

Ecoreg Solutions  
Eliminates Manual  
Processes and Runs Better  
With Sage Intacct

Sage



# ABOUT

After 25 years of working on large multidisciplinary water- and fisheries-related projects for industry and government, Helga Sonnenberg founded EcoReg Solutions in 2016. Based in Ontario, Canada, with a satellite office in Manitoba, the environmental consulting firm focuses on water quality and aquatic resource sustainability.

EcoReg Solutions ensures regulatory compliance through assessment, monitoring, and approvals. Its six service specialties are 1) water quality, ecotoxicology, fisheries, and aquatic resources, 2) hydrology and fluvial geomorphology, 3) environmental permitting and regulatory compliance, 4) environmental assessment, 5) site closure and reclamation, and 6) research and development.

Helga's progressive vision challenges the status quo through innovation, research, and a culture of integrity, equality, and diversity.



# Challenges of Entry-Level Software



Helga Sonnenberg  
President and CEO

During the startup phase, EcoReg Solutions began its financial life with QuickBooks but outgrew the entry-level software in a few years. The company's challenges were twofold: manual processes wasted time, and Helga couldn't get real-time information and insights to effectively run the business.

As is common with QuickBooks, spreadsheets took over in many processes. Helga explains, "There were a lot of tools I needed that I didn't have at my fingertips with QuickBooks. Everything was manual. We entered timesheets in Excel. Then admin pulled the timesheets and applied them to different projects. I'd verify the hours, then pull expenses from a different place. Sometimes it took a whole day to do a big invoice."

Expense management was another challenge. Most EcoReg Solutions' project managers perform fieldwork and can be at job sites for weeks, which means things were getting lost in the shuffle. "Think of every receipt for every purchase, from food to equipment to field supplies to repairs," Helga says. "There's a lot that runs through this business on the expense side."



*There were a lot of tools I needed that I didn't have at my fingertips with QuickBooks . . ."*



QuickBooks also couldn't provide meaningful reports. Without the ability to create reports from scratch or even tweak QuickBooks' reports, Helga didn't have a clear picture of project margins and staff chargeability.

Helga knew she needed a new business management solution. But like many small business owners, she was overwhelmed by systems that cater to larger organizations. She initially considered QuickBooks' add-ons and software that worked well with timesheets but wasn't ideal for other processes. Helga also had concerns with another contender. She explains, "It's a US-based business, and I worried about them understanding Canadian taxes." The system also had a hefty price tag.

## A Sustainable Solution

Helga contacted Vision33 based on a business advisor's recommendation. "What I liked about Vision33 was that I felt very supported," she says. "They were very understanding about my situation."

With Vision33's guidance, Helga chose Sage Intacct, a flexible, customizable accounting solution built on a true cloud foundation. The all-encompassing system met Helga's needs for time tracking, expense management, purchasing, invoicing, and filing. Sage Intacct was also the right-sized

solution—it's everything EcoReg Solutions needs, nothing it's not, and priced right for the growing business.

Adopting new technology can be daunting, but Helga understood Vision33—experts in Sage Intacct and ERP solutions—would be a trusted, long-term partner. "I always had faith that I hired Vision33 because the support would be there after implementation," she explains. "That's where they come through in spades."

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# Crystal-Clear Benefits

Invoicing is now a breeze with Sage Intacct's automation. "If information is input correctly, I can do an invoice in under 20 minutes," Helga says.

Intacct's built-in approval processes have enabled Helga to control purchasing costs and improve vendor relationships.

Because Sage Intacct runs in the cloud, EcoReg Solutions' field staff can easily submit receipts and enter their time remotely, and Helga can promptly approve it. Project managers have control over their own projects and can quickly access the information they need. And EcoReg's accountant and administrative staff have a powerful tool to help them do their jobs efficiently.

As EcoReg Solutions grows, Sage Intacct will play an important role. "It's much easier to start and end employment and start and end projects," Helga says. "With Sage, it's automated."

Now that manual, time-draining tasks are behind her, Helga can put more focus on other demands of her growing business. Vision33 and Sage Intacct will be along for the ride. "I continue to feel very supported," Helga says. "And I've only scratched the surface of what I can do with the system."

// *I continue to feel very supported by Vision33, And I've only scratched the surface of what I can do with the system."*



Vision33 ([www.vision33.com](http://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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