



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

Client: San Francisco Bar Pilots (SFBP) is the official maritime pilot group for the San Francisco harbor and associated waterways.

The Challenge: “We were with Dynamics SL since 1996 and were looking for an up-to-date, cloud-based solution so that we could work remotely and store information in one place. The system we had was antiquated, lacked key capabilities, and was no longer supported.”

“Dynamics SL reporting did not have the ability to grasp the data and trend it in the format I nor leadership needed. Therefore, I had to copy the existing information from Dynamics SL, cut and paste it and store it externally in Excel in order to create and provide meaningful graphs and trends for leadership. This was a repeatedly difficult and manually intensive task.”

The Goal: “We had wanted to migrate historical data into Sage Intacct correctly, and getting the data, moving it from the old to the new system, and getting it into the right place, was not something we wanted to do ourselves.”

The Choice to Work with PT: “We had decided to move to Sage Intacct, and one of our biggest concerns was migrating the data over because we didn’t feel comfortable doing it, and because the historical data had to be correct. Nancy McCarthy had recommended we turn to you.”

The Experience of PT’s Process: “The whole process went really smoothly. Guy and Hugh were fabulous to work with; they guided me along the whole process. They were very good at responding and getting back to me and telling me exactly what I needed to do. Working with the team was a really good experience. When we first started, they let me know what information I needed to gather, and in what format. I handed that over and they did the rest. They took what was in the new system, pinpointed issues, clarified why they were happening. They explained to me what they were looking for, and how Sage Intacct reads the data so I could understand what I needed to do to fix it. I felt well supported; their communication was excellent.”

The Greatest Benefits: “From my standpoint, bringing Platform Transition in to handle the migration saved me a lot of time. There was no way I would’ve been able to do the migration. It is so important to have the historical data whole and to be confident it’s right. They had set my mind at ease because I knew the data was accurate.”

Closing Statement: “I am very satisfied with the results. It was a positive experience and I think that it made the entire transition a lot easier and less stressful. I think it was well worth the investment to have Platform Transition do the migration for us.”

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