, East Malling Trust**

East Malling Trust is a charitable organisation that supports scientific research into the horticultural industry. The trust raises funds for horticultural research through various income streams, including management of its land and property; weddings and conferencing; and professional short courses for land-based industries.



# Moving to paperless automation and improving financial visibility



Business conditions can change quickly. Leading companies are ready to adapt and adjust with modern automation technology, while laggards struggle with paper-based manual procedures and data that is not presented in real time.

Sage Intacct core financials automate your most important processes, reduce your reliance on error-prone spreadsheets, and give you greater visibility into your real-time business performance.



## Companies improving financial visibility with paperless automation

**Quicksilver Express** modernised its financial management platform for rapid value.

**“Now (with Sage Intacct) we can see revenue and expenses for every vehicle. Through that, we’re able to make decisions based not just on location or department but on vehicles. In the transportation industry, that’s really your bread and butter.”**

~ Maggie Rogness, CFO, Quicksilver Express Courier

Founded in 1982, Quicksilver Express Courier handles last-mile courier delivery 24/7/365 for firms in healthcare, manufacturing, law, printing, and other industries. Quicksilver operates across the U.S. with a team of more than 500 employees.

**Vaquero Midstream** gets top-down perspective of production and revenue.

**“By showing volume-related operational data on gas production during pre-determined phases alongside the associated revenue, Sage Intacct makes it easy to determine which revenue is linked to a particular production month as opposed to the month when the accounting occurred. Additionally, in just one report, we can look at our produced volumes alongside monthly pricing references to get a clear picture of why our revenue is up or down.”**

~ Sandra Fendley, Chief Accounting Officer, Vaquero Midstream

Vaquero Midstream was founded by leaders with deep experience building and operating fully integrated midstream natural gas and crude oil systems throughout the United States. Since 2014, the company has created value for producers by building quality assets, utilising mutually beneficial terms, and providing excellent customer service.



# Improving work-life balance



Most financial leaders have a habit of working long hours—particularly with a steady flow of deadlines throughout the year. When so many days are consumed by tedious, manual tasks, there is a shortage of time, disrupting the harmony between work and personal life.

Believe it or not, you can balance both sides.

Sage Intacct enables teams to work from any location, complete routine tasks more quickly, reduce stress and enjoy more time relaxing with family and friends.



## Companies improving work-life balance

**Peoples Services** benefits with higher morale and less overtime for accounting.

**“I’ve been freed up to spend more time with my family and volunteer now that I know I can get my work done quickly and accurately in Sage Intacct.”**

~ Adam Herman, Treasurer, Peoples Services

Peoples Services is a network of wholly owned 3PL companies that provide award-winning warehousing, transportation, logistics, and fulfillment services across seven states

**Red and White Fleet** selects Sage Intacct and creates opportunity for a getaway.

**“Once we went to Sage Intacct from QuickBooks, I actually took a two-week vacation for the first time in 10 to 12 years. I left the country, but thankfully we had Sage Intacct, so I was able to log in and submit payroll and look at financials while sitting on the beach having coffee.”**

~ Sophia Shafiq, Controller, Red and White Fleet

Operating boat tours since 1915, Red and White Fleet was the first cruise business in the San Francisco Bay Area. The company offers award-winning audio tours of the San Francisco Bay Area in 16 different languages.





**Sage Intacct is the AICPA's preferred provider of financial applications**

The American Institute of Certified Public Accountants (AICPA), the world's largest association serving accounting professionals, acknowledges us as its preferred provider of financial applications.

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