

Capturx Case Study

Under Pressure Canada Ltd.

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FOR ENERGY SERVICES



Summary

Customer:

A top Oil & Gas pressure trucking service provider under 24-hour operation in East-Central Alberta.

Challenge:

Management wanted real-time visibility into field operations. Relying on paperwork and manual data entry slowed service scheduling, billing, and business analysis.

Solution:

Capturx Forms Service with iPads provides a single web app for online/offline field data collection. Data is instantly integrated into central systems and workflows.

Results:

Under Pressure is getting immediate access to field data, has eliminated data entry, and is on their way to cutting their billing cycle by 50%.

Energy Service Provider Reduces Billing Cycle with Capturx Forms Service + iPads

Under Pressure Canada Ltd. is a certified COR energy service company that provides 24-hour pressure trucking services to East-Central Alberta oil fields. As one of the top providers in Oil & Gas pressure trucking, Under Pressure values their highly-trained staff and wants to provide them with efficient, easy-to-use tools. When Under Pressure realized that arming their team with Capturx software plus iPads would enable real-time access to service and billing data – without reducing their superior efficiency in field processes – they chose to move forward with Capturx Forms Service. As a result, the company has significantly reduced field paperwork, eliminated duplicate data entry, and is on their way to cutting their billing cycle by 50%.

Challenge:

Under Pressure needed to speed up the process of data capture and sharing – to lighten the paperwork burden for their field operators and expedite billing processes. Operators were spending 2 hours of each work day completing paper invoices, collecting signature approvals, and doing manual calculations. After handing paperwork to management, a lengthy process of hand-entering data and verifying all calculations began. It was costly to reconcile mistakes, involving many team members to resolve each issue. The process of waiting for paper forms and then data entry, verification, correction, and sending invoices could take up to 3 months. With the addition of a 90-day turnaround for accounts receivable, the delay between Under Pressure's service and receipt of payment could be as long as 6 months.

In addition to data entry, management reviewed stacks of 400-500 paper invoices visually scanning to create custom receivable lists, overdue payments, and track drivers' schedules for balancing work load and payroll.

Under Pressure started looking into custom iPad apps, so that the work documented in the field would arrive to central operations digitally, requiring no manual entry or labor-intensive business analysis. They knew the design of the iPad apps had to support the intermittent network connections that are an issue in remote oil fields. To meet these requirements, one vendor quoted \$100,000 for the initial build of one custom app. Under Pressure decided that building a custom app for each form would take them over-budget and be unsustainable because they would have to hire the external developer again to write custom code for any changes or workflow tweaks. Seeking another option, Under Pressure sought referrals and heard of Capturx Software, a field paperwork automation solution.

Solution: Capturx Forms Service with iPads

To speed up data capture and sharing, Under Pressure selected Capturx Forms Service as their cloud solution, and iPads as their mobile devices. Capturx gave

"Our drivers love Capturx with iPads because they can get invoices signed and shared in real time without managing and delivering paperwork, and management loves it because they're getting accurate data fast and are on their way to cutting the billing cycle by 50%."

"Support for this project has been outstanding – the Capturx team was flexible and provided a specifically tailored workflow to meet our needs. Now that we've deployed, 24x7 tech support has proven they can help us solve issues in a timely manner without any downtime for our field teams."

KAREN MOULY
Co-owner
Under Pressure Canada Ltd.

them a way to provide multiple iPad forms through a single Web app – with no coding required, no change fees, and no proprietary software to learn. To get started, their invoice form was easily designed in Microsoft Excel for use online or offline by the iPad users in the field.

With Capturx forms and an iPad, each field operator easily enters data via drop-down lists, checkboxes, the onscreen keyboard, and a finger (or stylus) for signature capture. Automated workflows run in the background so that manual calculations are no longer needed. Whether the iPad is on or off the network, data can continue to be collected and is saved until the network signal returns. As soon as the field operator submits the form, the data is available in a standard format for easy integration into a range of back-end systems, in this case, a website hosted by Adapx. The Management team is immediately notified so they can begin creating and sending invoices, and has the option to review aggregate data for business analysis.

Whenever there is a need to change a form, anyone that knows how to use Excel can edit and deploy the updated iPad form with no custom development from outside vendors and no need to upgrade a mobile app.

Results:

Faster Data Access

Field Operators continue to serve customers and capture signatures, but now the data is effortlessly shared with management in real-time. In addition to management getting started on invoicing, completion of work for current and past service can also be automatically shared from the field with the customer for archive, compliance, etc. In addition, custom views can be set up to digitally track scheduling and payroll balances among field operators. Under Pressure is experiencing real-time visibility into field operations which impacts a broad group of business processes, including customer service, business analytics, and safety training programs.

Quicker Billing Cycle

Management instantly receives the data, enabling them to keep current on invoicing and avoid the delays that pushed many bills into later months. After a quick review, line items are aggregated into monthly bills without management having to do any time-consuming manual data entry, calculation verification, or issue resolution. Rules-based automated triggers and alerts are set into place to notify management of new invoices and past due payments. Custom views are available to track scheduling and payroll balances among field operators. Without the extra hassles of paperwork management and errors, invoices are now processed immediately – Under Pressure anticipates this will cut their billing cycle from 6 to 3 months. In addition to Under Pressure being paid faster, customers can also stay current on bills and avoid surprises from billing accumulating in the wrong months.

Reduced Burden for All Teams

With Capturx, field operators can instantly report on service, complete with signatures – without having to deliver paperwork to the office, spend 2 hours of each work day working with paper forms and completing manual calculations. Auto-calculations worked into the form definitely make life easier for both operators and management. By avoiding the rework associated with paper calculation errors, management can start invoicing earlier and use that freed-up time to give attention to additional priorities, such as training and regulations for the yearly safety audit.