extendsync

Zonte's Footstep Planted Roots and Removed Manual Processes and Potential Data Errors with ExtendSync

Customer
Zontes Footstep

Product
ExtendSync for Outlook
CRM: NetSuite

> " The beauty of ExtendSync is that it takes the important emails that need to be kept related to the customer and puts them into a single space so that at any point in time…we're able to follow through without having to go hunting for communication that may or may not exist. "

Anna Fisher
Co-Owner
Zontes Footstep

About

Zonte's Footstep is an independent Australian wine producer that was established in 2003. Their grapes are sourced from vineyards they own, as well as surrounding properties. They originally planted roots in Langhorne Creek, a wine region in Southern Australia, and have continued to grow from there. In 1999, a group of industry representatives purchased the vineyard and started to plant Viognier, Sangiovese, and other new grape varietals. While they were replanting the vineyard, some large boulders with footprints were discovered from the largest known marsupial to have ever lived: the Diprotodon. This unique fossilized footstep is what led to the name and the journey that started the company.

Background

Zonte's Footstep was developed at a time when there were many issues in the industry with oversupply and a need to move more grapes. Over their first few years, they grew quickly, and then in 2008, the exchange rates started to vary a lot and they had to restrategize. They started operating their business from the McLaren Vale area. Now, they are a premium wine brand from the Fleurieu Wine region that covers Adelaide Hills, McLaren Vale, and Langhorne Creek. With the rapid growth of the company, one

Website
zontesfootstep.com.au

of the co-owners of the company quickly realized the importance of removing any manual processes, potential data errors due to multiple data entry points, and keeping an accessible archive of organized communication. That's where CloudExtend comes in.

The Challenges

Zonte's Footstep originally had an ERP system designed for winemakers that required them to manually track all communication. If an email was received by one user who was not an administrator, only that person could see the email. Or, if there was critical communication such as a contract or financial commitment related to customers or suppliers, employees needed to follow a manual process of saving them as PDFs into their file management system. Over time the onslaught of customer communication only continued to grow. Because of this, important information was starting to get lost. The company wanted to see the bigger picture of communication in a single space so that at any point in time anyone in the company could review what had taken place with either a customer or a supplier.

The Solution

In the midst of a restructuring, Zonte's Footstep was put in a position where they needed to migrate to a different ERP and CRM system. When a colleague reached out who used NetSuite and CloudExtend, they knew they had found what they were looking for. The connection CloudExtend's ExtendSync app provided between their new NetSuite CRM and Outlook offered a seamless solution to their communication challenges. Not only were they able to communicate better between their internal teams, but they were able to set up the applications on their own and use the online support from CloudExtend when needed.

Bottom Line

ExtendSync has provided Zonte's Footstep with an organized and transparent line of communication between their customers, suppliers, and staff. They are now able to access or edit NetSuite records right from their Outlook inbox. They use ExtendSync's Autopilot feature to save entire communication threads to NetSuite with zero clicks. Employees save time and increase efficiency because they have eliminated the need to manually add emails and files to NetSuite or search for communication that may or may not exist.

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> We use NetSuite as our CRM, and our ability to just click a magic button that says, "Find this related record", and know that within our CRM system, we've got access to all of that communication without having to save files or try to come up with other systems to do so... it's really important.
> "

Anna Fisher
Co-Owner
Zontes Footstep