

Brentwood Recovery Home Streamlines Reporting and Approvals With Sage Intacct

Sage



Non-Profit residential treatment facility eliminates manual processes by moving financials to the cloud.



ABOUT

Located in Windsor, Ontario, Canada, Brentwood Recovery Home provides lifelong, compassionate, and evidence-informed treatment for people seeking recovery from alcohol and drug misuse. The registered charity ensures everyone gets the help they need.

Brentwood also offers ongoing, community-based support for residents' families. Brentwood Alumni pay it forward by actively participating in incoming individuals' recoveries as part of a lived-experience fellowship.

Visit them at www.brentwoodrecovery.com



Non-Profit Accounting Challenges

When Kelly Davey joined Brentwood Recovery Home in December 2021, her first significant project was finding new accounting software.

The organization used Sage 50, an on-premises solution from a trusted enterprise software company.

But non-profit organizations like Brentwood have accounting, tracking, and reporting needs that require specialized financial functionalities. They must focus on mission success, fuel growth, and demonstrate accountability and transparency. These are hard to accomplish with entry-level software and its manual processes and workarounds.

“Reporting was one of our biggest challenges,” Kelly explains. “We couldn’t slice and dice by different programs. We were taking canned reports from Sage 50 and manipulating them in Excel, which was very time-consuming.”

Brentwood receives funding from the Ministry of Health, and Kelly must provide the government agency with regular reports—a task that took two weeks and “a crazy spreadsheet” to complete.

Purchasing and payment approvals were also challenging. They had to be done in person, and checks were physically signed in the office.

“*When I realized how manual everything was, I knew I had to find something that would work better for us.*” —Kelly Davey



Power, Flexibility, and Visibility at the Right Price

“As a non-profit, our budget’s pretty tight. We wanted the most functionality for the best price,” Kelly explained. After exploring her options, Kelly chose Sage Intacct for its affordability and capabilities.

“We had generous one-time funding from Ontario Health West to help us implement new software, and Intacct was the best bang for everyone’s buck,” Kelly notes.

Intacct is a modern, cloud-native financial management solution perfect for non-profits because it simplifies grant, fund, and donor accounting while providing real-time visibility into the metrics that matter.

Non-Profits love Intacct because it ensures control and compliance, streamlines reporting, and easily integrates with other business applications. Since it runs in the cloud, Intacct reduces IT costs and can be accessed anywhere, anytime. And for non-profits used to Sage 50, Intacct delivers power and flexibility while staying with the same brand.

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Immediate, Tangible Benefits

Based on Sage's recommendation, Brentwood partnered with Vision33, experts in Intacct and enterprise resource planning (ERP) design, implementation, and support.

Intacct comes with best-in-class accounting software and allows users to choose add-ons and integrations as needed. Brentwood started with out-of-the-box functionality and will soon customize Intacct by adding budgeting.

Even though it's early days, Kelly and her team are already enjoying the benefits of this robust financial management solution.

No more unwieldy spreadsheets and weeks to compile government reports—everything Kelly needs is just a few clicks away.

Approvals are now hassle-free. "One of the things I love about Intacct is its approval system and how things are easily documented in the audit trails," Kelly says. "And check signers don't have to come to the office to sign things. They can do it online when it's convenient for them."

Buy-in has been a breeze thanks to Intacct's simplicity. "I hopped on a Teams call with one of my check signers and walked her through the process in 10 minutes," Kelly says. "She loved that it was that fast and easy."

Now that Brentwood Recovery Home has eliminated manual processes and graduated to cloud financials, the organization can more efficiently achieve its vision of transforming lives and communities through compassion, hope, recovery, and service.



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Vision33 (www.vision33.com) helps growing companies deliver on the promise of technology through enterprise resource planning (ERP) solutions, including SAP Business One and Sage Intacct, automation, and integration solutions. Vision33 has the people, processes, and technology to help businesses solve everyday challenges and seize new opportunities for growth and transformation. With proprietary solutions such as iDocuments and Saltbox, Vision33 helps businesses leverage the right transformative technology for their digital transformation journeys.

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