

CASE STUDY

Service Access and Management, Inc. (SAM, Inc.)

Work Smarter, Not Harder with Innovative ERP Solutions

Client: Service Access and Management, Inc. (SAM, Inc.)

Sector: Nonprofit

Company Size: 925 employees

Project: Comprehensive ERP System Integration

Timeframe: 4 months for initial implementation and training


Services Provided: ERP implementation and support

The Situation: Service Access and Management, Inc. (SAM, Inc.) plays a huge role in helping people across Pennsylvania and New Jersey. With a mission spreading over 70 counties, they juggle a wide array of services and provide essential financial and tech support to other nonprofits. But as they grew, their old computer system just couldn't keep up with all the new challenges. They had to deal with a high volume of information in different places and really needed a more cohesive way of working. Plus, Microsoft announced that it would be ending support for their old system after April 2025. SAM, Inc. saw it was time for a change – they needed a newer, better system that could grow with them and handle all their diverse work more easily.

The Challenge: Managing 18 distinct companies, SAM, Inc. faced a big challenge with their old system. Each company had its own set of data, which made it hard to manage money and reports smoothly. This caused a lot of problems, especially when they needed to put all the financial info together or dealing with the high volume of employee travel expense reimbursements. All these problems made it clear that SAM, Inc. really needed a new system that could manage their complicated work and unify their operations.

The Solution: SAM, Inc. teamed up with Vertilocity to implement Acumatica, a budget-friendly, cloud-based ERP solution tailored to their needs. The Vertilocity team conducted a thorough analysis of SAM, Inc.'s business processes to determine the best course of action before setting up the system. They established a timeline to ensure everyone on the transition team understood the upcoming target dates. Additionally, Vertilocity provided comprehensive staff training. This approach streamlined operations across all of SAM, Inc.'s 18 companies, particularly in managing finances and handling employee expense reports, ensuring a smooth transition to the more efficient and integrated Acumatica system.

The Result: Moving to Acumatica brought a major boost to SAM, Inc.'s ability to get things done. The new system made it easier to put all their banking activities in one place and seamlessly handle travel expense reimbursement for many of SAM, Inc.'s workers. It also helped reorganize how things worked in the finance department. Plus, reporting saw a significant upgrade, making the whole organization more responsive and efficient.



The new system refined the finance department workflow and made it easier to seamlessly handle travel expense reimbursements.