



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

Client: EmpiRx Health is a health insurer, pharmacy benefit management company.

The Challenge: EmpiRx Health had been relying on QuickBooks Online for approximately 4 years, and it could not deliver the level of detail, nor reporting capabilities required to support the business. QuickBooks Online had required EmpiRx to do a lot of manual work. EmpiRx required a solution with more customization, that could better suit their reporting needs.

"Upon selecting Sage Intacct as the replacement solution, there was a great concern around the required time, effort, and likely inaccuracy of migrating the legacy data due to its level of complexity."

The Goal: "We needed to achieve clear, detailed reporting, with less manual work, and more efficient results; as well as to migrate the historical data into Sage Intacct quickly, smoothly and accurately with little effort."

The Choice to Work with PT: "We didn't know that we would need help with the migration; we thought Sage Intacct would be handling it. When we learned otherwise, Sage Intacct had recommended we work with Platform Transition. Hugh worked with me to assure I provided the correct legacy files. There was no way I would have known where to start if I were trying to do the migration myself; I wouldn't have gotten it done."

The Experience of PT's Process: "Platform Transition's team was always helpful. They guided me as to where to look for the information I needed to provide them, they moved the data into the new system, and then I checked their work when it was done."

The Greatest Benefit: "With Platform Transition's guidance and the MDCS service, we've been able to migrate our QuickBooks historical data to Sage Intacct."

Closing Testimonial: "If I would have had to do this on my own, I wouldn't have known what to do. We needed to get the information from QuickBooks to Sage Intacct and Platform Transition helped us understand how to move the data from one system to another. We now have less manual work through automation and robust reporting. Platform Transition did a really great job helping us to move the process along."

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