

Uptake Boosts Results with the Support They Need from Sage Intacct and BT Partners

Industry	In Business Since	Solution
SaaS	2014	Sage Intacct

“BT Partners fulfilled their promises, with no surprises or issues. It’s been the best experience working with a Sage Intacct service provider.”



Steven Sleep
Controller & VP of Accounting
Uptake



Uptake creates intelligence software-as-a-service (SaaS) that drives smarter operations for industrial businesses worldwide. Transportation companies and Federal agencies rely on them to supercharge their data insights and manage fleets using one software platform so they can make faster decisions and increase ROI. As a global, multi-entity, and multi-dimensional SaaS company, they need best-in-class solutions to maintain their leading edge in a highly competitive world. With that goal in mind, Uptake selected Sage Intacct, a leading cloud ERP solution, for its financial management software.

Unfortunately, the implementation experience was challenging, and they found themselves not getting the value of the solution. To keep up with industry advancements and innovation, Uptake needed a new and trusted Sage Intacct service partner who could provide better value and ROI. Uptake needed to get more out of their technology so they could continue to innovate and offer their own emerging technology products & services that set them apart.

Implementation and Support Challenges

Uptake had purchased Sage Intacct from Sage directly and was working with the publisher for their implementation & support. The publisher had assigned the implementation to a partner, but the ongoing agreement was with Sage Software. “I had no

relationship [with the previous partner]. They would send me the invoice annually. They would respond only when I would send an email after a week asking ‘Hey, where’s my response?’ There would be calls about unhappiness with response time, addressing concerns, and there was just no change,” recalls Sleep.

David Thikoll, BT Partners’ Vice President of Business Development explains, “It’s not uncommon that we get calls from people who have bought direct from the publisher and are not getting the impact or ROI that they expected, like Steven experienced.” Thikoll continues, “It’s unfortunate as none of those people expect to be in that position, as they probably assume that buying from the publisher gets them better access to the core of development. The difference is that good partners spend so much time getting to know what the client needs that we are able to provide much more value.”

New Partner Brings New Success

It’s all about applied technology - working with someone who understands your business & industry, and then can apply the solution to the business problems and opportunities. Once Uptake brought BT Partners on board as their Sage Intacct partner, they had questions and emails answered promptly and were able to leverage the system properly, getting all the functionality & capabilities the financial management software has to offer.



“I was building out a financial reporting package ...for our board and what our investors want to see. I showed [BT Partners] how I was doing it manually, and [BT Partners] showed me how I can get that same report out of Intacct at the *click of a button*.”

UPTAKE

Steven Sleep
Controller & VP of Accounting
Uptake

Uptake was hoping for a partnership with more strategic guidance than just regular maintenance. BT Partners delivered exactly that with expert advice and long-term guidance on how Sage Intacct's functionality can make workflows easier, and more efficient, and how they can gain more robust financial reporting.

Uptake knows a good partner isn't just in it for the money. They've witnessed firsthand BT Partners' advanced technical expertise in Sage Intacct's financial management software and have appreciated being told when an add-on solution isn't going to provide their team with enough value for the price. Sleep sums up the partnership perfectly. "BT Partners fulfilled their promises, with no surprises or issues. It's been the best experience working with a Sage Intacct service provider." Getting the books closed faster means faster access to insight for management, which is the ultimate game changer. It allows fewer people to do more with their time, leveraging more efficiencies.

Improved Reporting and Insights

Having a knowledgeable and responsive partner with Sage Intacct has led to countless efficiencies in financial reporting, like reducing month-end from a couple of days to only five minutes.

Sleep also talked about the simplicity of Sage Intacct's ASC 606 and IFRS 15 revenue-recognition module "I was building out a financial reporting package and Nancy worked with me to help create a different grouping to get the reports I needed for our board and what our investors want to see. I showed her how I was doing it manually, and she showed me how I can get that same report out of Intacct at the *click of a button*." Fast access to fresh data leads to improved decision-making, cost savings, and overall better business performance. It's a critical factor in an organization's long-term success.

Nancy McCarthy, Sr. Director of Sage Intacct at BT Partners says,

These are very powerful tools and it's all about having a partner that can understand what you're wanting to achieve and show you how to use them to your benefit. These tools aren't something you simply turn on and can be missed in quick implementations."

BT Partners helped navigate changes by patiently explaining new system functionality and teaching staff how to use the financial management software so they can be self-sufficient and create their own reports. Before, Sleep was forced to report all the company's revenue manually, but with the help of BT Partners, that's been automated. The team can post revenue entries at the end of the month in only a few minutes, as opposed to hours.

SaaS Leveraging SaaS For Efficiencies

Sleep talks again about their monthly close process. "The revenue recognition module was a game-changer from it being manual. Sage Intacct and BT Partners knocked out a day or two of closing time. By adding this module, we could reallocate staff to meaningful work and save a day or two in the close process."

"We love helping clients improve metrics like their close process, but the underlying benefit is that these solutions can be used for competitive advantage. When you save time on reporting, avoid errors, have better data, and make better decisions, you have a platform with exponential growth potential," concludes Thikoll.

BT Partners made a major impact with their technical expertise and the partner relationship has been crucial. The team relies on BT Partners for Sage Intacct assistance, and when they say they're going to deliver efficiencies or new modules and upgrades, it actually happens. Sleep adds that BT Partners plays a meaningful role in their ongoing success. "They are a partner that invests in the long-term relationship and the end product has made our business much, much, MUCH more efficient."