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INSIDE CONNECTIONS

Software helps service centers enhance internal communications and manage tasks for improved business practices

BY LYNN STANLEY

Service centers need the right software tools to navigate in a fast-paced, rapidly fluctuating climate. Rapid growth coupled with increased restrictions and regulations means managers must be vigilant about overseeing the ins and outs of their business. They also must be able to access information quickly to make decisions in real time.

"Communication is even more important now with so many people working remotely," says Paul Parsons, vice president of sales and marketing for 4GL Solutions. The Stouffville, Ontario-based company writes ERP software tailored to the needs of service centers. Last year, 4GL released Task Manager, a product that covers the breadth of a client's activities and connects managers with personnel from the shop floor to the top floor. Task Manager also supports social distancing by minimizing or eliminating the need for face-to-face interaction

Task Manager's intuitive platform helps users easily identify, prioritize and assign tasks.
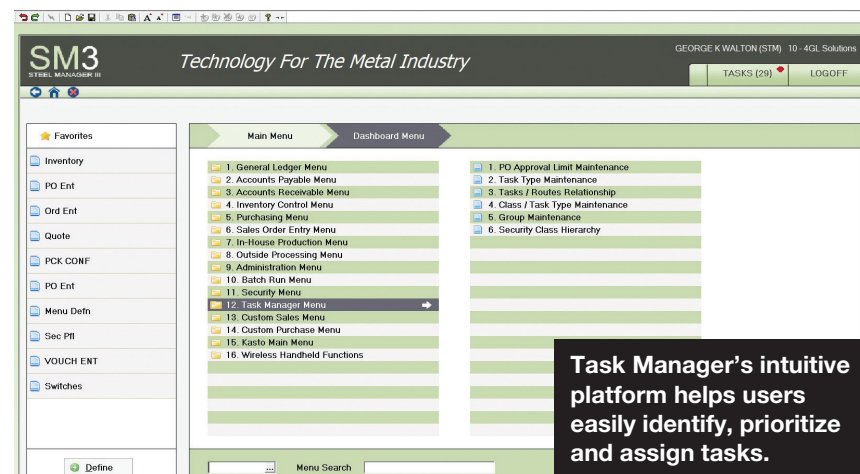
among employees, Parsons adds.

The software developer has built its business on its knowledge of the metals industry but uses input from customers to upgrade and improve its products.

"Service centers wanted an accurate, fool-proof method for accomplishing tasks and not letting anything fall through the cracks," says Parsons. "The response to Task Manager has been really positive,

and we are continuing to add functionality to it."

The user-friendly platform is intuitive. Once managers or associates sign in, they can click on the red icon and instantly see tasks sorted to individual users. Assignments can then be filtered by user, date, type of entry and status.

"With the hectic pace prevalent in service centers, managing multiple projects

or tasks can become a bit chaotic, leading to missed assignments or project delays," says Parsons. "With Task Manager, credit memo/debit memo approval, orders requiring credit approval, material buyout approval, purchasing approvals, pricing approvals and many other activities can be managed and tracked.

"Gone are the days where sales representatives are wandering around the office with orders in their hands looking for a signature," he continues. "Instead, they need to be on their phones or answering emails to do their job. The ability to automate bottom-drawer work frees personnel to pursue critical tasks."

Setting priorities

Projects can be assigned to individuals or groups, or—with the proper authority—transferred to another group member. The software allows team members to prioritize the most critical jobs. Individuals can view their Task Manager screens, but management can also view individuals' screens, allowing for quick action on items that range from credit approvals and document sign-offs, to purchase orders, message tasks, scan-to-invoice and e-commerce order approvals.

Daily tasks are assigned to the appropriate person. Take credit approval, for example. An order created for a customer that is flagged by credit for whatever reason will populate a credit manager's Task Manager dashboard for approval or de-

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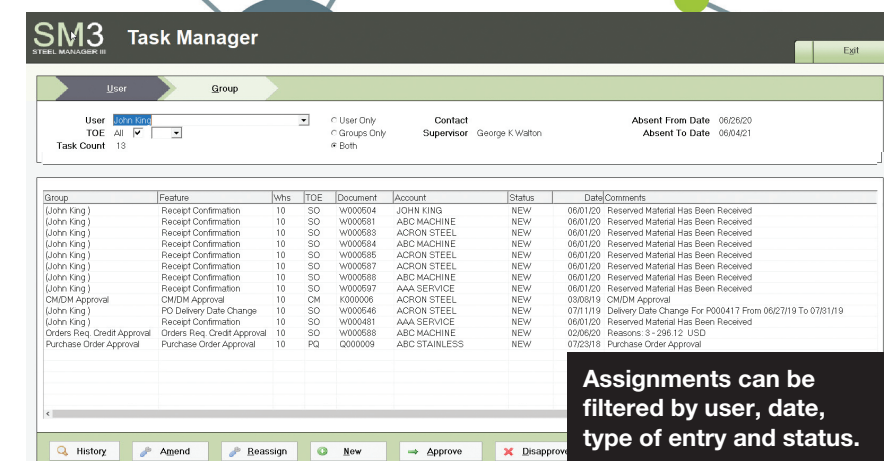
"COMMUNICATION IS EVEN MORE IMPORTANT WITH SO MANY PEOPLE WORKING REMOTELY."

PAUL PARSONS, 4GL SOLUTIONS

nial. All tasks are stamped at the time of creation.

For purchase order approval, companies can establish maximum purchase order values, e.g., Salespersons = $5,000, Sales Managers = $25,000. Any purchase orders outside those limits will automatically populate the purchasing manager's Task Dashboard for approval. High-value purchase orders can also stipulate approval by two or more managers.

Minimum and maximum gross profit margins can be established for any product or group of products. If an order is generated that falls outside these parameters, it will automatically populate a sales manager's Task Dashboard for approval.

The Task Manager also offers the mod-

ern version of the sticky note. Personnel can simply populate their Task Manager to ensure that no tasks are overlooked.

The software has been designed with an open client architecture so that a service center has the ability to connect to its ERP software at any time and from any location. The design gives clients and their customers the flexibility to connect via internet to an ERP application from any device. With a secure Open Client connection, individuals who are traveling are able to access the ERP software and run inquiries or reports.

Combining an open client solution with a task management system ensures efficient and timely handling of all tasks and results in a more detail-oriented, productive workforce. Quick, accurate and effective internal communication is key if service centers wish to provide the high level of customer service that's required in a competitive market. ■

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