



## CASE STUDY: RESSAC IMPLEMENTS SAGE INTACCT WITH SERVICETRADE INTEGRATION



For more than 85 years, Ressac has established itself as a high quality, low-cost commercial contractor for heating, ventilation, air conditioning, and refrigeration systems. Specialties include low-rise office parks, mall retail, and big box retail sites.

### THE CHALLENGE

Ressac recently implemented ServiceTrade to improve their service management and customer service. While this solved their challenges on the service side of their business, they were still using an outdated version of Dynamics NAV, a server-based accounting platform, to maintain financial records. *“We were so focused on making improvements to the service side including customer service and earning more revenue that accounting was an afterthought,”* explains Nick Rohan, CEO at Ressac. *“We lacked real-time visibility into our financial information,”* he says, *“and we had to double key everything.”*

With no transparency into financials such as working capital and cash flow, decision-making was more like guesswork. In a very competitive industry, and with a profit margin as low as 5-7%, it was critical to know the current situation when making business decisions. And since data wasn't being shared between the accounting system and ServiceTrade, the finance team carried a large time burden related to too many AP and AR manual processes.

*“Connecting to the old accounting system was cumbersome,” Mr. Rohan explains, “and we had a lot of issues getting into the system.”* And with no AP approval process in place, service managers had to approve purchases, which took them away from more strategic job-related activities and created time-consuming invoicing of their clients. Additionally, data siloed within spreadsheets led to inefficient and time-consuming reporting processes throughout the organization.



Ressac desired a cloud solution that could streamline its AP workflow and approvals and provide real-time visibility into its multiple locations' financial results. Sage Intacct's financial management software was selected and was seamlessly integrated with ServiceTrade to eliminate many hours of manual data entry and reduce costly errors inherent in their old system.

## THE SOLUTION



Nick recalls, *“We relied heavily on ServiceTrade’s recommendation of Sage Intacct. When we looked at various systems,”* he says, *“what sold us on Sage Intacct was the reporting.”* And selecting Wipfli as the service partner was easy. Wipfli provided full-service implementation, integration assistance, and ongoing support through a collaborative team approach as Ressac navigated through the process. *“We liked the feeling from Wipfli, and had confidence in the team we were talking to,”* explains Nick.

Everyone worked together to ensure a smooth integration. *“The ServiceTrade integration is behind the scenes, so you don’t really notice it,”* reports Nick. *“With the Sage Intacct and ServiceTrade integration, we’re operating differently now,”* he says. *“The time we’ve saved on double data entry allows us to code our transactions, which allows for better financial reporting.”*

With real-time visibility and transparency into their financial results across their multiple CA locations, Ressac now has the *“right information at the right time”* to make critical

business decisions. *“We’re getting more information out of our systems and doing a lot more meaningful work,”* he says. The improved financial reporting means Nick Rohan and his team can easily see where their financials stand on a day-to-day basis.



What’s more, according to Nick, *“the thing we really enjoy with Sage Intacct is our ability to access it anywhere from a browser, whether we’re at home or out of town. We can get in and see our daily runs and see how cash is doing,”* adding, *“it’s been fantastic!”*

Overall, with Sage Intacct in place, Ressac taps into deeper financial and operational insights and is able to tackle more strategic issues, keeping the whole organization focused on their customers. Now the pressure of competition is less of a burden as Ressac has the insights its team needs to *“grow strategically in existing markets and into other regions.”*

## LEARN FROM RESSAC’S EXPERIENCE

### Key Requirements

- Implement cloud-based financial solution to automate and streamline workflows and provide financial visibility
- Integrate their new system with ServiceTrade to allow for one single set of data to run the business reliably and remove the guesswork

### Key Challenges

- Remove data from spreadsheet silos and make it available for decision-support across organization
- Save time and reduce costly errors associated with manual data entry
- Enable managers to focus on strategic initiatives

### Key Outcomes

- Gained real-time visibility into their financial results across locations
- Saved time, money, and effort through automating processes, enabling greater focus on customers
- Positioned to make long-term strategic plans for company

## **EXPLORE INTEGRATIONS**

ServiceTrade can help whether you're looking to integrate your current accounting system with our application or explore a new accounting solution. Call your representative to talk about the best way to start weighing your options and understanding the scope of integrating ServiceTrade with your accounting or other operational applications.

Read more:

- [Accounting integrations](#)
- [Other integrations](#)
- [Sage Intacct and ServiceTrade](#)