

MUEngineers Uses Excel and Email Integrations to Streamline Workflows and Save Time

Customer
MUEngineers

Products
ExtendSync for Outlook
ExtendInsights for NetSuite

About

Florida-based MUEngineers is a full-service structural engineering and inspection company that designs a wide range of building structures. Their portfolio includes high-rise condominiums, apartment buildings, office towers, car dealerships, and municipality buildings. They also design high-end residential projects and cruise ship island developments. MUEngineers was founded in 2010 and focuses on developing primarily in the South Florida and Caribbean markets.

Background

While the project list at MUEngineers is substantial, they are a small team of about 15 employees. Each team member wears multiple hats, including founder and CEO Marcus Unterweger. This means that every employee needs complete transparency into what's going on in every project and account, and that efficiency is a prized commodity when looking at processes within the organization. MUEngineers added NetSuite in early 2021 to centralize information.

The Challenge

After implementing NetSuite, Marcus quickly realized that each individual on the team followed their own processes for tracking correspondence, which often precluded others from accessing information relevant to a project. "We were manually copying and pasting email records into project folders on our server and setting up certain rules within Outlook to automatically move emails to project folders and records in Outlook," said Marcus. "The downside of that was if another project engineer had their records saved in their Outlook, others didn't have access to it." Each engineer also had particular ways for managing their project records. Some saved files on the server, but others would save in Outlook folders, and occasionally, things would simply not get saved anywhere. "The approach was very sporadic and not really cohesive," Marcus recalled.

The Solution

Fortunately, MUEngineers found CloudExtend NetSuite integrations not

“

ExtendSync is easy to use, and it's constantly in front of you while you're going through emails, resulting in a more consistent record of correspondence.

”

Marcus Unterweger
Principal, CEO, and Owner
MUEngineers



long after they began using NetSuite. The first order of business to solve was project information storage, which was quickly revolutionized by ExtendSync, an Outlook and NetSuite integration app. “ExtendSync helped us streamline our communications better,” Marcus said, “making sure that certain emails get filed automatically to the project records within NetSuite. So there is now one place—the NetSuite project record—where all critical project, client, and vendor correspondence is directly linked.” The team found it was now much easier for anyone who needed information to find a particular email, product order, or other file in NetSuite.

“It’s just the click of a button now,” Marcus added. “You have an email, you click on ExtendSync, and then it’s just a matter of putting in the project number or client vendor number. You select the appropriate record and that’s pretty much it. Everything after that is handled by ExtendSync.”

So successful was MUEngineers’ experience with ExtendSync email integration that very shortly after, they added Excel integration as well via ExtendInsights. “While NetSuite is a great product, updating data is tedious, to say the least,” said Marcus. “You’d have to update one record at a time or go through an exchange process in NetSuite, which is not overly user-friendly. It wasn’t something we wanted anyone who wasn’t intimately familiar with NetSuite to be doing.”

Fortunately, ExtendInsights made working with NetSuite data so much simpler for the MUEngineers team by allowing them to work on data in the familiar interface of Excel. When it came to updating NetSuite data, the team could download project-related records into Excel, update fields like project tasks, status, start date, and assignees, and re-upload to NetSuite directly from Excel via ExtendInsights. “It’s not time-consuming, and it’s easy to use because we as engineers use Excel on a daily basis,” Marcus said.

ExtendInsights also helped the team with reporting and analytics by automatically pulling NetSuite saved searches into spreadsheets to populate reports. “We used ExtendInsights to set up several saved searches such as contact, customer, department, employee, expense, location, project, and vendor with scheduled exports to Excel records,” Marcus recalled. “Then those Excel records are automatically linked to Power Query, which means we don’t need to manually update data in the queries. It’s always up-to-date or as current as the most recent saved search synchronization.”

Bottom Line

Integration has become the saving grace for MUEngineers working in NetSuite. “If we didn’t have the CloudExtend integration apps, we might be looking at switching away from NetSuite,” Marcus admitted. “Without CloudExtend apps, many of our tasks would take hours at a time. What I spent days on before has been reduced to minutes.” Data updates and analysis are nearly instantaneous with ExtendInsights, while ExtendSync facilitates a much more consistent record of correspondence for projects, clients, and vendors. “As a team, we are just working more in sync these days,” Marcus concluded. “I wouldn’t want to go back to how we did it before.”



ExtendInsights
is fantastic
because you
have current
information
constantly in
front of you,
helping you
make more
educated
decisions
based on
actual data.



Marcus Unterweger
Principal, CEO, and Owner
MUEngineers

About CloudExtend

CloudExtend empowers organizations to make faster, more insightful decisions by creating innovative, user-friendly applications that integrate workplace productivity tools with platforms they use every day.

Contact Us

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

cloudextend.io

CS-MU-1224