



RubiCube

Automating Creation of ACH Reports by POS Systems



A Case Study by
CI Global and RubiCube

Executive Summary

In the franchise business, Royalty/ACH reports are essential to ensure smooth financial operations. However, manually generating ACH reports can be challenging and tedious, especially when there are a large number of stores. Each store's POS system records sales transactions and generates reports, while a mandatory weekly ACH report is essential for franchise royalty compliance.

In this case study, we will show you how CI Global used RubiCube and helped a Quick Service Restaurant (QSR) automate the creation of ACH reports by integrating a cloud-based POS system. We will also highlight the solution's benefits, the challenges it addressed, and how it improved the ACH report submission process's efficiency, accuracy, and compliance.

Goals



Automate the creation of ACH reports to reduce manual effort and improve efficiency.



Ensure the accuracy and consistency of ACH reports, franchise royalty compliance.



Enhance visibility into franchise business performance through detailed reporting.

Challenges



Downloading the sales report from the POS system:

The customer faced the tedious task of manually downloading sales reports from the POS systems of 20+ stores, while also ensuring the secure storage and organization of these reports.



Applying the franchise cost formula to each sales report:

Calculating the franchise cost formula involved manually entering each store's sales data and percentage values, which was prone to errors and inconsistencies.



Consolidating the ACH report for all 23 stores:

Consolidating ACH reports for 23 stores was a time-consuming and resource-intensive task, requiring manual calculations and formatting.

Solution

CI Global implemented a transformative solution by integrating Linga POS, a cloud-based Point of Sale system with RubiCube, to automate ACH report generation for the client. Linga POS is a comprehensive POS system that provides features such as inventory management, loyalty programs, online ordering, and analytics. Microsoft Fabric's Data Lakehouse, a platform combining the best of data warehouses and data lakes was used to provide reliable and scalable data storage and processing

Implementation

The devised solution capitalized on the synergies of Linga POS and RubiCube to automate ACH report generation. The solution involved the following steps:

- A customized ACH report template was crafted in RubiCube, encompassing the franchise cost formula and parameters specific to each store as set by the corporate office.
- RubiCube was empowered to automatically calculate the ACH report for each store based on sales data. The aggregation of these royalty reports for all 20+ stores was seamlessly handled by integrating multiple POS systems.



Results and Benefits

The solution provided by CI Global resulted in several benefits for the client, such as:



Time and effort saving:

The solution automated sales report processing, cutting generation time for ACH reports from three days to minutes. This efficiency boost saved nearly a week of resources each month, increasing profits.



Increased accuracy:

The solution ensured accurate ACH reports by reducing manual errors and verifying consistency with sales data and franchise cost formulas. This improved the reliability and credibility of the royalty report.



Meeting standards and visibility:

The report fulfilled the statutory obligations that required the client to pay a certain percentage of their sales to the corporate office as franchise fees. It also gave the client a clear and detailed store-wise insight into sales, revenue, and profitability.

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The solution reduced the manual effort, increased the accuracy, enhanced the visibility, and improved the compliance of the franchise payments. The client was satisfied with the solution and appreciated the value of the royalty reports delivered. CI Global's expertise and professionalism are evident in this case study. If you want to learn more about our services or how we can help you achieve your goals for your Quick Service Restaurant (QSR) or retail hubs, visit our website and get in touch with us today.

About CI Global

Since 1998, CI Global has been empowering businesses by providing comprehensive technology solutions, including ERP systems, product development, cloud transformation, and mobile app development. Our experienced team is dedicated to driving innovation, ensuring smooth transitions, and delivering projects on time. Whether you're modernizing your infrastructure or developing new software, we help you stay ahead in a rapidly evolving tech landscape.

25+ years of software product engineering | **1500+** product releases | **350+** customers across the world

About RubiCube

RubiCube is a versatile data analytics platform that seamlessly integrates with your existing systems like CRM, POS, and ERP, providing real-time insights and automating processes to resolve business complexities. With RubiCube, businesses can enhance decision-making, predict trends, and drive growth across industries.

