

Technologent Used ExtendInsights to Save 7,300 Hours in One Year

Customer
Technologent

Product
ExtendInsights for NetSuite

About

Technologent is a global provider of information technology solutions and services, serving Fortune 1000 companies with their digital transformation needs. Based in Irvine, CA, the company specializes in enterprise, cloud, storage, infrastructure, and data management solutions.

When partnering with Technologent, organizations benefit from the highest caliber of professionals, committed to delivering exceptional business outcomes backed by unmatched service and support. Their services practice has grown tremendously over the past three years, and they are looking to expand even further.

Background

When the sales support specialist started at Technologent over 5 years ago, his predecessor had been using Celigo's original Excel SmartClient. Soon after, he helped guide the transition to Celigo's new ExtendInsights by CloudExtend -- writing instructions, training new users, managing licenses, and helping employees set up templates. Currently, the company has over 20 users using ExtendInsights.

The Challenges

While Technologent has relied on NetSuite for many accounting related tasks and processes, the company discovered that they needed to further optimize creating

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I can't imagine not having ExtendInsights. It saves me an incredible amount of time.

It takes under a minute to load a quote using ExtendInsights.

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Dan Brashear
Sales Support Specialist
Technologent



quotes and tracking forecasts. Since NetSuite is web browser based, entering a multi-line quote was just too time consuming with endless copying and pasting. Their team needed a solution that allowed them to use their time more efficiently.

With a rapidly expanding client base, Technologent relies on inside sales to support their sales representatives with a multitude of responsibilities -- processing quotes, purchase orders, talking to manufacturers, negotiating shipping, tracking, and renewals. With so many aspects to the job, the company needed a solution to help save time and increase productivity to send out customer quotes and purchase orders as quickly as possible.

The Solution

Technologent uses ExtendInsights in several different ways, depending on role and responsibilities. The majority of Technologent users leverage ExtendInsights to create and edit customer quotes in Excel to directly upload to NetSuite. Some quotes have over 1,500 lines. Excel is highly productive and efficient because it reduces the likelihood of any costly errors compared to manually manipulating the data directly within NetSuite.

Another way in which Technologent uses ExtendInsights is updating forecasts. By using the refresh data feature, they are able to pull complete lists of deals sorted by sales representatives. ExtendInsights helps make forecast management significantly easier and more accurate, resulting in improved business decision and action.

By using saved searches, they can then make bulk update changes to send various types of data back to NetSuite with one click. This is a huge time saver for those who have a large number of sales deals.

Bottom Line

By using ExtendInsights, Technologent has saved a tremendous amount of time (7,300 hours in 2020 alone) by transforming laborious tasks into an enjoyable and productive part of the job. Creating large and complex multi-line quotes in Excel is now a breeze, and some users routinely update quotes that are anywhere from 500 to 1,500 lines. Technologent also has the peace of mind knowing that the data is correct by using ExtendInsights.



It's so much easier to just be able to pull data out of NetSuite into Excel and ExtendInsights and make changes rather than going line by line, tab by tab, trying to update everything... There is a peace of mind knowing that the data is correct by using ExtendInsights.



Dan Brashear
Sales Support Specialist
Technologent

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.

Contact Us

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

cloudextend.io

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