

Tech-Flo: Optimizing Ticketing and Rental Fleet Management with FieldFX



Customer Quick Facts

INDUSTRY:

Energy

HEADQUARTERS:

Conroe, TX

WEBSITE:

www.tech-flo.net

Tech-Flo, the leading provider of flexible hydraulic lift systems and filtration equipment, was struggling with tickets. Large volumes of missing or illegible tickets were leading to inaccurate pricing and high DSOs. FieldFX, along with its Enterprise Asset Management Module, has managed to turn things around for the company, getting the "flo" back at Tech-Flo.

Founded in Conroe, Texas in 2006, Tech-Flo is the leading provider of flexible hydraulic lift systems and filtration equipment. Tech-Flo offers a wide range of pumps - including HPumps, diaphragm pumps, and multiplex pumps - for all oilfield and industrial process applications. They also offer jet pump power fluid injection, saltwater disposal, waterflood, and fluid transfer.

Manual Ticketing Woes

Tech-Flo has historically been very good at optimizing its operations. The exception was tickets. According to Chad Musgrove, VP of Finance at Tech-Flo, their manual ticketing system was causing consistent problems. Manual

"The biggest issue was that there were tickets not being turned in, or getting lost. When employees couldn't find them, we had to redo them, days or weeks later."

Chad Musgrove, *VP of Finance*, Tech-Flo

Tech-Flo also experienced inaccurate and inconsistent pricing, due to a constant back-and-forth with their extensive inventory list. This issue was exacerbated by the often illegible handwriting of field personnel. This regularly confused both the customers and the back office staff responsible for keying ticket information into their systems. Moreover, employees were frequently failing to return the tickets for weeks at a time. This was creating an unacceptable DSO rate. When a new fleet was invested in, Tech-Flo knew they had to tighten things up.

"We had just invested a substantial amount into our rental fleet, costing around \$150,000. We were putting multiple units out pretty quickly, so we needed a new way to manage and take care of these things, because they were such a big cost."

Optimizing Operations with FieldFX and EAM

Seeking to evolve beyond manual tickets, cut DSOs, and optimize their fleet management, Tech-Flo turned to FieldFX. Unlike some FieldFX competitors, Tech-Flo found the solution to be cost-effective and quick to implement. It was also a big plus that the team had a deep familiarity with their industry.

Tech-Flo's first application of FieldFX was in ticketing.

“We were and are primarily using FieldFX for field ticketing. However, we quickly saw the value in the system as a whole. We saw that there was plenty of opportunity to expand our application of FieldFX, especially with the EAM module.”

The EAM module helped Tech-Flo rapidly improve the management of their valuable fleet of trucks. After setting up their rental assets in one centralized location, and gaining insight into reportable data for each asset, they established a preventative maintenance (PM) program for the whole fleet.

“We set these programs up as date-driven work orders,” said Musgrove. **“We set them up for a 30-day schedule, so a work order will be created every 30 days and be sent out to the service hands. That’s how we’re managing our PM schedule.”**

Future Plans

In the future, Tech-Flo intends to integrate their Supervisory Control and Data Acquisition (SCADA) systems into FieldFX, so that their maintenance tickets are pushed out based on run hours versus dates. “Our plan is to get granular with this and run our PM schedules on our actual run times and days,” said Musgrove. “The plan is to bring our data from our SCADA systems and utilize the run times vs the date-driven parameters.”

Tech-Flo's standard field service tickets will tie to the assets, so that any standard service tickets on a particular asset will be viewable at the asset level. Moreover, TechFlo is also planning to use EAM to manage their customer-owned equipment. As they're taking care of their own equipment, Musgrove explained, “we want to take care of our customers' equipment, as well.”

“Our long-term goal with FieldFX is to have all functionality from quote to invoice on the FieldFX platform, and EAM is a crucial step in that process.”