

Operational Excellence in Healthcare Inventory Management

FSL INTEGRATION

SERIALIZED TRACKING

QUICKBOOKS SYNC

REAL-TIME VISIBILITY

How an Australian/New Zealand Regional Home Healthcare Provider Achieved End-to-End Inventory Control Across 14 Locations on a Native Salesforce Platform

By the Arka Inventory Solutions Team

Contributors:

Client — Operations Team

Arka Inventory — Implementation Practice

June 2026

A Regional Home Healthcare Provider Confronts a Growth Ceiling

The client has been helping patients breathe better since 1995. As an ADP-registered vendor with 14 locations across the province, the client delivers critical home care services — CPAP therapy, home oxygen, and medical gas cylinder management — to patients and more than 500 clinics who depend on reliable, timely fulfillment. That scale of service demands an operational infrastructure capable of tracking thousands of serialized medical devices across multiple warehouses, service vans, and patient homes simultaneously.

What the client had instead was a fragmented operating model: three disconnected systems handling inventory, field service, and accounting independently. Warehouse staff maintained manual logs for serialized equipment. Field technicians delivering oxygen cylinders operated from a separate Field Service Lightning (FSL) environment with no live connection to warehouse stock. Purchase orders were entered manually, and financial reconciliation with QuickBooks Online required dedicated staff time every week. The operational gaps compounded with each additional location and each additional patient.

The ambition was clear — to extend high-quality, traceable home healthcare across the province — but the system architecture was organized around internal convenience, not patient outcomes. Every manual handoff between the warehouse floor, the field team, and the finance office was a point of risk: a misrecorded serial number, a stock commitment on a unit that had already been delivered, an invoice that never synced.

The solution needed to unify warehouse operations, field service, and financial accounting on a single native Salesforce platform — without replacing the systems the client already depended on.

Arka Inventory was that solution. Deployed natively within the client's existing Salesforce environment, Arka closed the operational gaps between FSL, the warehouse, and QuickBooks — creating a single, real-time operating picture across all 14 locations without the disruption of a full ERP replacement.

The Diagnostic: Five Interconnected Operational Failures

McKinsey research on operational transformations consistently demonstrates that organisations addressing root-cause system failures — rather than patching individual symptoms — are more than twice as likely to sustain efficiency gains at scale. For the client, the operational diagnostic revealed five distinct but deeply interconnected failures that, taken together, placed both patient care quality and business scalability at risk.

1. Disconnected Field Service and Warehouse Inventory

When a field technician picked up an oxygen cylinder from the warehouse and delivered it to a patient's home, that movement was invisible to the inventory system until a manual update was entered —

sometimes hours later. The FSL work order world and the Arka warehouse world operated in parallel, with no automated bridge between them. The result was chronic inventory discrepancy: stock counts in the system diverged from physical reality, and teams could not trust the numbers they were looking at.

2. Serial Number Tracking Without a Safety Net

Medical devices — oxygen cylinders, CPAP units, AirSense filters — each carry a unique serial number that must be tracked through inspection, filling, maintenance, repair, delivery, and eventual retirement. The client managed this lifecycle manually, recording serial numbers in logs that were updated by hand at each stage. The risk was not theoretical: a misrecorded serial number could mean a unit with a failed hydrostatic test being marked as ready-to-use, or warranty and compliance records that could not be reliably produced on demand. With no system-enforced uniqueness, duplicate serial number entries created reconciliation problems that staff spent hours resolving.

3. Purchase Ordering Driven by Instinct, Not Intelligence

Procurement decisions at the client were made on the basis of periodic manual stock counts and individual staff judgment. There were no automated minimum stock alerts calibrated to location-level demand. When a warehouse ran low, the trigger to reorder came from a phone call or a spreadsheet review — not from a system-generated notification. The consequence was predictable: stockouts that disrupted patient deliveries, and overstock situations that tied up working capital in slow-moving inventory.

4. Financial Reconciliation as a Manual Weekly Task

Every purchase order raised in Arka had to be manually re-entered into QuickBooks Online as an expense. Every packing slip processed for a retail or patient transaction had to be transcribed as a sales invoice. This was not incidental administrative overhead — it was a structural duplication of effort that created a permanent lag between operational activity and financial records. Invoice errors, missed entries, and location-field mismatches between Salesforce and QuickBooks generated an ongoing reconciliation burden that consumed staff hours and introduced financial reporting risk.

5. No Unified Visibility Across 14 Locations

With warehouses, showrooms, and service locations spread across the province, the client had no single view of stock across its network. Each location operated with local knowledge. Transferring serialized equipment between warehouses required manual coordination with no barcode-scanning support. Managers could not see, in real time, which units were in which warehouse, which were committed to open orders, and which were in service with patients. Scaling to additional locations under this model would require proportional increases in coordination overhead.

Arka Inventory Implementation: Operational Results

Exhibit

Arka Inventory implementation: operational results

Metric	Before Arka	After Arka	Improvement
Order-to-Delivery Cycle	Multi-day manual process	Same-day trigger via FSL automation	↓ ~60%
Manual Data-Entry Steps per Order	8–12 steps across 3 systems	2–3 steps, single platform	↓ 75%
Inventory Visibility	Spreadsheet / daily refresh	Real-time across all 14 locations	100% live
Serial Number Traceability	Manual log, error-prone	Barcode-scanned, auto-matched	Full lifecycle
Time to Locate a Unit (BIN)	12–15 minutes	2–3 minutes	↓ 80%
Financial Reconciliation	Weekly manual QB entry	Automated PO-to-expense & invoice sync	Eliminated

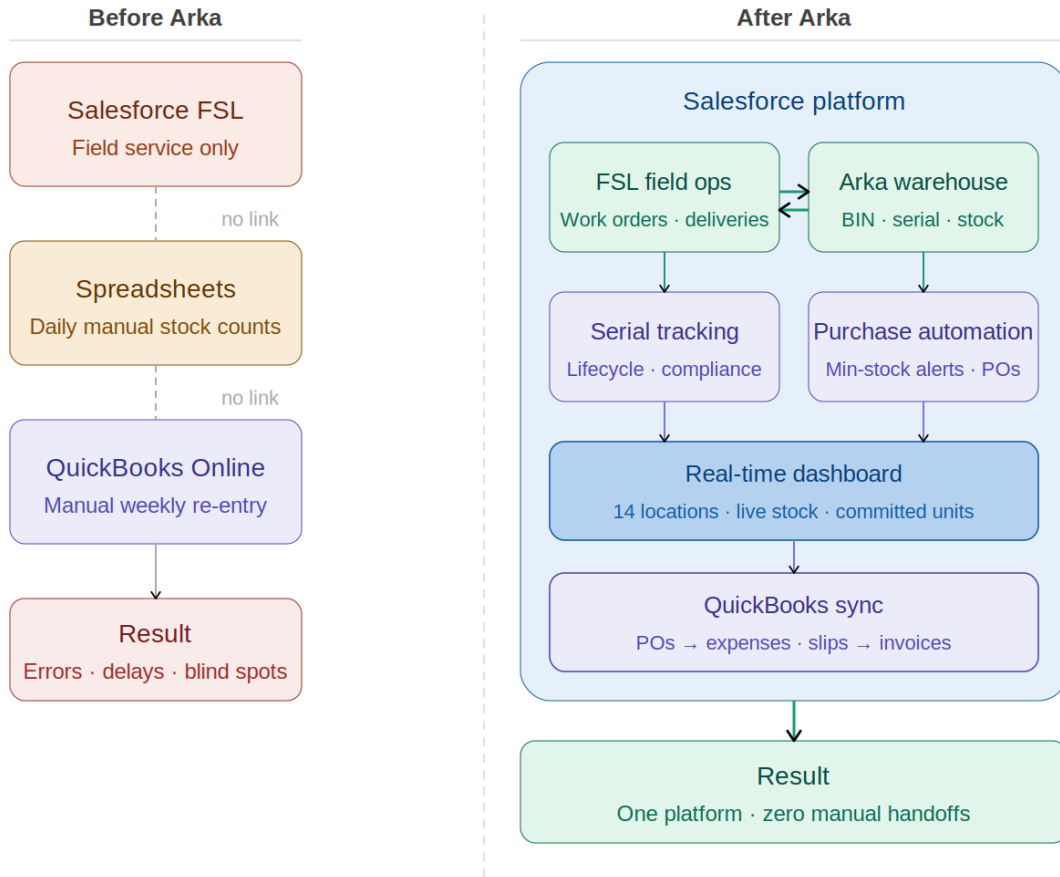
1 Cycle time measured from FSL work order creation to warehouse pick-and-ship trigger. Averages across all serialized product types, post-implementation.

2 Order accuracy defined as orders completed without manual rework, serial number correction, or financial re-entry post-despatch.

SOURCE: Client operational data, pre- and post-Arka implementation — June 2026

How Arka Inventory unifies client operations

Before Arka, the client operated three disconnected systems — Salesforce FSL for field service, daily spreadsheets for stock tracking, and QuickBooks Online for finance — with no automated bridge between them. Every transaction required manual re-entry across systems, creating chronic discrepancy and delay. Arka Inventory replaced this fragmented model with a single native Salesforce platform in which FSL field operations, warehouse management, serial tracking, purchase automation, and financial synchronisation operate as one unified system. The result is a complete, real-time operational picture across all 14 locations — with zero manual handoffs.



- Warehouse & field ops
- Data & finance layer
- Salesforce platform
- Pain / risk

Becoming Connected: Five Arka Capabilities That Closed Every Gap

The critical architectural decision was native deployment. Rather than building a middleware layer between Salesforce, FSL, and a separate inventory system, Arka lives entirely within the Salesforce environment. The client staff work within a single, familiar platform. There is no data reconciliation overhead, no integration lag, and no duplicate entry. The five capabilities deployed together addressed every failure identified in the diagnostic.

1. FSL–Warehouse Inventory Synchronization

The most operationally significant capability Arka delivered at the client was a live, bidirectional bridge between the FSL work order world and the Arka warehouse. When a field technician picks up a serialized unit from a warehouse and scans it onto their service van, the warehouse inventory record is automatically decremented in real time. When the unit is delivered to the patient and scanned at the point of care, the FSL transaction automatically triggers an Arka outbound movement — no manual entry required.

Custom Apex triggers and handlers built by the Arka implementation team for the client — including `ArkaProductTransferTriggerHandler`, `ArkaSerializedProductTriggerHandler`, and `ArkaStockLevelToProductItemHandler` — enable this capability. They automatically create a corresponding Arka inventory transaction for every FSL product transfer. A process that once required manual end-of-day reconciliation now runs as an automated, real-time data flow, giving warehouse managers an accurate view of physical stock at all times.

2. Serialized Product Lifecycle Tracking with Barcode Scanning

For the client, a serialized unit is not simply a product with a number — it is a medical device with a compliance history. Each oxygen cylinder, CPAP machine, and related device must be tracked through a defined lifecycle: Unfulfilled, In Warranty, Ready to Use, Inspection, Hydrostatic Testing, Filling, Maintenance, Under Repairs, and eventual Discard. At each status transition, critical data must be recorded: the date of the last inspection, the last hydrostatic test, the last fill, and the last maintenance event.

Arka captures this entire lifecycle natively. When a unit transitions out of Hydrostatic Testing status, the system automatically records the Last Hydrostatic Test Date. When it exits Filling, the Last Filing Date is stamped. The same logic applies to Inspection and Maintenance. Because these data points are system-enforced rather than manually entered, they are reliable — and they form the foundation of the compliance reporting and warranty management that a regulated healthcare environment demands.

Mobile barcode scanning is embedded directly in the workflow. Field technicians and warehouse staff can scan a unit's serial number barcode at the point of pick-up, transfer, or delivery — eliminating the manual transcription errors that previously introduced discrepancies into the serial number register. System-level duplicate serial number validation ensures that no two records can share the same serial number for the same product, removing a root cause of historical reconciliation failures.

3. Intelligent Purchase Automation with Location-Level Stock Alerts

Procurement at the client is no longer driven by instinct or periodic manual counts. Arka monitors inventory levels against configurable minimum thresholds at each of the 14 locations. When stock at any warehouse or service location falls below the minimum, the system generates an automated alert — giving purchasing teams the information they need to raise a purchase order before a stockout occurs, not after a delivery fails.

When an outbound order cannot be fulfilled from existing stock, teams can convert an unfulfilled outbound line into a back order and generate a purchase order with a single click. Arka automatically populates the PO with the vendor details, expected delivery date, and warehouse mailing address — fields that previously required manual lookup and entry. Purchase orders are raised faster, with less effort, and with greater accuracy than the manual process they replaced.

4. Automated QuickBooks Financial Synchronization

The financial reconciliation burden that previously consumed dedicated staff time each week has been eliminated. Arka's native QuickBooks Online integration — extended with custom automation built for the client — ensures that every purchase order raised in Arka automatically syncs to QuickBooks as an expense, and every packing slip processed syncs as a sales invoice.

The implementation team also built a custom Flow — ArkaPackingSlip Sales Type — to handle the specific conditions under which the client retail packing slips sync to QuickBooks, including custom field mappings that carry client-specific data points into QB records. QuickBooks customer matching is performed on exact account name, ensuring that invoice records are correctly attributed without manual intervention. When a sync issue does arise — for example, a location picklist value not matched on the QB side, or a transaction falling outside a closed book period — the system surfaces a diagnostic message in the Accounting Message field on the relevant record, so staff can identify and resolve the issue immediately rather than discovering it during month-end close.

5. Real-Time Inventory Visibility Across All 14 Locations

Arka replaces the location-by-location, manually-refreshed inventory picture that the client previously relied on with a unified real-time dashboard spanning all warehouses, showrooms, and service locations across the province. Stock levels, BIN assignments, committed quantities, and incoming purchase order timelines are visible in a single view — updated automatically as transactions occur.

Automated BIN assignment — implemented through the Arka Auto BIN Update to Products record-triggered flow — means that received items are immediately assigned to a physical warehouse location without manual direction. Auto BIN logic in the cycle count process ensures that adjustment transactions carry the correct BIN reference throughout. The average time for a warehouse operative to locate a specific unit has fallen from 12–15 minutes to 2–3 minutes.

Rather than building complex integrations between three separate systems, Arka unified FSL, warehouse operations, and QuickBooks inside a single Salesforce platform — eliminating the manual handoffs that had made accurate inventory management impossible at scale.

Building the Right Capabilities: Four Transferable Principles

This implementation offers four principles applicable to any organisation managing serialized, high-value inventory across multiple locations in a regulated environment. These are not technology recommendations — they are organisational design principles that explain why this implementation succeeded where generic point solutions consistently fall short.

- **Treat your field operations as an inventory system.** The moment a product leaves your warehouse, it does not leave your inventory responsibility. Organisations that treat field service and warehouse management as separate domains create structural blind spots in their stock data. This model — in which every FSL work order movement automatically updates warehouse inventory — makes the entire product journey visible from a single platform. Every unit in a technician's van, every unit committed to a patient, every unit in transit between locations: all visible, all traceable, all in real time.
- **Make compliance a system output, not a manual process.** In a regulated healthcare environment, the cost of a compliance failure is not just operational — it is reputational and regulatory. Serial number lifecycle tracking, inspection date stamping, and hydrostatic test records should not depend on individual staff discipline. When these data points are captured automatically as a product transitions through its operational status lifecycle, compliance reporting becomes a by-product of normal operations rather than a separate administrative burden.
- **Arm your procurement team with location intelligence, not averages.** Minimum stock alert models that operate at the aggregate level mask the location-specific stockouts that actually disrupt service delivery. A total inventory of 50 oxygen cylinders across 14 locations tells you very little about whether the Sudbury location can fulfil tomorrow's patient deliveries. Location-level minimum stock thresholds, combined with automated alert generation, shift procurement from reactive fire-fighting to proactive planning.
- **Close the gap between operational activity and financial records.** The lag between when an inventory transaction occurs and when it appears in the accounting system is a permanent source of financial reporting risk. When purchase orders flow directly to QuickBooks as expenses — and packing slips flow as sales invoices — the operational and financial pictures stay in sync without human intervention. The result is faster month-end close, more reliable cash flow visibility, and a finance team that spends its time on analysis rather than data entry.

Industry Applicability

This engagement demonstrates a model applicable across healthcare, medical device distribution, and high-value regulated inventory environments. Three segments share the same structural characteristics that made this Arka implementation transformational:

Home Healthcare and Medical Equipment Providers

Organizations delivering durable medical equipment — oxygen concentrators, CPAP devices, mobility aids, infusion equipment — face the same core challenge as this client: equipment leaves the warehouse and enters a patient's home, where it must remain traceable, compliant, and serviceable across an extended product lifecycle. Arka's serialized tracking, FSL integration, and lifecycle status management address this challenge natively within Salesforce, without requiring a separate MDM or RFID system.

Medical Gas Distributors and Cylinder Management

Businesses managing medical gas cylinders — oxygen, nitrous oxide, compressed air — operate in an environment where regulatory compliance requirements (hydrostatic testing, filling certification, inspection records) are not optional. Cylinder management on manual systems creates compliance gaps that regulators and insurers will find. Arka's status-triggered data capture eliminates those gaps by making compliance documentation a natural output of operational workflow.

Multi-Location Healthcare Distributors

Distributors operating across multiple warehouse and service locations — whether in healthcare or adjacent regulated industries — find that real-time visibility across locations is the primary value driver. The elimination of daily spreadsheet reconciliation between locations alone recovers hours of management time every week, and the ability to fulfil orders from whichever location holds available stock, rather than waiting for a central warehouse reorder, directly improves service levels.

The new inventory management model for healthcare is about knowing — in real time — where every serialized unit is, what its compliance status is, and what it is committed to. Organizations that achieve this on a native Salesforce platform eliminate the integration complexity that defeats every other approach.

This case demonstrates how modern inventory management — deployed natively on Salesforce — can drive operational excellence while supporting the service quality that patients and clinics across the province depend on. By unifying order management, FSL field operations, purchase automation, serialized product tracking, and QuickBooks financial synchronization, the organization built the operational foundation required to scale its service network without proportional growth in administrative overhead.

Operations leaders in healthcare and regulated distribution who can unify their inventory, field service, and financial systems on a single platform — eliminating the manual handoffs that compound into hours of wasted cycle time and days of financial lag — will have the structural edge as patient expectations and regulatory requirements continue to rise.



Arka Inventory Solutions Practice

sales@arkainventory.com

+91 93902 73833

www.arkainventory.com • Salesforce AppExchange: 4.8 ★ • June 2026

Copyright © 2026 Arka Inventory. All rights reserved.