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INTEGRATIONS

Salesforce to Adaptive Insights

Opportunity

Exports data from Salesforce with specific filters and custom formatting to include Repaid dates, Maturity date, Next payment date, interest rate and several other loan related fields to be imported to Adaptive Insights to drive the Lending model.

Fees

Exports Transactions from Salesforce to populate Fee data in Adaptive Insights.

Repayment

Exports Transactions from Salesforce to populate Repayments in Adaptive Insights, including Principal, Interest and Penalties paid.

Sage Intacct to Adaptive Insights

Monthly account balances including Program and Fund are exported from Sage Intacct, formatted in Datablend and imported into Adaptive Insights to drive Income Statement and Balance Sheet data.

Salesforce to Sage Intacct

GL Entry data is exported from Salesforce to create Journal Entries in Sage Intacct. This also includes an auto-create of Portfolio Loans in Sage Intacct after they are created in Salesforce for a seamless transition.

DATABLEND OFFERS FLEXIBILITY FOR FINANCIAL SYSTEMS INTEGRATIONS

DataBlend helps Root Capital achieve better data quality and increased efficiency through systems integrations.



CHALLENGE

Because Root Capital is almost entirely a cloud-based organization, it had thought of going the full-suite enterprise resource planning (ERP) route at various times. Ultimately, Root Capital determined it could gain better functionality at a lower price by handpicking best-of-breed technologies that meet the needs of its different functional areas.

However, there was the challenge of lack of integration between those systems. The organization faced the risk of picking systems that worked great for an individual department, without having the necessary integration to achieve better efficiency and data quality, with less duplication, across its full cloud-based IT environment.



DECISION

Root Capital started piloting DataBlend because of the additional flexibility it offers. The organization has been working with the Carlson team for a long time, about seven years, so it was an early adopter of DataBlend.

Specifically, Root Capital liked the fact that it is more flexible and not tied into a specific system, compared to connectors that are only compatible with their respective proprietary system. For example, DataBlend is highly effective at integrating Adaptive Insights, Sage Intacct, Salesforce and a multitude of other solutions.

"The fact that, with DataBlend, we can leverage the APIs of many cloud-based systems, as well as perform more functions (data filtering, etc.) with its feature-rich interface, makes it the best choice of integration platform for us." - Bryan Woliner



Bryan Woliner, Senior Director, Finance & IT

"DataBlend saves time and reduces expenses by providing a more efficient way to integrate your ERP, CPM and other core financial and operational systems. You have less operational risks and more trust in your data quality. You also gain so much value from being able to combine financial with non-financial data that previously lived in siloed systems."



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ABOUT DATA BLEND

DataBlend LLC offers a cloud-based integration platform as a service (iPaaS), currently being used by more than 100 companies. DataBlend's intuitive workflow builder allows business users to model and automate data flows between systems including corporate performance management (CPM), enterprise resource planning (ERP), customer relationship management (CRM), professional services automation (PSA) and more for more accurate and dynamic financial management, planning and analysis. DataBlend LLC is a joint venture of Carlson Management Consulting, the award-winning cloud financial solutions and services firm, and J2 Interactive, the healthcare IT services firm.

used by
100+
COMPANIES



intuitive
WORKFLOW

compatible with:
CPM, EPR, CRM & PSA



award-winning
FINANCIAL SOLUTIONS



RESULTS

The results Root Capital has experienced include faster pull time for information, more confidence in data quality, and the ability to pick best-of-breed, cloud-based systems without being constrained by their respective integration tools. The organization can rely on DataBlend to integrate the systems it chooses.

Root Capital has also saved costs on staff time. All in all, DataBlend is very competitively-priced with a comprehensive feature set that meets its needs.

"DataBlend has removed silos within the organization because staff are no longer only looking at information within their department systems. Now, they gain new insights into financial and non-financial data that may have been stored in other department systems and was inaccessible to them before we started using the platform." - Bryan Woliner



ROOT CAPITAL

Root Capital is a nonprofit organization that invests in the growth of agricultural enterprises, so they can transform rural communities. These businesses purchase crops such as coffee, cocoa, or grains from smallholder farmers. With growth, they become engines of impact that can raise incomes, create jobs, empower women and young people, sustain peace and preserve vulnerable ecosystems.

Root Capital supplies these businesses with vital resources: access to capital, trade and technical partners, financial training and conservation practices. It works in hard-to-serve geographies where others don't. To date, the organization has distributed \$1.2 billion to improve the lives of six million people in farming communities.

DATA BLEND, LLC

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