



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

Client: A Washington, DC-based 501(c)(6) membership organization of more than 1,400 public and private nonprofit hospitals and health.

The Challenge: "We had been relying on QuickBooks Desktop for 20 years and it just wasn't robust enough for us. We wanted better reporting and we really needed something in the cloud. QuickBooks just has so many limitations."

"Once we had decided to move to Sage Intacct, the greatest challenge we'd faced was with migrating the historical data. We were told that we could only bring in summary data which was not going to work for us. We needed to see that every vendor had been paid."

The Goal: "We wanted as much of the work done for us as possible."

The Choice to Work with PT: "We wouldn't know the first thing about getting data from QuickBooks into Sage Intacct. We needed to learn the system first. It would have taken a full-time employee at least three months (500 hours) to complete the project and we only had weeks."

The Experience of PT's Process: "PT was responsive, scheduled a meeting to discuss the project scope, explained the process clearly and we were happy to hear how little we needed to be involved."

The Greatest Benefit/s: "I cannot say enough about how glad we are that you guys exist. I do not know what we would've done without you. We would have been scrambling for months to get 10 years of data into Sage Intacct, a system we barely know, and were investing a lot of money to use. It needed to be perfect."

"Platform Transition provided the solution for exactly what we needed to do."

Closing Statement: "We are just thrilled that Platform Transition is around because we would not have been able to get all of our legacy data into Sage Intacct accurately or nearly as quickly as you did. PT was a great vendor to work with and I've worked with hundreds of vendors being in finance and administration for over 10 years now. PT totally saved our behinds, with no time to spare and, the price was more than fair."

Thanks to this client for allowing us the opportunity to serve them and for generously sharing their 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