

Success story

# Regal Crest Homes Lays the Groundwork for Sustained Growth with Sage Intacct and BAASS



## The challenge

Regal Crest Homes outgrew QuickBooks, facing difficulties managing complex development projects and producing consolidated reports across multiple entities.



## The solution

Partnering with BAASS, Regal Crest Homes implemented Sage Intacct Construction, integrating it with their existing tools to streamline reporting, vendor management, and project tracking.



## The result

The new system improved operational efficiency, enhanced reporting capabilities, and reduced manual tasks, allowing the company to focus more on strategic planning and achieve a positive ROI.



“We are saving valuable staff time by automating routine tasks and streamlining workflows.”

**Enrique Gomez**  
CFO, Regal Crest Homes



**Organization**  
Regal Crest Homes  
**Location**  
HQ - Vaughan, ON  
**Industry**  
Home Builders  
**Sage Partner**  
BAASS Business Solutions



## Regal Crest Homes

Regal Crest Homes is a premier home builder known for crafting exceptional residential communities in prime locations. With a reputation for quality, innovation, and attention to detail, they offer a range of beautifully designed homes that cater to diverse lifestyles. The company is committed to providing an unparalleled home-buying experience, ensuring that each home is built with the highest standards of craftsmanship and customer satisfaction.



Making the home-buying process simple and seamless for customers requires skill, rigorous planning, management, and communication. That's why Regal Crest Homes trusts Sage Intacct Construction, supported by the expert team at BAASS.

#### **Breaking Ground on Better Business Processes**

For many years Regal Crest Homes ran its accounting platform using QuickBooks. However, as the company grew and took on larger and more complex development projects, QuickBooks's shortcomings became increasingly glaring.

"We'd simply outgrown QuickBooks," explains Enrique Gomez, CFO at Regal Crest Homes. "Each project we develop is a separate entity, or 'instance' in QuickBooks. As our project count grew, it became very cumbersome for staff to switch between instances continually. Every subcontractor would have to be entered and maintained separately, each entity had its own chart of accounts, and generating system reports that looked at our whole operation were impossible to produce. We would thus need to create many Excel reports to accomplish this."

#### **Framing Success with Sage Intacct**

The company's management team knew that to grow its operations efficiently, it would need a new business management system. They briefly considered Newstar, a construction-industry ERP application, before deciding on Sage Intacct.

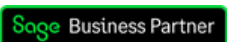
"We are very happy with Builder Lynx, and so we needed to consider an accounting platform that would be able to integrate with it." Enrique explains. "Then we heard about Sage Intacct and its integration with Builder Lynx and decided to explore it further. BAASS demonstrated it and showed us how it could help overcome the roadblocks we faced with QuickBooks. BAASS has a lot of other customers in this space, so they understand construction, which gave their advice and recommendations credibility."

#### **Rapid, Seamless Implementation**

With the decision made, Regal Crest Homes and BAASS began planning and executing the implementation plan. "We arranged to make the transition during our slower season, and BAASS was ready to go when the time came," Enrique says.

Switching accounting applications involves a learning curve, but Enrique says the staff quickly gained momentum with Sage Intacct. "BAASS provided training for our staff, and the online documentation is excellent. You can access context-sensitive help wherever you're working in the application. Plus, Sage Intacct is intuitive overall, making the switch seamless."

Regal Crest Homes runs a lean operation, with the majority of its resources dedicated to building, so it does not have an internal IT staff. "Sage Intacct and Builder Lynx are both cloud-based applications, which is ideal for us," explains Enrique. "Backups are automatic, and remote access is a breeze."





### Building Stronger Reports

Reporting was a constant battle in QuickBooks. “We could not draw meaningful data out of QuickBooks,” Enrique says. “The standard reports are very limited, so we ended up pulling the data into spreadsheets, which took too much time and inserted the opportunity for errors.”

Previously, running a single report showing how much the company owed a particular vendor across various projects was impossible. “We had to run a report in each of the QuickBooks companies and then add them up,” recalls Enrique. “Now, we can run one report that details payables across our projects. It provides us with a clear picture of our obligations and allows us to make smarter decisions surrounding cash flow.”

Sage Intacct provides rich reporting capabilities, including a robust custom report-writing tool that allows the company to look at its data in multiple ways. “Everyone, from our management team to our field staff, has direct access to decision-making data now,” says Enrique. “

BAASS showed Regal Crest Homes how it could map data from Builder Lynx into Sage Intacct for inclusion in reports. For example, information such as closing dates, buyer names, and home addresses is pulled into Sage Intacct. “We can now produce reports that show us which homes closed within a specific date range, for example, and which we expect to close next month,” Enrique says. “This is data we use to make better, faster, and more informed business decisions.”

### Streamlining Vendor Management

Tracking and billing for vendor retainage is a common challenge for construction companies — a challenge Regal Crest Homes faced with QuickBooks. “Sage Intacct streamlines retainage handling,” Enrique says. “It automatically calculates the retainage on each vendor invoice and provides deep visibility into the retainage we’re holding. There was no way to get this information with our old system — we tracked retainage manually. Considering the large volume of payable transactions that we run through the system, this one feature saves us many hours every month.”

Regal Crest Homes has begun scanning and attaching vendor communications and compliance documents to the vendor record in Sage Intacct, eliminating the need to retain and file paper copies and ensuring the documents are always easy to locate. The company is also planning to transition to electronic payments for its vendors, reducing or eliminating the number of paper checks it produces. “Sage Intacct is set up to handle that, and we expect this will save us additional time and money,” Enrique says.

### A Solid Foundation and Positive ROI

Following its successful move to Sage Intacct, Regal Crest Homes has plans to explore other integrated applications that offer additional capabilities. “Next on our list is to integrate data from our payroll provider into Sage Intacct,” says Enrique. “We’re impressed by all the many options available. Sage Intacct is clearly investing in the product, listening to customer feedback, incorporating new functionality, and keeping it out in front.”

Enrique is convinced the company’s move to Sage Intacct is generating a positive return. “We’re saving valuable staff time by automating routine tasks and streamlining workflows. That allows us to spend more time on strategic planning and exploring additional efficiencies.”

In addition, Regal Crest Homes’ partnership with BAASS will continue to add value. “We have weekly calls with our BAASS consultant,” concludes Enrique. They help us maximize Sage Intacct’s capabilities so we can continue to grow and expand profitably.”

