



## MDCS Migration Service - Platform Transition Use Case - Experience of PT Services

**Client:** Mordfin Group - a public accounting firm that has been in existence for 97 years; located in New York.

**The Challenge:** "We were running on NetSuite for approximately 13 years and it was an excessive operating expense; a catalyst for recently partnering with Sage Intacct. As a Sage Intacct partner, we needed to move our client's entire legacy system over to Sage Intacct."

**The Goal:** "We were hoping that everything would basically work the same way in Sage Intacct as it had in NetSuite and we'd just be able to continue going forward smoothly."

**The Choice to Work with PT:** "We had never done a migration, especially one with 13 years of data and we were brand new to Sage Intacct. We always have questions come up about the long-term billing with our customers and clients so we wanted to bring all the data over; it was important that we have their complete history available to us. We also needed to move the data over quickly as NetSuite was not open to providing a one to two-month extension on their service during our transition."

**The Experience of PT's Process:** "Working with Platform Transition was great because there was so much data that needed to be migrated, we had no idea how to do it ourselves, and we really couldn't waste the time figuring it out because we came up against the deadline of terminating our NetSuite service."

**The Greatest Benefit/s:** "All 13 years of historical data has been migrated and we are legacy-free. We did not need to extend the NetSuite service another year and we are now fully implemented on Sage Intacct."

"As a result of working with PT we've learned how to address our client's migration process moving forward. This was an important lesson because we will be the one's installing Sage Intacct as part of our service offering."

**Closing Testimonial:** "We had become a Sage Intacct partner and a portion of our business will be sales and installation so we needed to move our current system over to Intacct and Platform Transition made the conversion extremely easy. There was a lot of data and we couldn't have done it ourselves. We didn't have enough knowledge of how to do it. Anyone who is going through a big data migration would do very well to work with you guys. Working with Platform Transition was wonderful. I have no complaints; your team went above and beyond the call of duty."

*We thank the Mordfin Group you for allowing us the opportunity to serve them and for generously sharing their experience and feedback. It is with gratitude and humility that we deliver our services on time and in excellence. And we acknowledge you for the time you have shared with us here today.*

Thank you,  
Platform Transition