



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

Customer: Marcum Group, SIAP division

Client: A group of commercial real estate leaders from around the country. Their purpose is to give back what we have learned throughout our careers by supporting initiatives that Educate, Enhance, and Expand the commercial real estate community through promoting best practices, responsible and sustainable development, and educating the next generation of commercial real estate professionals.

The Client / Situation: Marcum’s client was initially on Great Plains. With regards to the reporting, anytime the client required a report, they had to request it from Marcum. This third-party approach to accessing accounting data was a challenge for both parties. The move to Sage Intacct resolved this as the client cannot access data on demand, without the involvement of Marcum resources.

The Goal: To have all of the desired detailed history migrated into Sage Intacct with little involvement or effort from Marcum.

The Choice to Work with PT: “You’re our go-to data migration provider.”

The Resolution: “The data was migrated in accurately and with ease.”

The Experience of PT’s Process: “There was great communication and Hugh was helpful – he brought light to the data which helped us to gain clarity and move through the process easily. PT was very clear, the process was smooth, the timeline and expectations were well defined. If we need detail, we will always work with you guys. It saved us time, and allows us to deliver our value in other areas, we like to let the professionals take care of the data in detail.”

The Greatest Benefit/s: “The client data is now in Sage Intacct in detail, and the client can access their data without our involvement. Our resources are no longer pulled away from their active tasks to address on the fly requests. PT has helped us in terms of our resources time savings. If we had to do this, it would have strained us to learn the systems and address stumbling blocks. You knew what challenges to look for, and how to easily fix them, where on our side if something challenging happened it could wreak havoc.”

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