SUPPLY CHAIN MANAGEMENT

VISIBILITY, PERFORMANCE TRACKING & AUTOMATION DESIGNED TO EMPOWER BUSINESSES

ROOK
CONNECT

BUSINESS OPTIMIZATION SOFTWARE

Software, CRM, ERP & BI
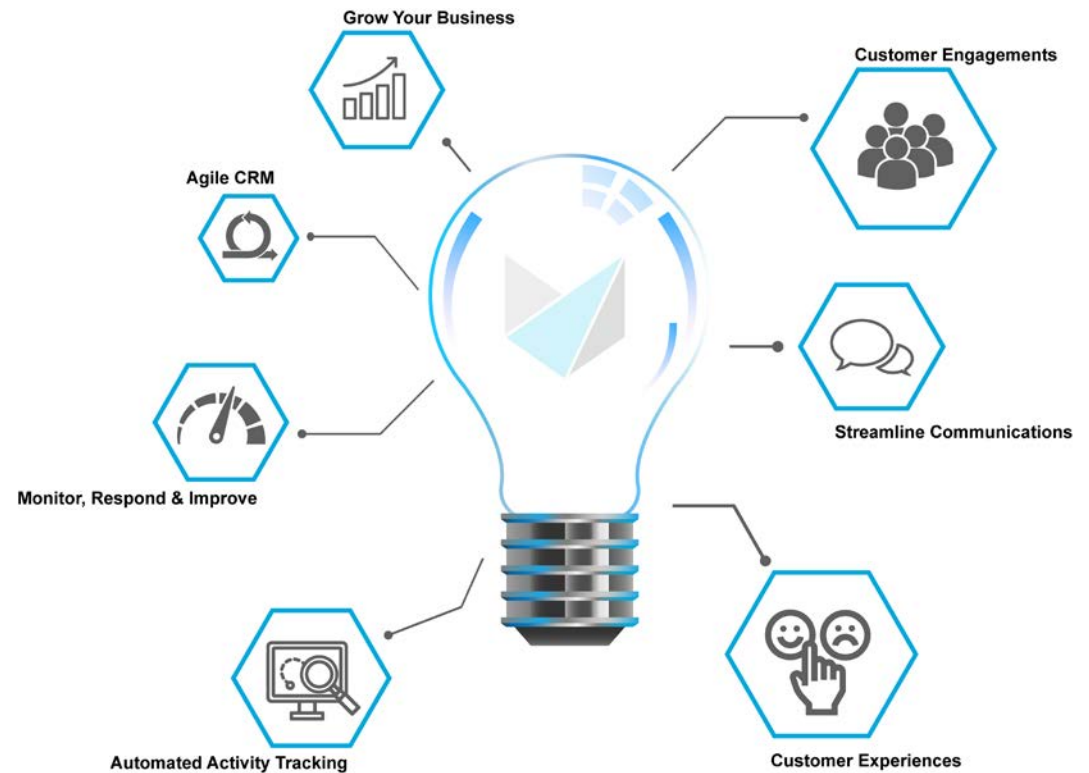
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Customer Orders: Manage Your Customers Your Way!

Businesses looking to execute customer orders with precision must be empowered with the right tools to do so. ROOK Connect includes comprehensive planning, organization, tracking and reporting functions that ensure your business has the visibility needed to make fact-based decisions.

With a complete customer order management platform built directly into it, ROOK Connect ensures that all promises, deliverables and action item reporting is available to businesses in real-time. Through instant access to customer details and account management reporting, our award-winning estimating and quoting tools make managing tender and customer requests simpler than ever.

Empower your team with the strategic cost planning solutions needed to project, budget and report every step of the way.

- Grow Your Business
- Customer Engagements
- Agile CRM
- Streamline Communications
- Monitor, Respond & Improve
- Automated Activity Tracking
- Customer Experiences

Planning: Timing is Everything!

Managing customer deliverables, time frames, scheduling and product/material expectations is essential to increasing overall asset management. Maximizing timeframes and proper order planning is important for all businesses looking to increase overall returns. With a complete purchase order, RMA and automated time frame planning system built into it, ROOK Connect empowers businesses with multi-location shipping, variant pricing and warehousing capabilities that will ensure proper inventory and WIP product/material assignment.

Properly managed products/materials ensure businesses can manage timelines, order processes and arrival dates. Save time, money and resources with automated supplier follow ups, shipping, tracking and tracing and distributor overviews. With automated tracking and monitoring capabilities, your business will gain the real-time visibility needed to adapt, evolve and continue to grow.

Key Features

- Automated Planning
- Auto Scheduling
- Adjustment Visibility & Projections
- Charting With Drag & Drop Operations
- Purchase Order Management
- Time Frame Reporting
- RMA Management
- PO Checksheets
- WIP Customer Orders
- Project/Job Management
- Work Benches
- Inventory Management
- Warehousing
- Variant Pricing
- Workbooks
- Cost Structuring
- Vendor Customer Management

Procurement

Simplifying The Purchasing Process

Procurement is an integral part of every business. Vendor pricing list comparison, individual product pricing and cost analysis is key to ensuring your business is as efficient as possible. With the ability to automatically upload vendor price lists, the software will learn your purchasing practices, provide recommendations and help you to continue to focus on the bottom line. ROOK Connect ensures all costs are properly tracked and that your margins are not only being monitored; but being tracked and reported against.

Implementing Work In Progress Framework

With a complete WIP management system, ROOK Connect ensures you have the tools needed to properly account for all products/materials. With a variety of cost and pricing tracking mechanisms, our WIP programs allow you to track and monitor specifics while automating reporting and data visualization tools. With built-in dispatch, logistics and RMA (returned merchandise authorization) features, ROOK Connect provides you with the information needed to track and manage your bottom line.

Vendor/Supplier Relationship Management

Vendors and suppliers are a vital part of every business. If you are able to cultivate a good relationship with your vendors, it's mutually beneficial for both sides, and they will usually go that extra mile to help you out when required. Having a software that tracks, monitors and keeps your vendors accountable for all orders helps build that relationship. By tracking your purchase history, the software will provide you with pricing history, drastic price changes and price differences between vendors. With this information at your fingertips, you are able to work with different suppliers that may be able to ship faster or provide you with better pricing. This gives you the tools and information needed to renegotiate contracts with the upper hand.

Manufacturing & Assembly

Workbench/Station Tracking

While every business is looking for a leg up on their competition, never before has there been a software that tracks how effective each workbench is. By tracking and comparing each workbench and how efficient each worker is at each station, you will be able track and learn how to improve. With detailed, essential information at your fingertips, you will know the exact costs and timeline on all products.

Quality Assurance Management

With businesses trying to be more efficient, it's easy to overlook how the product was made in order to get it out the door as quickly as possible. ROOK Connect keeps everyone accountable by tracking and including redundancies, ensuring the product going out the door has passed every level, and the personnel that signed off at each station are held accountable. By including a physical signoff at each station, personnel tend to put more pride in their work knowing their name is on that portion of the final product.

Warehousing & Inventory Management

Key Features

- **Complete Inventory Management**
- **Multi-Warehouse Applications**
- **Costing Structures**
- **Inventory & WIP**
- **Digital Counts**
- **First In, First Out**
- **Receiving Dashboards**
- **Material Management**
- **Waste Tracking**
- **Manifests**
- **Bill Of Ladings**
- **Truck Exports & Loading**
- **Pick Lists**
- **Real-Time Reporting**
- **Instant Search**
- **Purchase History**
- **Sales History**
- **Vendor/Supplier Comparisons**

Reduce Costs & Increase Business Efficiency

With ROOK Connect turnkey inventory management, your business can manage inventory the way you need it. Whether your business has multiple warehouses, is trying to reduce inventory and move to a WIP model or simply has a variety of costing and price points and needs support with organization, ROOK Connect provides the optimal next steps.

With location mapping and visibility on all activity, there's no doubt that from purchasing to receiving to shipping, ROOK Connect has you covered.

Distribution, Commercial & Retail

Real Information When You Need It!

Through intricate real-time tracking and reporting, ROOK Connect ensures the right products are shipped to the correct location with ease. With every process designed to streamline operations, our software ensures your business is as efficient as possible.

Our cloud-based software provides your customers with the ability to login to your software, create an order (where they will see what the pricing is and what products are available) and receive an estimated time of arrival based on the delivery method selected.

Key Features

- **Easy Fact Finding**
- **Customer Progress Tracking**
- **Order Progress**
- **Real-Time Alerts**
- **Real-Time Delivery Tracking**
- **Cost Analytics**
- **Inventory Management**
- **Customer Order Breakdowns**
- **Complete Process Visibility**

Product Development

Quality Management

Purchasing

Sourcing & Procurement

Supplier Relationships

Logistics & Operations

Inventory Control

Logistics

Organization Optimized

Our intuitive method for tracking, organizing and shipping allows your business to stay ahead of the game. By implementing digital manifests, bill of ladings and customer order planning, your business has a smart tracking system that will ensure your products are picked, packaged and loaded in the most efficient way possible.

If the software notices any possible conflicts, it will flag the issues and make a suggestion to accommodate your requirements. Simply provide the system with the parameters you require, and the software will make suggestions to help you get what you need, when you need it to get there.

Key Features

- **Route Optimization**
- **Manifests**
- **Smart Packing Solution**
- **Adaptable Accounting**
- **Product/Order Tracking**

- **Inventory Management**
- **Priority Management**
- **Bill of Lading**
- **Customer Order Planning**

Dispatch

Organization, Planning & Scheduling Is Crucial

In order to provide your customers with products in the most timely manner possible, ROOK Connect utilizes a route optimizer that takes traffic, congestion and accidents into consideration, and changes the delivery vehicle routing in order to get products where they need to go as efficiently as possible.

Adapt & Adjust

It's inevitable that at some point a new pickup is going to be added to the day. ROOK Connect makes handling this easy. Simply drop a pin on the map where the new pickup is required and the optimizer built into the software will analyze the time requirements of promised deliveries and current routing of all delivery vehicles and add the pickup to a delivery vehicle in the area that will not affect delivery times. If for any reason you don't agree with the vehicle or route the software has chosen, you have the ability to add a new pickup to a specific delivery vehicle or change the route to be more in line with where you would like it to go.

Complete Customer Visibility

We live in an era where everyone is looking for as much information and visibility as possible. Through our customer command center, customers are able to see where their orders are, when they should expect to receive them and if there is a delay, as well as what that delay was, providing peace of mind.

Key Features

- Scheduling & Routing
- Delivery Optimization
- Real-Time Visibility
- Communication
- Add Pickup Points with Ease
- Add Dropoff Points with Ease
- Intuitive User Interface
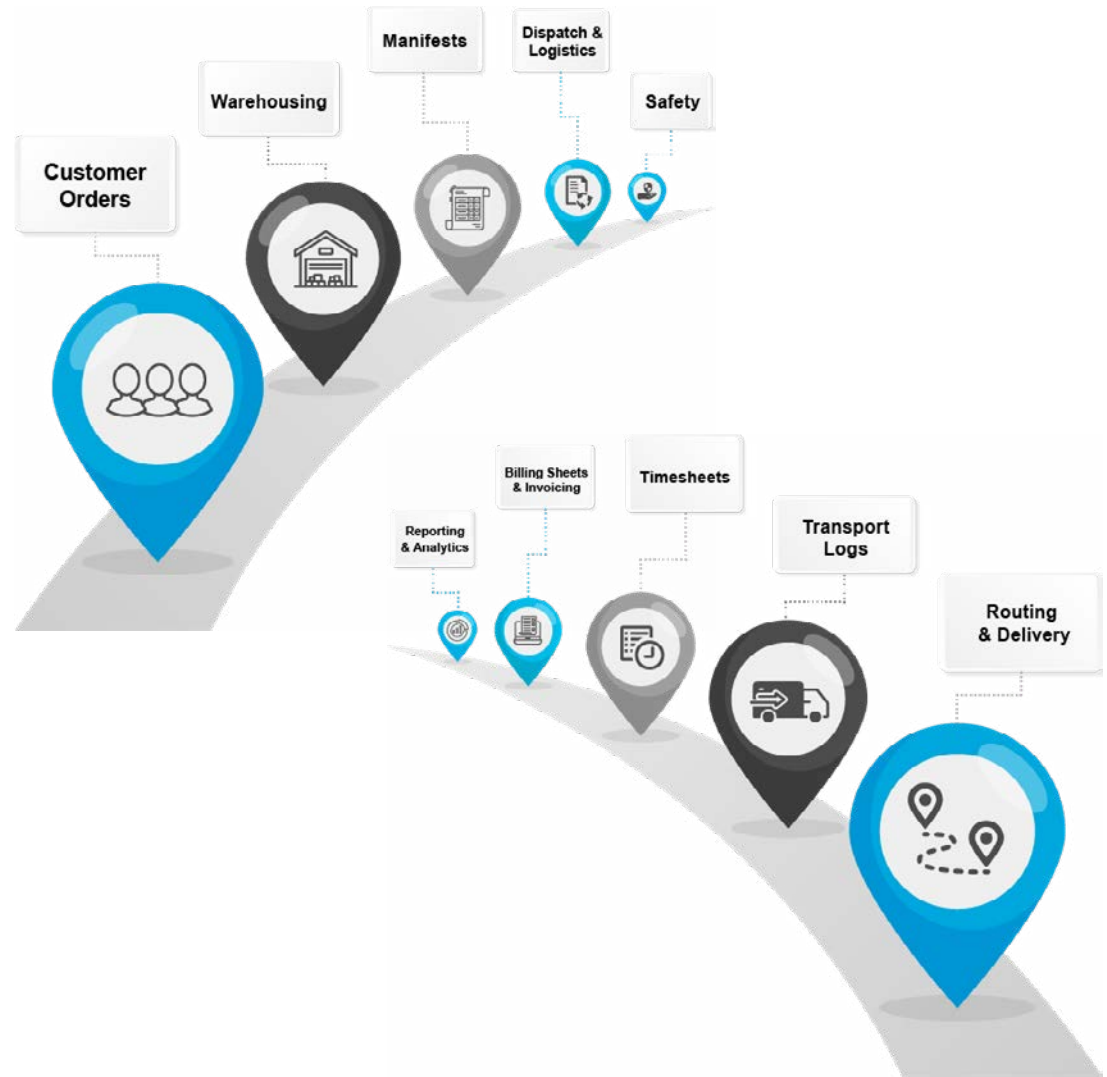- Increased Productivity
- Lower Operating Cost

Delivery

With the ability to see the exact location of each delivery vehicle on the road, you have complete visibility. This helps delivery companies track and manage their vehicles on the road by knowing if each vehicle is speeding, stopped for an excessive amount of time, cornering, accelerating or stopping too aggressively. The software monitors and tracks each driver's habits, and provides a scorecard for each person's driving habits.

Real-Time Reporting

This tracking system will also provide customers with the ability to physically watch their order traveling towards them with an estimated delivery time. No longer will you need to sit at home between the hours of 8am - 4pm waiting for something to be delivered. By utilizing today's technology, ROOK Connect is able to provide peace of mind for your customers.
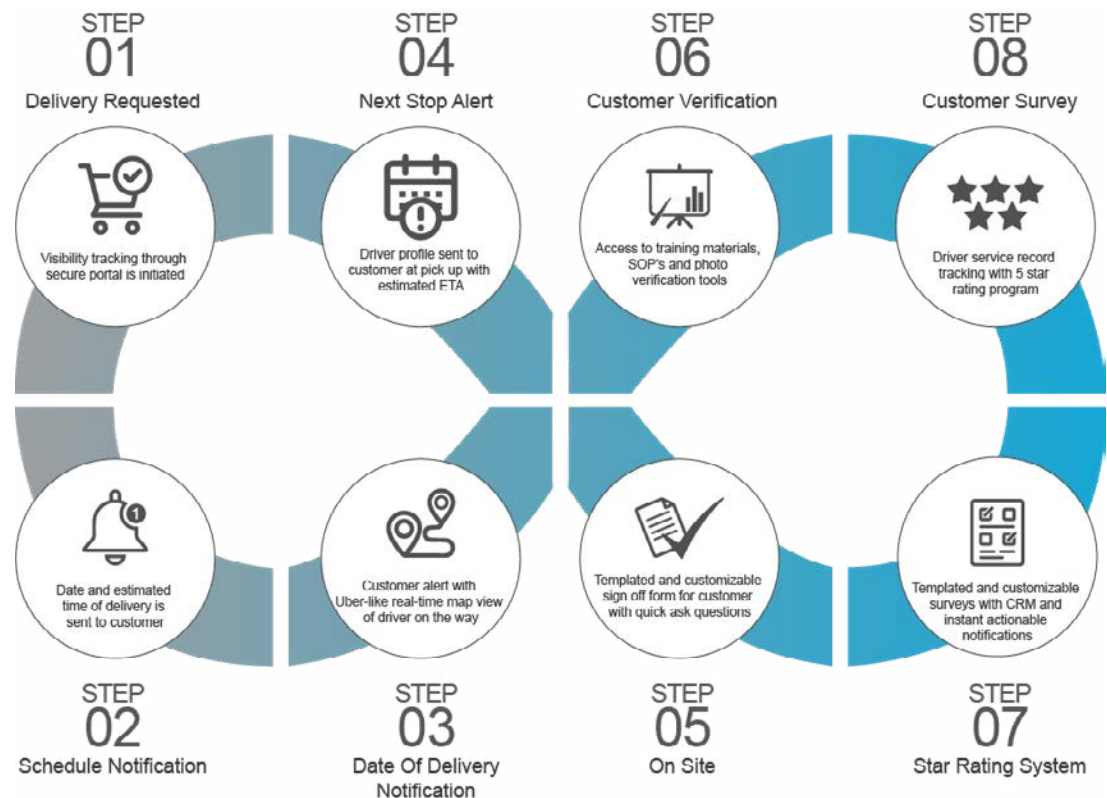
Quality Control

Delivery Confirmation

Delivery confirmation is a requirement when delivering products to a customer, especially if the consumer is not available. If personnel from the delivery company take the time to capture a picture of the product being delivered to the customer, they are not only protecting themselves with proof of delivery; but they are showing the customer when and where the product was delivered and where it's located, if placed outside the residence or business.

While a picture provides a thousand words, there is no better confirmation of delivery then an in-person confirmation of delivery and a signature. By having the customer state that the product was delivered without any issues and physically sign off on the delivery, liability is completely removed from the delivery company. If your business is the delivery provider for another business, this step is key to protecting your business.

Customer Experiences That Makes A Difference

STEP 01 — Delivery Requested — Visibility tracking through secure portal is initiated

STEP 04 — Next Stop Alert — Driver profile sent to customer at pick up with estimated ETA

STEP 06 — Customer Verification — Access to training materials, SOP's and photo verification tools

STEP 08 — Customer Survey — Driver service record tracking with 5 star rating program

STEP 02 — Schedule Notification — Date and estimated time of delivery is sent to customer

STEP 03 — Date Of Delivery Notification — Customer alert with Uber-like real-time map view of driver on the way

STEP 05 — On Site — Templated and customizable sign off form for customer with quick ask questions

STEP 07 — Star Rating System — Templated and customizable surveys with CRM and instant actionable notifications
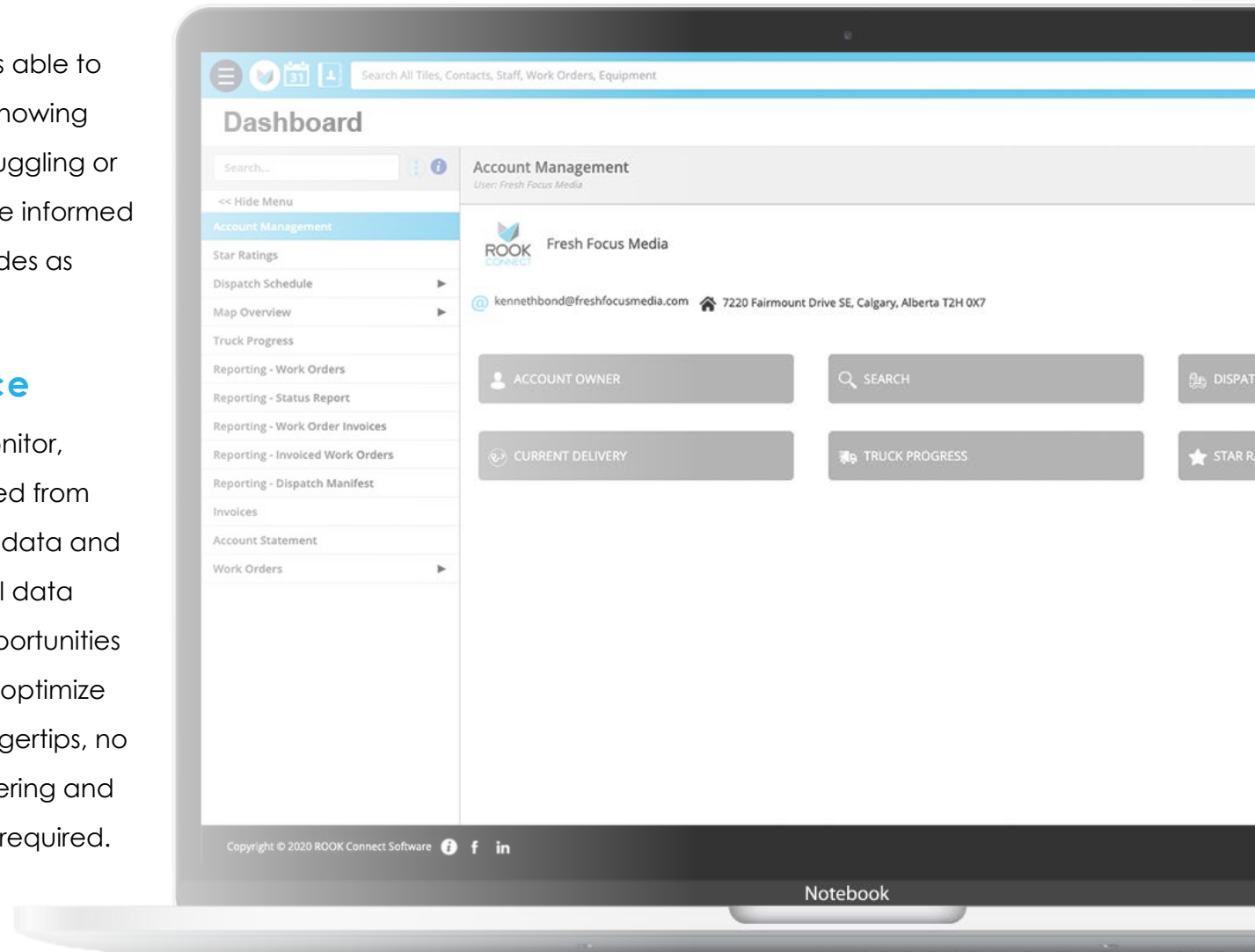
Reporting & Analytics

With real-time information, your business is able to stay one step ahead of competitors. By knowing where each division of your business is struggling or thriving, you have the knowledge to make informed decisions. ROOK Connect analytics provides as much or as little information as you want.
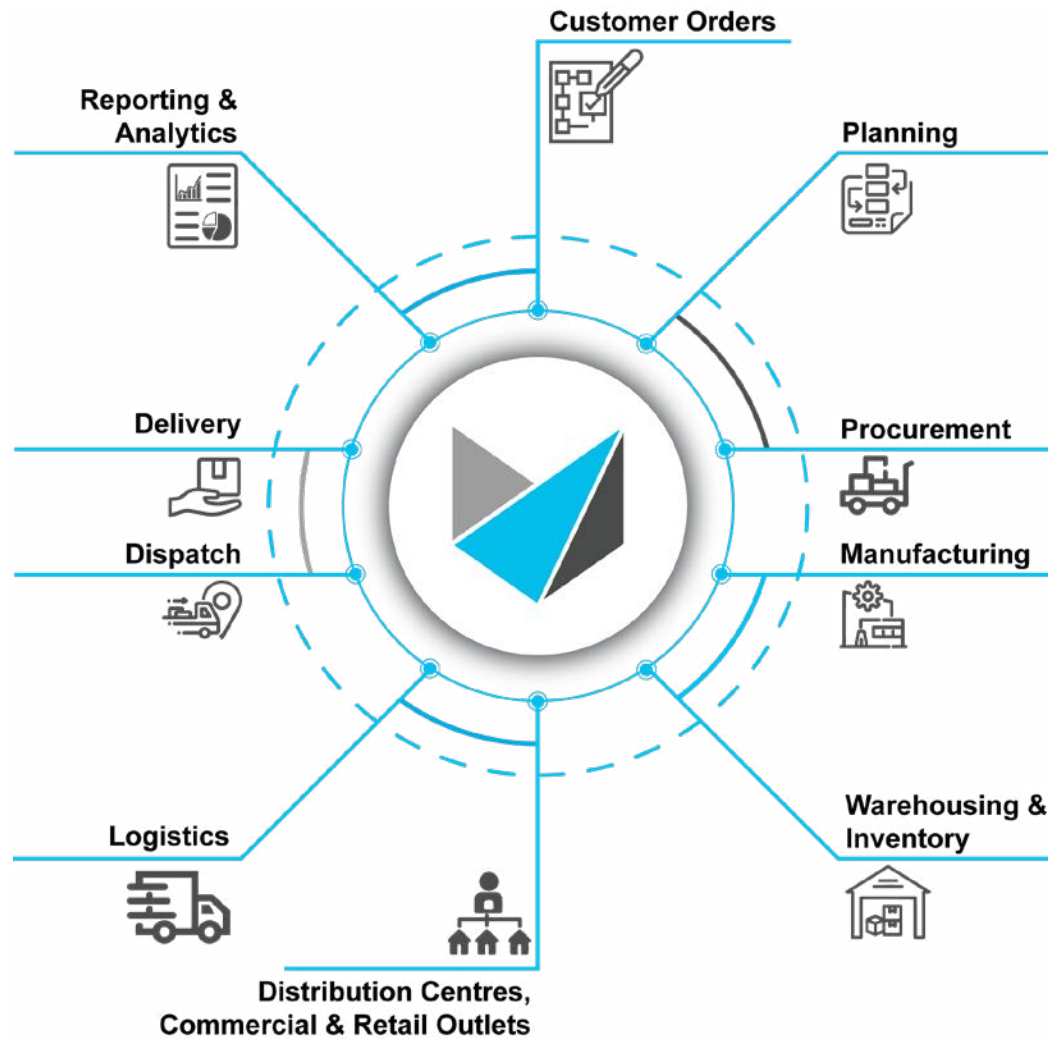
Powerful Business Intelligence

ROOK Connect provides the ability to monitor, track and compile all information gathered from your business, bridging the gap between data and decision making. Gathering your essential data helps maximize revenues and identify opportunities where you can increase efficiencies and optimize returns. By bringing information to your fingertips, no longer will you need to spend hours gathering and analyzing data to locate the information required.

Save Money & Streamline Processes

Customer Orders

Planning

Reporting & Analytics

Procurement

Delivery

Manufacturing

Dispatch

Logistics

Warehousing & Inventory

Distribution Centres, Commercial & Retail Outlets

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