

EDGIO

# Edgio Builds Comprehensive Real-Time QuickBooks Reports Directly in Excel

## Simple, Flexible Connectivity

CData provided Edgio with a quick way to access and transform their QuickBooks data directly within Excel – no complicated ETL pipelines or costly storage solutions needed.

## Financial Reporting Made Easy

With the CData Excel Add-In, Edgio can now work with QuickBooks Online data directly within Excel to provide stakeholders with vital financial reports on-demand.

## One-Click Access to Live Reports

Instead of manually collecting and manipulating QuickBooks data every month, Edgio can simply hit 'refresh' on their Excel reports and access live data whenever they need it.



### Company

Edgio

### Industry

Technology

### Product

CData Drivers

### Snapshot

Edgio leverages the CData Universal Excel Add-In to easily connect and transform disjointed QuickBooks Online reports into a live Excel dashboard for financial reporting.

The leading edge computing company leverages CData Drivers to enable their finance team to easily create customized reports in Excel using real-time Quickbooks data.

Edgio, formerly Limelight Networks, is a leading edge computing solutions provider, that helps top global brands like BBC, Marvel, and Nintendo deliver fast, secure digital experiences across web applications.

Like many organizations, Edgio leverages QuickBooks Online to manage their finances. They faced a challenge, however, in creating and sharing in-depth reports using QuickBooks' native analytics capabilities. QuickBooks' data model was too fragmented to easily build a complete general ledger (GL) or balance sheet within their preferred reporting tool, Excel.

Peter Perrone, Edgio VP of financial planning and analysis (FP&A), turned to CData to simplify and streamline the financial reporting process. Using the CData Universal Excel Add-In, he was able to write a few lines of simple SQL to pull together comprehensive reports from data across QuickBooks.

The CData connectivity solution drastically reduced the time and manual work it took for the Edgio finance team to transform individual data tables for analysis in Excel. Now, they can quickly and easily create real-time QuickBooks reports using standard Excel functionality.

"It's a lot simpler than going through pages and pages of transforms get the data prepared to do Excel analysis – but the result is the same," said Peter Perrone, Edgio VP of FP&A.

## The Challenge: Fragmented Reporting Capabilities

Edgio's finance team struggled with the same issue every month: manual report consolidation. They previously lost countless hours downloading individual reports from QuickBooks, compiling them into Excel, and manually transforming the data to build general ledger (GL) reports, income statements, balance sheets, and more.

"Once the QuickBooks reports were in Excel, the team had to do a bunch of manipulations to remove rows and all kinds of stuff to get the data prepared to analyze," said Perrone. "The next month, they'd have to go back and do it all again."

QuickBooks Online has plenty of reporting natively within the application. However, the data Edgio needed to form a full financial picture for company stakeholders was scattered in smaller pieces across each app-native report. In addition, Perrone's team needed access

to data collected from the other systems used across the organization, such as Salesforce and Sage Intacct.

"Nobody wants to go to those applications to get the data," said Perrone. "If you're the finance team, the last thing you want to do is go and get information from five different systems and figure out how to get what you need from each. That's clunky reporting. It's so much faster to work with them right in the environment that you're going to be doing the analytics."

**"The problem that CData helped me solve is to very quickly get information from mission-critical apps, and make it accessible in Excel for the finance, FP&A, and accounting teams with a speed and control that I couldn't find elsewhere in the market."**

– Peter Perrone, Edgio VP of Financial Planning and Analysis

## The Solution: Direct Connection to Critical Financial Data

A cursory review was all Perrone needed to know that CData Universal Excel Add-In provided simple, live access to the critical data he needed. Instead of building a complex ETL pipeline to replicate and consolidate organizational data into a storage solution, Perrone wanted an agile, self-serve connectivity solution.

"I didn't want to keep doing things over and over again," said Perrone. "I was looking for a tactical tool just to get exactly what I need in these applications instead of having to go into a larger data warehouse, which requires significant spending, IT involvement, etc."

It took Perrone just minutes to get QuickBooks Online connected directly inside of Excel with CData. After seeing how easy it was to configure using SQL, he added a Salesforce connection to gain live access to account, sales, and marketing data in Excel, as well.

"The reports you can create are unlimited, really," said Perrone. "And then once you set up those templates, you can literally hit refresh and there is your monthly dashboard in Excel."

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The CData Excel Add-In allowed Edgio to connect their QuickBooks Online data and make financial reports accessible across the organization. The result? Edgio gets accurate, up-to-date monthly financial and sales reports, and Perrone's team does less work to build them.

"Everything is just set to run and be live in Excel using standard Excel functionality," said Perrone, "For example, this balance sheet is just an Excel Pivot Table. I can access reports like this in a tool I already use and do simple data transformations that save mountains of time."



CData Software is a leading provider of data connectivity solutions. We make it easy to connect, integrate, and automate enterprise data, solving even the most complex data fragmentation challenges. CData's standards-based drivers and data integration solutions enable real-time access to hundreds of cloud-based or on-premises applications, databases, and web APIs.

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