

The Power of Integration: Flexitricity Automates Complex Transactions With Saltbox



Energy optimizer and aggregator used Saltbox to seamlessly integrate its energy trading platform with Sage Intacct.





About

[Flexitricity](#) pioneered the demand-side response industry in Great Britain. Over the last 20 years, Flexitricity has grown from a startup founded in a spare room to a thriving business leading the energy revolution.

While Flexitricity's focus is generating revenue for its customers, the company has a greater mission: To reduce emissions, secure energy supplies, and help consumers across Britain save money.

"Flexitricity partners with a range of businesses, including industrial and commercial businesses, investors and developers, and utility companies, helping them generate revenue from their energy assets and provide a flexible source of low-carbon energy to National Grid," explains Helen Phillips, Flexitricity's financial controller.



Outgrowing Manual Processes

Following a period of exciting growth, the data-driven company realized its accounting software, Sage 50, was no longer a good fit.

Flexitricity trades on behalf of its partners in the energy market and handles massive amounts of trading data. There's a high volume of transactions on the customer and supplier sides, and Flexitricity must record both sides of each transaction. The company must also perform "contra entries," which involves moving a balance from one side to the other.

"We used to do this manually in Sage 50 with a big spreadsheet," says Rhys Laird, a trainee accountant at Flexitricity.

"We manually entered all of our totals, and we manually matched everything down so we just had single balances."

This monthly task typically took a Flexitricity employee at least a full day to complete—time the company couldn't continue to sacrifice.

"Our timelines are quite tight," Helen says. "Due to the industry we're in, we often don't get the data until halfway through the month. And we have to make payments by the end of the month, alongside all of our other various tasks."

Migrating to Cloud Financials

Flexitricity made a strategic move from Sage 50 to Sage Intacct, a cloud-native financial management solution. Built by accountants for accountants, Sage Intacct provides unparalleled visibility and empowers data-driven decisions.

Flexitricity's contra entries and adjustments were steadily increasing—and an up-and-coming product could increase them even more. Flexitricity recognized the need for complex process automation to help them scale.

“Even with all the resources in the world, as we scale and grow, there physically wouldn’t be enough days for us to complete this process if the volume got bigger and bigger,” Helen says. “It was impossible without automation.”



Shifting to Automation and Integration

Helen and Rhys needed a technology partner to integrate Flexitricity's energy trading platform and Sage Intacct. This vital integration would:

- Create accounts payable invoices for all purchase transactions in the relevant supplier account
- Create accounts receivable invoices for all sales transactions in the relevant customer account
- Contra the accounts payable and accounts receivable transactions for each trading partner
- Shift the entire transaction process from manual to automatic

Flexitricity heeded Sage's recommendation to partner with Vision33.

Partnering With Sage Intacct and Integration Experts

Vision33 is an award-winning Sage Intacct partner, Sage Platinum Club member, and the top integration and automation solutions provider for the Sage channel and its customers.

Saltbox, Vision33's exclusive cloud-based integration platform, was the perfect solution for Flexitricity.

Vision33 deployed Saltbox and completed Flexitricity's Sage Intacct-energy trading platform integration on time and under budget.

Helen championed the project, and Rhys was heavily involved with testing and implementation.

“There’s quite a lot of complexities in the data and accounting treatments,” Rhys notes. “There are several very specific VAT rules that apply to our industry that had to be accounted for. There was a lot of good back and forth and collaboration with Vision33 to get it down to exactly what we needed. I can’t sing higher praises about Vision33.”

Helen adds, “This was also a rescue mission. Vision33 helped us finish our Sage Intacct implementation because our other implementation partner didn’t.”

Vision33 helped Flexitricity build a custom report in Sage Intacct so the only thing to do is put a file in the container for Saltbox. This generates a report that shows the payments that need to be made and the payments that have been received.

“That used to be a multi-stage, full-day project,” Rhys says.






Eyeing an Innovative Future

Flexitricity's innovations have shaped demand-side flexibility for two decades, and the company aims to create a greener and fairer energy system that benefits everyone.

As Flexitricity continues to innovate, its technology stack will evolve—and Vision33 will remain a long-term partner.

“Our objectives were 100% met with this integration project,” Helen concludes. “There’s nothing additional we could have asked. We’re working with Vision33 on some other projects because we have a good professional relationship and level of trust.”



Vision33 transforms business processes and results for customers by delivering value through the promise of technology and its benefits for growing businesses. For over 30 years, Vision33 has helped companies integrate and automate their business processes and applications to better serve their customers, employees, and stakeholders. The technologies may have changed drastically in 30 years, but Vision33's mission has never wavered.

With over 1,000 customers worldwide, Vision33 helps manufacturers, distributors, service firms, and SaaS businesses outperform their competition and lead their industries with successful technology investments.

With nearly 500 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether a global company with 100 subsidiaries or a small business, Vision33 works alongside every customer to meet their goals.

Vision33 also has formal partnerships to resell, implement, and support leading ERP applications, is a leader in cloud deployment, and has developed exclusive products, including Saltbox and iDocuments.

For more information about Vision33, visit www.vision33.com

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