DAVISWARE

Software Skyrockets Efficiency for Petroleum Equipment Company

Metrics

Track job progress on inventory and finances

Instant visibility on all field service projects at any given moment

Assess and allocate tech resources and parts

Background

Petroleum Marketers Equipment Company is a retail fuel service installation company based in Oklahoma. With a team of certified technicians available 24/7, Petroleum Marketers Equipment Company has specialized in delivering service for fueling equipment and fueling facilities for nearly 50 years.

THE CHALLENGE

Manual Processes Holding Up Progress

Around the turn of the century, Petroleum Marketers Equipment Company was facing increasing pressure to digitize its processes. The Petroleum Marketers Equipment company was growing, and its leaders knew that manually managing information simply wouldn't allow the company to keep up with customers' needs. At the same time, employees were seeing how much more efficient work was becoming for competitors that were moving to digital processes.

"We were starting to lose traction in our marketplace," explains Melvin Wallace, purchasing manager at Petroleum Marketers Equipment Company. "We pride ourselves on being the best in our business, but our processes were still dated."

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Melvin Wallace
Purchasing Manager at Petroleum Marketers Equipment Company

Wallace says they tried out a few software solutions, but it quickly ran into another problem. The programs it was using were disconnected and couldn't handle all of the company's needs on a single platform.

First, they picked up one software solution that was built for field tech management, but its financial management technology couldn't keep up. The next solution was the opposite. It made accounting easier, but it lacked a service component.

To Wallace, it was clear that the Petroleum Marketer's leadership team needed an all-in-one solution that was built for the industry. All the while, Wallace says the team felt it was letting critical business data and financial information slip through its fingers in the absence of powerful software.

THE SOLUTION

All-in-One Software Built for the Industry

After seeing Davisware's software at a trade show, the team decided to start using GlobalEdge as it's solution. With GlobalEdge, Petroleum Marketers Equipment Company was able to control the whole business on a single platform. That included everything from scheduling, dispatching, and field work to inventory tracking, finance management, reporting, and more.
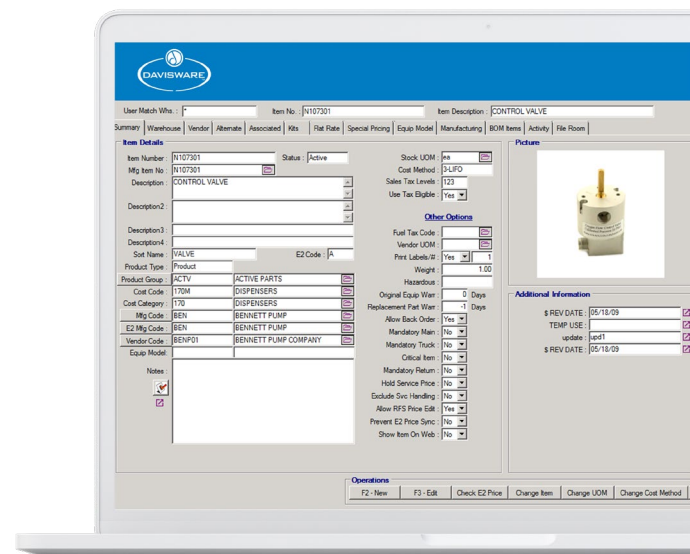
With GlobalEdge, they were suddenly given clear data to control both finances and operations on a single platform. By unlocking financial information and in-house accounting, the group was able to track revenue, handle payroll, and manage finances. At the same time, they could access real-time job updates, inventory, and all of the information driving operations. That made it easier to pair the right tech up with the right part for the right job.

By picking up GlobalEdge, they were able to fully control both aspects of the business—logistics and finances—without having to jump from program to program.

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I'm able to now see what's moving on a particular truck," says Wallace, "and ask, 'Do I need to increase inventory here or decrease inventory there?

Melvin Wallace
Purchasing Manager at Petroleum Marketers Equipment Company

Clearer Insights That Fuel Efficiency and Save Time

Wallace saw how GlobalEdge would help his team streamline its processes right away.

"It was pretty much immediate for us that we were able to see that we had made the right choice," says Wallace. "We saw how seamlessly it interacted with all of the departments and how it incorporated live-time inventory and everything into all of the processes."

As the software grew, it also prepared the team for the future. With Davisware's software, techs can now conduct remote field service work from their phones and tablets. Team leaders can also track inventory, see what items are moving, and even see if the right parts are on the right truck with the right tech.

"I'm able to now see what's moving on a particular truck," says Wallace, "and ask, 'Do I need to increase inventory here or decrease inventory there?'"

This insight saves the company money, time, and resources. Being able to track job progress, inventory, and finances makes it easier for dispatchers to send techs to the right job with the right parts the first time.

All the while, Wallace says their accounting team is able to pull financial reporting data that fuels better decisions. With clear figures in front of them, business leaders can see what they're doing well, how they can improve, and what moves they need to make in order to increase profits.

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THE FUTURE

Ongoing Growth with GlobalEdge

Wallace says his team is happy Petroleum Marketers Equipment Company made the decision to work with GlobalEdge and the Davisware team. As they continues to grow, he says his team will continue to use data from the system to improve.

"It's the data that makes you more efficient," explains Wallace.

In the future, Wallace says he and his team will continue to use GlobalEdge and plan to explore features they haven't yet tapped into.

"As we dig deeper into it, we're seeing there are a lot of things we aren't even doing yet," says Wallace. "But what we're doing is still 100 percent better than when we started."

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About GlobalEdge from Davisware

Widely regarded as the field service industry's most comprehensive software solution for commercial food equipment service businesses, GlobalEdge is a powerful all-in-one platform. It serves as Davisware's flagship product and is built for larger service organizations with more than 15 techs. The advanced software is designed for organizations that want to take full control of their business, increase visibility, and broaden their capabilities as they grow.

GlobalEdge lets field service companies control every aspect of the business on a single platform, including:

- Scheduling and dispatching
- Customer management
- Accounting and invoicing
- Inventory and equipment management
- Point-of-sale and purchase order management
- Warranty billing and job costing
- Bar coding
- And more

DAVISWARE

Want to learn more about Davisware's GlobalEdge software? Schedule a demo today.

Schedule a Demo ›