

# CASE STUDY:

## CASE DESIGN/REMODELING, INC. CLOSES JOBS FASTER AND REDUCES CYCLES SAVING VALUABLE TIME

**Industry: Construction**

### APPS USED

- Home Repair Work Order (Contracted)
- Home Repair Work Order (Time & Materials)
- Plumbing Work Order

### HIGHLIGHTS

- Project Managers receive Work Orders immediately via email so invoicing or additional work can be scheduled.
- Calculations on costs and mark-up are performed automatically and therefore with greater accuracy.
- Craftspeople do not need to return to the office just to drop off paper work.
- The completed Work Orders are automatically attached to the customer's record in Case's CRM system, MS Dynamics.
- Their customer receives a PDF document customized by Canvas to reflect and match Case's distinct branding.

## BACKGROUND

Case Design/Remodeling ([www.casedesign.com](http://www.casedesign.com)) is a family-owned, award-winning firm based in the Washington, DC metro area. Started in 1961, Case has always been a company of innovation. Whether that is the work it does or the company's process for getting it done, Case has pushed the envelope in improving the results it delivers for its customers.

Case offers a range of services from full additions, kitchens, baths, and handyman services. Case's innovative twist around its handyman business was to launch a separate brand and business called "fred" ([www.schedulefred.com](http://www.schedulefred.com)). This slick, contemporary offer required some slick, contemporary technology.

## BEFORE CANVAS

Multi-part carbonless paper forms don't scream "innovation". They take time to fill out when you're calculating job costs and margins. They are hard to read and easily lost. And they need to be driven back to the office before anything can be done with them. A truck is definitely a slow way to transmit data.

At Case, the craftspeople were supposed to fill out the top section of the paper form **first** and get a signature from the client agreeing to the work. **Then** they were supposed to start the job. After the work they would add in and calculate the materials, labor, travel fees, and mark-up. "Calculations for the mark-up on

materials was left to the craftsman. This led to calculation errors", says Karen Eckert, Sr. Director of Technology for Case.

A credit card number was collected from the customer and written onto the paper form. Another signature was collected. And then it was driven back to the office. "In the past", says Karen, "The paper forms required the craftsman to return to the office before the invoice could be processed."

## SOLUTION

In March 2014, Case addressed this business challenge by turning to Canvas, the global leader in mobile apps for businesses. Thousands of organizations leverage Canvas's mobile app platform to replace cumbersome paper forms with highly customizable mobile forms (We call them apps!) that improve their data collection and productivity.

Businesses can search from over 17,000 mobile app templates in the Canvas Application store that can be completely customized

with the online, drag-and-drop App Builder tool. Using that same tool, many businesses elect to build their own from scratch. Factor in features like Dispatch, Workflow, uploading your price and customer lists, and integration with other systems and Canvas changes the way work gets done.

## SET-UP

Karen built Case's work order using Canvas's powerful App Builder tool herself. Canvas's professional services team then customized the PDF document that the Canvas platform generates to match Fred's paper work order.

Case also leveraged Canvas's professional services team to connect Canvas to Microsoft Dynamics CRM in order to further automate the process.

According to Karen, "Building out the work orders and getting the integration with our CRM system went very smoothly. The team at Canvas was wonderful to work with. They created custom PDFs that look just like our paper form. Canvas was also very responsive to assisting me in building the work orders."

## AFTER CANVAS

Case now has one cool team of craftspeople out in the field each with an iPad mini and their Fred business is more streamlined than ever. Now what does their process look like?

### Craftspeople

- They quickly populate the customer's information at the top of the form by choosing the appropriate job number from a drop-down. The rest of the customer's information is populated automatically using Canvas's Reference Data feature.
- The Reference Data (Their customer list) is updated automatically thanks to the integration with MS Dynamics CRM.
- Then they review the job with the customer and capture their signature *prior* to starting work. They have to because Canvas does not let them advance to the rest of the form until they do!

After the craftspeople complete their work the process looks like this:

- They enter their costs into the form and *mark-up is automatically calculated for them* using Canvas's Calculation functionality.

- They collect the customer's signature agreeing that the work has been completed to their satisfaction.
- Or, if more time needs to be scheduled, the form is updated to indicate that and it is sent off to the Project Manager right away.
- They can collect payment via swiping the customer's credit card with the iPad mini (*Case does not use Canvas's mobile payment solution because they had an existing relationship with their bank for this.*)
- The form is transmitted immediately to the office so next steps can be taken right away.

### Project Managers

- The Project Manager receives an email with the PDF form attached.
- If the job is complete, then the Project Manager can close it out right away in their system. Electronic forms are much easier to read and craftspeople can't skip required fields.
- If the job requires more hours, the Project Manager can schedule that right away to keep things moving.
- The PDF is automatically attached to the customer's record in Microsoft Dynamics CRM.

## IMPACT

A number of things have been dramatically improved for Case since moving this process over to Canvas.

- Customers are happier because jobs requiring additional work are scheduled right away.
- Case's billing is more accurate because pricing and the associated markup is calculated automatically.
- Job close-out happens sooner and faster.
- Cash flow is accelerated. Especially if the customer pays via credit card on the spot.

## RECOMMENDATIONS

Karen's advice for going mobile?

- "Be prepared to train the end users on how to use the device itself."
- "Prepare your end users on how to handle the device in front of customers."
- "Let senior management know there will be bumps in the road and unhappy users in the beginning."

4701 Sangamore Road  
North Plaza 40  
Bethesda, MD 20816  
1-800-566-9373  
scheds@fred.com



Work Order: null  
Invoice Date: 07/23/2015

Client Information	Job Information
<b>Client Name:</b> George Washington	<b>Job Number:</b> 12345
<b>Billing Address:</b> 1600 Pennsylvania Ave	<b>Job Address:</b> 1600 Pennsylvania Ave
Washington, DC 20010	Washington, DC 20010
<b>Phone:</b> 202.555.1212	<b>Job Name:</b> Remodel the Lincoln Bedroom
<b>Project Completed:</b> Yes	<b>Reason Job Incomplete:</b>

Hourly Rates
<p><b>Tiered Carpentry Rates</b>                      \$110 per hour for the first 2 hours                      \$97 per hour beyond 2 hours                      \$130 per hour for Plumbing                      \$39 Tip fee                      Two 2 hour minimum</p>

Description of Work:
<p><b>Estimated Minimum Hours:</b> 40      <b>Estimated Maximum Hours:</b> 50  <b>Start Date:</b> 07/23/2015      <b>Start Time:</b> 03:39 PM  <b>Completion Date:</b> 07/23/2015      <b>End Time:</b> 03:43 PM                      Build and install built-in entertainment center.</p>

<b>Craftsperson Signature:</b>	<i>TJ</i>	
<b>Craftsperson Name:</b> Thomas Jefferson	<b>Craftsperson Signature Date:</b>	07/23/2015
I hereby acknowledge the authorization of the described work on a time and material basis and have read the General Conditions.		
<b>Authorized Signature:</b>	<i>GW</i>	
<b>Authorized Name:</b> George Washington	<b>Authorized Signature Date:</b>	07/23/2015

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**Right to Cancel**  
You, the owner may cancel this transaction at any time prior to midnight of the third business day after the date of transaction. Because of an emergency I waive any right I have to cancel this home solicitation sale.

**Owner Acceptance:**  
*GW*

**Owner Printed Name:** George Washington      **Acceptance Date:** 07/23/2015

Material/Other	Material	Amount
Wood		595.00
Wood Screws		16.92
Sand Paper		13.60
Brackets		84.52
	<b>Sub-Total:</b>	<b>710.44</b>

Labor	Date	Labor	Hours	Rate	Amount
	07/23/2015	Labor	40	110	4400.00
					<b>Sub-Total: 4400.00</b>

Totals and Payment	
Total Material/Other:	710.44
Total Labor:	4400.00
Tip Fee:	39
Deductions:	(0.00)
<b>Total:</b>	<b>5149.44</b>
<b>Payment Type:</b>	Pay Later
<b>Check Number:</b>	
<b>Payment Amount Collected:</b>	0.00
<b>Amount Due:</b>	<b>\$5149.44</b>