

CUSTOMER SUCCESS STORY



Improving a Global Supply Chain Process

A global provider of secure logistics solutions was looking for a better way to manage the supply chain for its electronic cash management product – including taking customer orders, scheduling customer installations, shipping products, and tracking inventory.

The three objectives were to find a robust database management system that would:

- » Consolidate all data into one repository
- » Provide access for both internal and external users
- » Enable customized views of the data in real-time

From Excel Spreadsheets to Database Management

Before Track Via, this global company primarily relied on Excel spreadsheets to manage one of its premier products. The problem was that every customer order required a separate spreadsheet – with more than 60 data fields – and those orders then needed to be uploaded to another spreadsheet called the order tracker.

Seldom were all the fields complete. Customer information such as addresses and phone numbers were often missing or incomplete. To provide the most accurate orders to the manufacturer, one full-time employee spent every morning cleaning up the missing data, calling sales representatives, and completing the orders. Then the information was downloaded so that it could be shared with the manufacturer at mid-day.

This inefficient process prevented more than one person – or department – from being able to access the spreadsheet at a time. Everyone from the sales team, manufacturer, installers, and technicians had to wait to get the information they needed to complete their part in fulfilling customer orders.

“Basically what we had was a static process that was full of lag time,” says one of the business analysts. “We knew we needed a better database management system, so in November of 2008 we began researching off-the-shelf software to see if there was something that could meet our needs.”

After years of managing the ordering and fulfillment process through multiple spreadsheets, there was a desire to find a Web-based solution to streamline the process. In just a few weeks, a free trial of Track Via had been downloaded and the team began customizing the easy-to-use, Web-based tool.

Solutions

TrackVia OnLine
Database
Professional
Edition



TrackVia
Application
Platform



Streamlining the workflow through a dynamic solution

The first step was to consolidate all the different versions of the Excel spreadsheets and consolidate them into one database. Once this was done, the team began creating filters so each stakeholder could view the information they needed to do their jobs.

One of the biggest positives of Track Via was that all the various groups could touch the system when they needed to – and not wait for others to finish their tasks. Literally overnight, what had once been a sequential process was turned into a dynamic, real-time system where all users have access to the same data.

Track Via also brought a much-needed discipline to the ordering process. Due to required fields, the sales team was no longer able to submit incomplete orders without them being rejected. This helped eliminate endless phone calls to track down missing information and streamline the installation process by ensuring that a site survey was complete and a customer location was ready to receive the product before it was scheduled for installation.

Becoming More Responsive to Customer Needs

Without a doubt, the biggest benefit of Track Via was the newfound ability to meet customer requests for reporting and product status. One of the company's largest customers had repeatedly asked for a daily report to show the status of their product. Before Track Via, creating this report was extremely labor intensive since it was entirely manual and was prone to errors.

With the centralized Track Via solution, all customer events and data were merged into one system. Now this report is produced daily in a just a matter of minutes – as opposed to hours – and has become one of the most important tools the customer uses to manage its operations.

Increasing Productivity Through Streamlined Processes

How has Track Via impacted the ordering process? At first it was hard to define, simply because of the vast number of the people who were using the system and all the different processes that fed off of it.

Not only did the sales team use Track Via to order products, but it is also used to manage product inventory, identify rush orders, schedule installations, authorize returned materials and provide maintenance.

Now that the system has been in place for two years, the company reports that it has cut the cycle time in half by making every part of the process more efficient. All the lag time has been eliminated and replaced with better communication across the supply chain. Most importantly, the data for more than 10,000 products and the customers who own them is now consolidated in one database.

About TrackVia

TrackVia delivers the world's most secure, flexible, and scalable OnLine Database and Application-Building Platform designed for Business Users. TrackVia balances business-user empowerment with enterprise-class performance, scalability, and end-to-end security. The result: A data management and collaboration solution that even the most skeptical Internal IT organizations can champion. To-date, over 1000 customers across the globe rely on TrackVia, including ADP, Healthways, US State Department, the TSA, US Olympic Committee, Samsung, and US Cellular.