



CREATIVE REALITIES' INTEGRATION FOR SUBCONTRACTOR MANAGEMENT

CreativeRealities[□]

The Company

Creative Realities Inc. (CRI), a Louisville, Kentucky based company, provides the latest digital technologies to retailers and brands to create a better shopping experience. Through their design, development and deployment of digital ecosystems and high-end audio-visual networks, CRI transforms the consumer and shopper journey into an intelligent, responsive, aware and immersive experience.

Founded 16 years ago, CRI's evolving client base has led to recognized leadership in deploying technology aligned with strategic and consumer behavior goals at a retail level. From conceptual design creation to platform development, hardware and software engineering, to post execution monitoring, measurement and maintenance, CRI delivers the end-to-end solution.

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Headquarters
Louisville, Kentucky

Industry
Digital Imaging

Financial System in Use
Microsoft GP

Fieldpoint Users
100

Fieldpoint Applications
Work Orders, WorkMarket
Integration

The Problem

After three recent merger transactions, CRI was left with the challenge of collectively bringing all their information and data into one unified system. Prior to the merger transactions, CRI was struggling to take advantage of three legacy systems that were not updated, included multiple customizations, didn't take advantage of native modules and feature sets, and interacted via unstable integrations.

Consequently, the Company also implemented workaround processes involving email and offline spreadsheets to satisfy certain reporting and information needs.

This created a time management issue, as any data entry had to be completed across three or more systems, and CRI utilized the copy and paste method to transition information from accounting software, to work orders, to their work management system and third party contractor provider. Simply keeping track of, retrieving and reporting on valuable customer data, as well as cost analysis, proved challenging when dealing with multiple sources.

Additionally, CRI was using a workforce management system, WorkMarket, to hire and manage subcontractors for installations and repairs. This, again, required more manual data input and transfer back to spreadsheets and accounting software to keep track of incoming work orders. Not only was it creating more work to manually input each work order, but it also was significantly slowing down the invoicing process.

BUILT IN CUSTOM INTEGRATION

The Solution

Needing a single system to handle the entire process, CRI worked with Fieldpoint's field service software, and built in a custom integration that would speed up the workflow process from getting work orders from their customers, straight through to the billing and payment stages. With the WorkMarket integration, the process of hiring a subcontractor was all done within a single system, limiting the amount of data input required for each job and any errors that could come from it.

Automating the Work Order Process

With Fieldpoint's integration, much of the efforts to get work orders in the hands of the subcontractors is now just a few clicks away. CRI can accept batches of work orders from clients in a simple excel spreadsheet that, when uploaded to Fieldpoint, immediately creates work orders with pre-determined custom templates that include checklists, work requirements and tasks to complete for the job. The need to enter each work order manually was replaced by an upload system that automatically populates most requirements for the job.

Getting it to WorkMarket

With a few clicks, CRI is able to export their work orders to the WorkMarket community, all from within Fieldpoint and without the need to open any other portals. Price, location and skill sets for the job are set prior to submission, as CRI can drill down their selections to a geographical location, or to individual contractors they have used in the past.

"It's nice that Fieldpoint goes ahead and sets up a certain ID for them, so that we don't have to go and search WorkMarket's pages or wait for them to apply for the job," said Alexis McDonald, CRI Manager of Systems Support. "We can just accept them for the job and send it only to them. So, it's great that the technicians that we normally use are populating, like a mini-database in our actual system."

Subcontractors, who use the WorkMarket portal, see all aspects of the work order, including job requirements and specific documents that need to be sent back to CRI from within WorkMarket, but the integration allows for CRI to maintain their presence in Fieldpoint only, rather than working with two different portals. Job bids come through to Fieldpoint, and the selection process is made and an offer submitted, continuing the process straight through until the work is completed.



Finishing the Process

Once the installation or repair is completed and work information and documents are sent through WorkMarket, all documents are viewable in the Fieldpoint software. From here, CRI continues the process of finishing the work order by entering the billing and invoicing phase, ensuring that their clients are billed on time, while their contractors are also paid. With one click, invoices that are populated with specific codes for each job are formatted specifically for the clients invoicing system, and are easily downloadable in single file or batch formats. They are then sent to the customer, finishing the process all within one software, without any need to use multiple portals or information systems.

"This is all about efficiency and workflow, where we want and prefer our folks to be living in Fieldpoint as opposed to doing something in Fieldpoint, then doing something in WorkMarket, then doing something in a third-party customer portal. We've set up automation and integration layers such that they live in just one system." – John Walpuck, CFO/COO

RESULTS OF THE FIELDPOINT IMPLEMENTATION

The Results

CRI needed to speed up their work order process, while also limiting the amount of double- and triple-entries of data that were required, due to outdated and poorly designed systems. With the implementation of Fieldpoint's WorkMarket integration, the time needed to go from a request from a customer to getting the job listed on WorkMarket has dramatically decreased, as no longer is multiple entries or copying and pasting required to relay the same information.

"Through Fieldpoint's intuitive integration platform we are now bi-directionally connected with our primary workforce management partner," said Walpuck. "We have had a great experience with the Fieldpoint implementation consultants, and are very pleased with the design and level of integration achieved."
