



“Integrating the mobility tools with Accredo has added another dimension. It streamlines our business processes and lets everyone contribute to the success of the business.”

The team at Foleys (Sophie Koks, Bruce Muldrew and Sarah Alcock)

Two systems working as one provide contractor with powerful business management system

A software integration that seamlessly links back office functions with technicians in the field is giving trade services contractor, Foleys, a single source of truth and helping it accelerate growth on the back of a positive South Island construction environment.

The firm is a long-time user of Accredo’s accounting software and in 2015 it was one of the first companies to implement Tradie on the Move – a mobile job scheduling application specifically designed to integrate with Accredo. Working in harmony the two systems are saving Foleys administration time, improving data accuracy and giving field workers better visibility of their key performance indicators.

Operating since 1934, Foleys is a multi-discipline business, providing plumbing, electrical, mechanical, gas fitting and drainage services across the domestic, commercial and construction sectors. It has grown rapidly on the back of the Christchurch rebuild and now has nine locations around the South Island.

The team at Foleys says Accredo is a great system for a growing business. “When you add locations and venture into new business areas, you need software that can accommodate new processes – both on the financial and operational sides of the business.”

Working hand in glove

Unhappy with the hand-off of information between Accredo and its original job management software, Foleys decided to replace the latter with [Tradie on the Move](#) – an application developed by Hadley Trounson and his team in Christchurch to ‘play nicely’ with Accredo.

“A business such as Foleys lives and dies on getting one job done and moving to the next one as quickly and efficiently as possible,” says Trounson. “Job scheduling plays a very important part in that. Tradie on the Move enables a business to create run-sheets for staff and track job progress in real time. The scheduler is automatically updated when new jobs are added to Accredo so that dispatch staff can delegate work as it is reported. Each day the field technicians open their iPads in the morning and can see everything they need to do for the day.”

Tradie on the Move provides real-time data feeds to and from Accredo and allows technicians to execute a range of key activities. “Tradie is essentially a user operator interface for our team in the field,” says Foleys. “It enforces key tasks, such as completing health and safety questionnaires at each job, and sends that information straight back to the office and into Accredo. It allows them to add time and materials against each job and lets them create

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purchase orders on the move, making them instantly available to the customer."

The benefits are obvious, says Foleys. "Filling out that information on the spot, means it is much more accurate than handing it to someone to key into the system back in the office. It cuts down errors and saves time, and allows our office staff to concentrate on higher value tasks. Data capture is real time as possible, which means Accredo is kept up to date."

Having one source of truth is extremely important, says Foleys. "We used to have tremendous frustrations around pulling information out of our old job scheduling system and placing it into the Accredo P&L. It was a time-consuming translation exercise and we kept finding things that were not reconciling, which meant we never



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Hadley Trounson, Tradie on the Move

entirely trusted what we were seeing."

But now that information flows between Tradie on the Move and Accredo, Foleys says reporting and budgeting exercises have become easier to conduct.

The thing Foleys likes most about Accredo is the ability to tailor the software relatively quickly. "We have great support from our business advisor, Donna Ruwhiu at BB&S. She customises the reports we need and can create links between the modules that streamline our day-to-day activities."

Just the job

Foleys is using Accredo's Job Costing module to great effect. "We can convert a job from a quote into a 'live' job within Job Costing without having to load any external budgets or information. Budgets can be assigned based on work we have done previously on similar jobs.

"We have also created a way to make budget information on each job available in the field. The technicians can see how many hours have been allocated to do a job and can see how their time and materials are tracking. If they can see and understand their targets, it not only gives them more responsibility, but gives them more incentive to reach them."

Tailored compliance tracking

On the commercial side of the business, Foleys says Accredo cuts down time spent allocating costs. "It's really handy the way you can print and export to Excel quickly. We run each branch and department as profit centres, so it's quite a long and complex P&L. Each manager is responsible for their area and because we can track each part of the business separately they know exactly how they are performing."

Accredo automatically enforces the requirements of the Construction Contracts Act. "From a payments point of view that makes things a lot easier," says the Foleys team. "We have it set up to conform exactly to the Act, so we know all the retentions and payments we assign are completely compliant."

Smarter invoicing and information capture

In Accredo, all the information required for invoicing is available on one screen which has simplified the billing process. "All the material purchase orders, labour and notes are instantly visible. Similarly, the job booking form has been customised to ensure each job is entered into the system correctly – eliminating any oversights.

"Accredo controls workflows and ensures they are followed correctly, no matter who does them. It locks down the process, so you can't move to the next stage unless you have filled out the fields correctly," Foleys says.

Foleys uses Accredo to capture granular business information. "With all our different locations and departments that type of information is important. We need to know what type of jobs we are doing – domestic versus contract for instance – so we know how our business is performing. Donna is great at designing reports that extract the information we need to make informed decisions about the business."

Foleys says Accredo's most significant feature is the way it handles work in progress. When the team sends out a progress invoice for a job and then subsequently receives some more costs, they stay unpicked and go into a WIP report where they can be accrued as income.

"It really helps to give us a more accurate snapshot at the end of the month. It means we can accrue WIP accurately, so there are no gaps in profits and losses month to month."

Satisfaction that drives success

Everyone in Foleys who uses Accredo and Tradie on the Move rates both systems highly. "The fact that we have been using Accredo for such a long time speaks to how satisfied we are with its performance. Integrating the mobility tools has added another dimension – it streamlines our business processes and gives everyone the opportunity to contribute to the success of the business."