

Trinity Displays Leverages Email and Calendar Integration to Save Hours Every Day

Customer
Trinity Displays

Products
ExtendSync for Outlook

About

Trinity Displays, located in Chesterton, Indiana, is a collaborative force of creative thinkers, project managers, friendly account representatives, and skilled craftspeople. They offer diverse solutions, from readily available portable displays to custom fabrication and large-format printing, catering to the experiential and trade show industries. Trinity Displays prides itself on building trusted relationships by developing the most practical and in-budget solutions for its customers.

Background

Needing to track multiple communications and details of orders with significantly varying lead times, Trinity Displays deployed an ERP solution to serve as a single source of truth. Unfortunately, the original solution did not prove robust enough for the business' needs. The team ended up working out of three separate solutions that did not connect well, leaving them with little access to information and no clarity across the organization in communications with clients or vendors. It was time to migrate to a new ERP solution: NetSuite.

The Challenge

While NetSuite proved beneficial to the organization, there were additional customizations the team wanted to make so processes to save emails to NetSuite records were further automated and streamlined. "A lot of our team members were so comfortable in Microsoft Outlook, and comfortable continuing to use that system," recalled office manager Lauren Rossi. "We wanted to make sure that we were continuing to allow them the solution that worked best for them, while also implementing a solution that works best for the company."

“ ExtendSync saves us a couple of hours every day by having information automatically saved in NetSuite. ”

Lauren Rossi
Office Manager | Trinity Displays



The Solution

Trinity Displays quickly found ExtendSync by CloudExtend, a purpose-built Outlook integration app for NetSuite. Now, teams can automatically associate emails and attachments with NetSuite records without ever leaving their Outlook inboxes. “When we found ExtendSync, it was a lifesaver, a simple product that we could easily add into our daily workflow and be able to sync all the information that we need from emails to meetings,” said Lauren.

The team benefited specifically from the use of Autopilot, a sync feature that automatically attaches emails to NetSuite records based on either email thread or email address to ensure that all back-and-forth communication is connected appropriately. “Because of the nature of our business, our projects are not a one-time conversation,” Lauren said. “With the Autopilot feature, our team can have a quote in process and have all that communication back and forth in the system that they’re comfortable using, while still having all of that data automatically connect back to the transaction.” Autopilot for email messages keeps things organized, especially for long-term build projects that can span up to 120 days.

When Calendar Autopilot for Outlook debuted in ExtendSync in early 2024, it intrigued a team that was already so comfortable using Outlook. “There were times sales meetings were not getting uploaded within NetSuite,” Lauren recalled. “By adding in Calendar Autopilot to our ExtendSync subscription, it allowed a lot more visibility across the organization as those meetings and phone calls were getting added into NetSuite. It allowed our team to see all those details on the client level.”

Automating the connection between Outlook, calendars, and NetSuite has revolutionized how the team at Trinity Displays works. Zero changes have been made to how they do their work because automation ensures that information flows between Outlook and NetSuite without any extra steps. “It’s been extremely helpful as we have been building out more work organization calendars within NetSuite to see all of that information, as well as for our sales teams who put meeting requests in through Outlook and they sync straight into NetSuite,” said Lauren.

Bottom Line

Having access to such deep visibility in communications and meetings has revolutionized processes for the team at Trinity Displays. No longer relying on manual processes means that many prior delays due to communication are eliminated, and clarity is reinforced in every project. “Just in the frustration levels alone, we’re saving a couple of hours every day from having that information saved,” Lauren said. “It has also saved us money because we have that visibility with the data. It’s been such a wonderful system.”



ExtendSync
makes it very
simple and
clear for
everyone to
understand
the process
... when we
need to go find
data, we know
where to look.



Lauren Rossi
Office Manager
Trinity Displays

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.

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