Mobile invoicing solution delivers real-time data for franchised company

Established in 1983, Cookie Time's humble origins began when owner, Michael Mayell, started baking cookies out of his one bedroom flat in Christchurch, New Zealand.

Today, the iconic Kiwi company employs more than 75 full-time staff in the Cookie Time factory headquarters in Christchurch. Cookie Time has 45 independent franchisees delivering stock to a range of outlets across New Zealand. Over the busy Christmas period, an additional 30 full-time staff and 70 student contractors are employed to help cope with the extra demand.

The challenge

Cookie Time distributors are scattered across the country and are responsible for many hundreds of retail locations. As a consequence, franchisees are constantly on the move. Previously Cookie Time was using a tedious paper-based system, in which reports and invoices had to be filled out by hand using carbon paper to get the required number of copies. These copies were then posted to both head office and clients.

On receiving the hard copy invoices, head office had to enter the data into its accounts receivable database. This was a slow and arduous task that was prone to data errors.

As distributors are independent business owners, all stock is purchased by the franchisee from Cookie Time. To aid franchisees, Cookie Time's accounts receivable team will collect monies owing by approved clients on a franchisees' behalf. Therefore, Cookie Time accounts receivable must collate both the 'charge' invoices (collected by Cookie Time on behalf of the franchisee) and the 'cash' invoices (those issued and collected by the independent franchisee).

As a result of the overwhelming administration work involved in separating and calculating cash and charge invoices using the old paper-based system, cash invoices were not entered into the database and only the total of the charge invoices was recorded. This meant Cookie Time was only able to analyse sales data by reviewing what stock it had actually sold to franchisees.

In addition, Cookie Time distributors had no convenient way of capturing images of its own stock displays or those of its competitors to share with head office and other distributors.

Cookie Time's systems manager, Chris White explains, "Due to the decentralised structure of the company, we needed a system that would enable franchisees to process invoices on the spot. Using the old system, invoices and product orders used to be completed on carbon paper and were hand written. Once completed, they would get posted back to Cookie Time headquarters. As you can imagine, this was an ineffective process which ultimately delayed our billing process. We had to find a way to invoice clients on the spot during a restock visit and a way to send accurate reports back to head office in a timely and efficient manner."

What Cookie Time needed was a mobile computing solution that would enable its franchisees to stay in contact and report data from across the country.

The solution

After comparing the available mobile computing devices on the market, Cookie Time converted its paper based invoicing system to the SalesLink Mobile, a sales order entry solution that is installed on the Palm® Treo™ 650 smartphone.

Chris says, "We found during our trials of other available devices, that some were unreliable as the hardware couldn't support the application we had sourced. This caused a great deal of frustration. While some devices showed potential, they were not easy-to-use and the set up process was difficult.

"The Treo 650 smartphone however, exceeded all expectations – resolving the issues we had encountered with the other trial devices. The Treo 650 proved to be a durable device with all the features that made inputting and transferring data simple."

According to Chris, one of the most compelling features of the Treo 650 was its keyboard. "The QWERTY keyboard is so easy-to-use and this has helped us produce accurate reports in a fraction of the time, making it perfect for our distributors to use on the road.

"The Treo 650 smartphone exceeded all expectations."

Chris White, systems manager, Cookie Time

"During customer visits distributors can now review stock levels, and prepare invoices while in the shop. When a distributor goes out to their van to unload product, they can send the invoice from the Treo 650 via infrared to the printer in their van. This has enabled us to issue invoices on the spot. Information can then be sent immediately to head office."

The camera on the Treo 650 has also changed the way Cookie Time does business. "Images of in-store product displays can be captured using the Treo 650's digital camera, and shared over Cookie Time's intranet. This gives franchisees the ability to share and inspire each other to create innovative point of sale displays. Information such as new competitor products, innovative displays and new packaging can be visually communicated across the country. This creates a sense of community and integration throughout the Cookie Time team and ensures that any issues are resolved quickly," says Chris.

The outcome

Since implementing the Palm Treo 650 smartphone across the organisation, Cookie Time has been able to significantly reduce the amount of time spent on administration, ordering and invoicing. Capturing all the data electronically has allowed Cookie Time to have a much better view of the market, enabling them to identify other opportunities.

The new system has reduced the number of data discrepancies caused by input and translation errors. Now both the customer and head office receive invoices and stock orders promptly. All of these factors combined allow franchisees to focus more on selling their product and reaching their targets.

Chris concludes, "The Treo 650 smartphone has all the features a Cookie Time franchisee requires to do their job. It has a reliable platform, camera to capture images, phone capabilities to stay in contact and a QWERTY keyboard that makes inputting data easy. What's more Bluetooth enables us to transfer data between different devices such as printers and desktops, and all of this is in one lightweight, compact device."

"Not only is the Treo 650 a crucial component in processing invoicing data, it has become a pivotal tool for capturing images to be shared across the organisation. The comprehensive insight and information that we can now share across the team means that we are always on top of our game."

Enterprise
Cookie Time Ltd

Industry
Food manufacturer

Category
Sales and marketing reporting

Application
SalesLink Mobile

Features
- Easy-to-use interface
- Simplified, synchronised invoice reporting
- Ability to capture images
- QWERTY keyboard
- Bluetooth and infrared
- Access to intranet
- Reliable hardware

Benefits
- A completely mobile, cost-effective, easy-to-use solution
- Reduced paperwork and data entry
- Enhanced internal communications
- Increased sales productivity

Specifications
- Palm Treo 650 Smartphone
- Palm OS® 5.4 running SalesLink Remote
- High speed CDMA data for communications to a Windows Server running SalesLink Server
- Wireless printing to portable printers

There are more than 29,000 Palm OS® based applications solutions – each customised to meet the needs of both individuals and businesses. For more information, please log onto www.palm.com