

From Dynamics GP to Sage Intacct: Nakisa Modernizes and Simplifies SaaS Finance

NAKISA®



About NAKISA®

Headquartered in Montreal, Nakisa is a cloud-native enterprise software company serving over 1,100 clients and 6.6 million users across 135 countries—including many of the world's largest Fortune 500 organizations.

Nakisa's AI-driven platform spans three integrated portfolios: HR (organizational design, workforce planning, and analytics), Finance (lease accounting, financial forecasting, and regulatory compliance), and Real Estate (integrated workplace management, facility management, and capital projects). All three portfolios are built on a modern microservices architecture with native ERP integrations for SAP, Oracle, and Workday.

Recognized by Gartner, IDC, and the Everest Group, Nakisa is advancing an AI-first strategy through its Decision Intelligence platform, enabling enterprise teams to move from operational efficiency to data-driven, autonomous decision-making.



GP: Challenges in Achieving Fast, Accurate Consolidations

Before implementing Sage Intacct, Nakisa used Microsoft Dynamics GP (historically Great Plains) to support its accounting and finance operations. Edwin Tran, Nakisa's controller, says GP is a robust solution with strong core accounting capabilities, but it's better suited for companies with inventory and was too complex for Nakisa's needs.

One of the biggest challenges Nakisa faced was GP's lack of consolidation tools. Nakisa consists of four entities across Canada, the United States, Europe, and Pakistan, and the company handles four currencies within its Canadian entity alone.

"We had to implement a separate consolidation tool," Edwin says. "We did our data entry in GP and ran the third-party solution on the side. It would take the database from GP and consolidate it into an Excel file. It was a time-consuming process."

And because of the manual effort required to reconcile multi-entity, multi-currency data, Nakisa's small finance team was often burdened with a month-end close process that took two to three weeks.



Sage Intacct: Built for Finance, Loved by SaaS Companies

Nakisa replaced GP with Sage Intacct to better support its global operations and streamline financial management.

Trusted by over 30,000 high-performance finance teams, Sage Intacct is the AI-powered financial management solution designed by accountants and endorsed by the AICPA.

Sage Intacct empowers SaaS finance leaders to confidently scale by combining automation, real-time financial visibility, and investor-grade reporting in a single platform.

Sage Intacct also makes multi-entity, multi-location, and multi-currency management effortless. It automates consolidations, intercompany transactions, and eliminations, improving accuracy across entities and geographies.

Vision33: Sage Intacct and SaaS Experts



Nakisa engaged Vision33 to implement and support Sage Intacct, ensuring a smooth transition to the modern, cloud-native solution.

“Our Sage Intacct implementation went smoothly,” Edwin notes. “Our Vision33 delivery manager trained us and answered all our questions on the spot. He’s been a great help.”

As a trusted global Sage Intacct partner, Vision33 helps SaaS organizations translate high-performance objectives into practical execution—strengthening renewal predictability, improving forecasting agility, and scaling financial operations without adding manual complexity.



Instant Wins in SaaS Finance

While it's early days for Nakisa using Sage Intacct, the company has already achieved significant benefits in finance.

"Sage Intacct is a game-changer," Edwin says. "Everything is in one solution. You can be anywhere and it's easy to access. You just need an internet connection."

Edwin and his team can easily see and move between Nakisa's different entities in Sage Intacct, and consolidations are no longer dreaded and time-draining.

"At the press of a button," Edwin explains. "The magic happens in the background. We can extract the information to Excel and play with the numbers. If we need updated numbers, we just refresh the consolidation."

When using GP, Edwin couldn't see transaction details, so he had to keep track of month-end schedules in Excel.

"In Sage Intacct, we just click on the amount, and we can see all the details for all year, on a monthly basis, or year to date," he says.



Edwin also appreciates Sage Intacct's flexibility—for example, the simplicity of adding fields.

"Our Vision33 consultant showed me how to add a tab and a box field to keep notes about a customer," Edwin says. "It's easy to change and adapt the system. If we want a checkbox, we can add it. Then we can even run a report on the new checkbox."



Sage Intacct shines in reporting. SaaS organizations like Nakisa enjoy powerful, real-time reporting that makes it easier to track subscription metrics, revenue recognition, and multi-entity performance. Dimensional reporting allows finance teams to drill into critical KPIs, such as ARR, churn, and deferred revenue.

Additionally, Sage Intacct's best-of-breed approach enables over 350 seamless, pre-built integrations across CRM, payroll, and operational platforms.

Nakisa has connected Sage Intacct and ADP for payroll and plans to integrate with ExpensePoint for employee expense management.

"Integration saves a lot of time," Edwin says. "It's less error-prone and eliminates journal entries being copied and pasted between systems."

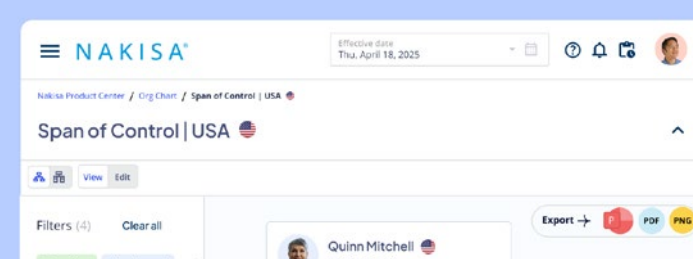
From Complexity to Confidence

By switching from GP to Sage Intacct, Nakisa has modernized its financial operations and gained the scalability and flexibility needed to support its global business.

With simplified multi-entity and multi-currency management, faster close cycles, and more SaaS-specific reporting, Nakisa's finance department is better equipped to deliver timely insights and make data-driven decisions.

"My team says we should have implemented Sage Intacct a long time ago," Edwin concludes. "We're seeing a huge difference and positive impact with Sage Intacct."





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 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 vision33.com.

Ready to transform your business?
Contact award-winning
partner Vision33:
contact@vision33.com

Sage Tech Partner



Sage Business Partner