



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

Client: Family Business Consulting Group (FBCG) is a leading consultancy founded in 1994 specializing in creating structures and processes which protect the integrity of the family and the enterprises that they have built.

The Challenge: FBCG was implementing their new Intacct accounting system. Once in process, Sage Intacct explained that their standard procedure was only to bring over the past two years of summary balances and net changes. This was not acceptable and created tension within the Sage Intacct – FBCG relationship. It was critical to FBCG that *all* of their historical detailed financial data was migrated from the legacy system to the new system.

FBCG was new to Intacct's navigation and functionality, and they had a critical requirement to move 19 years of transactional data (over 500,000 lines of data) from the legacy system into Intacct.

The Goal: FBCG not only wanted to migrate their historical QuickBooks data, but they wanted to take full advantage of their investment in the Multi-Dimensional Data Conversion solution, which would allow them to re-dimensionalize past data to mirror the structure of their future, more complex data, in Intacct such that the company could view all financial data continuously.

The Choice to Work with PT: Intacct recommended FBCG speak with Partner 'Platform Transition' (formerly known as The Financial CoPilot) to explore the possibility of delivering a solution to meet FBCG's requirement.

The Experience of PT's Process: "I was a novice to Intacct and did not know how to dimensionalize the QuickBooks data. Hugh worked with me extensively; he had walked me through all the prep work. He had stuck with me the whole way showing me how to dimensionalize the data so that I wasn't bringing over data in QuickBooks form, and could use the enhanced data in the new environment.

After that, the migration moved very quickly, in a matter of two weekends. Hugh was very patient with me. He really drew out the questions I hadn't thought to ask. He'd asked very pointed questions about our data and how we were going to use it. He guided me to look at the data in a different way, and it was very satisfying. The actual process was uncomfortable from the perspective of having to think about the data in a new way but I felt at ease because of his patience, and his expert ability to draw out meaningful information from me. That was a really great part of the process."

The Greatest Benefits: "We did not have to marry two different systems, a legacy system of data, and the new system of data. We gained the ability to prepare metrics for our company, and to continue to provide seamless information to our clients."

Closing Statement: "I think it's 100% the thing to do, to have all of your data in one place, accessible in one system, and to do so with the relative ease that it takes to get it there; I can't imagine doing it any other way. It was so easy, and Hugh really just made it so seamless."

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