

## How C.L. Services Slashed Operating Costs While Increasing Productivity by 25%

Customer  
C.L. Services

Product  
ExtendInsights for Salesforce

“

We use CloudExtend every day. I couldn't do my job without it.

CloudExtend is Excel-friendly and saves us hours upon hours. Switching to it was a no-brainer.

”

Steffen Lewis  
Director, I.T.  
C.L. Services

### About

C.L. Services was founded over 20 years ago by two industry veterans in the transportation business. The company provides freight management services and has experienced tremendous growth over the past several years. Rated one of the top 3PL (third-party logistics) providers in the country, C.L. Services prides itself on innovation and personal attention for their clients that range from Fortune 500 companies to small businesses.

### Background

The company has been using Salesforce since 2016, and worked with a data management integration tool that has been around for a long time. The Director of IT, who was formerly the accounting manager, was the only person with knowledge of the tool. With new employees hired over the years, the company had too many separate processes and manual tasks between the finance and IT departments.

Things had to change if they wanted to increase efficiency and productivity in order to scale the business.

### The Challenges

The previous data management connector with Salesforce was not very user



**C.L. SERVICES**  
A PROSPENSIVE® LOGISTICS COMPANY

Website  
clservicesinc.com

friendly and did not have any pre-built templates. C.L. Services also uses Accounting Seed, a leading financial software solution built on Salesforce and had a need to update their financials with Excel. They had to manually build out their templates in Excel, map to different fields on the spreadsheet, then import the Excel document in Salesforce. This took their team an extensive amount of extra time and effort to do. They also had to constantly search for client data such as account IDs and GL codes.

Another example of a previous challenge is that the transportation dispatchers have many contacts, either written on paper or on spreadsheets, that needed to be migrated into Salesforce. These would have to be manually uploaded into the CRM to provide transparency across the organization, but it was difficult to allocate the time to complete this important task due to other priorities. For a company that prides itself on innovation and superior service for their clients, this was not a very efficient process. Because of these limitations, the current finance team did not take full advantage of the tool, costing the company thousands of dollars in unused licenses.

## The Solution

With CloudExtend integration, the finance team instantly started managing Salesforce data in real-time directly within Excel. The ease of use, built-in functionality, and convenience were the biggest differences. From an IT perspective, there was no need to download and install a separate data loader application on every user's computer. C.L. Services employees appreciated that CloudExtend solution was built into Excel, an environment they were already familiar with.

C.L. Services also utilizes CloudExtend's native support for custom objects to save significant time on managing their Accounting Seed records by creating journal entries, uploading finance charges, and applying mass changes on fields for account and contact records as well as a custom object for tracking fuel reports from the US Energy Information Administration. Cash application related tasks would normally take 6-7 hours a day. With the help of multiple users on CloudExtend, those same tasks can be completed in about an hour and a half. The entire company knows that they can rely on both the finance and IT departments to complete projects on time, and CloudExtend is a big reason why.

## Bottom Line

With CloudExtend, C.L. Services significantly increased productivity and streamlined processes while saving the company thousands of dollars per year. They are able to take advantage of multiple user licenses and be instantly up and running, even while working remotely.

C.L. Services leveraged CloudExtend to quickly and efficiently integrate data from Excel and into Salesforce, saving valuable time and resources so that the company can focus on strengthening client relationships to grow the business.



With CloudExtend, our CFO notices a big difference in speed and productivity.

The application broke the language barrier between IT and the data loader. While not everyone in the company has CloudExtend, everyone in the company takes advantage of it.



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Director, I.T.  
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### About CloudExtend

CloudExtend email and spreadsheet applications integrate top business applications to help organizations increase productivity and extend the value of applications they use every day.

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