

Success Story

Capstone Eyecare gains clear vision for growth

“Our switch to Sage Intacct has eliminated redundant payment tasks, significantly improving our financial efficiency.”

Cristy Jones

Controller at Capstone Eye Care



The challenge

Capstone Eye Care's system lacked multi-entity support, making financial management complex. Manual intercompany transactions led to errors, slowed processes, and posed data risks. Limited reporting hindered KPI tracking and data-driven decisions, creating major challenges with growth.



The solution

Sage Intacct automated intercompany transactions, reducing manual entry and boosting efficiency. It enabled data consolidation and comprehensive reporting across entities, facilitating precise financial analysis. Streamlined data integration supported a smoother transition and improved decision-making.



The outcomes

With Sage Intacct, Capstone Eye Care saved time through automation, enhanced data accuracy, and optimized reporting. Despite a smaller team, productivity rose, allowing efficient financial analysis. This scalable system ensured higher ROI, allowing Capstone to achieve greater operational efficiency with fewer resources.

- Time savings
- Increased accuracy and reduced errors
- Improved data analysis
- Ease of discrepancy investigation

Sage

Company
Capstone Eye Care

Location
Oklahoma, US

Industry
Healthcare

Sage Products
Sage Intacct

 **CAPSTONE** holdings



Multi-entity financial challenges

Capstone Eye Care initially utilized a solution with limited financial accounting and reporting capabilities across multiple locations and entities. As the business expanded, several challenges arose. The solution lacked multi-entity support, necessitating complex and repetitive intercompany transactions requiring manual data entry. This manual process was time-consuming, error-prone, and hindered financial efficiency.

Tracking KPIs and generating comprehensive reports across entities proved difficult, impacting data-driven decision-making. The solution's absence of a retention policy raised data security concerns, risking transaction deletion and compromising data integrity.

Streamlining financial management with Sage Intacct

Capstone Eye Care implemented Sage Intacct as its primary financial management and reporting solution to address existing challenges. The platform streamlined intercompany transactions through automated data entry and integration, significantly reducing manual work and improving efficiency.

Sage Intacct also enhanced the ability to consolidate data and generate detailed reports across all entities, facilitating better financial analysis and decision-making. Integration capabilities allowed for partial data import, ensuring a smoother transition. These combined features positioned Capstone Eye Care for more effective financial management and reporting across its multiple entities.

Benefits of using Sage Intacct

The transition yielded several benefits for Capstone Eye Care's financial operations. Automating data entry and reporting processes saved significant time, with tasks previously requiring multiple inputs now completed once. This reduction in manual work led to increased accuracy and fewer errors in financial data.

Sage Intacct also improved data analysis capabilities, allowing for more effective financial performance evaluation. The system's ability to hyperlink to account transactions within reports facilitated easier identification and investigation of discrepancies.



“Facing resource constraints, our team has significantly enhanced operational efficiency through process optimization. Using Sage Intacct has enabled us to expand our capabilities and improve overall performance, despite the reduction in team size.”

Cristy Jones

Controller at Capstone Eye Care

Results and ROI

The features and integration capabilities in Sage Intacct allowed the accounting team to maintain productivity despite resource constraints. The implementation led to notable operational efficiency gains, particularly in managing intercompany transactions. Tasks previously requiring multiple steps were streamlined into a single process. Enhanced reporting capabilities, such as detailed income statements by legal entity and location, empowered better strategic decision-making.

The automation and improved reporting offered by Sage Intacct contributed to increased productivity. The accounting team achieved more with fewer resources, including a reduction in personnel. The adoption of Sage Intacct has streamlined Capstone Eye Care's financial operations, improving accuracy and enhancing financial analysis and reporting. This has resulted in significant efficiency and productivity gains, allowing the organization to “do more with less” and ultimately deliver greater value.



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