

How CHC Hydronics seamlessly tracks Labor Costs to FinancialForce

Intro

CHC Hydronics is a leading Manufacturers
Representative and Package Systems Manufacturer of
HVAC, Hydronics, Steam, Heat Transfer, and
Plumbing Equipment. Headquartered in Hayward CA,
CHC has operations across the Pacific Coast in
Washington,Oregon, Montana, Idaho and Alaska. The
company provides cutting edge products to reduce
energy costs and protect environmental resources.

CHC not only sells appropriate products and parts, but works with customers to build extremely customized solutions that fit both within the building's needs and the limited floor space available.

Challenges

With their fast growth, CHC had spread across multiple warehouses and workcenters across the Pacific Coast. They also worked as Manufacturer's Representatives for multiple leading equipment manufacturers. In addition, CHC's FlowTherm Division provides a pre-engineered, packaged product that overcomes partners' unique financial, dimensional, and timeline constraints.

CHC Hydronics installed FinancialForce ERP to streamline their financial and operational processes, improve visibility into their data and make better decisions across the organization.

Since manufacturing and fabrication was spread across multiple locations, CHC needed an easy way to track the time that their employees spent on specific jobs. They also needed to track the time that their service engineers spent on the field on repair and maintenance jobs.

This prompted CHC to look for a solution that could meet its evolving needs for time tracking. One that would easily integrate with its FinancialForce ERP system.

Solution

In 2019, CHC implemented PK4's Time Tracker for Salesforce. Since the TimeTracker data was all in Salesforce, it was very easy to integrate the system with FinancialForce.

TimeTracker Project Creation

CHC customized the FinancialForce Production Order screens to allow for the creation of a TimeTracker Project. When a specific Production Order was ready for manufacturing and fabrication, users could simply push a Create Project button on the Production Order. This would create a Project within the TimeTracker that would carry the details of the Warehouse where it would be manufactured and the WorkCenter that needed to work on the job.

Time Capture based on Location

Each Warehouse and Workcenter used the TimeTracker in a Kiosk mode on iPads. The TimeTracker was configured to filter data such that only employees in that Warehouse and WorkCenter would be able to log time into Projects for that location. This was based on the Warehouse and WorkCenter details from the Production Order.

Easy Time Tracking

Employees on the fabrication floors used the TimeTracker's easy-to-use interface on Apple iPads to track their time. Since the employees were tracking time on the TImeTracker Kiosk, they did not need to have Salesforce or FinancialForce licenses. So not only was time tracking easy, it was highly cost-effective too.

Labor Costs Capture on the Production Orders

When the employees completed work on a specific Project, they would mark that Project as Complete on the TimeTracker Kiosk. This would fire up a Salesforce Workflow in the backend that would take the Labor Hours and Cost from the Project and update them on the Labor lines in the Production Order.



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Results

Efficient time tracking for fabrication team

Since the time tracking was so easy to use and was right on the factory floor, CHC was able to get a much more accurate summary of the time spent on each Production Order. In addition, when needed, they were able to get the detailed hours spent on each project by multiple employees.

Detailed time data for analysis

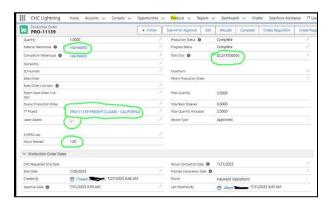
Based on the detailed time tracking data that they now had, CHC was able to roll up the hours spent on fabrication and implementation to each of their manufacturer's representatives. So labor costs on each product line was very accurate and clear.

Accurate billing for Service time

CHC also implemented the TimeTracker Mobile app for their Service Engineers on the field. Service Engineers would be assigned specific Service Sales Orders within FinancialForce. These would be converted to Project Assignments to the Service Engineers, again with just the click of a button. Service Engineers would have a list of all Assigned Projects for the day, listed on the TimeTracker mobile app on their phones. They could easily Check In and Out of each Assignment, which would track the actual time spent on the Assignment. When the Assignment was completed, a back-end Salesforce workflow automatically pushed the time back to the Service Sales Order in FinancialForce. This would then generate invoices to customers based on the time and materials that the Service Engineer had

Tech Components

- Salesforce Sales Cloud
- FinancialForce ERP
- TimeTracker in Salesforce
- TimeTracker Mobile for Service Engineers
- TimeTracker Kiosk for Fabrication team



CHC Production Order with Labor Hours and Costs



Service Engineers Assignments



Users Track Time on Kiosk