



MDCS Migration Services - Platform Transition VAR Use Case – Experience of PT Services

Client: TrustedCFO Solutions (a Sage Intacct VAR Partner) on behalf of Atlanta Classical Academy Project, a non-profit charter school.

The Challenge: “Our client had been relying on QuickBooks Online and was transitioning to Sage Intacct. QBO’s reporting capabilities were lacking as the chart of accounts was built poorly and they could not look at their financials in meaningful ways. They were forced to do a tremendous amount of manual labor to report externally.”

The Goal: “ACA was seeking to gain visibility into their data, without manual time or effort, and to sort the data in a variety of ways.”

The Choice to Work with PT: “The client wanted to bring in *all* of their historical data; it was important to them because they did not want to go back into or maintain the legacy system.”

“We love Platform Transition, you’re our trusted partner. I think PT just does a really good job of bringing in the dimensions and attending to the overall data migration project. We know you guys are going to bring in the dimensions as desired and streamline the historical data migration process.”

The Experience of PT’s Process: “The data migration process itself is seamless.”

The Greatest Benefit/s: “Our client is delighted. They have visibility into their history in ways they hadn’t before. They no longer need to invest manual labor or invest valuable time. They have insights via reporting capabilities that were previously unavailable to them. They are free of QBO, and the client did not have to trouble themselves with the time or effort of handling the migration themselves.”

“Platform Transition provided the ideal outcome - they can now see all of their historical data in Sage Intacct and report in 20 different ways. They have a lot of different systems that were speaking with QBO, and now they can easily gain insights into their financial state from any data source.”

Closing Testimonial: “I think Platform Transition does a phenomenal job of getting all the detail out of the old system, mapping it accurately and bringing it into your new system so you don’t have to refer to your legacy system - they are the subject matter experts in this. They do it in a very effective way and a very efficient way. I’m very confident in their ability; I recommend them for that reason.”

Thank you for allowing us the opportunity to serve you, your client and for generously sharing your experience and feedback with us. 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