

Customer Story

Edwards Aquifer Authority

Political Subdivision — Texas

Efficiency flows at Edwards Aquifer Authority



Edwards Aquifer Authority

Executive Summary

EAA provides a critical service, so it needs a financial management solution — and a technology partner that helps it lead from the front, providing stakeholders with accurate, timely metrics. For EAA, that solution is Sage Intacct and the partner is Express Info.

Results with Sage Intacct

- Saving the equivalent of one half-time employee
- Decreased procure-to-pay processing time by 50%
- Shaved five days of the monthly close
- Rapid three-month implementation sped ROI

Growth highlights the need for modern technology

Edwards Aquifer Authority (EAA) is a regional water management agency responsible for managing, enhancing, and protecting the aquifer that provides water for nearly three million people across eight counties in southwest Texas.

Previously, the aquifer's legacy on-premises accounting software made daily finance tasks cumbersome and necessitated a full day's worth of tedious report preparation in Excel each month. The system's shortcomings were further magnified when the agency doubled its budget and took on a new restricted fund. That's when EAA's finance team decided it was time to upgrade to a cloud-based financial solution that could meet its current needs and scale into the future.

"After reviewing several applications, we narrowed our choices down to Sage Intacct, NetSuite, and Microsoft Dynamics," recalls Shelly Hendrix, Controller and Senior Director of Finance at EAA. "We ultimately selected Sage Intacct because we felt it was the best match to help us meet our internal requirements and the expectations of our various stakeholders. In addition, it's easy to use and provides powerful reporting and analysis capabilities. Sage Intacct is also cloud-based, which frees our IT resources and ensures we're always able to take advantage of new capabilities."

Automated workflows cut processing time by 50%

With expert support from its business partner, Express Info, EAA transitioned to Sage Intacct in just three months. "Express Info was a tremendous help during the transition and continues supporting us now," says Shelly.

With Express Info's assistance, the organization has optimized several financial processes, most notably its time-consuming procure-to-pay workflows. "Before, we spent hours passing yellow folders around the office with printed invoices for directors to approve," explains Hendrix. "Now, we just scan each invoice into Sage Intacct, the system routes it to the appropriate directors based on account code, and they approve it electronically. As a result, we've eliminated paper from the process and reduced the approval time by at least 50%."

“Using the automated workflows in Sage Intacct, we have shifted from day-to-day bookkeeping to strategic thinking and planning.”

Shelly Hendrix, Controller & Senior Director of Finance, Edwards Aquifer Authority

Save 50% on monthly close

By leveraging the solution's reporting capabilities, EAA has also streamlined its reporting processes, shaving five days off the monthly close. “Previously, if there were one small change that needed to be made in the financials, I'd have to fix worksheet after worksheet to get the reports issued correctly,” notes Shelly. “Today, I make the adjustment in Sage Intacct, which automatically updates all of our reports instantly.”

In addition, the system helped EAA make its payments more efficiently and streamline what was formerly a paper-based expense reporting process. By sending ACH files or signing checks directly from Sage Intacct, the finance team no longer spends over an hour on each check run.

Financial transparency promotes collaboration

Through dimension-based reporting in Sage Intacct, EAA can easily track and report upon data by fund, department, or vendor type. As a result, the organization is providing higher quality, more relevant information to its stakeholders more quickly. To provide self-service access to key

performance indicators and other financial data, the finance team built custom Sage Intacct dashboards for EAA's staff.

Reporting efficiency frees time of half-time employee

“We have an executive dashboard with real-time financial reporting, so we can see where we stand on cash or just how we're progressing through the month for our P&L,” Shelly notes. “Our departments have visibility into open purchase orders, for example, along with any remaining balances. This is great for our decision-making processes since we live or die by our budget as a government entity.”

Express Info showed EAA how to create a custom dimension in Sage Intacct to track which of its vendors are minority and women-owned business enterprises (MWBE). This reporting requirement had been a significant challenge previously. “It used to take us a week and a half to manually produce our MWBE report every quarter, and even then, we didn't have great confidence in its accuracy,” Shelly adds. “Now we have timely, accurate data with just a push of a button. The point-and-click reporting saves at least the equivalent of a half-time employee's labor.”

Supporting the mission

When Shelly considers the changes at EAA since the implementation of Sage Intacct, what strikes her most is the easy access and retrieval of data. “There's no more paper in the office,” she says. “All our data is securely stored electronically, and we can access it instantly. It's hard to quantify the time-savings and value surrounding this, but it is enormous.”

EAA's core values include collaboration, creativity, integrity, and professionalism. Shelly believes that with Sage Intacct and Express Info she's found a product and a partner that actively support each of those values. “Using a modern, innovative financial management solution like Sage Intacct demonstrates transparency and accountability, promotes better team communication, and Express Info helps us to leverage new workflows and best practices that lead to a better, more responsive organization.”

About Express Info

Express Info provides premier accounting and financial management software with a local, San Antonio approach. Our greatest strengths are creating solutions to intricate problems and resolving concerns efficiently for our diverse industry clientele which includes manufacturing and distribution, healthcare, nonprofits, hospitality, construction, real estate, and more.

We take pride in helping small and mid-sized businesses reach beyond their potential, a dedication to detail that has earned the trust of over 600 companies' accounting and financial software needs. Nothing makes us happier than seeing our customers succeed and knowing we played a part in their triumphs.