



Boosting a clunky, dysfunctional accounting system into the digital age.

CASE STUDY:

CAI

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About Coactive

Coactive builds innovative and intelligent business applications on our proprietary software development platform using rapid application development workflows and technology.

www.gocoactive.com



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The Client

CAI, like any company, needs a timekeeping system for payroll purposes and project management. CAI needs this system to also be able to bill clients. The system that was currently being used had many issues, and CAI finally decided to make a switch to a new system. Intacct became the accounting system for CAI. However, CAI needed to get data out that matched with current business processes, which would require third-party integration. However, Intacct (at the time) did not support all of CAI's processes.

For more information: www.cagents.com/about

The Challenge

In a nutshell, CAI needed a conversion to Intacct for all their timesheets, expenses and project management reports. CAI had a lot of backend processes that relied on a consistent data report in certain formats. Unfortunately, Intacct, at the time, didn't support this type of reporting. CAI needed a way to get the data out of Intacct, collated, and formatted in a way that would match their current business process and reduce the risk of failure when they converted to the Intacct accounting system.

Due to the nature of the data, CAI needed a secure system since the data store contained sensitive information. They also needed security to be addressed from a user access standpoint; there was a desire for single sign-on access (this was also a convenience feature for users, so that not yet another password would have to be remembered).

There were multiple departments/disciplines using this system that run different types of reports. CAI needed to be able to create a report, save the specific parameters, and run that report on a schedule.

The Solution

Coactive understood the need for flexible, accurate and safe reporting requirements across a business. As these reports were tied into financial payments, the data sensitivity and accuracy requirements were heightened. Coactive used their IRAD platform to create an application that was integrated with SSO (single sign-on) through Office 365, and further utilized Intacct's API to create exactly what CAI was looking for. The process was extremely smooth thanks to the open lines of communication and Coactive's interactive workflows between different teams.

The Results

According to Eric Collier, Assistant Director, Automation and IT at CAI "building apps with Coactive is so fast that you'll need a Dramamine and a crash helmet!". Partnering in the project with Coactive meant that CAI received a fast and accurate solution. The build was extremely smooth and the subsequent maintenance processes are the same given that Coactive use open communication as a fundamental part of their IRAD platform. CAI are now able to continue with existing processes for payroll and project management reporting that they wouldn't have otherwise been able to do.