

## Managing 12 Companies with a Team of Three How Carpe Diem Management Left 11 Years of Great Plains Behind

### ABOUT THE CLIENT

Carpe Diem Management is an internal services company that handles finance, accounting, HR, payroll, marketing, maintenance, and IT for a portfolio of approximately 12 businesses. The companies span from worldwide aviation operations and an aviation maintenance facility to a restaurant and the owner's personal investment entities.

A three-person finance team manages the full accounting function across all 12 entities. Michelle Cannon oversees that function and has been with the organization for 11 years.

### THE CHALLENGE

Like many businesses that have relied on Microsoft Dynamics GP for years, Carpe Diem reached a point where the system's limitations were no longer manageable. GP had served them since 2015, but as the portfolio grew, the cracks became harder to work around.

Each of the 12 companies required a separate login, which meant constant context switching as the team fielded requests from across the portfolio. If a transaction was entered in the wrong company, finding it meant searching manually across all 12.

The bigger problem was intercompany accounting. Because Carpe Diem provides services across all its entities, shared expenses were a daily reality. A pest control bill. A purchasing card split across a road trip. A repair covering multiple companies.

In GP, each of those transactions required entering AP in the management company, allocating to a suspense account, doing an AR to every company being billed, then logging into each individual company to enter a corresponding AP back. Every time. All day. The result was 82 intercompany reconciliations at month end. When something didn't balance, it could take an hour or two to find the discrepancy. Sometimes it was a penny.

## CARPE DIEM.

### Company

Carpe Diem Management  
[www.carpediempartners.com](http://www.carpediempartners.com)

### Industry

Aviation, Restaurant, Investment

### Number of Employees

3-Person Finance Team

### Location

CA, FL, IL, MO, PA, TX

### Products

Acumatica General Business +  
Intercompany Accounting

### Partner Details



i-Tech Support, Inc.  
[www.i-techsupport.com](http://www.i-techsupport.com)

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"It was a nightmare. Absolute nightmare. We streamlined it and got pretty good at it. But you just dreaded it."

The server-based infrastructure made remote work effectively impossible. Michelle could view data remotely but processing transactions outside the office was unreliable enough that she described it as "Russian roulette." GP's approaching end-of-life added urgency. With 12 companies worth of data and a small team, she wanted years to plan, not months.

"I don't want to get down to the last minute and all of a sudden we have to hurry up and find something. We have a lot of companies. There's a lot of data. There's a lot of information that has to line up in order to switch over."

That last point will resonate with any GP customer watching the end-of-life timeline. Michelle started her research two to three years before go-live specifically because she knew the complexity of her environment required lead time. The urgency of waiting, she felt, was a risk she wasn't willing to take.

## THE EVALUATION

Michelle had been researching Acumatica for two to three years before the project was formally approved, prompted initially by a recommendation from the i-Tech team. But she ran her own evaluation, and she ran it in a way that set the implementation up before it started.

She asked her AP, AR, and payroll staff to research multiple systems independently, including watching training videos rather than relying solely on demos. The team shared findings, built pros and cons lists, and identified what mattered most. Intercompany accounting was at the top.

The owner initially had a different system in mind. Michelle built her case, ran comparative demos, and changed his mind. The alternative was Microsoft Dynamics 365, the option Microsoft most commonly puts in front of GP customers considering a move. Her assessment was straightforward: it required significant customization and build-out to function as needed, and the cost climbed quickly as modules were added. With a three-person team managing 12 entities, she needed something ready to work.

## CARPE DIEM.

“ That was one of the most limiting things about being on Great Plains with it being server-based. I could remote in, but it was almost like Russian roulette. You were safe if you were just looking. ”

*Michelle Cannon, CMA  
General Manager/Financial Controller*

"I need one that will get us through the basics and we can customize later. I don't have time to figure all that out up front."

It's a perspective worth noting for any GP customer being steered toward Business Central or Dynamics 365 by Microsoft promotions. The right answer depends on the complexity of your environment and how much runway your team has to configure and build. For Carpe Diem, Acumatica was the better fit.

## THE IMPLEMENTATION

The go-live date was January 1st, chosen deliberately. Carpe Diem's aviation companies operate under formal

audit requirements, and a clean calendar-year cutover meant financials wouldn't need to span two systems during an audit. The timing was demanding: year-end close in GP, quarter-end, month-end, and a new system launch, with the team already down one person.

It went more smoothly than expected. Because Michelle's staff had helped choose the system, they came to implementation meetings invested and prepared. Their daily familiarity with the work surfaced questions Michelle wouldn't have thought to ask. When go-live arrived, they were ready.

"Being cloud-based helped too. Michelle handled GP year-end from the office and Acumatica setup from home on the same days, something that simply wasn't possible before. That was one of the most limiting things about Great Plains. I could remote in and look at stuff, but don't do anything in it. With Acumatica, I can save some things for when I'm at home in peace and quiet."

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## CARPE DIEM.

*“ I was able to set up my days where I was doing all my old system stuff at work and all the new system I would just do from home. Because I actually could for once.*

*I cannot be an implementation team of one with all these companies. My team was just fabulous ”*

*Michelle Cannon, CMA  
General Manager/Financial Controller*

## THE RESULTS

The intercompany module delivered what Michelle had spent years looking for.

Shared expenses are now entered once and allocated across entities on the same screen. The system stays in balance by design. The 82 monthly reconciliations are gone. Dave from i-Tech built a custom report that lets Michelle confirm all intercompany balances in a single view without manually cross-checking account by account.

"The time savings: approximately 20 to 25 hours per month, from intercompany alone. I don't say life-changing about a lot of things. But the intercompany module has been life-changing in our circumstance."

The Innova HR and payroll integration resolved a separate long-standing issue. Under GP, payroll ran in the system but HR lived in a disconnected platform. The two now communicate through an API integration with Acumatica, eliminating duplicate entry and ensuring accuracy across all entities.

Michelle is also using the implementation to build the processes she always wanted. Templates are being configured to hard-code accounting on recurring transactions. Account suppression means each company's financials show only the accounts relevant to that business. Consolidations for the five-company core group are built in.

Carpe Diem retained a single GP license through November to support its ongoing aviation audit and maintain access to historical data, a practical and common approach for businesses mid-transition that need continuity without losing access to prior records.

## WORKING WITH I-TECH

Michelle came to the project with a lot of questions and a deliberate pace. She asked for multiple demos before committing, and once underway the i-Tech team was more often waiting on her than the other way around. She's direct about that.

What stood out was that the team worked with her process. The custom intercompany reconciliation report Dave built matches exactly how she set up her account structure and naming conventions. It works the way her team thinks.

"They were probably more worried about it actually happening than I was. But we made it."

## CARPE DIEM.

*“ I've been researching Acumatica for a couple of years. I already knew which one I wanted to go with. I just was waiting for the go ”*

*Michelle Cannon, CMA  
General Manager/Financial Controller*