Tracknicity Case Study

Improving Business Performance with Tracknicity

Our Client:

Residential Systems Inc. (RSI) is Colorado's leading home technology supplier, offering custom electronic solutions including high-end electronics, audio-visual, lighting systems, home theatres, motorized shades and golf simulators. RSI employs approximately 30 people, with 60% of these staff working 'in the field'.

Proposals and estimates are created in D-Tools, which links with Quickbooks to then manage all of the financial operations of the company. Any changes and additional equipment are made within D-Tools. All RSI field employees use an iPhone to ensure that there is a seamless integration between business systems and the workforce.

The Challenge:

While proposals and estimates were entered into D-Tools and then linked to Quickbooks, initial orders, information and inventory was still very much a manual process. Field staff were writing things on clipboards and dealing with paper records when checking out equipment for a project or a service call. This created a number of issues.

Some things were forgotten about before they were written down. Poor handwriting meant some information was lost in translation and no one knew where anything was! A combination of post-it notes, emails and clipboards created further complications for reconciliation and inventory management.

The fact that the inventory was never correct highlighted the fact that a solution was needed – especially as this issue also created problems with final billing as parts were often missing and could not be accounted for.
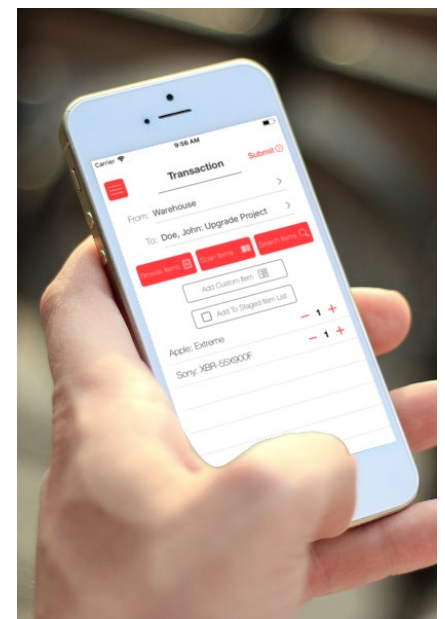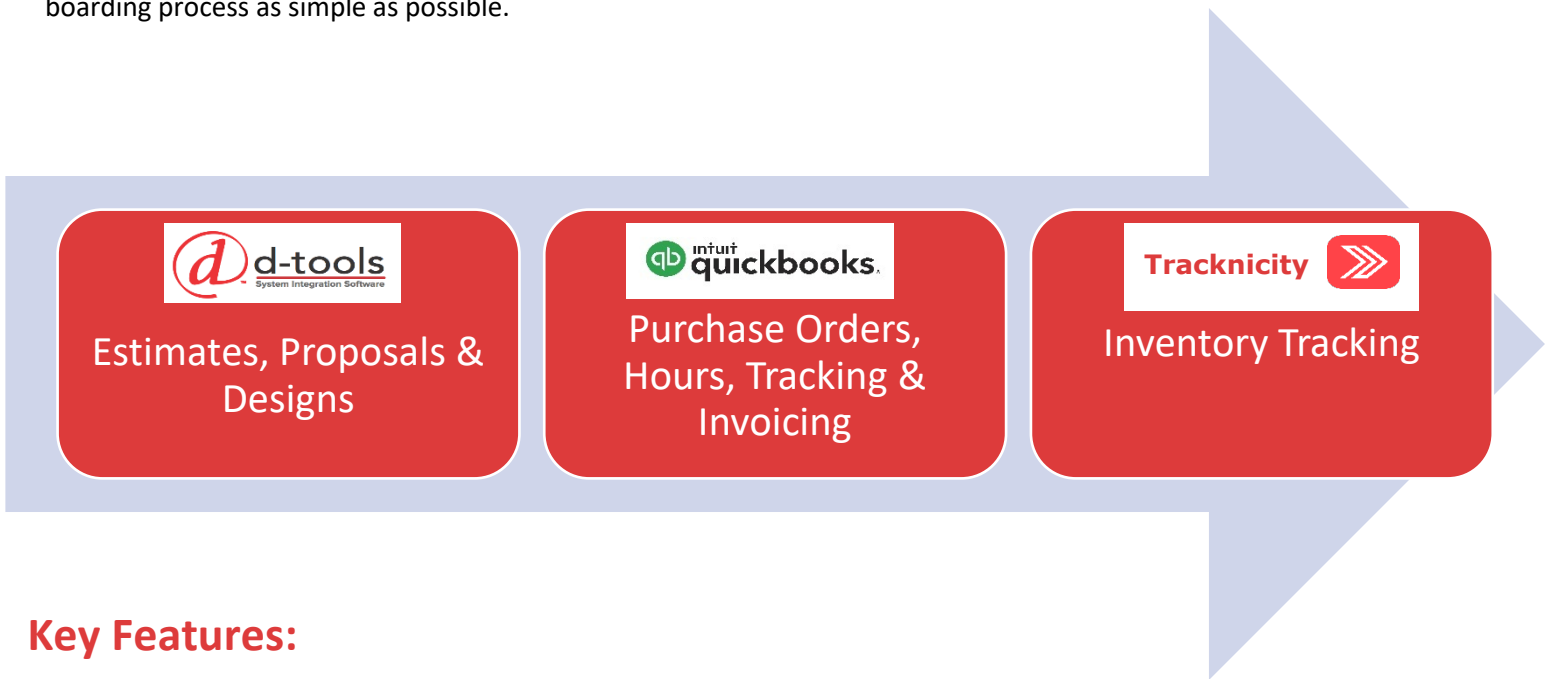
Tracknicity.com

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The Tracknicity Solution:

Having established that a solution was needed, RSI focused on finding a better way to do things. RSI evaluated a number of custom solutions but nothing met the needs of their small business. The solutions were either too expensive to deploy, too complex to run or not designed for their business. RSI eventually met with the Tracknicity development team to review their solution and document their business requirements.

Tracknicity offered the ideal solution for RSI. Its application was easy to deploy and incredibly inexpensive. It offered full integration with D-Tools and Quickbooks and was designed to operate on the iOS platform which everyone already used.   The migration from the current system was relatively straightforward as the Tracknicity team made the on-boarding process as simple as possible.

d-tools	quickbooks	Tracknicity
Estimates, Proposals & Designs	Purchase Orders, Hours, Tracking & Invoicing	Inventory Tracking

Key Features:

- Quickbooks integration
- Multi-location mobile application
- Mobile bar code scanning
- Check parts in and out from any iOS device
- Custom requests
- User configurable notifications
- Reporting and history (by employee and by job)

"Tracknicity does what every good piece of software should do - It makes my job easier, saves time, and places critical information quickly and accurately at my fingertips. Before we adopted Tracknicity as our inventory management and product allocation platform, I relied on a combination of hand-written checkout sheets, time-consuming monthly inventory counts and corrections, and lots of detective work to do my job. As soon as I got started with Tracknicity, the burden of tracking so much information manually began to lift. Tracknicity takes the guesswork out of tracking our inventory and enables me to complete normally time-consuming tasks in minutes instead of hours."

Purchasing Manager, Residential Systems, Inc.

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The Results:

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20% fewer errors compared to spreadheets and clipboards	**$1,000** In additional evenue billed each month which was previously lost	**Up to 6 Hours** saved every week for the Operations Team

Everyone at RSI welcomed the introduction of Tracknicity. Tracknicity provides a simple and intuitive user interface which makes everyone's jobs easier. It enhances efficiencies and processes across the entire business. The most popular features amongst the team include bar code scanning and real-time access to prices while team members are visiting clients. Being able to receive notifications of when products arrive in the warehouse is also a big benefit.

Processes that used to take up to 6 hours a week copying information form clipboards (and post-it notes!) are reduced to just 2 minutes as items can be approved or rejected as part of the interface between Tracknicity, D-tools and Quickbooks.

There are also far fewer problems and mistakes. Billing accuracy has improved significantly delivering an increase in profitability. In addition, the audit log feature allows for reporting based on each employee, each location and each job. This delivers far more meaningful information into the business to enable much more effective decision making.
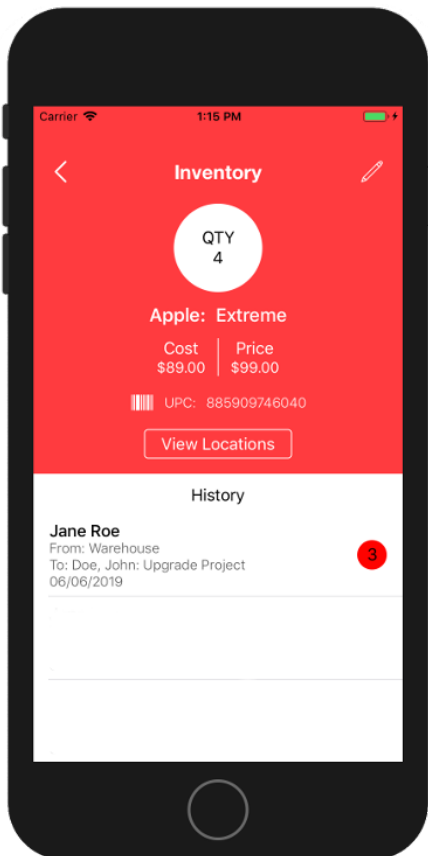
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"Our project managers are each assigned an average of 35 projects at a given time, and Tracknicity has revolutionized the way they keep track of order statuses. If they need to know when a particular part arrives, a project manager can subscribe to notifications that will inform them when the part gets to the warehouse. They can submit a request for parts to be ordered and delivered to the job site. Saving a few minutes here-and-there adds up to hours that can be dedicated to more important responsibilities."

Operations Manager, Residential Systems, Inc.