Lone Star Transforms Field Services and Billing with Automated Work Order Management from Apptricity

An experienced provider of instrumentation and electrical support services, Lone Star Instrumentation & Electric Corporation serves the oil, gas, petrochemical and mining industries across Texas and New Mexico. The organization has a passion for exceptional service, professionalism and strong business partnerships. Lone Star takes pride in quality of workmanship, safety, integrity and on-time service delivery at a reasonable price.

Emphasizing the use of the latest technologies, Lone Star sets itself apart from competitors who rely exclusively on paper-based processes. The organization continuously seeks to improve its processes and systems by investing in both people and technology. Lone Star transforms field services and billing with automated work order management from Apptricity.

Time-Consuming Manual Work Order Entry and Invoicing

Lone Star saves its customers time, headaches and large sums of money. For instance, if an oil pump jack breaks, all profits are lost from that jack while it is out of service — so time is of the essence. Lone Star field service personnel maintain and repair oil pump jacks and similar equipment on a regular basis.

Until recently, managing work orders, recording time worked on each job and invoicing clients were labor-intensive chores that took weeks to complete. The company was always behind on these administrative tasks due to manual processes, and maintaining accuracy was difficult.

"We needed a better way to handle the amount of worksheets coming in from the field every day," said Ronnie Hobbs, President and CEO of Lone Star. "Someone might use a numbered worksheet in the field for a notepad. When we were missing a work order number, was it somebody's scratch pad or a $10,000 order?"

It took three to four days to enter the handwritten worksheets into a database and verify how many hours an individual had worked on each job. "Then the billing department would re-enter all of it, plus add the descriptions. It was just a whole lot of manual entry," Hobbs said. "We were probably four to five weeks behind getting invoices entered manually. Our business is doing about $700,000 a week. When you're four weeks behind, you're looking at $2.8 million behind in invoicing. It was big for us."

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The situation also took a toll on the morale of many Lone Star employees, particularly in field services. In addition to completing work orders, employees needed to record all the information related to each job. That meant writing down the date, job number, location, client's company name, the trucks and materials used, the number of hours worked, and the names of everyone on the job every day. Some chose not to fill out worksheets at all. Lone Star sought an automated solution to address the time-consuming, frustrating and error-prone nature of processing work orders and invoices manually.

Solution: Integrated Work Order and Billing Automation

Lone Star tried several vendors but found their solutions lacking. Eventually, the company learned about Apptricity's supply chain management capabilities. "We talked to Apptricity about developing a system that was tailor-made to fit our needs," Hobbs said. "Apptricity put the power where we needed it. That was really a good fit."

Lone Star implemented **Apptricity** Work Order. Built on the Apptricity Jetstream technology platform, this comprehensive solution provides start-to-finish control of work order processing. The system tracks labor hours and work orders while assigning fees to the appropriate accounts. Apptricity integrated the system with Lone Star's accounting software so the company could generate invoices.
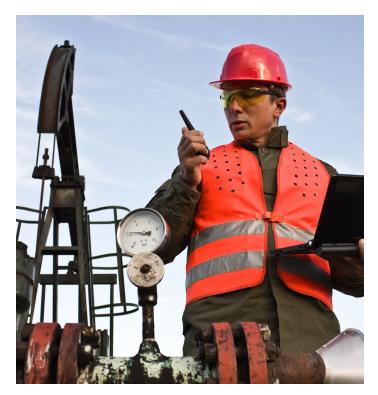
Delighted to use Android® tablets, field services personnel quickly made the shift to mobile data entry. A worker simply enters a job number, and fields are automatically prepopulated with the job name, customer address and so on. Legibility is no longer a problem.

"Once data came into the office, the headaches were gone," Hobbs stated. "It's helped not only the morale in the office because we're no longer swamped, but also the morale of the guys who were writing so much repetitive information."

Field personnel can copy and save a job template with repetitive job details, then use it when performing the same work in a new location. "There are a lot of shortcuts to help the guys in the field, make things quicker and easier, and keep them from not wanting to do their job," said Hobbs. "We've heard nothing but good things from them. That means a lot, because if they're not happy, nobody's happy."

A Web-based console accessible by Lone Star's four offices includes security measures so finished work orders cannot be altered. Data entry occurs once, directly from the field. A worksheet summary indicates the number of work orders in process. Once complete, they are converted into invoices. "Time sheets and invoices are completed almost simultaneously. It saves a lot of steps," Hobbs said.

In addition, electronic processing has accelerated the identification and ordering of materials in the field. "Apptricity converted my part numbers using item descriptions. Now, when my guys are on their tablets, all they need to know is the descriptions," Hobbs said. "The girl in the back office doesn't need to know anything, because each part has already been invoiced and taken out of our inventory system. That part is really amazing."

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Dramatic Results: Ability to Provide Same-Day Billing

Lone Star's work order and billing processes are now state-of-the-art. Field service personnel receive an electronic work order already filled out, arrive at the site, and complete and report their tasks in a fluid process while hours tracking and customer billing occur transparently.

"Before, if we could get everything billed out within two to three weeks, it would be a miracle," Hobbs said. "Now we're in real time. We can have invoices in the mail prior to paying our employees, which is huge when you're talking the volume of business we're doing."
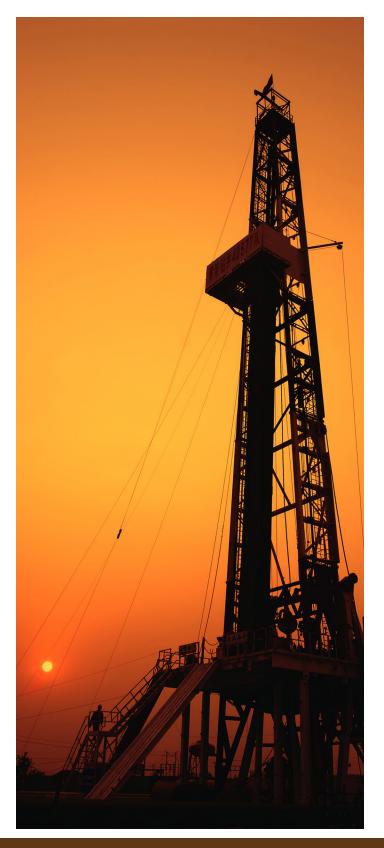
Work Order makes Lone Star far more nimble and profitable. Competition is fierce, so Lone Star is pleased to be able to provide streamlined services and timely billing through the new Apptricity system. According to Hobbs, "The first thing a prospect will ask us is, 'How's your billing? We don't want invoices six months late.' We're proud to tell them they can get an invoice the same week if that's what they want. We can send an invoice the day the work's done. We're not doing that, but we have the ability."

User-Friendly, Secure System that Pays for Itself

Hobbs predicts an extremely rapid return on invest-ment (ROI). "We've dropped our line of credit $200,000 or $300,000 a month and possibly more. We're saving $4,000 to $5,000 in interest, and that's just one piece of the puzzle when you talk about ROI," he said. "We're still rolling out tablets every day to different areas, so it continues to get better. We might have our complete return in less than 12 months or right around the 12-month mark. I'd say there's a 12-month ROI on it."

This ROI is not unusual for Apptricity's solutions, which are easy to configure and customize for a variety of industry verticals. The technology is also flexible, scalable and secure, all of which provides tremendous value for Lone Star.

"If we opened an office in North Dakota tomorrow, there would be no mailing, scanning or emailing. The system would be the same system that's in our main office, done via the cloud," Hobbs said. "Before, we had backups and backups and backups, but you always wonder how good they are. Now our building could be destroyed, and we could go home, get on the Web and invoice like nothing happened. For a sense of security — with everything Web-based and in the cloud — it's a good fit for us."

Plans for an Inventory Control System

To continue improving its systems and processes, Lone Star plans to implement Apptricity Inventory Management. The solution includes automated inventory management with asset tracking and detailed profit and loss (P&L) records.

"We've never had a good inventory system, so if a driver purchases $50,000 worth of material, we're anxious to be able to know what amount he sold and how much is left. Apptricity can do a P&L statement all the way down to the truck itself," Hobbs commented.

It is critical to ensure that customers are billed for materials used on a job. For example, failing to invoice for a $20,000 rack delivered to a customer through the automation department can deplete that department's profits. "Being able to track a piece of equipment we purchased, put it on a truck, assign it to one of our staff and make sure he bills that out and gets the customer to sign for it will make us breathe easier. That's what we're looking for from Apptricity," Hobbs explained.

Positive, Ongoing Business Partnership

Lone Star now has an efficient platform for growth as well as an ongoing partnership and a dedicated, responsive support team. The company had wanted a strong business relationship with an experienced technology partner and found that with Apptricity.

"Apptricity has a very good team and a very good product. The people are easy to work with, and we have a great working relationship," said Hobbs. "We really stressed them, but they didn't crack. I thought a couple of times that they were going to crack, but they insisted they would get it done — and they have. So I'm really excited to see what happens with the inventory module and continue to grow. When you calculate the office and the true ROI, it probably could be around $10,000 a month."

Apptricity provided the simplicity Lone Star needed in a challenging, competitive industry. The solution's easy-to-use, intuitive interface enabled non-technical field representatives to immediately transition to mobile technology without training, saving time and money while eliminating error-prone manual processes. Hobbs has confidence that Apptricity will help Lone Star meet its challenges going forward.

"It's been well worth it. It's made a difference within our office and given us the ability to get our billing done in a timely manner," Hobbs stated. "Apptricity's people have been very supportive. We could change our business tomorrow 180 degrees and tell them what we're going to do, and they'll get us there. It's always positive to know whom you can count on. I told them we're in it for the long haul. We're looking forward to seeing where we'll go in the future."

About Apptricity

Apptricity Corporation provides mission-critical supply chain management and spend management solutions to small, midsize and global enterprises and government organizations worldwide. Apptricity software and solutions mobilize any enterprise with unprecedented levels of real-time information and business intelligence so management has visibility into every action and transaction within the enterprise and among its partners, customers and suppliers. Powered by Apptricity JetStream platform, our solutions enhance legacy enterprise applications and extend the value of information technology investments. Our platform enables us to address the universal objectives of business, government and the military with accelerated business processes and command visibility.

For More Information

For additional information about Apptricity solutions or to request a demonstration, please visit www.apptricity.com.

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