

## Success Story

# Sage boosts efficiency levels at Set Solutions

Cyber security experts navigate tax compliance challenges with help from Sage Intacct

“Sage Intacct has given me time back in my day to focus on finding better financing for my customers.”

**Missy Basone**  
CFO, Set Solutions



### The Challenge

Set Solutions' rapid growth from one to 27 states in four years posed challenges in managing tax compliance across diverse jurisdictions. Unique tax laws and changing requirements demanded a more efficient solution than traditional manual methods to avoid errors and compliance risks.



### The Solution

Set Solutions partnered with Avalara and Sage Intacct to streamline tax compliance processes. The cloud-based integration between Sage Intacct and Avalara eliminated dropped connection issues, providing greater reliability and efficiency.



### The Result

Sage Intacct's flexibility and seamless integration with Avalara have increased Set Solutions' productivity, saving at least 30 hours a week and \$300,000 in salaries. The software's adaptability to unique needs provides peace of mind and allows the team to focus on other important aspects of the business.

- Automation of tax processes saves \$300,000 per annum.
- Increased productivity saves 30 hours per week.
- Streamlined tax compliance processes reduces risks and time investment.
- More time allocated to focus on strategic business activities.

Sage

**Company**  
Set Solutions

**Location**  
Texas, US

**Industry**  
Technology and Software

**Sage Products**  
Sage Intacct



### About Set Solutions

A subsidiary of the Trace3 technology consultancy group, Set Solutions provides cybersecurity services to businesses and organisations from its HQ in Houston, Texas.



The seamless integration between Sage Intacct and Avalara has increased the team's productivity.

### **Navigating tax compliance challenges**

Set Solutions specialises in offering cutting-edge cybersecurity technologies, SaaS products and consulting services to help protect clients' digital assets and sensitive information. Based in Houston, Texas, the team experienced significant growth from 2018, expanding from one state to 27 in just four years. However, alongside great opportunities came significant challenges in managing tax compliance across various jurisdictions.

The complexities of managing tax laws and regulations across separate states and counties are difficult in of itself, but for Set Solutions this was amplified even further as jurisdictions can vary on the definition of what a SaaS product is. This meant that keeping up with ever-changing tax requirements became a complex and time-consuming task. As Set Solutions continued to expand, it was becoming clear that traditional manual methods of tax compliance were no longer sufficient, leading to potential errors and compliance risks.

### **Getting the right software mix**

To overcome these challenges and streamline their tax compliance processes, Set Solutions partnered with Avalara, a leader in cloud-based tax services. However, they also needed a complementary accounting solution that would work seamlessly with both Avalara and their quoting platform, QuoteWerks. Sage Intacct was the answer.

"It was one of our tax advisors who recommended Sage Intacct," explains Missy Basone, CFO of Set Solutions. "So, we went away and did some research into the software and we were really impressed. It was a big step up from QuickBooks that we were using before," she says.

Missy explains how the different pieces of software interact today to enable a smooth lead-to-cash process. "The process begins with opportunities being entered into Salesforce and then transferred into quotes using QuoteWerks, where Avalara is integrated to handle sales tax calculations for these quotes," she says. "Once the quote is accepted and becomes an actual deal, a purchase order is received and entered into Sage Intacct, where Avalara is again utilised for tax calculations on the invoices," she continues.

### **No more dropped connections**

The seamless integration of Sage Intacct and Avalara ensures both reliability and efficiency, a marked improvement over the former setup involving QuickBooks. Although Sage Intacct and Avalara were implemented almost concurrently, there was a slight overlap with QuickBooks, which required a remote server.

"There were occasional issues with dropped connections, which slowed us down and was a source of frustration," Missy explains. "The benefit of Sage Intacct and Avalara working together is they're both SaaS, so it's running in the cloud and there's no remote server to connect into and it doesn't drop off," she says.



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#### **Software that moulds to unique needs**

As well as being more reliable, Sage Intacct allows the Set Solutions team to be flexible, and they do not require a product catalog to run their accounting software.

“Most companies like ours would have a product catalog,” Missy explains. “I don’t have the team to have a product catalog. We run a very lean team. It was one of the reasons why we went with Sage Intacct, as it enables us to keep running the business this way. We love it because our situation’s unique and we needed a solution that was moldable and flexible to our needs.”

#### **Greater productivity, less stress**

Missy says that the seamless integration between Sage Intacct and Avalara has increased the team’s productivity, and she estimates that it has saved them at least 30 hours a week. They no longer need a full tax department, saving the company around \$300,000 annually in salaries.

The integration has also brought Missy something you can’t put a figure on: peace of mind. “I’m no longer worried about my team spending a lot of time doing all these manual calculations and possibly getting it wrong,” she says. “I’m not worried about the possible risk that is associated with not collecting and remitting correctly to the different states.

“It’s give me time back in my day to focus on finding better financing for my customers,” Missy concludes.



Sage

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