Insite4Doors™

Top 7 Things to Look for in a Door Business Management System

Door Companies need to make the best use of available resources, provide exceptional service, and make a profit.

A well-designed and properly implemented Door Business Management system (DBM) can help you accomplish that.

Your company provides service for installed equipment either under warranty, on a contract basis, or a la carte – likely all three. In order to provide these services, you have an investment in vehicles, equipment, parts, and talented and dedicated people. Your mission is to support customers' equipment with prompt, effective services, including both preventive and corrective actions and maintenance. The right technology tools can modernize your operations, boost your efficiency, and develop lasting customer loyalty.

When searching for the right Door Business Management system (DBM) , the selection team should focus on the following 7 functional areas where a DBM is most needed, and where it can provide the most benefit.

1 Scheduling and Dispatching
2 Mobile Technology
3 Installed Equipment Tracking
4 Inventory Management
5 Integration with Back-End Systems
6 Flexible Billing
7 Analytics

1: Scheduling and Dispatching

Deploying service resources – people, equipment, parts – is a large part of the door business. Scheduling and dispatching are the key functions of Door Business Management systems. You'll want a system that can schedule emergency and short-notice calls, along with regular and previously scheduled service calls. This minimizes "mileage" and travel time while providing the quick response and schedule reliability that customers demand. The system should integrate mapping and GPS to allow the scheduling team to see the impact of potential responses to emergency repair requests, helping them determine the best way to respond to the change in priorities.

Scheduling and dispatching functions should be integrated with the repair and maintenance history of each customer and each piece of equipment as well as inventory tracking. This ensures that the right parts and equipment are dispatched along with the technicians so they can get the job done with no delays.

2: Mobile Technology

Modern field service resources MUST be mobile-enabled. Mobile technology helps field technicians stay in touch with changing schedules; makes equipment information, usage, and repair history instantly available on-site and on the way; reduces or eliminates hand recording of time spent, parts used and history updates; makes reporting for billing purposes instantaneous and more accurate; and more. A well-designed DBM will work with standard mobile devices (smartphones, tablets) using existing cellular networks.

Mobile devices should be capable of real-time connection to the host system to display dispatching changes and traffic information to provide the best current route to the next customer site.

3: Installed Equipment Tracking

Tracking installed equipment and its service history helps make service operations more efficient and more effective, of course, but there's more to be gained from detailed equipment tracking. Having that information available to assist in the provisioning of mobile inventory, as a base for tracking maintenance and repair history (linked to equipment engineering and use data for analysis, planning, and product improvement), and keeping records for warranty purposes are all obvious and important needs. But, there's even greater value available.

Equipment service history is a critical part of Product Lifecycle Management (PLM). Serial number tracking is even more important in support of engineering studies and product improvement efforts, as well as being a necessary part of the response to litigation or product recall. The serial number is also part of the basic equipment identification that supports configuration history (as-is configuration to compare to as-built and as-designed). Equipment tracking and service history are an important component of preventive and predictive maintenance. A supplier that helps its customers stay on top of certification and calibration records will be considered a valuable partner.

And don't minimize the importance of this traceability on customer service. Imagine how the customer will feel when they call in and the service rep has all of their door and operator information right in front of them. You can help your customers keep their equipment running smoothly and reliably while making it really easy for them in the process. This type of interaction is important as it makes you a partner in the safe and reliable operation of their equipment.

4: Inventory Management

It is important to control and track inventory of tools and repair parts spread across multiple vehicles and warehouse locations. Your system should help you determine the best locations and quantities to provide the best coverage at the lowest cost. Inventory can be deployed/

relocated in conjunction with scheduling and dispatching, to ensure that service technicians have what they need, where and when they need it so as not to waste time and be able to complete assigned tasks. With integrated inventory and purchasing, your technicians will always have the right parts on their vehicles for every job and you get complete vision of all inventory and its value across your organization.

5: Integration with Back-End Systems

Integration with a complete back-office financial/accounting platform eliminates delays and errors from manual entries or re-keying. The benefit is multiplied when mobile device entry from the field is included. Billing is fast and accurate, good audit trails and history are maintained with 'one version of the truth'. The resultant unified database can be exploited for ongoing improvements and savings, reports and measurements including Key Performance Indicators (KPIs).

Integrated DBM and back-office keeps everyone one the same page by providing company-wide visibility of customer activities, inventory usage and status, and equipment performance. Billing and collection are timelier, improving cash flow. Financial records are complete, accurate, and immediately updated as activities are completed.

6: Flexible Billing

Your DBM system should not limit or impair your ability to create and process invoices in compliance with all the variations in contracts and relationships you might have with customers. For example, it should be able to assemble and process billing: by project for tear/haul and installation; for recurring revenue for service contract and preventive maintenance; by time and materials for repairs; consolidated billing for multi-site clients or centralized payment situations. Be sure that the financial functions are able to track and properly recognize warranty terms so billing (or more importantly, non-billing) for parts and service are correct.

You should have complete control over the look and feel of your customer facing documents, with the ability to roll-up lines, or itemize based on customer requirements, and because many door dealers operate multiple entities or profit centers, you should be able to generate unique billing documents for each.
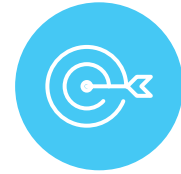
7: Analytics

DBM, in conjunction with ERP, manages a wealth of data about equipment usage and performance, repair and maintenance needs and activities, costs and revenues for labor, materials and equipment, costs and needs for warranty coverage, customer relationships, inventory deployment and usage, and much more. Your enterprise information infrastructure should enable the exploitation of that veritable ocean of data to create more value from your Door Business Management system. Analyze the data and look for patterns and intelligence. Cross-reference repair history with usage information, location, or design details to gain insight into the validity and effectiveness of preventive maintenance and either change policies and warranties or advise customers to help them get more from their equipment investment. Optimize inventory in the warehouse and on service vehicles. Provide valuable feedback to design engineers to improve future product performance and reliability… and much more.

The analytical capabilities can stem from an ERP module or application, a feature of the DBM system, or a third-party analytics product. No matter the source of the capability, its effectiveness will rely on the quality and unity of the database your DBM and ERP will be building. Ideally, that database is fully integrated across both ERP and DBM with no redundancy, overlap or duplicate entry. That structure should be a prime objective as you review and consider DBM solutions.

Summary

In the door business, the primary areas for management attention that can be greatly improved with the right technology include scheduling and dispatching, tracking installed equipment, inventory management, and accounting/administrative. A well-designed and integrated Door Business Management system is an essential tool for managing the service side of the business to control costs, deliver needed service efficiently, and keep customers happy.

Advanced Systems Group, Inc. offers over 20 years experience working with door dealers to provide the very best technology. Our Insite4Doors DMB system provides the most advanced and complete business platform for modern door companies. It's not a "bolt-on" for QuickBooks or a flashy phone app disguised as a business tool. It's complete business platform designed to make door companies more profitable in every area of their business.