

TECO Technology Improves Efficiency by 25% Using Automatic Email Sync with ExtendSync

Customer
TECO Technology

Products
ExtendSync Google Workspace for NetSuite

About

Founded in 1937 as Transmission Engineering in South San Francisco, California, TECO Technology originally supplied gear reducers, clutches, and brake components, then added boat transmissions for liberty ships during WWII. Twenty years later, they switched to focus on pneumatic and fluid power components. Over the years, TECO has expanded to also provide assemblies and components to the semiconductor, material handling, life science, energy, instrumentation, transportation, agriculture, and mining industries. Today, they are a full-line supplier and distributor of fluid and motion control products and systems.

Background

Running a lean organization of only 55 employees means that every role needs to run as efficiently as possible. For customer service manager Arzee Norwood, that means not only managing the customer service team but also taking calls herself to process orders, generate business, and process quotes. Information needed to be readily available to all the relevant stakeholders across the organization, which meant the team needed to build out a single source of truth. Thus, in 2018, TECO implemented NetSuite ERP and CRM.

The Challenge

Despite the benefits of moving to NetSuite, the team was still struggling to operate the system as efficiently as possible for the needs of the business. "There was so much missing information that we couldn't access," said Norwood. "The

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We've used ExtendSync for about four years, and I don't ever want to go back to using NetSuite without it.

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Arzee Norwood
CSM | TECO Technology

TECO

Website
tecotechnology.com

biggest problem was for our accounting team. Let's say customer service enters an order, but the customer is over their credit limit. The order would fail and go on accounting review, but the controller wouldn't have all of the necessary information."

The Solution

In the search to find a better way to collect information in NetSuite, several TECO Tech team members went to the SuiteWorld conference where they were introduced to ExtendSync by CloudExtend. With its ability to automatically sync emails from Gmail inboxes by address and by thread to NetSuite accounts, the TECO team knew that ExtendSync was the perfect fit for their needs.

Installation was a breeze: The team simply followed a link from IT to install the extension and set up the preferences. Norwood was easily able to teach her team members how to use ExtendSync. Beyond the customer service and accounting teams, outside sales and engineering also got ExtendSync licenses to attach necessary information to NetSuite. Workflows were revolutionized almost immediately. "Now when I associate an email thread into a sales order, my controller can review it right away. She doesn't have to bother me at all," Norwood observed. "That makes my time more efficient, makes her time more efficient."

Bottom Line

After working with ExtendSync for close to five years, Norwood has proclaimed herself the biggest champion of the integration tool. "I don't even remember how we did it before ExtendSync. The way we use it is just so important," she said. ExtendSync's Autopilot feature enables the team to automatically sync email threads as soon as transactions, quotes, and sales orders come in. "There's very little that doesn't have to go into NetSuite," Norwood said. "It's just second nature to sync with Autopilot so I can have information there in order for anyone who needs it to see." ExtendSync's easy learning curve has also helped empower employees, and now with the team running efficiently on the integration app for several years, Norwood estimates that ExtendSync email syncing has saved TECO as much as 25 percent of people's time by ensuring information is available at the right place at the right time. "I just can't tell you how much I love ExtendSync," Norwood concluded. "I wouldn't ever be able to do my job well without it."



The way we use ExtendSync is just so important: It saves us up to 25 percent of people's time because they're no longer chasing somebody to get information.



Arzee Norwood
CSM | TECO Technology

About CloudExtend

CloudExtend is a brand of Celigo, a leader in the iPaaS and SmartConnector space. The CloudExtend product suite integrates NetSuite with Google Workspace, Outlook, Microsoft 365 and Salesforce applications to empower end users to work exponentially faster.

Contact Us

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

cloudextend.io

CS-TT-0524