



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

Client: A Scientific Testing Facility.

The Challenge: “After our purchase of Sage Intacct software and subsequent transition from QuickBooks Online, our original intention was to import the QuickBooks data ourselves in an effort to save money. It quickly became clear that was not feasible with the staff on hand and I had two options: hire a temp to complete this project for us (slowly, over time), or contract with a service provider who specialized in this. We made a poor choice of timing in that we began the project after we'd already gone live in Sage Intacct. In addition, once we had gone live in Sage Intacct our time was consumed by learning the new system, and it was challenging for us to devote time to the import project. This turned out to be a problem because our instance of QuickBooks was deteriorating while we worked and if we'd been able to focus on the project, we would have saved everyone a lot of headaches caused by trying to import bad data into Sage Intacct.”

The Goal: “We were seeking to migrate our QuickBooks data to Sage Intacct before QuickBooks failed and we lost our history altogether.”

The Choice to Work with PT: “Our Sage Intacct VAR recommended Platform Transition. After our first call with them I was persuaded that this was the superior, faster solution, and cheaper.”

The Experience of PT's Process: “Platform Transition handled the entire project beautifully, including solving each problem as it arose, including the ones we unexpectedly created - I didn't realize at the time that the small tweaks we were unthinkably making in our Sage Intacct instance would affect the mapping that Platform Transition's team had painstakingly built for us. They were responsive to my questions, attentive to my problems, and were generally easy to work with. I am sure they were working with other clients at the same time but it never affected their availability for my project.

The Greatest Benefits: “Platform Transition delivered ubiquitous history from a system that had gone unstable. With only two leads in the finance department, they took a significant volume of work off of us.”

Closing Statement: “They treated us kindly when our bumbling actions caused problems for them and if we annoyed them, they never showed it! I would recommend them without hesitation and would definitely work with them again.”

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