cloudeXtend
by celigo

POS Supply Solutions Uses CloudExtend Email and Excel Integration Apps to Increase Efficiency by 40%

Customer
POS Supply Solutions

Products
CloudExtend Excel for NetSuite
CloudExtend Google Workspace for NetSuite

About

Founded in 1999, POS Supply Solutions has been providing high-quality Point of Sale (POS) and transaction supply solutions to businesses for over 20 years. They offer the largest selection of POS supplies in the United States, including thermal paper rolls, carbonless paper rolls, printer ribbons, cleaning cards, credit card supplies, thermal labels, and more. POS Supply Solutions serves a full spectrum of industries including hospitality, retail, financial, gas stations, healthcare, and wireless, to name a few. With offices in Middleton, MA, and Pittsburgh, CA, and distribution warehouses strategically located across the United States POS Supply Solutions has a mission to ensure speed, accuracy, and reliability.

Background

POS Supply Solutions stores an enormous amount of data in NetSuite, in a multitude of different types of records. They also need to update NetSuite records on a regular basis. With more inventory, more customers, and increased production happening in the business, the manual process of exporting in and out of NetSuite into different applications to obtain clear data was becoming more and more labor intensive. Their COO quickly started looking for an integration solution that would solve their efficiency problems and be adaptable by the whole team.

The Challenges

POS Supply Solutions had a variety of different challenges associated with data integration. One of which is being more active in the acquisition world. When they purchased another company and needed to integrate the other company's data into their own systems, it was cumbersome. There was also the challenge with the speed and accuracy of the data being relied on for their sales process and for marketing to be able to have really targeted, meaningful messaging.

> "This tool lets us quickly and efficiently connect external conversations and documents to the appropriate records within NetSuite. Since rolling this out, we have seen a marked improvement in both internal and external communications."
>
> Mark Fitzgerald
> COO
> POS Supply Solutions

POS SUPPLY SOLUTIONS

Website
www.possupply.com

In addition, they were having to input the same information over and over again, wasting time and energy in capturing a clear and organized data stream. It was essential for POS Supply Solutions to make sure that the data, no matter what system it may be coming from, was brought in quickly and accurately so that they could make sure that they had a 360-degree view of the data that was being used.

The Sales and Customer Services departments also started realizing that 15-20% of their conversations with customers were happening outside of NetSuite which was causing critical gaps in communication. The company was seeing customers responding to a historical thread but referencing a new order. In an effort to make sure their communications were documented properly in NetSuite, they opted to utilize CloudExtend for Gmail.

The Solution

To address their reporting and analysis challenges, POS Supply Solutions knew that they wanted an Excel-based solution that integrated with NetSuite. The vast majority of their users already had familiarity with Excel, so this would help them to leverage that knowledge. CloudExtend has helped POS Supply increase efficiency by more than 40%. Because of CloudExtend Excel for NetSuite, they can now quickly, and in real-time, access NetSuite data in Excel. They also are able to use the tool to manipulate and manage the data, ensuring that the data is accurate. Their marketing team uses CloudExtend to update data, pick out the key for each different record type, and with a single click, push that data back into NetSuite. Now, because the app is so easy to use, they can access any saved searches they run in Excel, manipulate them, then choose what they're pushing back into NetSuite.

Since rolling out CloudExtend for Google Workspace, POS Supply Solutions has seen a marked improvement in the visibility of both internal and external communications in NetSuite. They can now quickly and easily attach conversations and critical documents (ie Purchase Orders, Tax Certifications, Product Quotes, etc) to the appropriate record within NetSuite.

Bottom Line

CloudExtend's Excel application has provided POS Supply Solutions with more accurate, and faster analysis of their NetSuite data. The IT and marketing team at the company utilize the tool to access saved searches in Excel and simplify the way they obtain their important data and push it back into NetSuite. The process of setting up the app in Excel and syncing it to NetSuite was straightforward. This made it easy to introduce the product to the entire company and start using it right away.

CloudExtend's Google Workspace application has allowed the sales and customer services teams at POS Supply Solutions to attach emails and files to specific records, and utilize the Google Drive feature to save on NetSuite Storage. This has allowed them to be more productive and efficient when syncing email communications to NetSuite throughout the company.

> **"**
> CloudExtend has really made it 40% more efficient for us to be able to quickly and in real-time, access NetSuite data in Excel. We then utilize it to manipulate and manage the data, making sure that the data is clean, and we can fill in all the gaps. **"**
>
> Mark Fitzgerald
> COO
> POS Supply Solutions

Contact Us
3 Lagoon Drive, Suite 130
Redwood City, CA 94065 USA
Email: cloudextend-sales@celigo.com

cloudextend.io

CS-POSU-223