SamTrak™

Challenge: To continue growing, ACRI needed an efficient, reliable means of tracking property work orders.

Solution: SamTrak II, the work order tracking software designed by Achievement Technologies LLC.

Results: Reliable handling of work orders means that ACRI can better manage their properties and ensure owner satisfaction. SamTrak II also gives ACRI the capability to handle more properties more efficiently.

ACRI Case Study

Background

ACRI, established in 1993, is a property management company that contracts with third-party vendors, such as maintenance workers, roofers, plumbers, and landscapers, to maintain properties. ACRI serves condominium boards, cooperatives, and homeowner associations by fulfilling maintenance requests for every unit. With more than 50 clients in western Pennsylvania, ACRI manages approximately 4,800 units.

Challenge

Previously, ACRI employees tracked and managed property work orders by hand using an outdated paper-based filing system. When a work order was called in, an employee would write the property owner a description of the problem, and the vendor to contact on a piece of paper.

"By managing work orders by hand, it became difficult to know which work orders were outstanding, and which were completed," said Rinaldo Acri, president of ACRI. "We couldn't track orders until an invoice for completed work arrived from our vendors. We then compared these invoices to our hand-written lists. We were always concerned whether all work orders were being completed."

To create status reports for its clients, ACRI staff members would then enter work order status by hand into spreadsheets. This took hours, and re-entering the data increased the likelihood of errors.

"Our clients were concerned about our ability to track work orders effectively," explained Acri. "We wanted a solution that would tell us which work orders were completed, which needed to be filled, and the dates that orders were started and completed."

Solution and Benefits

After evaluating what the staff needed, and after looking at several property maintenance solutions, ACRI decided that SamTrak™ II from Achievement Technologies LLC, met all of its needs. SamTrak II provides work order tracking and management with its easy-to-use and intuitive interface. Moreover, SamTrak II was designed to integrate with SKYLINE, ACRI's property management system, so staff members benefit from a shared database and a one-time entry of data. Shared data includes facility, unit, and occupant files; accounts payable and accounts receivable; vendor management; purchase orders and receivers; and job cost budgets, change orders, and cost transactions.

When a call for a new work order comes, staff members can easily create a new work order in SamTrak II. Staff can then track and manage that work order, assign a vendor to

the work order, and check it off when it's completed.

SamTrak II offers ACRI these important benefits:

- **Seamless Integration** – SamTrak II enables ACRI to access the data already entered into SKYLINE, their property management software system. One time entry of tenant and property information is a great time saver for the staff.

- **Customization** – ACRI wanted a solution that could adapt itself to the way staff members worked, not the other way around. SamTrak II enables staff members to customize fields using familiar terminology, thus reducing the potential for errors.

- **Reporting** – ACRI wanted to generate reports so its clients could monitor the progress of maintenance work orders for their properties. SamTrak II offers a flexible reporting interface that can be integrated with sophisticated reporting packages, such as Crystal Reports. With Crystal Reports, ACRI can generate reports that list not only unit numbers, but unit owner names, the date a work order was opened, the date it was completed, and other information requested by their clients.

- **Growth** – On average, ACRI adds five new properties to its client roster every year. As ACRI manages more properties, SamTrak II will grow with the company.

- **Cost-Effectiveness** – SamTrak II is affordable and its interface is intuitive and simple to use. The SamTrak representative trained ACRI's staff how to use the software. Thus, ACRI staff members don't waste hours trying to figure out the new system.

Since implementing SamTrak II, ACRI now tracks and manages work orders more efficiently than before. With just a few mouse clicks, ACRI staff members can easily access work order status, sort them by properties, vendors, or units, and then quickly generate a report for clients. Staff members no longer have to track orders by hand or re-enter data into a spreadsheet. They know at any given time which work orders are outstanding.

An unexpected benefit is ACRI's improved relationships with their vendors. "Thanks to SamTrak II, we've also been able to form better relationships with our vendors," says Acri. "Most of our vendors do not have the capabilities to automatically track work orders across multiple properties. They rely on their notepad. With SamTrak II, we can print a report of all outstanding work orders by each vendor. With the printed report, our vendors can organize their days more effectively and complete more work orders. SamTrak II not only helps us manage our business more efficiently, but we can manage our vendors' businesses as well."

Finally, with SamTrak II, ACRI is poised to meet the maintenance needs of its growing client roster. Typically ACRI adds five new properties to its client list each year; in the past, these acquisitions sometimes meant that the company needed to find additional vendors to maintain the new properties. This year, however, will be different. "SamTrak II keeps us so well-organized that our current vendors will easily be able to fulfill maintenance requests for our new properties," says Acri.