



PEX

sales@pexcard.com
www.pexcard.com

Logan Services cuts expense processing time by 75% with PEX and Sage Intacct



About Logan Services

Logan Services is a family-owned residential HVAC and plumbing company with about 250 employees across three locations. The company helps homeowners keep their homes comfortable and continues to grow with a people-first approach. Sharon Nolen, Director of Finance at Logan Services, brought 30 years of construction and trades experience to the company. She had used PEX Visa® Prepaid Cards in a previous role to manage field employee spending and she knew PEX could give Logan Services the real-time control, receipt management and accounting efficiency it needed.

SAVED TIME SPENT GETTING CARD DATA INTO SAGE INTACCT

75% through the direct integration with Sage Intacct

GIVING FINANCE CLEANER DATA WITHOUT FOLLOW-UPS

Expense reports eliminated across the team

HAVING FULL CONTROL OVER SPEND

Real-time spend control across 250 employees

"Compared to the alternatives out there, PEX was definitely the right choice for us. It's made things easier for the finance department and for our cardholders. Being able to have it connected to Sage Intacct is probably the biggest selling point there was."

Sharon Nolen, Director of Finance, Logan Services

The challenge

Before PEX, Logan Services used two Chase credit cards, mainly for marketing and permits, plus US Bank cards for executives, managers and other employees. The broader bank card setup made real-time visibility, user management, credit limit changes and Sage Intacct preparation difficult for finance.

The process created friction from the top down. Employees handed in expense reports, but finance didn't always receive them on time. Card activity didn't appear in real time. User updates and credit limit changes took too long. Even adding Sharon to the US Bank account turned into a frustrating process. When employees needed more spending power for an event, purchase or urgent business need, the old setup made it hard to move fast. In some cases, employees borrowed someone else's card just to keep work moving.

Accounting took too much manual effort, too. To get card data into Sage Intacct, finance had to download transactions, reformat files, add location details and code expenses by business unit. With three locations and about a dozen business units, including marketing, sales, install, service and plumbing, every missing detail created extra follow-up. Logan Services needed one controlled card program that could eliminate expense reports, show spend in real time, simplify limit changes and send clean data directly into Sage Intacct.



sales@pexcard.com
www.pexcard.com

The solution

Logan Services chose PEX Credit Expense with the PEX Visa® Commercial Card to give managers, executives, directors and select employees a faster way to make approved business purchases. Teams now use PEX for meeting materials, urgent job parts, IT purchases and expenses outside regular inventory channels.

PEX also eliminated expense reports. Cardholders now capture receipts and code transactions as they spend, so finance gets the information it needs without chasing paperwork.

PEX sends Logan Services' card transaction data directly into Sage Intacct. Before PEX, finance had to download transactions from bank cards, reformat files, add location details and code expenses by business unit. With PEX, cardholders add key details at the point of sale, including location and business unit and transactions sync nightly into Sage Intacct. Sharon estimates this reduced the time needed to get card data into Sage Intacct by about 75%.

PEX gives Logan Services the flexibility to manage spend without slowing teams down. Sharon can update card limits in real time, then reset them when a purchase or event is complete. Tag visibility adds another layer of control by showing each team only the GL accounts and business-unit options they need. Cardholders move faster, finance gets cleaner data and the business reduces risk without adding extra steps. The company also added PEX Virtual Cards, and the Vice President of Marketing quickly became a strong advocate. Virtual Cards help the marketing team track budget activity in real time, so leaders can see spend as it happens instead of waiting for statements or manual reports.

Across the business, PEX made spend easier for the finance team and for cardholders. Employees saw the difference right away and embraced a process that replaced late expense reports, slow bank workflows and borrowed cards with real-time visibility and control.

The results

By implementing PEX, the Logan Services finance team significantly improved its financial efficiency via:

75% less time spent getting card data into Sage Intacct

With PEX and Sage Intacct, Logan Services replaced downloads, formatting and manual coding with a direct integration. Transactions sync nightly and cardholders add location and business-unit details at the point of sale

Expense reports eliminated across managers, executives and directors

PEX removed the need for employees to hand in expense reports. Cardholders capture receipts and code transactions as they spend, giving finance cleaner data without late reports or follow-up

Real-time spend control across 250 employees and three locations

Finance can update limits, review activity and manage spend in real time. Logan Services can support everyday purchases, urgent job needs, IT spend and vendor payments without relying on slow bank processes



The PEX Visa® Prepaid Card, the PEX Disburse Visa Prepaid Card, and the PEX Credit Expense Visa Card are issued by Fifth Third Bank, N.A., Member FDIC, or The Bancorp Bank, N.A., Member FDIC, pursuant to a license from Visa U.S.A Inc. and may be used everywhere Visa Prepaid cards are accepted. Please see the back of your card for its issuing bank.