



MAXIMIZING YOUR ERP WITH SPREADSHEET WORKAROUNDS? SEE HOW A REGIONAL DENTAL CORP. SHED THE MANUAL WORK.

Financial controller Sara Hofmann is the cornerstone of finance and accounting operations for Dental Service LLC, a regional care provider based in Vancouver, Washington. She has seen first hand how important it is to support business process by tuning company software to prevent a flood of manual spreadsheets. So, in 2015 when Dental Services converted to Open Dental, an open source Practice Management (PM) system, Hofmann’s job was aligning the business and the software for all 10 locations. Hofmann’s years of experience told her that, even using their PM software to its fullest, some stretch of the last mile would always depend on spreadsheets. She wanted to do better.

Dental Service LLC is a growing dental care provider operating under the names Gentech Dentists and Dental Care Today. As of 2018, they have 38 dentists serving over 35,000 patients each year. Hofmann has spent over 10 years at Dental Service under CFO Kevin Boie, and both have experienced a classic industry problem, manual spreadsheets growing from the gaps in existing software systems. They know that, over time, this wears on productivity. Theirs was a common one, but how they solved it was far from typical.

The Interject Introduction

For 2 years, Dental Service and Interject Data Systems had neighboring offices in the same building. It wasn’t long before the two companies’ executives, Jeff Honsowetz of Interject and Boie of Dental Service, came to share their companies’ stories. Honsowetz’s enthusiasm for fixing spreadsheets piqued Boie’s interest, and he quickly brought Hofmann into the conversation to explore the possibilities.

Hofmann saw that Interject’s unique approach to spreadsheets could be the solution she needed. Interject could help her leverage existing PM software further, while avoiding excessive manual spreadsheets. It was imperative she keep repetitive manual tasks out of financial close, especially since growth took so much time already. And while other market solutions typically

replace spreadsheets with ERP customizations or web application plugins, Interject dramatically improves the spreadsheet, providing a two-way, customizable spreadsheet interface with Open Dental. Hofmann found the best of both worlds with Interject..

Completely Traceable Reporting

One challenge Hofmann had was accommodating prior period changes within the PM software. Billings corrections--if done improperly--would fall in prior periods outside the accounts receivable roll forward. That was a critical problem leading to accounts receivable inaccuracies and consuming hours just to trace and correct. Hofmann was looking for “an air tight way to catch any changes happening in our system,” and she worked directly with the Interject team to find the answer.

Designed for Transparency:

- 1) A data solution to track the change history, so nothing would be missed in the accounts receivable roll forward.
- 2) A smart view of accounts receivable aging, with drill options to spreadsheets that detail every change.
- 3) The ability to securely edit classifications from the same spreadsheet used to drill on detail transactions.
- 4) Full control over who can update what data and how it can be updated.

Hofmann says “it’s nice that the Interject team goes deeper than just providing a great spreadsheet interface. They knew the right road to align my data and provided the engineering resources and network to make it happen.” And the data is built right into the spreadsheets. “Interject really does enable a cleaner close process,” she explained.

Helpful for the IT Dept. Too

Brandon Jones, the IT Manager of Dental Service enjoys that cleanliness as well, adding, “Although I normally steer clear of spreadsheet solutions, I like that Interject uses spreadsheets as interfaces to data. It encourages users to avoid saving more spreadsheet versions, reducing the spreadsheet sprawl that grows in every company.” Brandon also likes the report logging inherent in the Interject platform. IT now has central control and visibility. They can see all Interject report activity, including who is using data and from which location.

Empowering End Users

Hofmann recalls, “A particular benefit to me was how Interject could quickly adapt to changes we made in our PM software. It was easy for me to update the Interject enabled spreadsheets on the fly.” Jeff Honsowetz, CEO of Interject Data Systems, adds that spreadsheet power-users can be comfortable updating the spreadsheet reports and distributing their creations with less work and maintenance than ever.”

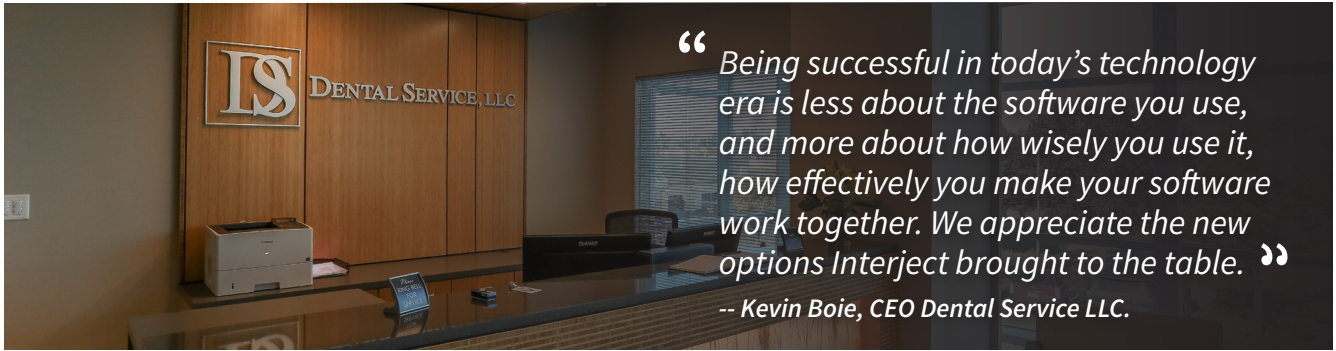
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-- Sara Hofmann, Controller Dental Service LLC

Since Interject works as an add-in for Microsoft Excel, Hofmann was able to apply her spreadsheet expertise in creating what she needed, without relying on IT to make custom reports. Updated spreadsheet templates are easily shared to her entire team without any confusion. There’s essentially nothing more to learn, which was crucial for Hofmann, her team, and CEO Boie. In Hofmann’s words, “Adoption with existing spreadsheet users was nearly instantaneous.”



Sara Hofmann, Controller, Dental Service LLC, Vancouver USA



“Being successful in today’s technology era is less about the software you use, and more about how wisely you use it, how effectively you make your software work together. We appreciate the new options Interject brought to the table.”

-- Kevin Boie, CEO Dental Service LLC.

Opening Lines of Communication

Hofmann’s end-of-day reporting reconciliations spanned all 10 Dental Service offices, and using manual spreadsheets bogged this process down considerably. Hofmann remembers that, “prior to Interject reports, reconciliation was completely manual. Now, if our master reconciliation is off, we know who approved transactions and can quickly and easily trace them back to a user to contact them for clarification and/or correction.”

Interject helps take reports further, allowing IT to provide features for centrally stored user annotations and data changes—all through a familiar spreadsheet. Hofmann was delighted by how well each office manager took to the Interject implementation, how easily they were trained, and how open they were to using the new reports. This new collaboration made her team’s job much easier.

From Spreadsheets to Web Apps for All

Not everybody in a company loves spreadsheets, and that was the case for Dental Service as well. Hofmann wanted to expand the Interject spreadsheet application to their dentists in the field, adding an additional layer of review for prescription medicines. Since most doctors work from tablets and don’t often use spreadsheets, she needed new interface options.

Interject stepped in to provide a web interface connecting the same data sources leveraged for her spreadsheet reports. Since Interject supports custom API connections, the same API that interacts with spreadsheet reports was used for a website application available only to dentists. “Interject’s web interface,” notes Hofmann, “has resulted in savings from avoiding Excel installation on multiple machines for dentists who have no other need for it. Since it’s so easy to navigate, user acceptance of the process has improved.” She added that “it was a huge benefit to create an interface for users who are not currently and don’t need to be familiar with Excel.”

Fast and in Your Control

Hofmann solved the typical industry problems uniquely with the help of Interject, and, most importantly, she was able to solve these complex problems simply. There will always be gaps between business processes and the software used to facilitate them, but Interject’s solution can bridge many of them, providing broad reach with centralized efficiency. CEO Kevin Boie summarizes the critical point: “Being successful in today’s technology era is less about the software you use and more about how wisely you use it, how effectively you make your software work together. We appreciate the new options that Interject brought to the table to make our software investments go even further.”

