extendinsights

Access Intelligence eliminates tedious tasks and empowers their Finance team with ExtendInsights

Customer
Access Intelligence Group

Products
ExtendInsights for NetSuite

About

Headquartered in the United Kingdom, the Access Intelligence Group provides high-quality SaaS products for the marketing and communications industries. By combining AI technologies with human expertise, Access Intelligence analyzes data and creates insights on what impacts organizations and their key audiences. Their product portfolio includes Isnetia, Pulsar, Vuelio, and ResponseSource.

Background

A long-time NetSuite user, Access Intelligence continually looks for ways to improve their many financial and accounting processes. After several years of finance spending the bulk of their time on highly repetitive reconciliation tasks using CSV uploads their team asked for a better solution.

> "
> We needed a better solution than manual CSV uploads. Now a few hours' job with ExtendInsights becomes 10 minutes or so. Annually, we've reduced the amount of time we spend on these tasks by up to 20%.
> "

Financial Controller
Access Intelligence

accessintelligence

Website
accessintelligence.com

The Challenges

Despite being primarily a SaaS product provider, Access Intelligence also serves a group of customers who purchase one-off products. This necessitated manually creating a list of all these customers each month, including how much each had spent, which products they purchased, and in what month. The report could be hundreds of lines. Following the manual report creation, the team then had to upload the information to NetSuite via CSV, a process that inevitably failed multiple times. Once the upload was finally complete, more manual work was required to split out sales orders and invoices, and update individualized due dates based on direct debit payments.

The Solution

Finance's main request was that the solution be something incredibly simple to leverage. If a solution looked good on paper but was too complicated to integrate or learn, they knew the team would not use it. Simplicity was key, which prompted the team to look at ExtendInsights. With an intuitive set-up that was easy to learn, the team began running processes through ExtendInsights right away, adding the ability to bulk approve supplier bills and make adjustments at year-end, in addition to skipping CSV uploads in favor of using ExtendInsights to create sales orders and invoices. Monthly reconciliation processes have been reduced from a multi-hour process to a 10-minute task, with other process times halved, resulting in an annual time savings of 10 - 20 percent.

Bottom Line

With enthusiastic approval from the finance team, Access Intelligence selected ExtendInsights as their solution for updating NetSuite records. Using ExtendInsights, the team is now able to take data from NetSuite and transform it into new reports and different ways of visualizing data that are not otherwise natively supported. ExtendInsights empowers the team with additional understanding on how data is stored and how it can be used in other programs for ultimate usability and insight.

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> [There's] a lot less time spent doing quite repetitive, mundane tasks within NetSuite . . . which is empowering. It means less boring work, and hopefully more time doing the more interesting stuff.
> "
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> Financial Controller
> Access Intelligence Group

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