cloudeXtend
by celigo

Case Study

Company
Small Business

Product
ExtendSync for Outlook

Background

This case study of an insurance SMB is based on a survey of CloudExtend customers. The profiled company asked to have their name blinded to protect confidentiality.

The Challenge

The business challenges that led the profiled company to evaluate and ultimately select ExtendSync for Outlook:

- Fully manual approach to attaching emails to NetSuite
- Lacked centralized communication tracking
- Needed to build a single source of truth
- Wanted to save file attachments while minimizing costs
- Needed to improve efficiency and productivity

Use Cases

The key features and functionalities of CloudExtend that the surveyed company uses include:

- Save email attachments
- Save on file storage by linking OneDrive / SharePoint files directly to NetSuite records

Results

The surveyed company achieved the following results with CloudExtend:

- Saved 1 - 5 hours per week with the help of automation
- Improved efficiency and productivity by up to 40%

> " ExtendSync is user-friendly and streamlines our ability to reference documents. "
>
> Controller
> Insurance Small Business

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.

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