

ITE TOOLBOX DISCOVERY SESSION 006

Bring installation and field service out of spreadsheets — and into the order

The install is the last mile of every order — yet it usually runs on spreadsheets, texts, and a whiteboard, disconnected from the system that built the cabinets and invisible to anyone tracking margin.

When field measures, installs, punchlists, and service trips live outside your order, dates slip against the builder's closing, the wrong crew shows up for the wrong job, and the cost of all those return trips never gets counted. Join us for a live session to see how running installation and field service as service orders — tied directly to the original sales order — keeps the whole last mile on schedule, in the right hands, and finally visible.

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Who should attend?

This session is designed for manufacturers whose tech stack includes Cyncly's Insight, and who are asking questions like:

- ? What if every field measure, install, and punch lived on the same order that built the cabinets?
- ? How do we make sure the right crew with the right skills shows up for every install?
- ? Do we actually know which builders and projects are eating our install margin?



What we'll explore together

One Order, Every Field Activity

The install shouldn't live in a separate world from the order. We'll explore how Insight ties every field activity — initial and final field measures, the install, quality walks, punchlists, and repair/replace trips — back to the original sales order as service orders, jobs, and tasks. Templates pre-build the standard set for each scenario, whether it's a standard install, a rush, or a custom line, so nothing gets forgotten and everything traces to one job and address.

Skill-Based Dispatch & Scheduling

Trade the Excel schedule for a live board. We'll show how field supervisors, service techs, and 1099 contractors become resources with defined skills, and how each job carries skill requirements — so a high-touch custom install can only land on a crew that can handle it. Drag work onto a calendar, spot double-bookings, and filter by type, date, skill, resource, or region to plan the day.

Hit the Date, Protect the Margin

Installation runs on two dates: the install date the builder gives you and the closing date that drives final punch. We'll explore how scheduling backward and forward from those anchors keeps measures, install, and punch aligned — and because every field trip is captured against the order, you can finally see where service costs pile up. Track trips and rework by builder and project, and surface the install margin that's quietly leaking today.



About our Operational Excellence Lab

We've designed the Operational Excellence Lab as a collaborative, hands-on space to explore the Art of the Possible in your business transformation together.

In the lab, we:

- Explore end-to-end automation — from order to cash
- Run hands-on workshops grounded in real operational scenarios
- Collaborate with partners like Cyncl, imos AG, machine manufacturers, and universities to push industry innovation

OUR PARTNERS:

