Vision33

A New Way Forward: The Way Back Modernizes Financial Management With Sage Intacct

Sage Tech Partner

Sage Business Partner

About

Based in Port Jefferson, New York, The Way Back, Inc. is one of Long Island's oldest mental health housing providers. Serving Suffolk County since 1980, the organization helps people with psychiatric disabilities build independent, fulfilling lives in the community.

The Way Back currently serves 135 clients through three levels of housing. The Community Housing program consists of five group homes, each with up to 12 residents. At the highest level of care, this program includes 24/7 supervision, rehabilitative services, and medication management. When residents gain more independence and daily living skills, they move to the Apartment Treatment program. Here, two or three residents live in single-family homes and receive on-site counseling services several days per week. Finally, the Supportive Housing program provides independent permanent housing with monthly in-home case management services.

Unlike many residential providers in the region, The Way Back owns all of its 33 residential properties rather than relying on outside landlords. This extends its responsibilities beyond human services to property management. While not the largest provider in New York, The Way Back believes being smaller has great benefits.

"We get a chance to really know our clients," says Kimberly Dilgen, The Way Back's CEO. ***"We take a lot of pride in really touching people and helping people one-on-one with their individualized needs."***

The Way Back, Inc

Reaching the Limits of Legacy Software

Kimberly knows The Way Back's financial operations inside and out. Before becoming CEO, she served as the organization's CFO for 16 years. During that time, she was part of the search for a modern, cloud-based financial management solution.

Sage BusinessWorks, The Way Back's legacy software, was an on-premises solution that served the organization for 25 years—but it was becoming increasingly challenging and risky to maintain.

"We started getting very worried about the software's age," Kimberly explains. ***"Because Sage BusinessWorks was server-based and didn't have true backups, we were nervous about our information getting wiped out at some point. If there was a bad storm, I'd think, 'I have to run to the office to shut the server down.'"***

The challenges extended beyond the software's infrastructure. The Way Back has three separate entities, and Sage BusinessWorks didn't offer an easy way to consolidate its financial information. And because The Way Back is a 501(c)(3) non-profit organization, it undergoes internal and independent audits each year. Preparation included downloading information from Sage BusinessWorks and interpreting it in Excel workbooks—a process Kimberly describes as manual and time-consuming.

Setting the Organization Up for Success

Because The Way Back had relied on a Sage product for 25 years, staying within the Sage ecosystem seemed like a natural choice.

After reaching out to Sage directly, Kimberly and her team were excited about Sage 50—until they learned it couldn't handle the different allocations required across The Way Back's various programs.

With the software search temporarily paused, Kimberly attended a community housing conference, where she met a Vision33 sales consultant who introduced her to Sage Intacct.

Sage Intacct was a strong fit, but Kimberly knew switching systems would represent a significant change and meaningful investment for The Way Back.

Ultimately, she knew the investment would set the organization up for the future.

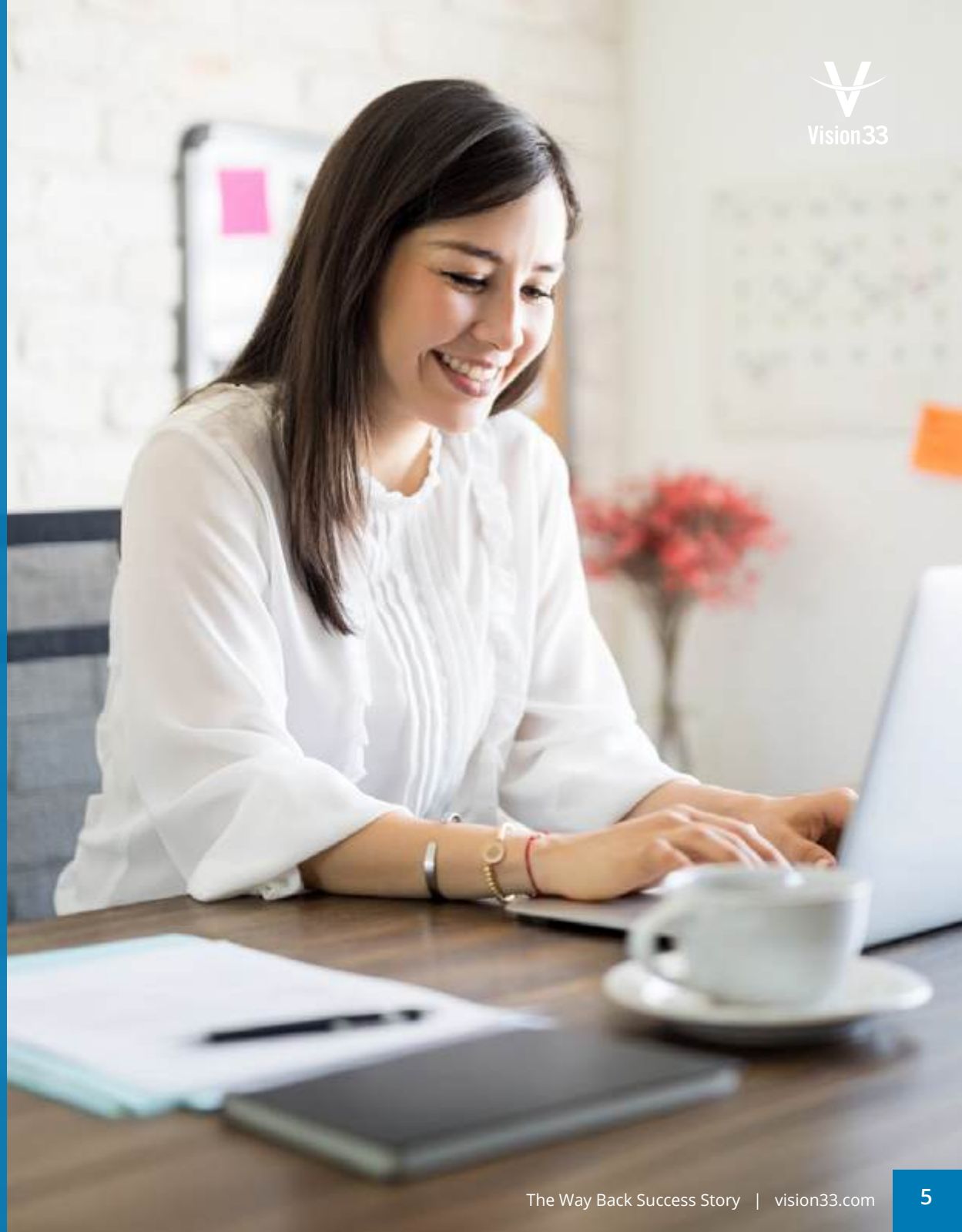
"I knew I'd be moving from the CFO role to CEO and would have someone else working the books," Kimberly shares. ***"I needed to set that person up for success."***

Combining the Right Solution With the Right Partner

Designed by accountants and endorsed by the AICPA, Sage Intacct provides a modern, cloud-native platform for non-profits to manage accounting, budgeting, reporting, and compliance. Its robust capabilities include fund accounting, grant and project tracking, dynamic allocations, multi-entity consolidation, and real-time financial reporting.

Vision33 is a trusted global Sage Intacct partner with experienced consultants, including certified public accountants, who help organizations implement and get more value from Sage Intacct.

"Our Vision33 implementation team was amazing—top-notch," Kimberly recalls. ***"They were awesome people who responded well. Any time we encountered a roadblock, we just solved it together."***



Realizing the Benefits of Cloud Financials

Having run Sage Intacct for just over a year, Kimberly describes the transition to cloud financials as ***"a dream."***

Gone are the days of scrambling to shut down a server in inclement weather. Sage Intacct runs on Amazon Web Services (AWS), giving The Way Back the security and flexibility of modern technology without the burden of managing on-premises infrastructure. Financial data is securely hosted and backed up in the cloud, protecting information and allowing The Way Back's five users to securely access Sage Intacct from anywhere.

While Sage BusinessWorks didn't offer consolidation capabilities, Sage Intacct consolidates financial data in real-time, automates inter-entity transactions and eliminations, and provides consolidated reporting while allowing users to work within individual entities.

"Another useful thing is classifying and reclassifying in Sage Intacct," Kimberly notes. ***"It's cleaned our books up. If something gets booked to the wrong GL code or program dimension, we're able to just reclassify it and make it right."***

The Way Back's finance team also appreciates Sage Intacct's drill-down functionality, which provides instant visibility into the stories behind transactions.

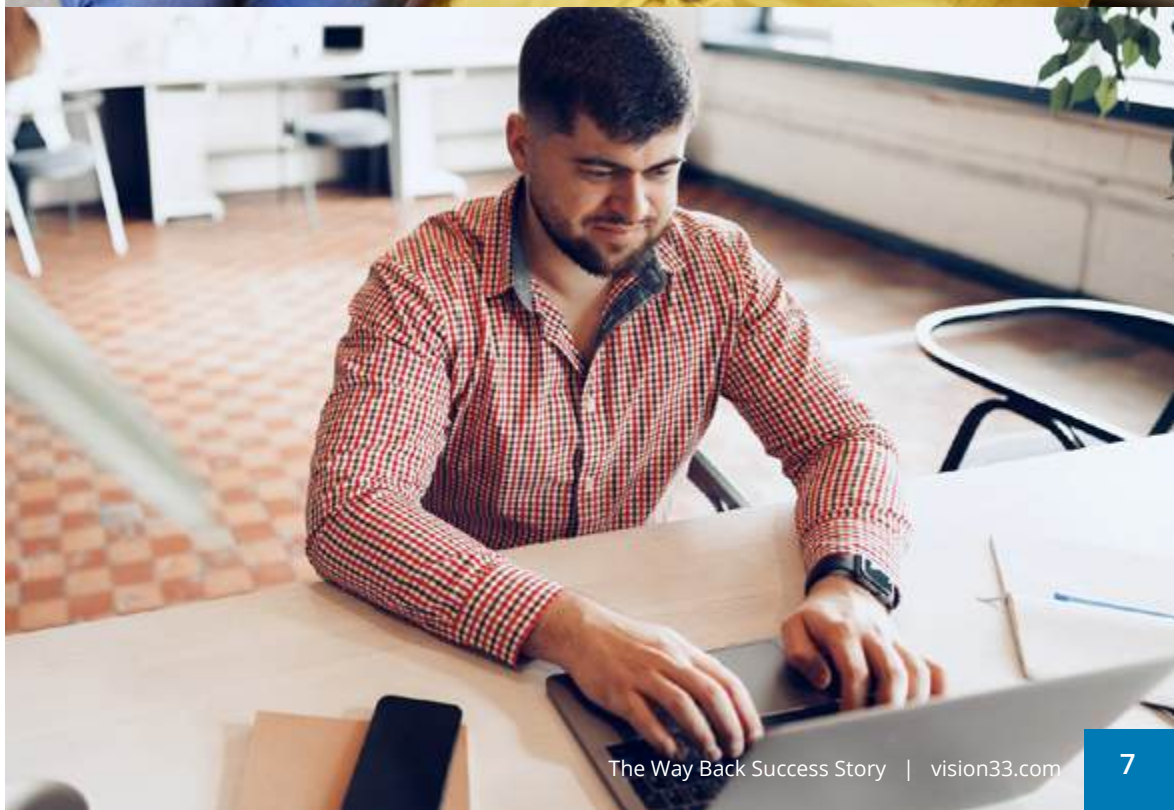
And not only is it easy to get information out of Sage Intacct—it's also easy to get it in.

"It's a very simplified process because the system remembers," Kimberly elaborates. ***"We have 33 houses, and we have utility bills that are on balanced billing for every single house, every single month. That could be hundreds of transactions just for utilities. Well, in Sage Intacct, once you put the utility in and hit 'populate from last bill,' the information is already there. You don't have to specify, 'This is the vendor, this is the amount, this is the account code, this is the dimension code.' It's already populated. Two seconds. Done."***

The Way Back's finance team has set up reports for accounts receivable, open invoices, aging, open checks, and income statements to view performance by dimension—all of which are automatically emailed each month.

"Everyone gets and reviews the same reports," Kimberly says. ***"We don't have to run reports anymore, so it's one less thing to put on the calendar. That's been great."***

And when The Way Back's next audit happens, Kimberly is confident the process will be easy.



Looking Ahead With Confidence

Choosing Sage Intacct was about more than replacing aging accounting software. It was about giving The Way Back a secure, modern financial management solution that will serve the organization well into the future—and giving the next generation of finance leadership the tools they need to succeed.

With greater visibility into its financials, streamlined processes, and confidence that its data is secure, The Way Back's finance team spends less time managing software and more time supporting the organization's mission.

"We love Sage Intacct," Kimberly concludes. ***"It really is a success story, and we're so happy to be in it."***

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 400 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether it's 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 Lumiya.

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

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