

Full Coverage for Finance: PEI Mutual Modernises With Sage Intacct



PEI MUTUAL
INSURANCE COMPANY

Sage Tech Partner

Sage Business Partner

About

Located in Summerside, Prince Edward Island, Canada, [PEI Mutual Insurance Company](#) has been protecting Islanders since 1885.

PEI Mutual's coverage reflects the Island way, with specialised expertise in four major insurance lines: residential, commercial, fishing, and farming.

Everything PEI Mutual does is in service to its members. Profits are reinvested into improving service, offering competitive rates, giving back to the Island community, and providing mutual rebates to policy-holding members.



Choosing a Scalable, Cloud-Native Solution

Supporting its commitment to members meant ensuring the company's financial system could keep pace with its growth.

After using a custom-built, server-based Microsoft Access system for 20+ years, PEI Mutual evaluated new software to modernise finance, integrate critical applications, and streamline manual processes.

Rudy Smith, PEI Mutual's CFO, explains that the company implemented a hybrid solution of Salesforce, an accounting system, and an HR platform.

After a trial-and-error period, PEI Mutual decided to keep Salesforce, switch the HR platform, and replace the accounting system with Sage Intacct.

"We have a few people in the finance department who have used Sage solutions before," Rudy notes. "They have had good experiences, and I have heard nothing but good reviews from others about the Sage Intacct platform."

Trusted by over 30,000 high-performance finance teams, Sage Intacct is a cloud-native financial management solution designed by accountants and endorsed by the American Institute of Certified Public Accountants.



The Value of an Experienced Partner

Because PEI Mutual's instance of Salesforce is highly customised, the company needed an experienced partner to not just implement and support Sage Intacct but properly integrate it with Salesforce.

"That's where Vision33 really shone through for us,"
Rudy notes.

As a trusted Sage Intacct partner for over 20 years, Vision33 helped PEI Mutual navigate a complex implementation and integration. Saltbox Integration Platform, Vision33's exclusive integration solution, seamlessly connected PEI's new Sage Intacct system to Salesforce.



From Manual Processes to Real-Time Insights

While it's early days for PEI Mutual using Sage Intacct, Rudy says the company is "super excited" about what the software can do.

With Sage Intacct's cloud platform, PEI Mutual's finance team has a more modern way to work, with improved flexibility, accessibility, and real-time visibility.

Transactions that previously required manual processing in Microsoft Access now flow automatically through Sage Intacct in real-time.

Financial reporting—an area where Sage Intacct shines—is a key advantage.

"We can run our own custom queries and accounting reports and get a lot more granular, real-time data," Rudy explains.



A Foundation for the Future

With a modern financial foundation, the company is continuing to build for the future.

PEI Mutual is currently integrating Sage Intacct with its HR platform and enjoys intelligent, best-in-class cloud solutions that will allow the company to confidently scale.

PEI Mutual's strategic plan includes enhancing several products and services and offering policyholders more self-service options.

"In the next three years, we're looking to continue to grow and modernise," Rudy concludes. "Modernising our technology is going to be a big part of the company's success going forward."



Vision33 transforms business processes and results for customers by delivering value through the promise of technology and its benefits for growing businesses. For over 30 years, Vision33 has helped companies integrate and automate their business processes and applications to better serve their customers, employees, and stakeholders. The technologies may have changed drastically in 30 years, but Vision33's mission has never wavered.

With over 1,000 customers worldwide, Vision33 helps manufacturers, distributors, service firms, and SaaS businesses outperform their competition and lead their industries with successful technology investments.

With nearly 400 employees, Vision33 offers product expertise, business experience, and innovative technology leadership. Whether it's a global company with 100 subsidiaries or a small business, Vision33 works alongside every customer to meet their goals.

Vision33 also has formal partnerships to resell, implement, and support leading ERP applications, is a leader in cloud deployment, and has developed exclusive products, including Saltbox and Lumiya.

*For more information about Vision33, visit **www.vision33.co.uk**.*

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