



Making the Grade: ONCAT's Success with Sage Intacct & Equation Technologies

Customer

Ontario Council on Articulation & Transfer (ONCAT)

Industry

Nonprofit

Challenge

Outsourced accounting and QuickBooks limitations created growing pains and limited growth.

Solution

Equation Technologies implemented Sage Intacct, providing a streamlined ERP with fewer integrations and advanced automation tools.

Results

- Improved automation capabilities
- Reduced reliance on integrations
- One centralized solution
- Streamlined accounting AP workflows
- Future-proofed business
- Boosted job satisfaction
- Remote system access

The Ontario Council on Articulation and Transfer (ONCAT) plays a pivotal role in supporting learner mobility, working to reduce barriers for students seeking to transfer among the province's public colleges, universities, and Indigenous Institutes. ONCAT partners with postsecondary institutions to help establish academic pathways, facilitate recognition of prior learning, and support learners' transition into the labour market.

QuickBook Quirks

In 2015, ONCAT faced challenges with its accounting processes. At that time, they were outsourcing accounting services and using QuickBooks. As the nonprofit began to scale, they experienced the typical growing pains many businesses encounter when on QuickBooks and went looking for a partner with servers located in Canada. Peter Desera, the Manager of Finance, explains, "We realized that it [QuickBooks] had its limitations. So, we wanted something that had more flexibility." With this in mind, ONCAT partnered with Equation Technologies in 2016, successfully transitioning from QuickBooks to Sage 300 on a private local Canadian cloud.

Cloud-Centered Transformation

While moving to Sage 300 initially improved control and scalability, six years later, technology evolved, and ONCAT needed a more advanced cloud-based solution to address new inefficiencies and limitations. Desera recognized the urgent need to be in the cloud for remote system access, transforming operations, and improving efficiency. He says, "A story I often share is this: imagine you're in transit, and someone submits an invoice to you. You review it and approve it, all without waiting to sift through a pile of paper once you get to the office. That's the vision I always had, even before the pandemic."

Add-On Overload

ONCAT saw the value in leveraging automation to stay ahead with technology and reduce operating costs. "It's better to be on board and to get ahead of the curve, rather than being caught off guard by something unexpected—whether for you or the organization," adds Desera. However, with their heavy reliance on third-party add-ons for Sage 300, Desera felt uncomfortable about using automation features provided by these add-ons. He wanted one centralized



"It's been a great relationship. The team is easy to work with, approachable, responsive, and incredibly helpful. They're very knowledgeable across a wide range of areas. As a smaller organization with limited in-house support, we always felt well-covered."

*Peter Desera,
Manager of Finance,
ONCAT*

Enterprise Resource Planning (ERP) system that streamlined their accounting AP workflows and future-proofed business.

Teaming Up For Success

Their strong and strategic partnership with Equation was something they valued deeply. So, in October 2022, ONCAT reached out to Equation once again for their expertise in a Sage Intacct implementation so they could benefit from fewer integrations and enhanced automation tools. Desera adds, "It's been a great relationship. The team is easy to work with, approachable, responsive, and incredibly helpful. They're very knowledgeable across a wide range of areas. As a smaller organization with limited in-house support, we always felt well-covered." Their choice to move to Sage Intacct with Equation by their side, proved to be the right decision as they navigated their next phase of digital transformation.

What made this partnership even more impactful was Equation's genuine care for ONCAT's success. Desera particularly felt this when working with Chathu and commented that Chathu seemed more invested in the project's success than he was. This personalized attention reassured Desera and made him so comfortable with the Equation team that he encouraged his colleague to reach out to them whenever needed. "I tell Amy to reach out to Equation directly because we're comfortable working at that level. When you're not as comfortable, you tend to want to manage the relationship more carefully, especially if things feel tricky or complicated. But when I ask a colleague to contact them directly, it shows just how confident we are in their support—they always help us," says Desera.

AP Automation Fuels Efficiency

Following the Sage Intacct implementation, ONCAT has enjoyed significant improvements in both efficiency and accuracy, particularly in automating their accounts payable (AP) process. Automation has streamlined workflows and allows for quicker approvals without the need for manual intervention. "This is efficient. That saves a lot of time and I believe it will save money in the long term as well," says Desera. It also improves audits by giving auditors' system access to review processes independently. This assures everyone that the system is reliable and operating in compliance with financial regulations. Desera explains, "It gives the auditors more assurance when they can look at the code and see the process. They see the system works well, and they [ONCAT staff] are using it."

From Data Management to Strategic Impact

Sage Intacct's powerful automation tools allow Desera to be much more strategic. He says, "The automation that comes with Intacct frees up time that would have been spent on day-to-day activities, so I can focus on the more in-demand tasks, like forecasting, budgeting, reporting." Estimating that Intacct automation has freed up 20-25% of his time, Desera appreciates having this extra time to analyze the data as opposed to just managing the data. This has considerably increased not only his impact on the company, but equally important, his job satisfaction. He enjoys taking on more challenging work and better apply his forensic & strategic accounting skills.

The boost in job fulfillment isn't just felt by Desera, but also by Amy Oziel, Operations Specialist. With less time spent on data entry, she can focus on learning and growing within the team. Since implementing Sage Intacct, her role has become more advanced, with greater authority, allowing her to take on more strategic responsibilities and contribute more thoughtfully to ONCAT's mission and goals.

"The automation that comes with Intacct frees up time that would have been spent on day-to-day activities, and then I can focus on the more in-demand tasks, like forecasting, budgeting, reporting."

*Peter Desera,
Manager of Finance,
ONCAT*

Scaling for the Future

Sage Intacct is designed to scale alongside nonprofit organizations. Looking ahead, Desera mentions, "The next part we're going to do is we're going to try to integrate it [Sage Intacct] with our credit card program." He is also exploring how they can leverage Sage Intacct with their grant management processes. By consolidating everything into a single, centralized solution, ONCAT has been able to improve data accuracy, streamline financial workflows, and increase staff enjoyment. Desera adds, "I'm always happy to have all this in one platform."

Building Trust and Success

Desera expressed how impressed he's been working with Equation, mentioning specific members of the team. He says, "Equation has been really great from day one. From the technical side, I remember folks like Scott. Scott was great and was always helpful. You reach out with an issue, and they respond to you immediately." Scott's responsiveness made a significant difference in minimizing disruptions to daily operations. This fast and reliable support strengthened their overall partnership and gave Desera the confidence that ONCAT's needs would always be met.

When discussing the detailed work involved in tailoring ONCAT's reports during the Sage Intacct implementation, Desera emphasized the thoughtful approach taken by Lee-Ann. Desera notes, "Lee-Ann Wood was great. She was helping me with the customization of reports, and you could see how she was taking her time. And she's making sure that I understand." He appreciated Lee-Ann's patience and dedication, noting how she carefully walked him through each step, so he fully understood the customized features. This empowered ONCAT with the self-sufficiency to build their own custom reports confidently, enabling them to make informed decisions quickly.

"Equation has been really great from day one... You reach out with an issue, and they respond to you immediately."

*Peter Desera,
Manager of Finance,
ONCAT*

Solving Problems and Building Partnerships

There are two distinct pieces to a Sage Intacct implementation with a partner – the product and the relationship with the partner. Regarding Sage Intacct, Desera shared, "Intacct is so far solving our problems. We are a medium organization with a \$7.5M annual budget. So, looking at the AP module, it is solving to automate our workflows and automate our current needs and helping us to become fully virtual. My goal is to be 100% virtual so that in case the need arise, it can be an easy switch. It is moving us at the fastest speed to that kind of place."

When speaking about the Equation team, Desera is equally as happy. "The folks [at Equation] go above and beyond to try and help," he states. Reflecting on his years of experience with them, he continues, "The partnership has been great. Whenever I've needed help, they've always been there. I can't recall a single instance where I felt unsupported." With Sage Intacct in place and Equation as their trusted strategic partner, ONCAT is well-positioned to continue scaling and embrace more advanced solutions that help drive their nonprofit's mission forward confidently.

