



Innovating for the Future: CSMC's Journey with Sage Intacct & Equation

Customer

Charter School Management Corporation (CSMC)

Industry

Non-Profit Education

Challenge

Sage 300 was cumbersome, prone to frequent server crashes, and unscalable.

Solution

Equation implemented Sage Intacct, simplifying complex financial processes & boosting their confidence to scale business.

Results

- Cloud-based system with increased accessibility
- Seamless report migration
- Audit time savings of 25 hours
- Real time access to information
- Responsive partnership
- Automatic system updates

Charter School Management Corporation (CSMC) cares about students and schools succeeding, which was the driving force behind its inception. Providing back-office services, like payroll, student data, and consulting, CSMC supports charter schools nationwide with financial and business support, empowering them to focus on delivering the best education to their students.

For 18 years, Equation Technologies has been CSMC's long-term technology partner. The Equation team ensured seamless operations by installing and offering exceptional technical expertise and support throughout the entire lifecycle of their Sage 300 system. This was why, when it was time to transition away from Sage 300 and to a more modern, 'Enterprise Resource Planning' (ERP) cloud based software, they looked to Equation for help.

Inefficiency & Security Struggles

Sage 300 was handling business but wasn't transforming business the way CSMC needed it to meet evolving needs. It became obvious that the burden of maintaining a server and its frequent server crashes was significantly disrupting operations.

Since the CSMC staff work remotely and are only in the office occasionally, they knew they needed to get off the traditional on-premise server and onto a modern, cloud based system that better supported remote access.

Additionally, the security put in place to protect the server and let staff in to use the system was a constant source of angst. Simple daily tasks, like logging in and downloading and uploading files, were becoming a time-consuming struggle. Patricia Meckes, Vice President of Accounting for CSMC, recalls, "[With Sage 300] You have to click like 50 buttons to get to where you could upload. It was becoming very cumbersome."

The Value of a Responsive Partner

During the ERP selection process, CSMC explored cloud based software options and tested various solutions on the market. They were met with some resistance from other technology partners with a 'take it or leave it' type of sales approach. Meckes states, "We were having a hard time overcoming the fact that they weren't that responsive to our questions."



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Vice President of Accounting,
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This lack of service was a deal breaker for CSMC and wasn't something they were used to from working with Equation. They knew they needed a partner who would be there for them when they needed them.

"Every system has its limitations. It's just how many can you live with? What's the breaking point? Which limitations work for you and which are a deal breaker?" says Meckes. She continues, "One of the things our company does is try to be extremely responsive and customer service oriented. I feel like Equation has that same attitude - they are customer service oriented."

Smooth Transition

The new Sage Intacct system rollout went smoothly thanks in part to the extensive testing facilitated by Equation. Given the large number of clients CSMC has, they wanted to ensure the implementation was smooth for not only themselves but also for the schools they support. Meckes shared, "We are very, very happy with Intacct and our implementation with Equation."

Since Sage Intacct out-of-the-box didn't suit CSMC's business reporting needs, they needed to create reports to match what their clientele was used to seeing with the old Sage 300 system. While CSMC had some familiarity with report creation, navigating the transition wasn't always straightforward. Equation ensured a seamless migration by providing strong training and getting them off on the right foot.

If Sage Intacct wasn't working quite the way they wanted, CSMC would reach out to Equation and get an instant response. Meckes explains, "Equation are extremely responsive. We've been very happy with that because that's really important to us. We have many

users on Intacct, and if we have a question, or someone has a problem, we can't wait a week. It brings people to a standstill. I feel like they've been very responsive to addressing any concerns right away."

Saving 25 Hours with Better Tools

Efficiency is synonymous with a thriving business. CSMC had previously been using an add-on for Sage 300 which didn't have drop and drag capabilities. It took multiple clicks to browse for files and documentation.

Sage Intacct offers users a drag-and-drop function that staff and clients use daily. Meckes says, "I love the drag and drop feature in Intacct. We can drag and drop anything, not just invoices because we were limited to invoices using a previous add-on software. For bank transactions or any general ledger transactions, we can drag and drop. The support is right there, and I just love that because our schools and our partners use that."

Meckes considers this feature a game-changer because it saves them at least 30 minutes per audit. With around 50 clients, that's a minimum savings of 25 hours they can now put towards more strategic priorities.

Unlocking More Insights, Faster

A healthy business or school requires real-time access to information. Sage Intacct allows CSMC clients to conveniently log in and access their school's data directly from private reports whenever they need it, with strong security features limiting who has access to each report.

Meckes confirmed the team has received a lot of positive feedback from their clients about how easily accessible it is for them now, to retrieve reports and information just by logging into the portal. Additionally, the reports are easy and quick to download because the data is now in the cloud, and they don't have to go through the server like they did with Sage 300.

Empowering Independence with More Productivity

Equation prefers to set their clients up to be as self-sufficient as possible. Meckes experienced firsthand the effectiveness of Equation's training as she was able to build custom reports for the business herself.

When discussing this she states, "The Equation team was very good at explaining how to do things ourselves because every report had to be customized for our business. I didn't need to pay Equation to customize reports because it was simple enough to do ourselves." This self-sufficiency approach fosters greater confidence and capability among CSMC staff which has led to higher productivity in their operations.

Enhancing Efficiency with Expertise

When it comes to the larger impact of choosing their partner, Meckes says "Equation really brings value by finding solutions and helping us to solve problems. If there's something that we need to do, they help us figure out a way to make that happen."

By leveraging the Equation team's skills and experience, CSMC can improve business processes and drive efficiency, so they remain agile while still providing the best support to their schools. "I appreciate Effie because she will go out of her way to try and find us something that'll work. Or if the team hears about something, they'll bring it up to us. They've been helpful in that way as well," notes Meckes.

Cloud Catalysts for Success

Meckes especially likes the automated updates that Sage Intacct gets as a cloud solution. "I love that Sage sends out quarterly improvements. They're always working to improve the product versus Sage 300. We were server-based [with Sage 300], so, if we were going to make an improvement, that meant everybody shut down so we could update the system. It's so challenging to do that we didn't want to do it very often."

Since transitioning to the cloud based software Sage Intacct, CSMC's relationship with Equation has strengthened significantly, even compared to the 18 years they were partnered with them on Sage 300. CSMC reaches out whenever they have questions or an issue, and the Equation team is always happy to help.

"I don't know if I need a regular webinar or newsletter because Equation is so accessible and helpful," explains Meckes. Equation's outstanding training skills coupled with Sage's ongoing system enhancements have proven invaluable to CSMC's business operations.

Confident Growth with Flexibility

Looking forward, CSMC's long-term plans are to continue working with Equation to find and integrate a user-friendly Purchase Order solution that their clients use, plus an internal budgeting and payroll solution.

"They're very knowledgeable about Sage Intacct and are very willing to help us find solutions. That's what we need," says Meckes.

To date, they haven't run into any trouble finding solutions that integrate with Sage Intacct, even with their unique government requirements and reporting structure. This speaks volumes to Sage Intacct's flexibility and versatility.

Meckes explains, "What I like about Sage Intacct is they have a lot of partners, and they have a lot of solutions out there. It seems that a lot of different companies are wanting to work with the software. I do love that because it gives us a lot of choice, not just for now, but for the future."

As a pioneer in helping charter schools achieve their education goals, CSMC credits Equation's strategic partnership and Sage Intacct for where they are today and their possibilities for future growth. CSMC has not only streamlined its financial processes but also feels confident scaling business, which is paramount to success and ensuring the long-term stability of the schools it supports.



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Charter School Management Corporation*



United States 533 2nd Street | Encinitas, CA 92024

Canada 220 Brew Street, Suite 301 | Port Moody BC V3H 0H6

UK: 55 Station Road, Beaconsfield, Buckinghamshire, HP9 1QL

866.436.3530 | info@equationtech.us