



PrimaryCare:24[Ⓛ]

Primary Care 24's Success with Sage Intacct & itas

Who are Primary Care 24?

Primary Care 24 (PC24) is a primary healthcare provider contracted exclusively with the NHS, delivering a diverse range of essential health services including daytime GP practices, out-of-hours care, asylum seeker health checks, and medical services within intermediate care settings.

As Finance Director, Hazel Locker oversees both finance and business development, ensuring the organisation maintains strong financial control, operational efficiency, and the ability to support front-line healthcare delivery. PC24's commitment to accessible, high-quality healthcare meant they needed a financial system capable of keeping pace with the scale and urgency of their services.

What Financial Challenges did they face?

Before transitioning to Sage Intacct, PC24 faced significant obstacles due to an incorrectly installed and poorly functioning finance system.

Reporting was unreliable and lacked the depth needed to assess performance across business segments, delaying critical decision-making. Manual, Excel-driven processes dominated their workflows, increasing the risk of errors and consuming valuable staff time. Financial reporting cycles often took weeks, slowing the month-end close and limiting the organisation's agility.

PC24 urgently needed a cost-effective, scalable financial solution that could improve data quality, automate processes, and support the organisation's growing operational demands.

"Since implementing Sage Intacct, we've reduced our month-end close by 10 days—a significant improvement for our organisation. We believe we can streamline this even further with upcoming features. Whenever we encounter issues with the Sage Intacct system, itas is always available via email or phone to promptly address any queries or problems."

- Hazel Locker, Finance Director, Primary Care 24



Solution: Transition to Sage Intacct

To address these challenges, Primary Care 24 transitioned to Sage Intacct, a solution known for its robust financial management capabilities. Sage Intacct's domain dimension structure allowed PC24 to customise and slice data according to their business needs, providing greater flexibility and detailed insights.

The decision to implement Sage Intacct was driven by its ability to streamline financial processes and its compatibility with PC24's operational requirements. With a tight deadline to meet the fiscal year end, the organisation needed a solution that could be set up, installed, and operational within a short timeframe, which Sage Intacct and its implementation partner ITAS were well-equipped to deliver.

Sage Intacct Impact

The introduction of Sage Intacct delivered immediate and measurable improvements. With real-time, granular financial data available through dashboards, the team gained instant visibility into performance, enabling more informed and timely decision-making. Month-end close time was cut in half, from over 20 days to around 10, unlocking capacity for higher-value activities, with further reductions expected as new features roll out.

Automated and digital approval workflows significantly accelerated invoice processing and budget approvals, while streamlined processes replaced legacy Excel-based systems. Intacct's flexible reporting and dimensions allowed PC24 to slice, customise, and analyse financial data in ways that supported both operational insight and strategic planning.

Integration & Efficiency Gains

By moving away from manual, spreadsheet-heavy methods, PC24 achieved a major uplift in operational accuracy and efficiency. Automated invoice processing reduced admin workload, while digital invoice and cost approvals enabled faster turnaround and eliminated paper-based procedures. Real-time dashboards empowered budget holders to work proactively, improving accountability and financial control. Enhanced budget management tools offered clearer visibility, streamlined adjustments, and more accurate forecasting. Flexible reporting capabilities meant the team could easily produce tailored reports for teams, leadership, and trustees—accelerating insight and strengthening decision-making across the organisation.

Why itas?

itas was selected as the implementation partner for Sage Intacct due to their deep understanding of the healthcare sector and their proven ability to deliver tailored solutions. Their experience with similar organisations meant they could effectively address the specific needs of Primary Care 24, ensuring a smooth and efficient implementation process.

itas demonstrated a strong capability to meet tight deadlines and provided excellent support throughout the transition. Their responsiveness and adaptability during the implementation phase, along with their commitment to understanding and addressing PC24's unique challenges, made them the ideal partner for this critical project..

Key Benefits realised with Sage Intacct

Primary Care 24 has completely transformed the way they manage their finances by moving from Sage 50 to Sage Intacct. With this switch, they've streamlined their financial processes, making everything from reporting to decision-making much simpler and quicker.



Real-Time Financial Data: This feature provides the team with instant visibility into financial information through intuitive dashboards, enabling more informed and timely decision-making.



Faster Month-End Close: Sage Intacct has dramatically accelerated the month-end close process. Previously, this process took over 20 days, but with the new system, it has been reduced to approximately 10 days, freeing up time and allowing the team to focus on strategic initiatives.



Streamlined Invoice Processing: Sage Intacct's Streamlined Invoice Processing ensures that invoices are handled more quickly and accurately, reducing administrative burdens and enhancing overall productivity.



Enhanced Budget Management: Sage Intacct's budget management has been enhanced with improved visibility and control over budget approvals and adjustments. This level of oversight allows for better financial planning and resource allocation, contributing to more effective budget management practices.



Flexible Reporting: The flexible reporting capabilities of Sage Intacct have been a major benefit. The system's intuitive design features make it easy to customise reports, allowing the team to tailor financial reports to meet specific needs and requirements. This flexibility supports better analysis and reporting, further strengthening financial management at Primary Care 24.



"itas has transformed our day-to-day operations from a finance perspective. Now, all users within the organisation who need financial information can access it in real-time through our dashboards, eliminating the need for printing and circulating reports. This has drastically improved our process efficiency, allowing budget holders to approve invoices and costs digitally and instantly."

- Hazel Locker, Finance Director, Primary Care 24



If your organisation is seeking to streamline its financial management processes and drive growth, Sage Intacct, coupled with a trusted implementation partner, itas, offers a comprehensive solution tailored to your specific needs. With seamless integration, enhanced reporting capabilities, unparalleled efficiency, flexibility, and ongoing support, Sage Intacct and itas empowers organisations to achieve their financial goals and drive business success.

Email one of our Sage Intacct Specialists to find out more >