

Primrose Retirement Connects 37 Communities with BT Partners & Sage Intacct

Industry	Client Since	Solution
Senior Living	2023	Sage Intacct

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Director of Accounting
Primrose Retirement Communities



Primrose Retirement Communities operates 37 senior living communities across multiple states, with levels of care including independent living, assisted living, and memory care.

Each community functions as a standalone business, with its own financial operations including payables, banking, reporting, and daily activity. At the corporate level, accounting must quickly and accurately consolidate this information across multiple entities and ownership groups.

It's no small task. Senior living finance involves many moving parts: resident billing, community-level approvals, corporate payments, community-level reporting, consolidated financials, and either department or functional leaders who need reliable information without waiting for accounting to track it down.

Primrose already relied on ALIS for resident billing, so connectivity was a major part of the decision. The team needed a financial management system that could support complex multi-entity accounting, connect with resident billing activity managed in ALIS, and give both corporate and community leaders better access to the information they use every day.

With help from BT Partners, Primrose moved forward with Sage Intacct.

Growing Senior Living Operator

Primrose's 37 communities operate as standalone locations, each with its own balance sheet, income statement, and bank account. Office managers handle inputting bills locally, while the corporate accounting team manages payments, reporting, and financial oversight from the home office.

That structure gave each community room to operate locally, but it also placed a heavy demand on corporate accounting. The team needed to manage activity across dozens of locations, maintain accurate reporting by entity and ownership interest, and still provide leadership with a clear view of the entire organization.

As Primrose continued to grow, the accounting team needed a faster way to process transactions. It needed a connected financial and operations management foundation that could keep pace with a multi-community senior living business.

A key factor in the decision was the ability of Sage Intacct to handle consolidations. With multiple ownership groups and complex reporting needs, Primrose wanted confidence that financial data from different communities could be combined and analyzed accurately and quickly.



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Scott Noeldner, Director of Accounting at Primrose, says the team saw an opportunity to improve the way work moved through the organization. "When we looked at some of the features that Sage Intacct was bringing, we started thinking about how we make little changes to what we do and really lean in on the technology and the advancements within the system," he says.

BT Partners helped Primrose assess its current systems, think through its unique senior living requirements, and shape Sage Intacct to reflect how the organization actually operates. "BT Partners was able to come in and help us assess where we were at with our unique senior living reporting needs across our whole portfolio, then take that and blend it in with our existing needs," Noeldner says.

The result was a system Primrose could trust to support both the complexity of today's operations and the growth still ahead. "Sage Intacct gives us even more power than what we had before," Noeldner says. "That was one of our selling points on it: that it could handle a large volume of data and do it quickly."

Faster Reporting Across Multiple Communities

Before Sage Intacct, month-end reporting required more manual effort to bring together balance sheets, income statements, cash flow reports, and other financial information across communities.

With BT Partners' guidance, Primrose automated reporting and approvals in Sage Intacct, helping the accounting team work more efficiently and with greater confidence. "We've gained days of time back by utilizing the system to create those reporting packages," Noeldner says. "That's one thing that's been a huge difference: the reporting that's available within Sage Intacct. We've gained a lot more trust within our processes because of it."

Reporting packages that once took more effort to assemble are now much easier to generate. "Now you go in, select your

reporting package, pick the location, pick the timeframe, and the system takes care of the rest," Noeldner says. "The reporting methodologies that we've laid out and set up in Sage Intacct have really streamlined the reporting process."

That matters in a business with dozens of communities and multiple stakeholders relying on accurate financials. Faster reporting gives Primrose more than saved time. It gives the team more confidence in the numbers behind decisions.

Connecting ALIS & Sage Intacct

The connection between ALIS and Sage Intacct quickly became one of the most important parts of the project.

ALIS manages resident billing activity for more than 2,000 residents. ALIS built and supports its own API integration with Sage Intacct, allowing revenue activity to move into the financial system quickly and consistently.

"If somebody generates an accounts receivable invoice and creates the bill, and since revenue's been acknowledged inside of ALIS, that flows over, in real time, within an hour into Sage Intacct," Noeldner says.

That connection gives Primrose a more up-to-date view of financial activity without requiring the team to switch systems to piece together the information. Noeldner explains, "Mid-month, if something changes, that's recognized right away, and you don't have to wait for those kinds of things to be reflected on the income statement," Noeldner says.

Before, answering questions often meant navigating several systems to understand where the organization stood. That took time and slowed responses. "You were in and out of three different systems to give somebody information on where we're at today, and it took a lot of time to do that," he says.

Now, whether the team is assessing cash flow, reviewing income statements, or answering operational questions, the information is easier to access and trust. "The information must be reliable, it must be accurate, and it must be timely," Noeldner says. "That's what you get with a combination of these two systems connected the way they are."

Better Visibility for Corporate & Community Teams

Sage Intacct also gives more Primrose employees access to the information relevant to their roles. Business office managers, executive directors, dining managers, maintenance staff, and other team members can run reports, drill into invoices, and review supporting images without having to send every question back to accounting.

Access like this changes the way people work. "Now people who should be asking the questions can do so directly," Noeldner says. "It creates better relationships."

It also saves time in the normal course of the day. "It could be a two-second question that might take an hour to get answered if accounting is tied up in a meeting," he says. "If they can get in there and access those things, that's been a key shift in our operational day-to-day needs inside of our company."

With better access to financial detail, local teams can review expenses, monitor costs, and catch questions closer to the work itself. That gives Primrose another proactive layer of oversight across its communities. "It gives us another set of eyes," Noeldner says. "The information transparency that we've been able to get across our whole company has really made a difference."

That transparency also helps with cost-conscious decisions. Staff can drill into invoices, expenses, and departmental costs in real time, making it easier to spot billing questions and compare trends over time. "Sometimes you catch vendors billing for things that aren't what they were actually there for, and the business office manager wouldn't necessarily know that," Noeldner says. "Maintenance has access to drill down, review the invoice, and say, 'Hey, I better call them and follow up.'"

The same visibility helps with budgeting. Teams can look at historical costs by department and location, from lawn care to culinary expenses, and use that detail to make better decisions. "Here you can look at invoice-over-invoice or month-over-month. Where has my average been? Where are those things at?"



"They really came in presenting themselves as industry-knowledgeable—industry-leading—when it comes to understanding the needs of senior living."



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The system allows for that, whereas in the past, a lot of that was a manual process," Noeldner says.

Practical Automation for High-Volume Accounting

With dozens of communities and a steady flow of invoices, Primrose also uses automation in Sage Intacct to reduce repetitive accounting work.

AI-powered accounts payable capabilities help process invoices more consistently across communities, including reading descriptions, suggesting coding, and standardizing information. For an accounting team managing high transaction volume, that support reduces the small manual steps that can pile up quickly.

"Knowing that the AI piece is there, you know you're keeping up with your competitors," Noeldner says.

Technology has not replaced staff, though it has helped remove repetitive work that pulls skilled people away from higher-value tasks. "Those little things make a big difference in how people look at how they do their job," Noeldner says. "It takes the pressure off and lets you use that energy somewhere else more positively."

For the accounting team, automation also helps reduce the risk of mistakes and makes the daily workflow easier to manage. "Knowing that unintentional mistakes aren't being made. Those are all things that make an accountant's life a little easier."



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Senior Living Experience from BT Partners

BT Partners paired technical implementation support with senior living experience, helping Primrose shape reporting, workflows, integrations, and system decisions based on how its communities actually operate.

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That industry knowledge helped during implementation and continues to help as Primrose looks for more ways to use Sage Intacct across the organization. “It’s nice to have that partner who’s there, who you can reach out to, who’s always responsive,” Noeldner says.

Noeldner also points to the reliability and follow-through of the BT Partners team. “BT Partners are true to their word. They are there to make sure your business continues to thrive. They want to make sure that they’re listening to your needs. When it comes to any question we’ve had in the senior living area, they’ve been able to address it.”

Confidence to Grow

With Sage Intacct, the ALIS integration, and guidance from BT Partners, Primrose has a stronger financial foundation across its 37 communities.

The accounting team can produce reporting packages faster. Resident billing activity flows into the financial system more quickly. Local leaders have better access to the information they need. Corporate finance has greater confidence in the numbers. The organization can spend less time chasing answers and more time acting on them.

With more reliable information and stronger connections between systems, Primrose has a high performance financial foundation that fits the way the business operates today and gives the team room to keep improving as needs change. “Knowing that’s there gives you confidence to push forward in different areas,” Noeldner says.

For Noeldner, BT Partners remains an important part of that progress. “They value your time. They make time for you,” he concludes.



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