

CASE STUDY:

J2 INTERACTIVE INTEGRATES MAVENLINK, SAGE INTACCT, AND GOOGLE SHEETS WITH DATA BLEND



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INDUSTRY VERTICAL:

IT Services and IT Consulting

APPLICATIONS:

Mavenlink, Sage Intacct, and Google Sheets

INTRODUCTION

J2 Interactive is an award-winning software development and IT consulting firm specializing in customized solutions for hospitals, labs, research institutions, and health information exchanges. Their approach to design and development is rooted in a fundamental belief that systems succeed or fail based on how well they serve the people who depend upon them. For their clients in the healthcare industry, that includes doctors, nurses, technicians, and administrative staff...but ultimately, it means patients and their families.

Twice ranked #1 for Technical Services in the annual Best in KLAS survey, J2's expertise spans a broad array of offerings including technology strategy and best practices consulting, workflow optimization, systems integration, application development, health information exchange, CRM, and business intelligence.

**SITUATION**

J2 Interactive needed a flexible solution to support their operations team that enabled them to save time and eliminate errors for finance and accounting, while also facilitating budgeting and reports.

"Prior to DataBlend, we were exporting data from different systems to combine and compare them on complicated spreadsheets. This worked for a while until it didn't," says Lesley Anderson, Senior Consultant.

TRANSFORMATIONS

Parsing Data:

Extracting significant characters from a longer string

Date Formatting:

Converting source date formats into target date formats

Aggregating Values:

Summarizing data by weeks and months

CHALLENGE

J2's invoicing process was a particular challenge. First, the finance team were entering invoices and payments twice – once in Mavenlink, their professional services management application, and once in Sage Intacct, their accounting application. In a typical month, J2 processes anywhere from 100 to 200 invoices. As the business grew, so did the burden of double entry.

Secondly, the information the finance team needed to see on the Sage Intacct invoice differed from the information needed on the Mavenlink invoice for tracking project budgets.

Finally, the finance team needs extracts from both systems for regular reconciliation.

SOLUTION

When J2 made the decision to eliminate invoice double entry by integrating their Mavenlink invoices into Sage Intacct and their Sage Intacct payments back to Mavenlink, J2 choose DataBlend as their integration platform.

"When we reviewed our choices for an integration platform, DataBlend offered not just the connections we needed, but also the flexibility we wanted" says Lesley Anderson.

"Prior to DataBlend, we were spending hours manually processing invoices into Sage Intacct and then manually importing them into Mavenlink – with DataBlend the payments get pulled every night from Sage Intacct to Mavenlink. It takes 5 minutes. DataBlend has been a huge timesaver that has dramatically reduced errors," says Chasity Fagnant, Finance Specialist.

In addition to automating invoices and payments between Mavenlink and Sage Intacct, J2 Interactive has expanded their use of DataBlend to include exporting data to Google Sheets.

"The financial reporting that I do monthly is a breeze. I have a preset package from Google Sheets that is seamless and easy. Information comes from Sage Intacct, as well as Mavenlink and then gets compared," Hannah Weisner, Director of Finance and Outsourcing.

"We run some workflows every night, others we run manually as we need to. Our DataBlend workflows have helped us work more efficiently across the board," says Lesley Anderson.

J2 Interactive currently uses DataBlend to automate:

- Monthly Financial Budgeting & Reporting Processes
- Expense Reimbursement Processes
- Financial Package Processes

Because of the automations that J2 Interactive has implemented with DataBlend, they are closing the month faster. “It’s a domino effect in the organization – as more and more manual processes are replaced with automated solutions, we are able to reconcile quicker and have a faster close,” says Chasity Fagnant.

CONCLUSION

“Accountants don’t want to spend time doing manual work. We want to review and check. This happens by implementing automated processes. DataBlend gives us that,” says Hannah Weisner.

J2 Interactive is constantly expanding their use of DataBlend since their original implementation. It is a solution that can easily scale and grow as you expand.

What’s next for J2 Interactive?

“Mavenlink has expense reimbursement – Accounting was manually entering expense reports into Sage Intacct and marking as paid. We are currently building a workflow to do this with DataBlend. It will take away that manual effort. Right now, this takes me a couple of hours to do this. When it is done it will be a huge timesaver,” says Chasity Fagnant.

THE DATABLEND STORY

DataBlend is an iPaaS company with its roots in finance and accounting. That is why DataBlend is the only Integration Platform-as-a-Service (iPaaS) solution designed exclusively to integrate the everyday applications relied on by finance and accounting professionals. Featuring a no-code, low-code workflow builder, DataBlend allows users to create secure and worry-free data integrations. Companies use DataBlend to collect and join data from multiple sources, build workflows (e.g., field to field mapping, pivot tables, and additional data transformations through virtually unlimited custom scripting possibilities), and schedule events so users are never without real-time data access. DataBlend’s intuitive interface makes it easy to manage all application integrations from a single platform, eliminating the need to rely on IT resources to manage multiple, point-to-point connections.

WANT TO LEARN MORE?

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