

# Keeping up with Mobile Opportunities

*A Guide to Modern Delivery & Field Service*

March 21, 2019

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# Moderator



**Grace Rybak**  
Content Marketing Producer  
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# Presenter



**Gregg Lounsbury**  
Software Application Specialist  
ADD Systems



# Webinar Goals

- Learn about the latest in mobile delivery and service technology
- Learn how to gain the most operational efficiency
- Learn how to leverage mobile to improve customer experience and increase loyalty



# Agenda

1. Evolution of mobile products
2. Delivery benefits
3. Service benefits
4. Challenges
5. Back office integration

# Why Mobile?

Mobile solutions have changed the way we do business by:

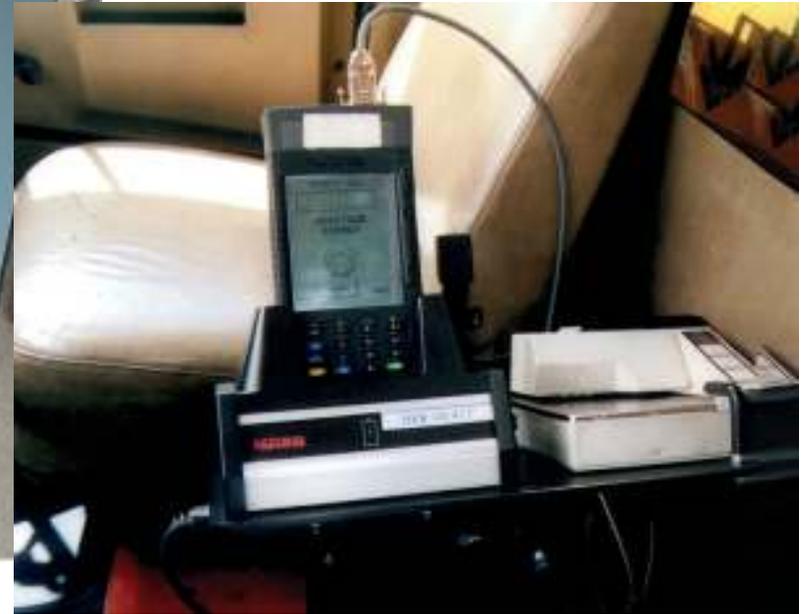
- Providing instant access
- Providing more data
- Allowing for dynamic changes
- Keeping others informed
- Providing help when needed
- Making us more efficient



Mobile solutions continue to change, and we must change too.



# History of Mobile



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# Types of Mobile Products

Delivery



Service





# MOBILE DELIVERY



# Mobile Delivery History

- First deployed in 1995 in this industry
- No real-time communication
- Efficiency gained through
  - Automatic upload/download through docking station
  - Accurately priced ticket on site improved time to payment
  - Driver efficiency reporting — Stops per mile, etc.



# Mobile Delivery Today

- Wireless / cellular
- Passive and active vehicle tracking
- Tablet and phone benefits
- Multiple types of deliveries — retail, wholesale, meter reading, cylinder exchange
- Real time efficiency analysis



# Why Mobile for Delivery?

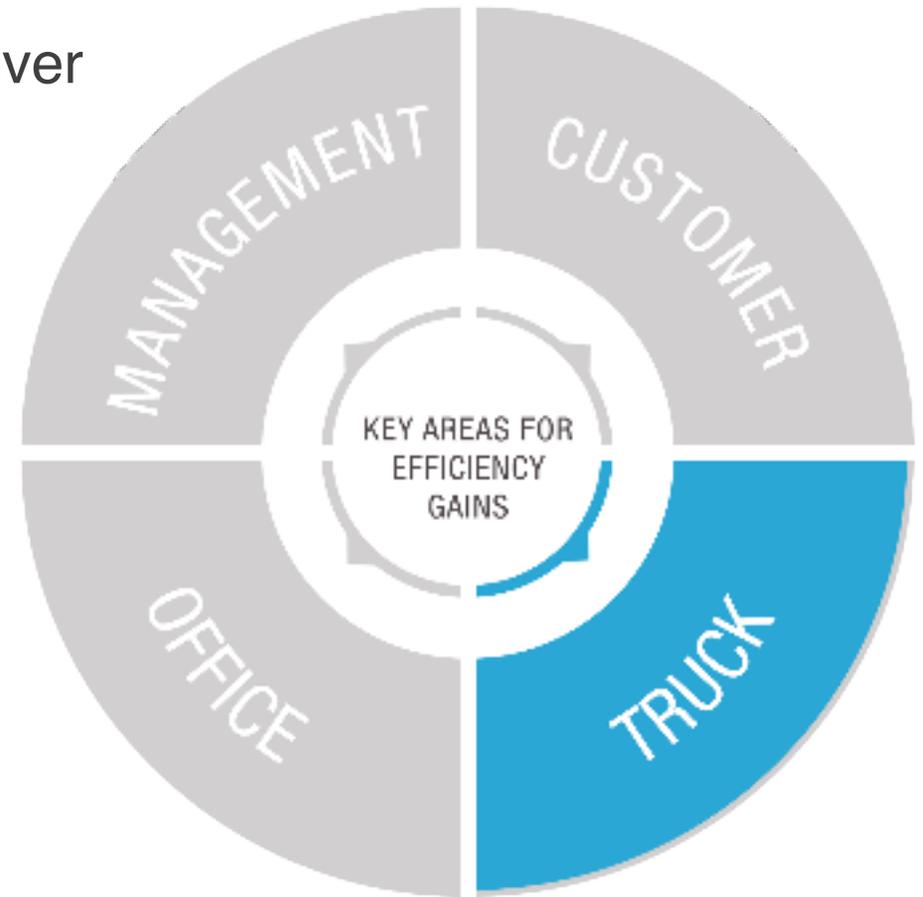
Efficiency gains in key areas

1. Truck
2. Office
3. Management
4. Customer

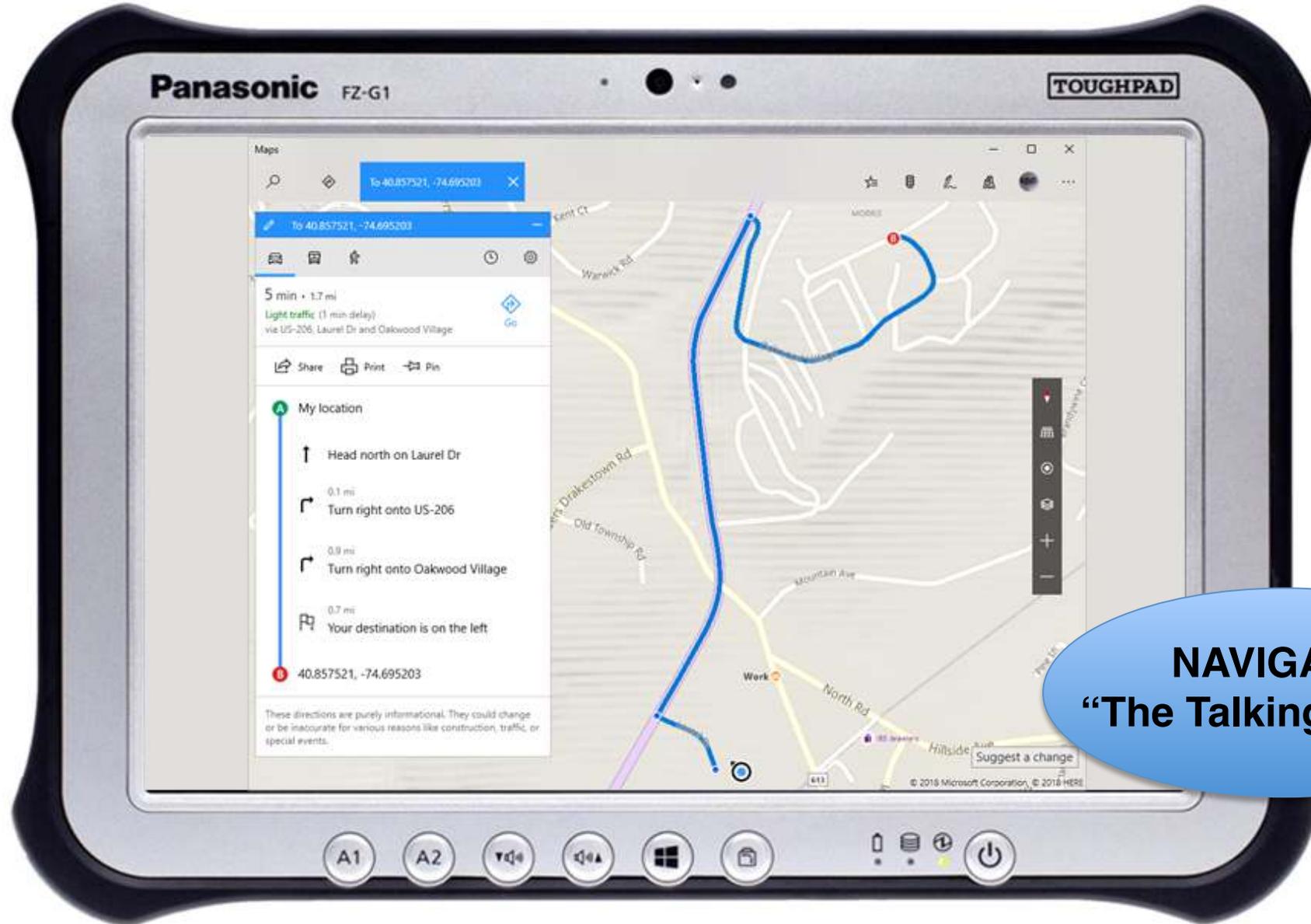


# Benefits — Truck/Driver

- Auto-pricing the delivery — less work for the driver
- Easy driver communication with the office
- Route optimization for reduction in miles driven
- Increase the number of deliveries per driver
- Flexibility of scheduling
- Reduced on-site time



# Turn-by-Turn Directions



**NAVIGATION**  
**“The Talking Truck”**

# Delivery Location Validation



Images by Openclipart.org - House by katterkrab, Check by qubodup, Satellite by basicvisual

# Leverage Street View



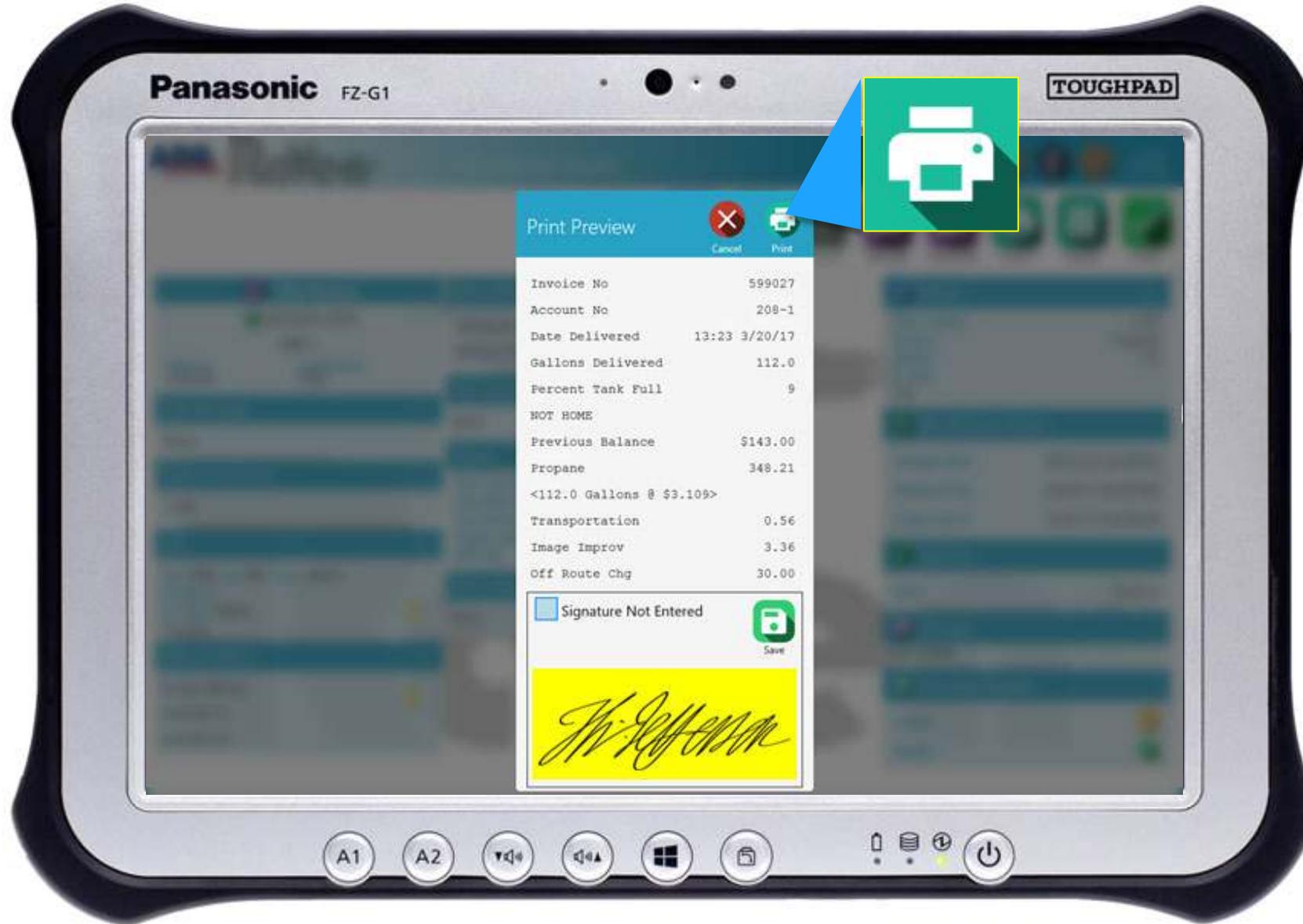
# Two-Way Communication Between Driver & Office



Here's a new phone order

I'm taking a lunch break now

# View & Print Invoice with Signature Capture

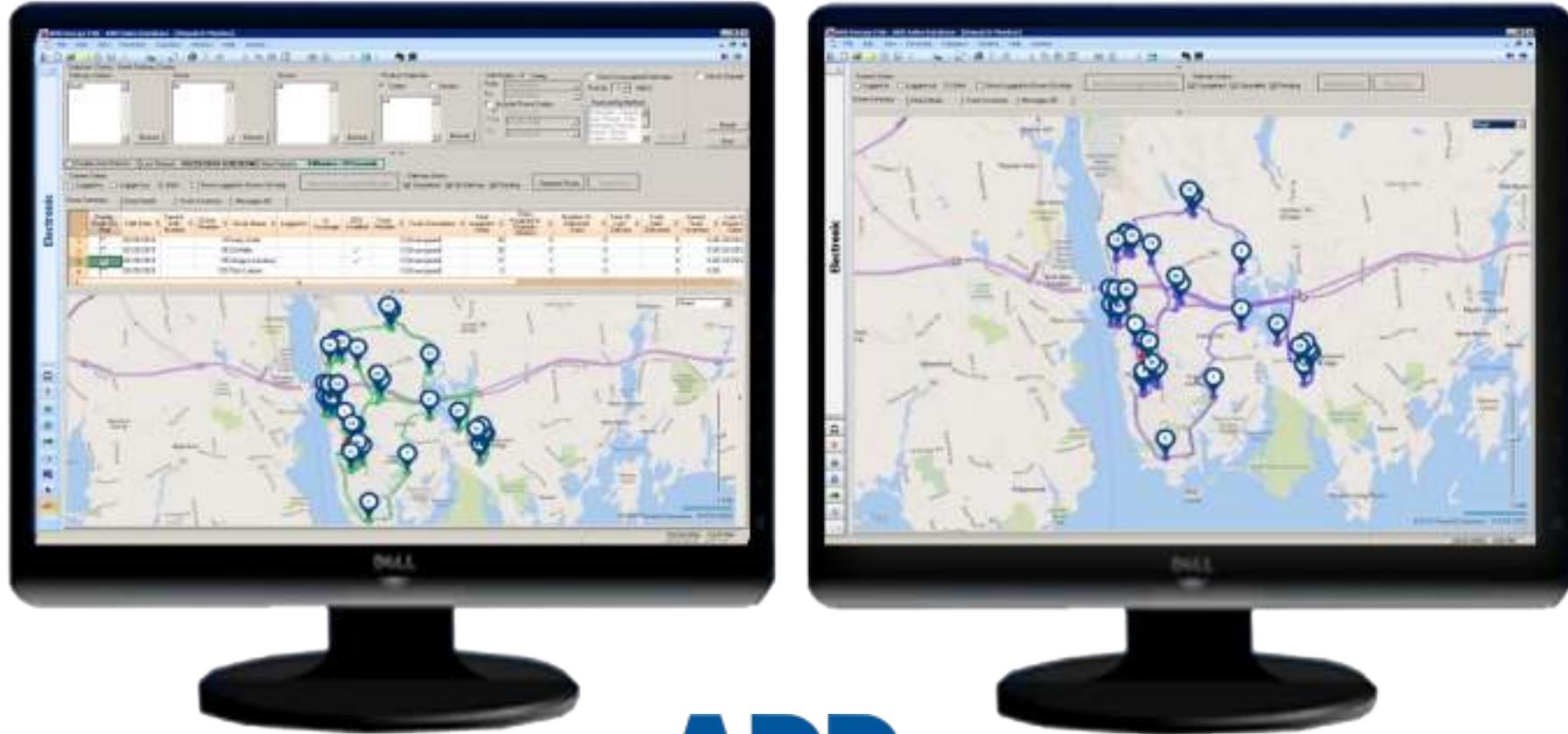


# Benefits of Mobile Delivery – Back Office

- Tracking the truck with GPS
  - Dispatcher and CSR know where trucks are now and where they will be
- Two-way communication between the driver and dispatcher
- Ability to handle more “same day” phone orders
- Reduced posting effort with automation
- Faster billing reduces AR
- Real-time information for easier customer support

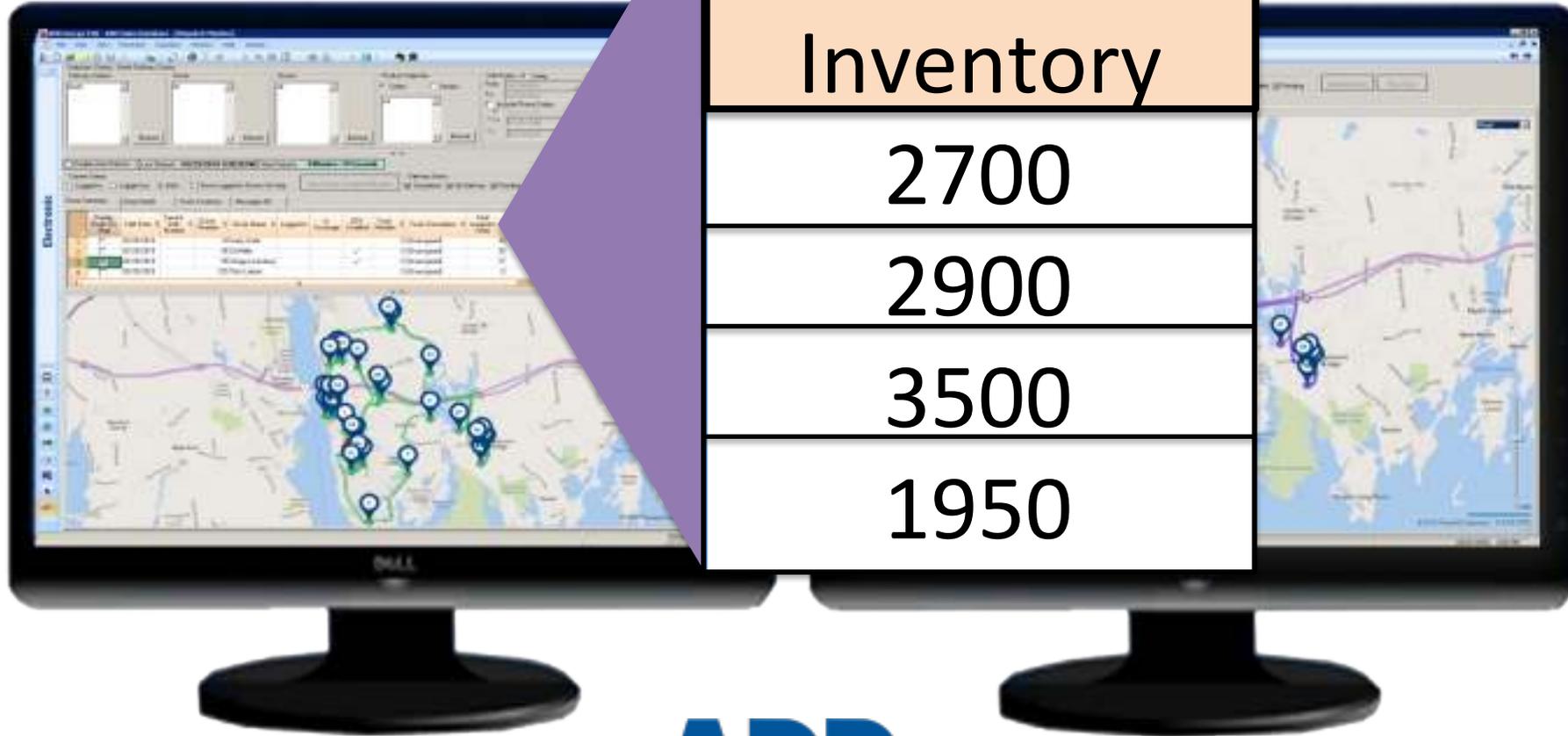


# Wireless Dispatch



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# Monitor Truck Locations & Inventory Levels



# Two-Way Communication Between Office & Driver

The screenshot displays the 'Dispatch Monitor' software interface. At the top, there are controls for 'Disable Auto Refresh' and 'Refresh Interval (sec.): 60'. A 'Raven Wireless License: 2' is also visible. The interface is divided into several sections: 'Driver Selection' (listing drivers like Anita911 and Anita912), 'Current Messages' (with a 'Browse' button), 'Message List' (a table with columns for 'Mark as Read', 'Urgent', 'Driver', 'Message Date', and 'Message Time'), and 'Message Text' (for composing or viewing messages). A 'Message History' section is also present. A 'Message Actions' panel is on the left. A 'Message Type' selector (Incoming, Outgoing, Both) and 'Message Date' range (From: 02/01/2018, To: 07/31/2018) are located on the right. A 'Powered by Microsoft .NET' logo is at the bottom right.

A circular diagram in the top right corner, labeled 'KEY AREAS FOR EFFICIENCY GAIN', is divided into four quadrants: 'MANAGEMENT', 'CUSTOMER', 'TRUCK', and 'OFFICE'. The 'OFFICE' quadrant is highlighted in purple.

A yellow box highlights the 'Outgoing Messages' dialog box, which contains the following fields and controls:

- Selection Criteria:** Drivers: Anita912 dont touch
- Transmit message up to date/time:** 07/31/2018, 7:49:13 PM
- Message Text:** \*\*\*\* Please call the office after the next delivery!!!
- Urgent:**
- Send** button

# Dynamically Assign Phone Orders

Electronic

	Display Route On Map	Driver Number	Driver Name	Logged In	In Coverage	GPS Enabled	Total Assigned Stops	Assigned In Dispatch Monitor	Number Of Delivered Stops	Time Of Last Delivery	Total Units Delivered	Current Truck Inventory	Last Raven Route Update Date/Time	Raven/System In Sync	Route Progress
1	<input type="checkbox"/>	14	Harry Smith	✓	✓	⚠	22		11	11:37	800.4	2700	11:37		50%
2	<input checked="" type="checkbox"/>	56	Ed Miller	✓	✓	✓	23		6	10:45	900.5	2900	11:11		26%
3	<input checked="" type="checkbox"/>	99	Gregg Lounsbury	✓	✓	✓	37		5	11:53	669.5	3500	11:15		13%
4	<input type="checkbox"/>	125	Rick Liebert	✓	✓	⚠	19		7	10:32	1550.0	1950	11:10		36%

**Phone Order**

- Send To
  - Today
    - 14 - Harry Smith
    - 03/30/2016
      - 56 - Ed Miller
      - 03/31/2016
        - 99 - Gregg Lounsbury
        - 04/01/2016
          - 125 - Rick Liebert
          - 04/02/2016
          - 04/03/2016
          - 04/04/2016
          - 04/05/2016
          - 04/06/2016
- Unassign
- Delete

Acct: 787654  
 Customer Name: Carl Finlayson  
 Phone order: 300 Gallons  
 Note: Get key next door



# Current inventory



Driver Number	Driver Name	Logged In	GPS Enabled	Truck Number	Truck Description	Total Assigned Stops	Stops Assigned In Dispatch Monitor	Number Of Delivered Stops	Time Of Last Delivery	Total Units Delivered	Current Truck Inventory
103	Dale Meister			222	Tw22	6	0	0	10:22:08	0	0.00
107	Mike Campbell			111	PO11	13	0	9	11:22:15	1987	520.00
108	John McCann			143	PO43	18	0	17	11:28:33	2965	522.00
112	Jeff Myers			224	Tw24	3	0	1	09:52:40	930	0.00
121	DAVE HIPKINS			131	PO31	8	0	6	10:43:46	1286	1238.00
215	Steve Fenton			122	PO22	14	0	3	11:15:04	525	2066.00
222	DEE CLARK			116	PO16	17	0	13	11:22:54	2212	493.00
302	MARK TURNER			141	PO 41	6	0	5	10:29:07	911	268.00
310	LANCE SANDEL			315	CMP #15	0	0	0		0	1664.00

**Grid View**

**Visual**



# Reduce “Order to Cash”



## Invoice Timeline without Mobile



## Invoice Timeline with Mobile

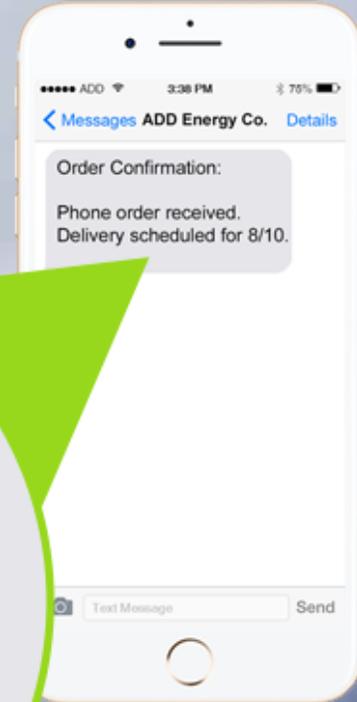


# Benefits of Mobile Delivery — End Customer

- Enhanced communication with customers
  - Delivery confirmation via text message or email
  - Non-Delivery Notice (and why) via text message or email
  - Real-time information on web portal
  - Real-time information through CSR
- Invoices are available upon completion of delivery
- Improved customer relationship through delivery of last minute orders



# Phone Order Confirmation



Order Confirmation:  
Phone order received.  
Delivery scheduled for 8/10.



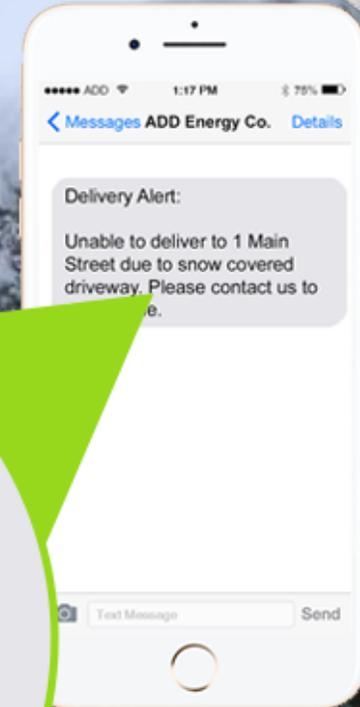
# Delivery Confirmation



Delivery Alert:

50 gallons were successfully delivered to 1 Main Street.  
Thank you for your business!

# Text Non-Delivery Notification



Delivery Alert:

Unable to deliver to 1 Main Street due to snow covered driveway. Please contact us to reschedule.

# Real-Time Information Via Web Portal



**ADD**  
— SYSTEMS

# Invoices Available Upon Completion of Delivery

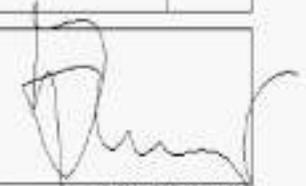


INVOICE NO	QUANTITY	DESCRIPTION	AMOUNT
988 559004	43.2 gallons	PROPANE @ \$2.500/GALLON	\$108.00
		43.2 Transportation	0.22
		Previous Balance	\$0.00
		INVOICE SUBTOTAL	\$108.08
		TOTAL COST	\$108.08

ADD PROPANE & FUEL OIL CO. INC. John Dyer 98 Rock Hill Dr Rock Hill NY 12775  ACCOUNT NO: 988-00000787  <input type="checkbox"/> CHECK HERE IF name address telephone or usage has changed Item# 1515384 CPR 5208 0608	DELIVERY NOTICE  Delivery Date: 11/11/12 14:40 Ticket No: 988-559004  AMOUNT DUE DUE DATE Amount Enclosed	DUPLICATE XXXXXXXX XXXXXXXX WILL BE BILLED BY STATEMENT
---	--	--

ADD PROPANE & FUEL OIL CO. INC. P.O.# _____ Name: John Dyer ACCT# 988-00000787-001 Driver ID Tank Serial# 111 36  For Inquiries, please call 1-800-988-9899 or your local office 988-988-9899  Liquefied Petroleum Gas, 2.1, UN 1075, Product Propane, Non-Corrosive  WHERE REQUIRED: LP Gas Volume has been corrected to standard	*If Safety P&T is noted above see "Fees" on reverse for a description of this Safety & Training Practices Fee.  RECEIVED BY  Customer Please see reverse side for safety information Item# 1515384 CPR 5208 0808 DUPLICATE	ADD PROPANE & FUEL OIL CO. INC. 8 LAUREL DRIVE FLANDERS, NJ 07838 (973) 584-4028  Thank You For Your Business!	If you would like to make your payment by credit card, please visit us at <a href="http://www.company.com">www.company.com</a> or call us toll-free at 800-988-9899 to take advantage of our Pay by Phone option. Thank you
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# Benefits of Mobile Delivery — Management / Ownership

- Tracking the truck with GPS
  - Routing
  - Risk Management
- Improved cash flow with faster invoicing
- Fewer miles driven — savings per mile
- Increased production from same fleet
- Increased customer satisfaction
- Easier onboarding for new drivers
- Driver productivity reporting
- Overtime management



# Monitor Truck Locations & Inventory Levels



**ADD Energy E3® - ADD Sales Database - [Dispatch Monitor]**

File Edit View Favorites Company Window Help Actions

Current Status:  Logged in  Logged out  Both  Show Logged-In Drivers On Map  Delivery Status:  Completed  No-Delivery  Pending

Driver Summary | Stop Details | Truck Inventory | Messages (0)

	Display Route On Map	Driver Number	Driver Name	Logged In	In Coverage	GPS Enabled	Total Assigned Stops	Stops Assigned In Dispatch Monitor	Number Of Delivered Stops	Time Of Last Delivery	Total Units Delivered	Current Truck Inventory	Last Raven Route Update Date/Time	Raven/System In Sync	Route
1	<input type="checkbox"/>	14	Harry Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22		11	11:37	800.4	2700	11:37		50%
2	<input checked="" type="checkbox"/>	56	Ed Miller	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	23		6	10:45	900.5	2900	11:11		26%
3	<input checked="" type="checkbox"/>	99	Gregg Lounsbury	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	37		5	11:53	669.5	3500	11:15		13%
4	<input type="checkbox"/>	125	Rick Liebert	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19		7	10:32	1550.0	1950	11:10		36%

**Electronic**

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03/21/2016 2:29 PM

# Reduce “Order to Cash”



## Invoice Timeline without Mobile



## Invoice Timeline with Mobile



# Driver Productivity Reporting



**HAND-HELD DRIVER REPORT**  
 DRIVER > 14      TRUCK > 10      DOWNLOAD > 019240144      RY VERSION > V020399  
 TOWN, STATE      ZONE      PRODUCT      GALLONS      SIZE      START      END      TIME  
 START OF SHIFT >      07:50  
 << PRODUCT LOADING >>      LOCATION: 10 NET: 210      5 LP GAS      2590.0      08:38      08:39      00:01      00:48

**QUICK VIEW OF KPI's:**  
 Stops/Hour 3.7  
 Stops/Mile: 0.2  
 Miles/Stop: 4.1



STOP TIME	DRIVE TIME	MILES
00:01	00:48	
00:03	00:13	
00:04	00:04	
00:12	00:07	
00:12	00:04	
00:12	00:02	
00:08	00:00	
00:04	00:01	
00:10	00:05	
00:05	00:00	
00:11	00:07	
00:14	00:16	
00:13	00:08	
00:09	00:06	
00:06	00:08	
00:14	00:07	
00:03	00:03	
00:04	00:03	
00:06	00:03	
00:03	00:02	
00:27	00:03	
00:04	00:00	
00:02	00:12	
00:18	00:21	
00:14	00:00	
00:05	00:00	
00:03	00:08	
00:03	00:02	
00:02	00:05	
00:25		
03:52	03:43	115.0

SUMMARY SECTION:

END	TOTALIZER	ODOMETER	TIME	PRODUCTIVE: 07:35 TOTALS >	LOADING	28 <STOPS/HOUR>
START	348,723.00	127,189.80	15:25	NON-PRODUCTIVE: 00:00		1 PRODUCTIVE: 3.7
DIFFERENCE	346,568.00	127,074.30	07:50			0 TOTAL: 3.7
	2,155.00	115.5				0 STOPS/MILE: 0.2
						0 MILES/STOP: 4.1

SIZE	#STOPS	UNITS	UNITS/STOP	#PAYMENTS
100	15	545.8	36.4	0
200	9	683.0	75.9	0
300	0	0.0	0.0	0
500+	4	913.3	229.8	0
TOTAL	28	2,148.1	76.7	0

PRO	UNITS	DOLLARS
5	2,148.10	3,752.46
TOTAL	2,148.10	3,752.46

TOTALIZER/DELIVERED VARIANCE: -69

LIST OF SCHEDULED TICKETS WHOSE TANKS WERE NOT DELIVERED  
 ACCOUNT TANK    ACCOUNT TANK    ACCOUNT TANK    ACCOUNT TANK    ACCOUNT TANK  
 42199 007      7888      002

# Driver Productivity Reporting



**Automatic alert**  
when driver performance  
falls outside “normal”

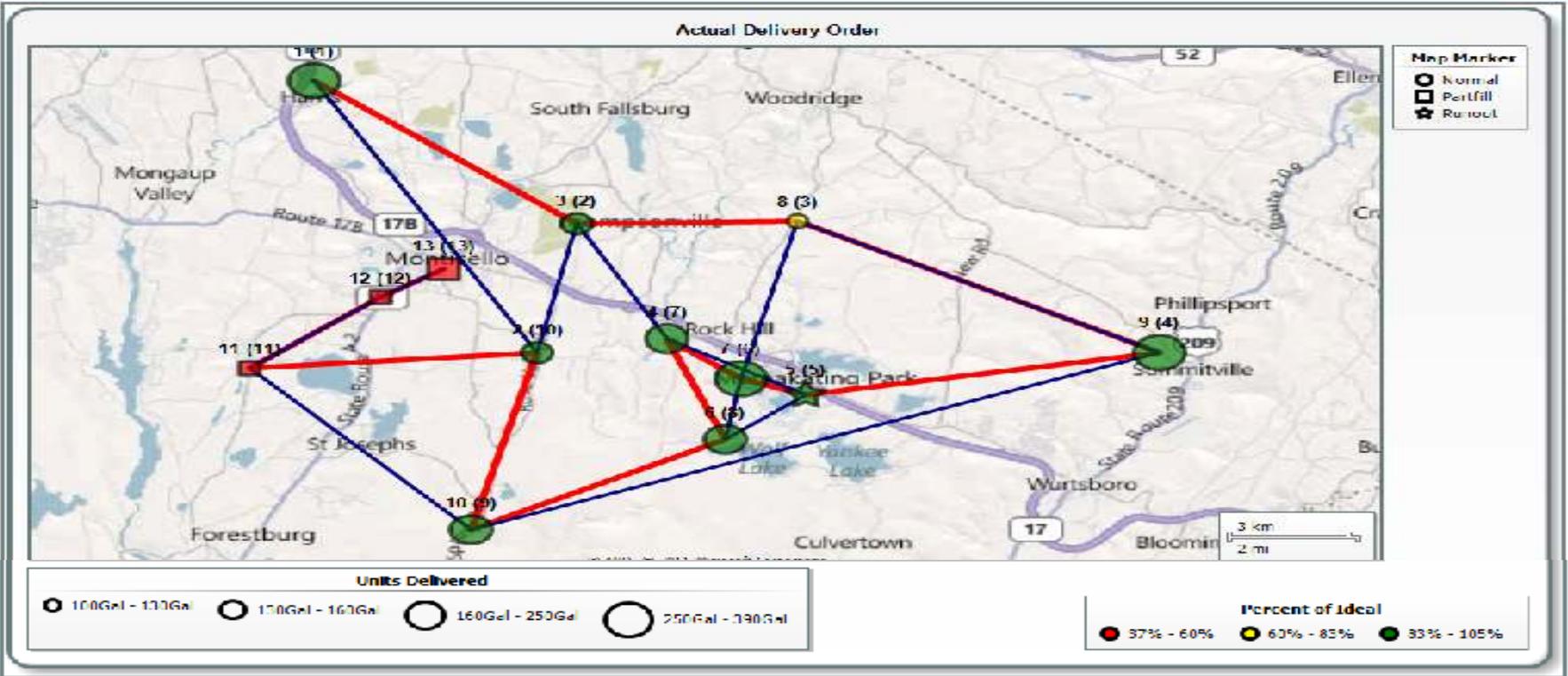


							Drop Pct of Ideal	Partial Fill	Phone Order	Runout	Start Time	End Time	Duration (Minutes)
PAT SAPP	1		1	50	147.00	170	96.23%	N	N	N	09:59:00	10:10:00	11
CHARLES BEAUMONT % MYSTIC SHIPYARD INC	1		1	500	159.80	190	84.11%	N	N	N	11:22:00	11:29:00	7
SOUTHEASTERN ENTERPRISES	1		1	50	164.40	190	86.53%	N	N	N	10:53:00	10:59:00	6
KENNETH HAZLIN	5		1	500	201.10	190	105.84%	N	N	Y	09:15:00	09:21:00	6
ERA SHELTER SHOPPE	5		1	500	171.20	190	90.11%	N	N	N	09:00:00	09:14:00	14
H & L INVESTMENTS % HAROLD WALLACH	5		1	110	300.60	340	88.41%	N	N	N	10:31:00	10:44:00	13
DONALD & LYNNE CHIECO	9		1	110	120.40	190	63.37%	N	N	N	08:00:00	08:37:00	6
BEATRICE C HOPPMAN	6		1	50	365.40	400	91.35%	N	N	N	09:00:00	09:51:00	11
EDWARD SKINNER	5		1	110	168.60	190	88.74%	N	N	N	10:00:00	10:20:00	6
WALTER LAHUE	OC04		1	50	100.60	185	54.38%	N	N	N	06:00:00	06:09:00	9
EARL A WILLIAMS	OC07		1	50	100.60	185	54.38%	N	N	N	06:00:00	06:49:00	7
David Tappen	5		1	500	150.60	400	37.65%	N	N	N	08:00:00	08:19:00	8

Drop %  
of Ideal  
37.65%

<input checked="" type="checkbox"/> Billy Frey		12	58	3,708.1	0	0	0	7.0	\$91.00	0.0	\$0.00	\$0.025	\$1.569	\$7.583	529.7	63.9	309.0
<input type="checkbox"/> 4/25/11		12	58	3,708.1	0	0	0	7.0	\$91.00	0.0	\$0.00	\$0.043	\$0.715	\$7.000	325.2	16.6	162.6
<input checked="" type="checkbox"/> Harry Smith		14	137	2,276.4	0	0	0	7.0	\$98.00	0.0	\$0.00	\$0.043	\$0.715	\$7.000	325.2	16.6	162.6
<input type="checkbox"/> 4/25/11		14	137	2,276.4	0	0	0	7.0	\$98.00	0.0	\$0.00	\$0.043	\$0.715	\$7.000	325.2	16.6	162.6

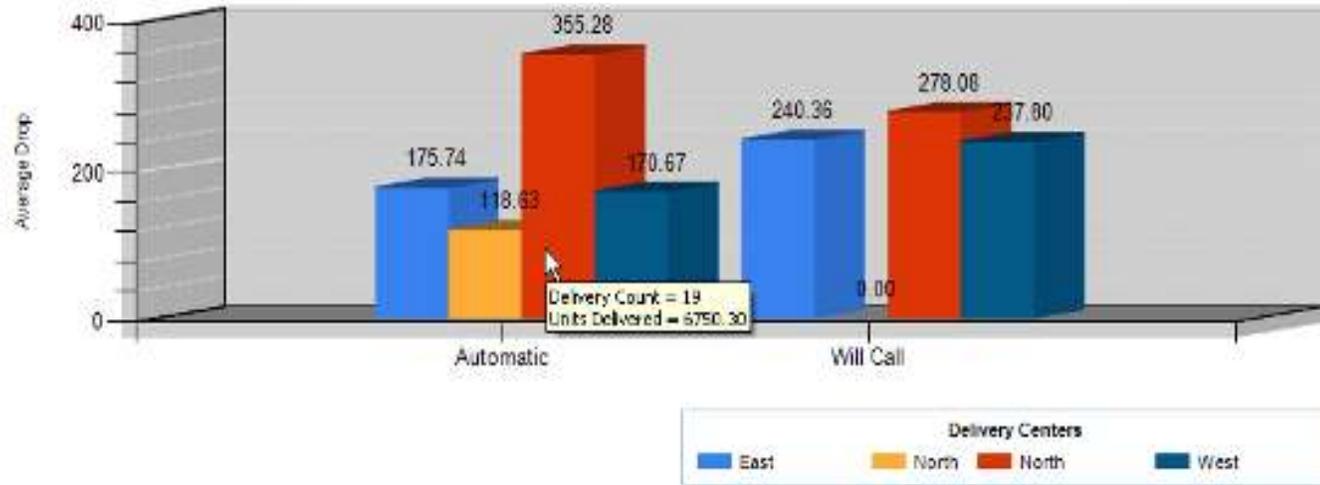
# Planned vs. Actual Route



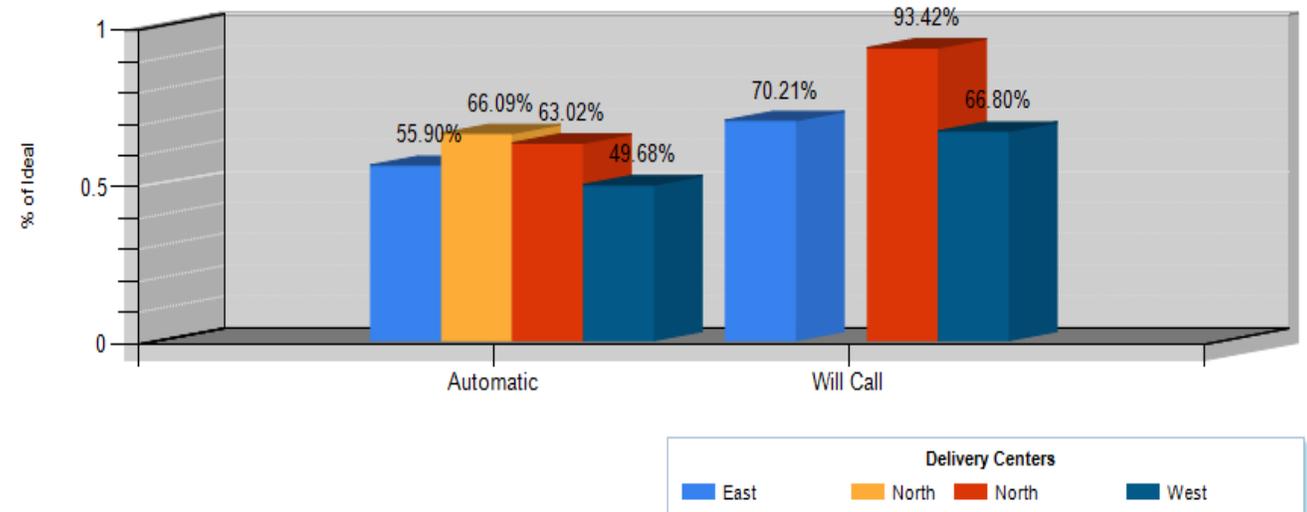
**Planned**  
**Actual**



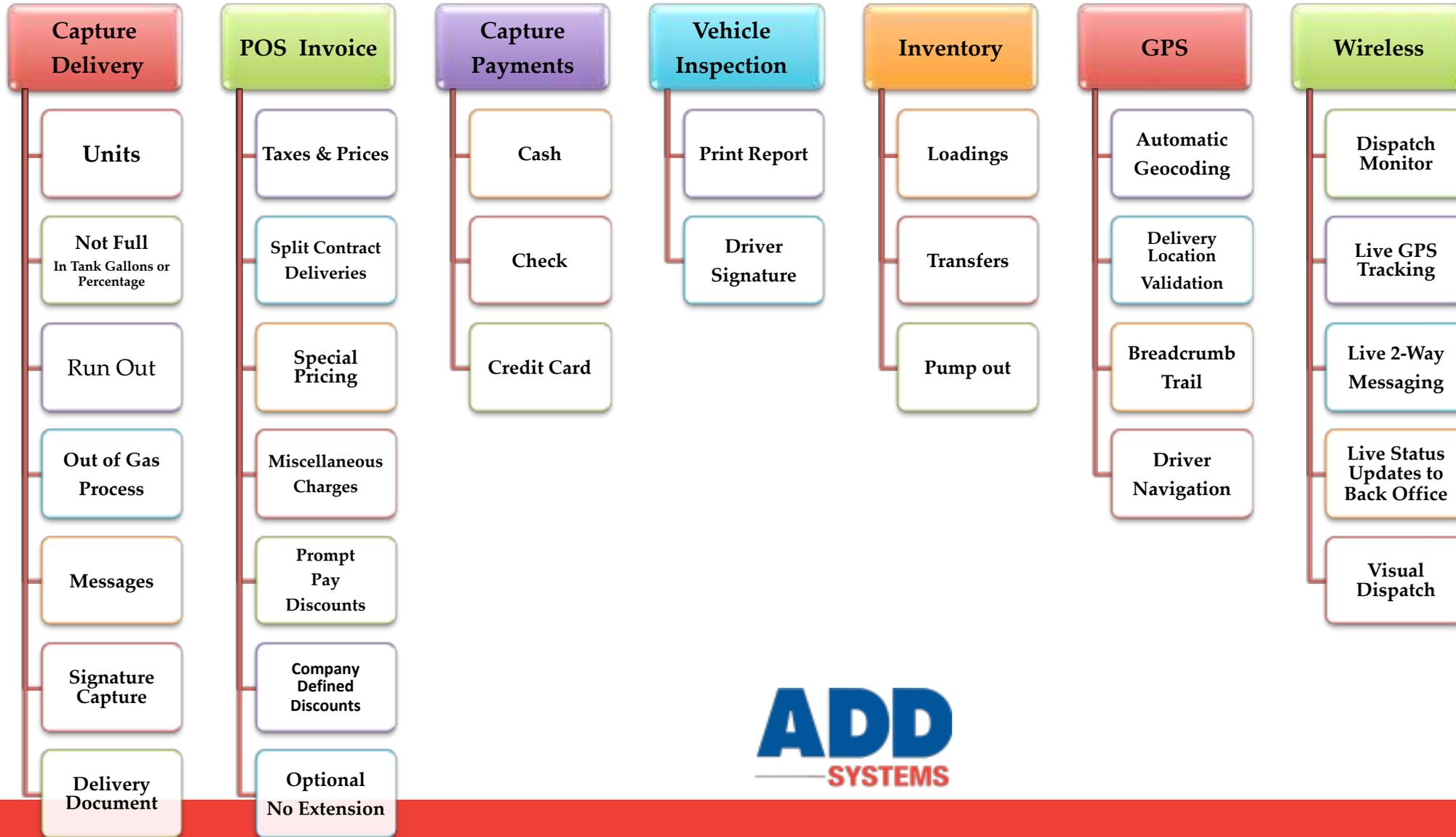
## Average Drop



## % of Ideal



# What the Right Mobile Solution Should Offer



# Advanced Features

- Asset / Tank Verification with QR code scanning



# Advanced Features

- Signature Capture



**ADD**  
SYSTEMS

# Advanced Features

- Invoice copy is stored electronically including signature



ADD Energy [33] ADD Energy/Wholesale Service [Customer Document Viewer - 11/01/2012]

File Edit View Favorites Company Window Help Actions

Customer #: 787 Mr. Preston J Dyer Jr  
 Location type: All Locations From date: 04/12/2008 To date: 05/10/2016  
 Document type: All Find

Date Document  
 07/30/2012 Ref: 41  
 07/29/2009 Ref: 41  
 Tank #11

System Maintenance

INVOICE NO	QUANTITY	DESCRIPTION	AMOUNT
888-888004	432 gallons	PROPANE @ \$2.52/0 GAL. LON	\$108.96
	432	Transportation	0.22
		Previous Balance	\$0.00
		INVOICE SUBTOTAL	\$109.18
		TOTAL COST	\$109.18

ADD PROPRANE & FUEL OIL CO. INC.  
 PO: Name: John Dyer  
 ACCT# 988-00000787 (01) Driver ID  
 Tank Serial # 111 58  
 For inquiries, please call 800-898-8898  
 or your local office 800-898-8898

Liquid Petroleum Gas, 2.1 L.M. 1075  
 Product: Propane, Non-Condensive

WHERE REQUIRED: LP Gas Volume  
 has been corrected to standard  
 volume at 60 degrees Fahrenheit

ADD PROPRANE & FUEL OIL CO. INC.  
 ELAISEL DRIVE  
 FLANDERS, NJ 07736  
 (973) 984-4006

DELIVERY INVOICE  
 Delivery Date: 11/10/14 48  
 Total No: 888-888004

AMOUNT DUE: \$109.18  
 DUE DATE: 11/10/14  
 Amount Enclosed: \$0.00

WILL BE BILLED BY STATEMENT

Thank You For Your Business

3088401121120000C10300000C133680000C800785

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 95%

# Cylinder Exchange



# Wholesale Deliveries



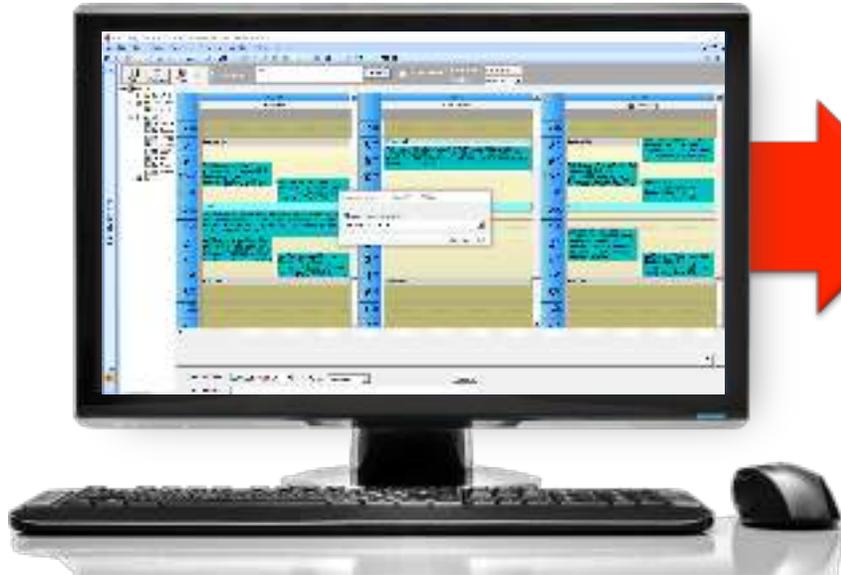
# Rugged / Non-Rugged



# MOBILE SERVICE



# Mobile Service



SCHEDULING



TECHS

# Service Management

- **Work order scheduling**
  - Manpower availability
  - Technician skill set
  - Geography
- **Work-in-Progress tracking**
  - Tied to Job ID
    - Profitability
- **Installation profiles**
- **Gas Check**
  - Marketing data



# Why Mobile for Service?

Efficiency gains in key areas:

1. Van
2. Office
3. Customer
4. Management



# Benefits of Mobile Service — Van/Technician

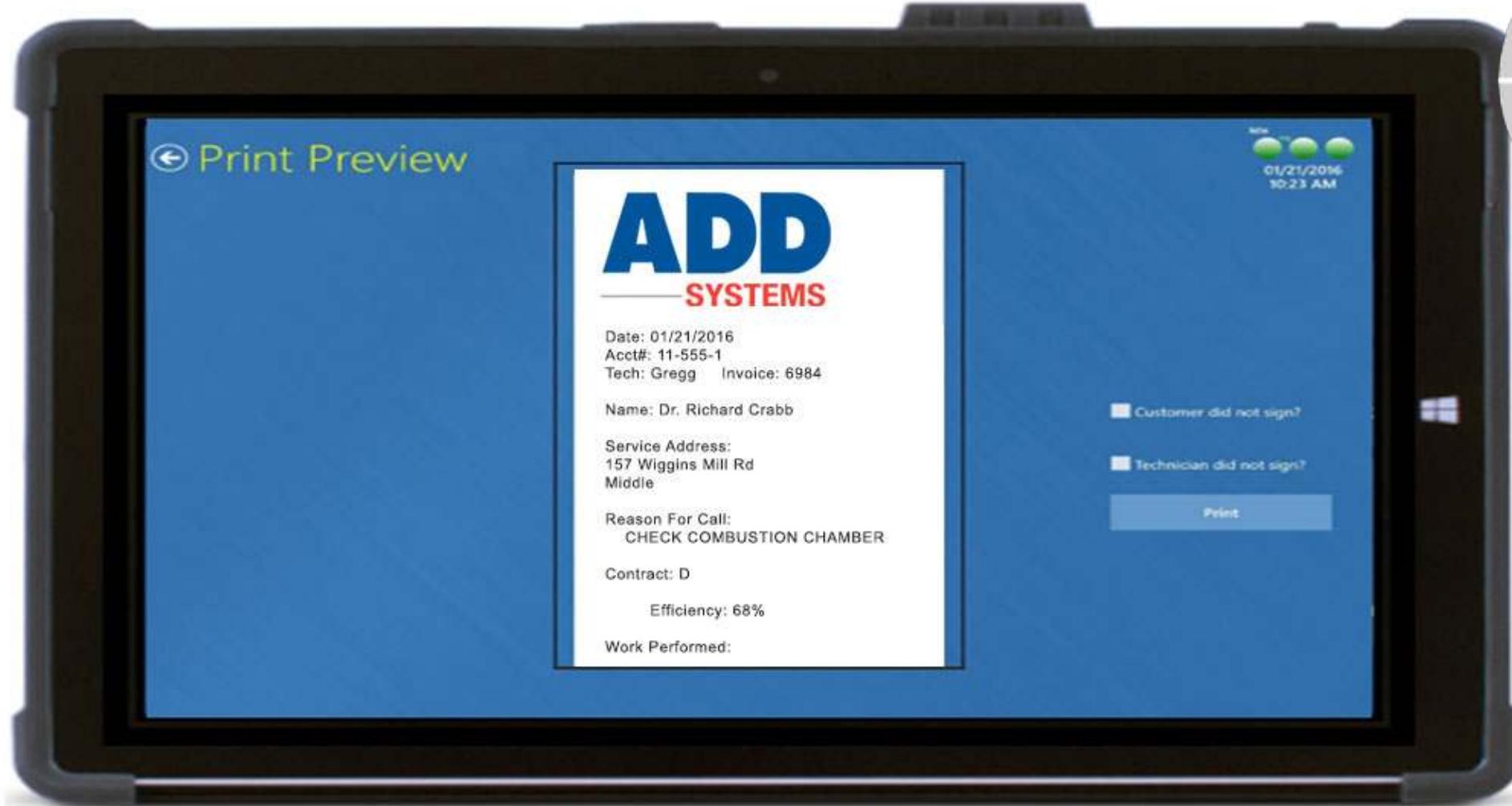
- Auto pricing the job — less work for the tech
- Tech communication to the office
- Reduce miles driven with improved scheduling
- Flexibility of schedule
- Tracking of parts used
- Access to service history
- Digital Gas Check record keeping



# Auto Pricing the Job



# Print Preview & Create Email Document



# Signature Capture



# Email Document(s)



# Gas Check — Ready for Emailing

← Capture Gas Check Document

11/18/2016 9:47 AM

**GREGG** (technician)  
Certify that I have completed the System Check as prescribed.

- Main Delivery Valve installed
- Pressure Control Valve
- Pilot and Leak Test
- Propane Permit on File
- Propane Safety Manual
- All Customers Safety Information and Labels
- AC 91 30002

**Benton** (customer)

- Know how to use the gas in case of an emergency
- Have received propane and understand its use
- Have received the complete safety information and labels
- Have gas system checked and all safety equipment tested
- All required rules and codes have been followed
- Agree all gas appliances are listed on the label

Technician's Name: Gregg L.

Technician's Signature: *Gregg L.*

Clear

Customer did not sign

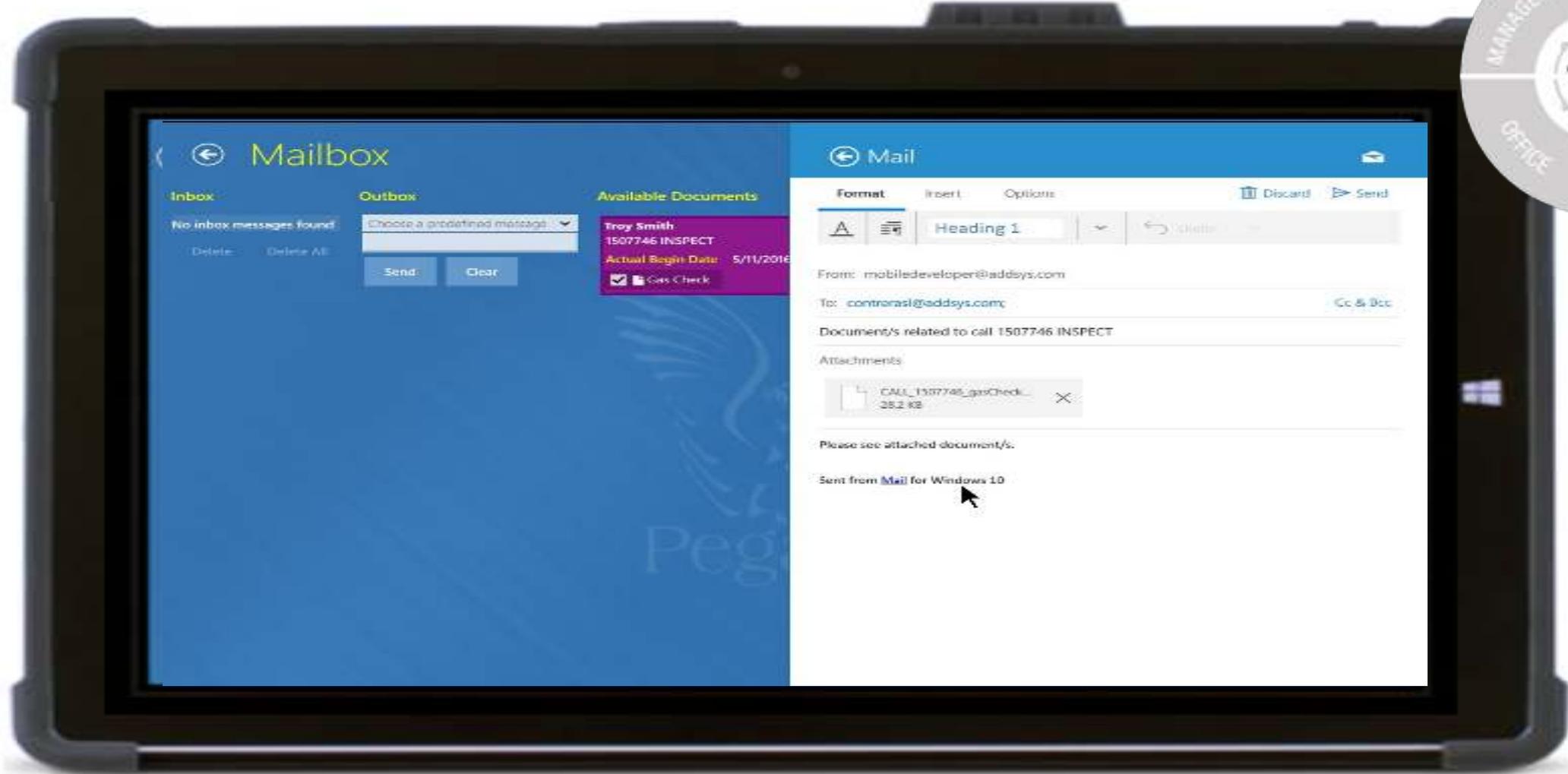
Customer's Name: Loren Benton

Customer's Signature: *Loren Benton*

Clear



# Gas Check — Email Completed Document



# Benefits of Mobile Service — Back Office

- Tracking the tech with GPS
  - Dispatcher and CSR know where techs are and are going to be
- Two-way communication with the technician
- More techs handled by less dispatchers
- Ability to handle more same day calls
- Call Create feature for “after hours”
- Reduced posting effort with automation
- Faster billing reduces AR — GET PAID on-site



# Create & Assign Calls

ADD Energy E3® - ADD Energy/Wholesale Service - [Customer 688 - Mr Joe Demaio]

Service Call Scheduler - Work Order #: [New]

Customer #: 688    Name: Mr Joe Demaio    Service Location: 1 - ./471 High St./Odessa DE    Zone: 189 - Augusta

Call Information

Priority Customer     Do Call Today    Created On:    Created By:

Call Reason

Primary Call Reason: 1    No Heat    Service Technician Preferred Tech: <Any>

Priority: Critical    Assigned Tech:

Additional Call Reason 1: 0    Additional Call Reason 2: 0

Phone First (201)555-9324     Send to Pegasus

Bill In Office     After Hours     Cleaning Ticket     Print    Print To: <Default Printer>

Call Note: This is where you can type notes

Day Of Week	Date	Zone Match Type	Actual Zone Match Count	Linked Zone Match Count	No Zone Match Count
1 Thursday	03/31/2016	Linked	0	2	1
2 Wednesday	03/30/2016	None	0	0	12
3 Friday	04/01/2016	None	0	0	12
4 Monday	04/04/2016	None	0	0	12
5 Tuesday	04/05/2016	None	0	0	12
6 Wednesday	04/06/2016	None	0	0	12

Technician Code	Technician Name	Arrival Begin	Arrival End	Home Zone	Zone Match Type	Linked Zone	Linked Order	Unassign
1 15	Rick Liebert	13:45	14:45	007	Linked	014	2	<input type="checkbox"/>
2 50	Ryan Lounsbury	15:00	16:00	003	Linked	007	1	<input type="checkbox"/>
3 10	Bruce Bott	10:30	11:30	007	None		0	<input type="checkbox"/>

Job ID:    Attach Job    Cancel Call    Insert Component    Pegasus Details    Select Slot    OK    Cancel

Assigned Technician




# Tech Tracking

Pegasus Processing - pegasus

File Edit Customer Call Technician System Company Help

Service Monitor

Call #	PMI	CR	Priority	Status	In Trans.	Arr.	Scheduled	Age	Duration	Zone	CP	C/B	F/C	Service Address	Technician:	Customer Name	Service Center	Call
106998	Due	18	Low	Unassigned	6:49	7:04	Y		1:00	1105	L	N	N	45 Holly Dr/ Earville MD		Mr John Bayalis	Main	(201)
106997	Due	22	Med.	Unassigned	6:49	7:04	Y		1:00	1028	L	N	N	63 Scott Rd/ Warwick MD		George Bailey	Main	(201)
106995		15	Med.	Unassigned	6:49	7:04	Y		1:00	1210	L	N	N	46 Cabot Ct/ Warwick MD		Mr Harry Black	Main	(201) 555-1202
106999		67	Med.	Unassigned	6:49	7:04	Y		1:00	1140	L	N	N	236 Church Rd/ Warwick MD		Mr Joe Brown	Main	(201) 555-1202
106982		36	Med.	Unassigned	5:49	6:04	Y		1:00	1014	L	N	N	105 N.E. 2ND St/ Milford DE		Mr Sam Colvin	Main	(800) 922-0911
107000		09	Med.	Unassigned	6:49	7:04	Y		1:00	1021	L	N	N	429 Mill Ln/ Earville MD		Mr Sam Cook	Main	(201) 555-1202
107001		38	Med.	Unassigned	6:49	7:04	Y		1:00	1056	L	N	N	556 Mill Ln/ Galena MD		Dr Richard Crabb	Main	(000) 000-0000 555-1
107002		03	Med.	Unassigned	6:49	7:04	Y		1:00	1189	L	N	N	471 High St/ Odessa DE		Mr Joe Demaio	Main	(201) 555-9324 688-1
106994	Due	32	Med.	Unassigned	6:49	7:04	Y		1:00	10	L	N	Y	113 Main St/ Warwick MD		Mrs Laben Benton	Main	(201) 555-6806 216-2
106996	Due	01	Crit.	Unassigned	6:49	7:04	Y		0:45	1035	L	N	N	149 Fulton Ct/ Warwick MD		Mrs Jack Adam	Main	(201) 542-7181 42-1

Map

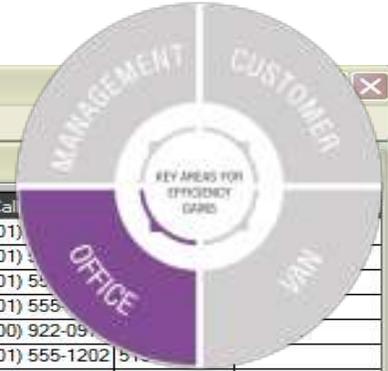
File Edit View Tools

40.7892-74.2627  
 Technician: Gregg  
 Current Status: Idle  
 Date: 02/08/2016  
 Time: 17:30:01

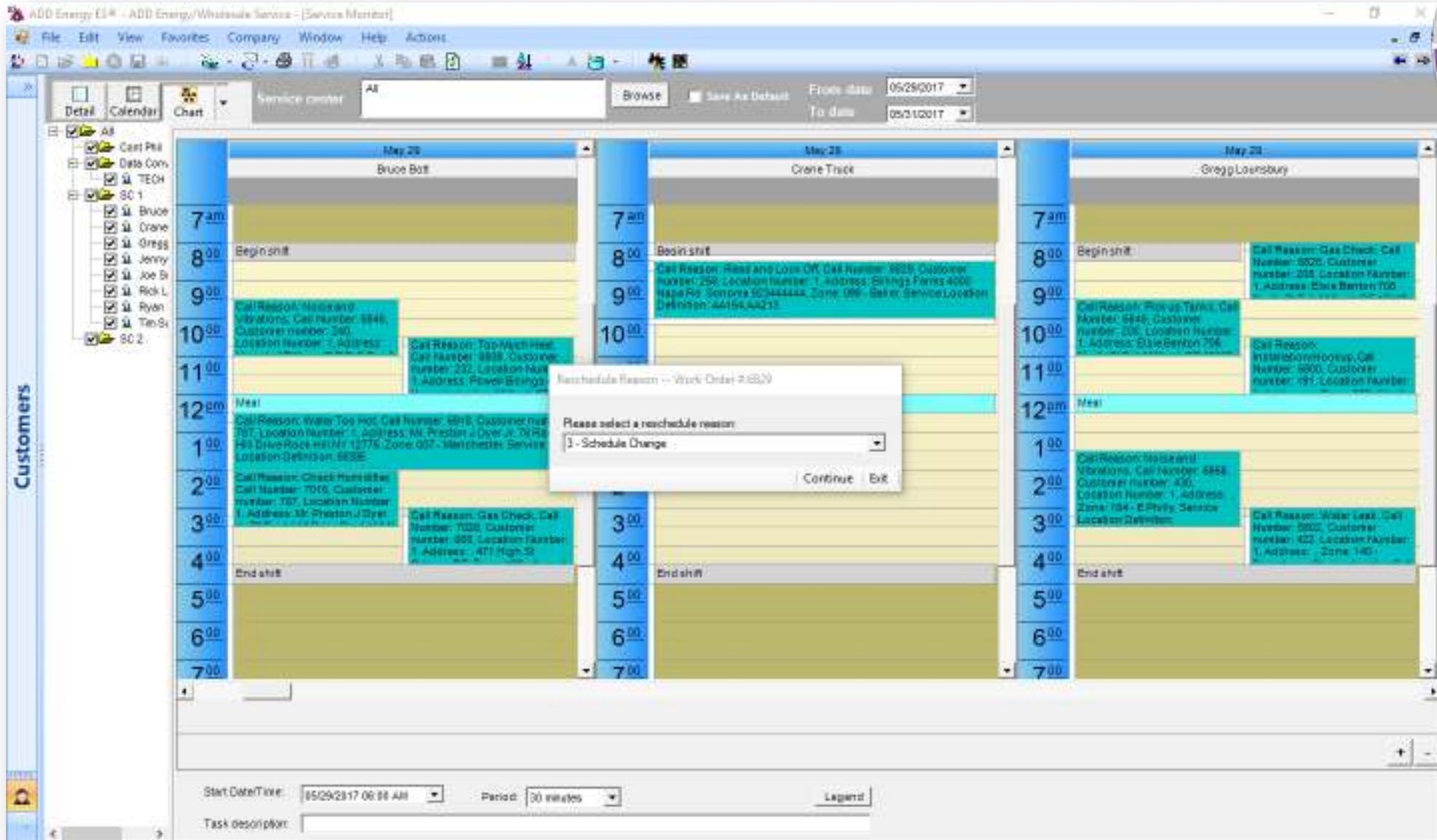
calls 10 Unassigned: 10 Conflicts: 0 Next Alert Techs: 1 Refresh in: 0:00 Last: 10:56 Size 100%

Refresh Sort Order Exit

0 Msgs Mode: Processing



# Dynamic Tech Scheduling

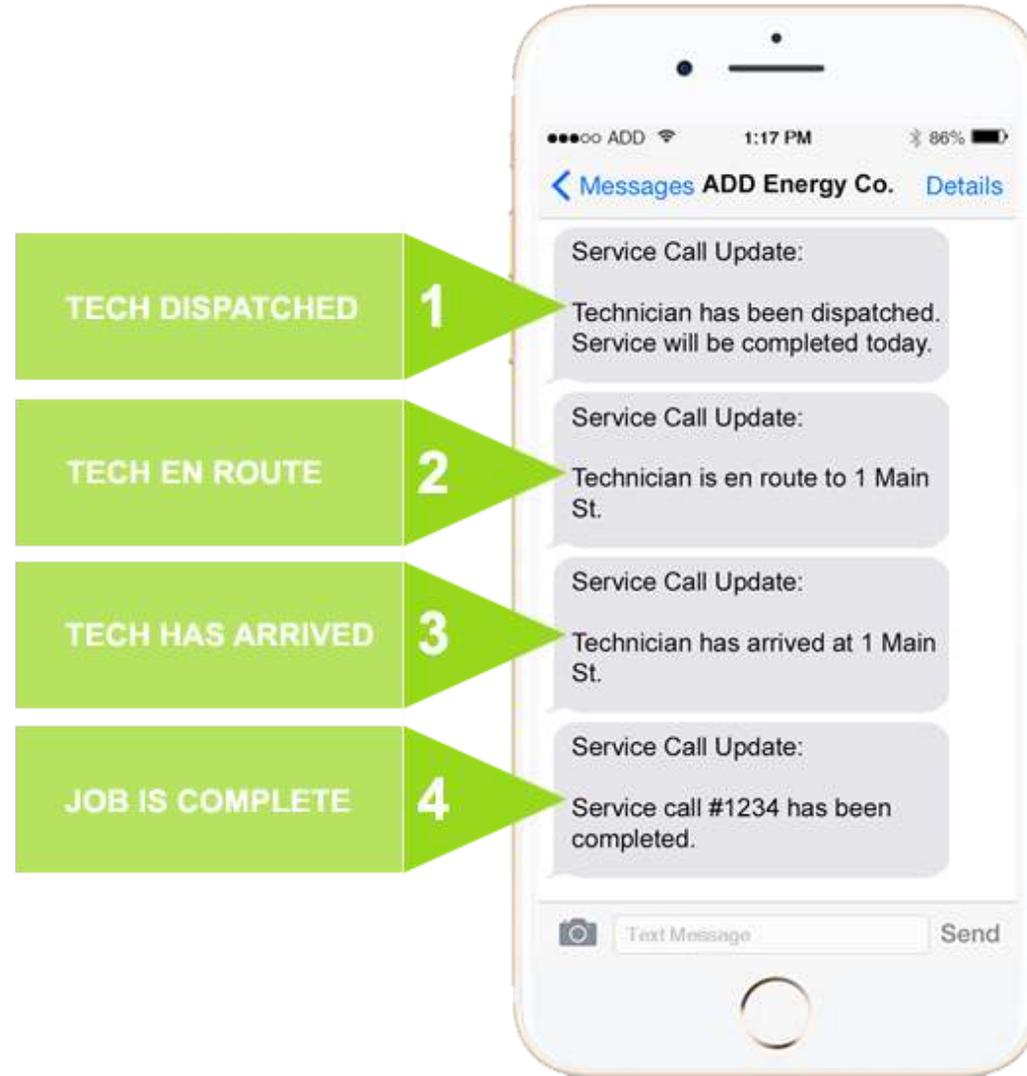


# Benefits of Mobile Service – Customer

- Text message or email notifications to customers
  - Tech is dispatched
  - Tech is en route
  - Tech has arrived
  - Job is complete
- Invoices can be available same day / on-site



# Customer Experience – Notification of Tech Status



TECH DISPATCHED

1

TECH EN ROUTE

2

TECH HAS ARRIVED

3

JOB IS COMPLETE

4

# Benefits of Mobile Service — Management / Ownership

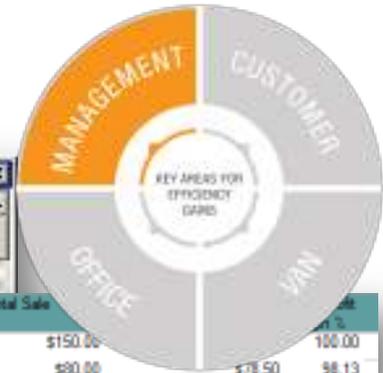
- Tracking the techs with GPS
  - Routing
  - Risk Management
- Improved cash flow with faster invoicing
- Fewer miles driven — savings per mile
- Increased production from same tech fleet
- Increased customer satisfaction with better communication
- Technician productivity reporting
- Reduce shrink with tighter parts control
- Increase number of service calls



# Pre-assigned Workload



# Tech Productivity Reporting



**Pegasus Analytical Reports - Selection Criteria**

Version: 17.01.100

Report:

- Activity Analysis by Date
- Activity Analysis by Date
- Activity Analysis by Technician
- Arrival Analysis Detail
- Arrival Target Analysis (Scheduled Calls)
- Arrival Target Analysis (Unscheduled Calls)
- Call Efficiency (Summary)
- Call Progression
- Canceled Calls
- Daily Variance Report
- First Call Efficiency
- Information Code Analysis
- Last Call Efficiency
- On-Site Analysis by Call Reason
- Service Department Productivity
- Serviceman Call Log Report
- Technician Daily Report
- Technician Productivity (Detail)**
- Technician Productivity (Summary)
- Technician Work History
- Work Hours by Date
- Work Hours by Technician

Print Preview

**Service Profitability Analysis Report - Specification 1**

Service Profitability Analysis Report  
Between 05/01/2016 AND 05/31/2016

Accounting Date Range: 05/01/2016 - 05/31/2016

Division: DIVISION #14, DIVISION #2, DIVISION #3, DIVISION #4, DIVISION #5, DIVISION #6, DIVISION #7, DIVISION #8, DIVISION #9, DIVISION #10, DIVISION #11, DIVISION #12, DIVISION #13, DIVISION #14, DIVISION #15, DIVISION #16, DIVISION #17, DIVISION #18, DIVISION #19, DIVISION #20

Technician	Call #	Call Date	Call Labor Cost	Call Labor Hours	Call Labor Sale	Call Part Cost	Call Part Sale	Total Cost	Total Sale	Profit %	
10 - Bruce Bot	8955	01/12/2016	\$0.00	1.00	\$150.00	\$0.00	\$0.00	\$0.00	\$150.00	100.00	
10 - Bruce Bot	8812	12/15/2010	\$1.50	0.06	\$80.00	\$0.00	\$0.00	\$1.50	\$80.00	98.13	
10 - Bruce Bot	8833	12/02/2013	\$1.75	0.07	\$85.00	\$0.00	\$0.00	\$1.75	\$85.00	97.94	
10 - Bruce Bot	8813	03/04/2011	\$8.75	0.35	\$80.00	\$0.00	\$5.00	\$8.75	\$85.00	89.71	
10 - Bruce Bot	8977	01/12/2016	\$50.00	2.00	\$0.00	\$0.00	\$347.00	\$50.00	\$347.00	85.59	
10 - Bruce Bot	8995	01/12/2016	\$50.00	2.00	\$300.00	\$0.00	\$4.00	\$50.00	\$304.00	83.55	
10 - Bruce Bot	8960	01/12/2016	\$50.00	2.00	\$300.00	\$35.00	\$125.00	\$85.00	\$405.00	80.00	
10 - Bruce Bot	8956	01/12/2016	\$50.00	2.00	\$300.00	\$60.00	\$240.00	\$110.00	\$540.00	79.63	
10 - Bruce Bot	8870	11/18/2013	\$17.50	0.70	\$80.00	\$0.00	\$0.00	\$17.50	\$80.00	78.13	
10 - Bruce Bot	78887	07/15/15	\$0.00	0.00	\$0.00	\$0.00	\$80.70	\$0.00	\$210.00	61.57	
10 - Bruce Bot	8817	12/02/13	\$0.00	0.00	\$0.00	\$0.00	\$5.25	\$0.00	\$0.00	-5.25	0.00
10 - Bruce Bot	8964	12/15/15	\$0.00	0.00	\$0.00	\$0.00	\$11.25	\$0.00	\$0.00	-11.25	0.00
15 - Bob Brown	5677	07/29/15	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$400.00	71.19	
15 - Bob Brown	78787	05/15/15	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00
20 - Gregg Lounsbury	6917	08/14/2014	\$9.20	0.23	\$0.00	\$0.00	\$1,317.00	\$9.20	\$1,317.00	99.30	
20 - Gregg Lounsbury	6875	12/06/2013	\$0.75	0.03	\$80.00	\$0.00	\$0.00	\$0.75	\$80.00	99.06	
20 - Gregg Lounsbury	6941	05/27/2015	\$3.20	0.08	\$80.00	\$0.00	\$243.00	\$3.20	\$323.00	99.01	
20 - Gregg Lounsbury	6904	04/28/2014	\$0.75	0.03	\$75.00	\$0.00	\$0.00	\$0.75	\$75.00	99.00	
20 - Gregg Lounsbury	6908	04/28/2014	\$1.00	0.04	\$80.00	\$0.00	\$0.00	\$1.00	\$80.00	98.75	
20 - Gregg Lounsbury	6885	12/18/2013	\$1.00	0.04	\$80.00	\$0.00	\$0.00	\$1.00	\$80.00	98.75	
20 - Gregg Lounsbury	6975	01/18/2016	\$6.00	0.15	\$0.00	\$0.00	\$474.00	\$6.00	\$474.00	98.73	
20 - Gregg Lounsbury	6921	10/15/2014	\$1.20	0.03	\$80.00	\$0.00	\$0.00	\$1.20	\$80.00	98.50	
20 - Gregg Lounsbury	6876	12/11/2013	\$3.75	0.15	\$0.00	\$0.00	\$248.00	\$3.75	\$248.00	98.49	
20 - Gregg Lounsbury	6871	11/26/2013	\$1.25	0.05	\$80.00	\$0.00	\$0.00	\$1.25	\$80.00	98.44	
<b>Subtotal (13) 4 452.19</b>											
<b>Subtotal (2) 4 458.78</b>											
<b>Subtotal (5) 36 458.08</b>											
<b>Subtotal (9) 36 458.08</b>											
<b>Grand total (4) 36 458.08</b>											

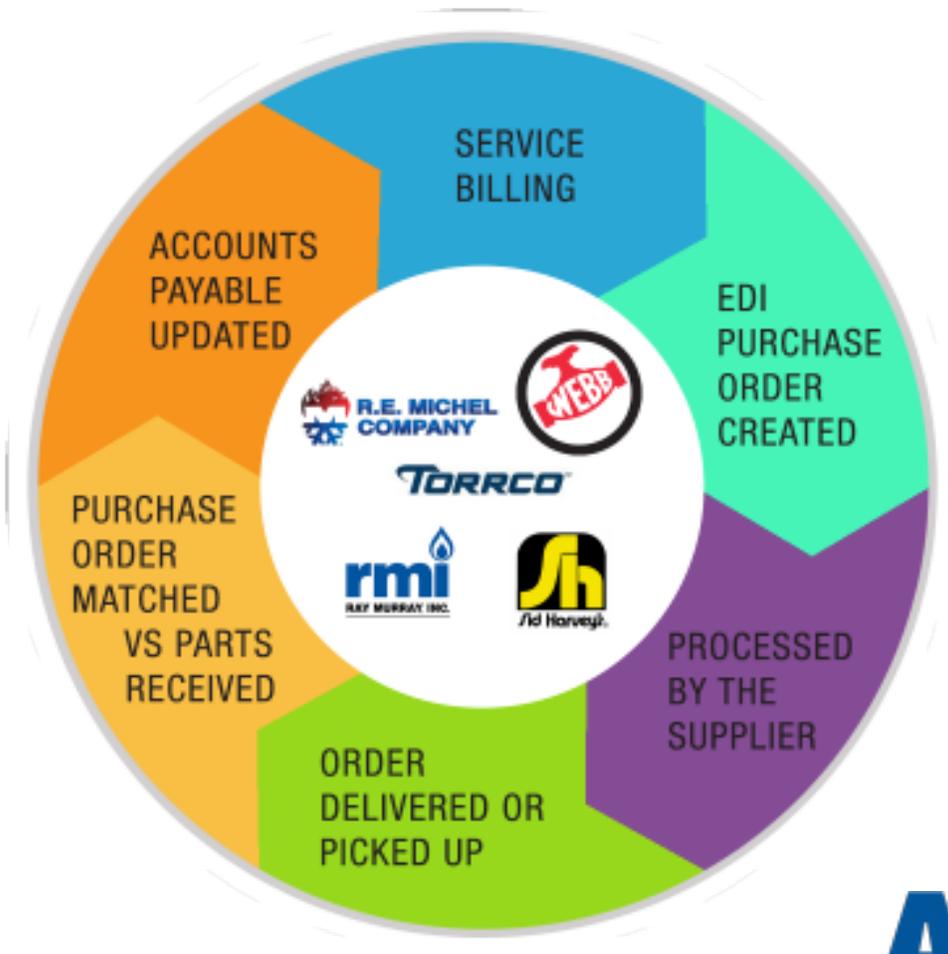
Average Profit Margin% 71.19

Average Profit Margin %: 71.19

Average Profit Margin %: 34.38

Average Profit Margin %: 98.80

# Automatic Parts Replenishment



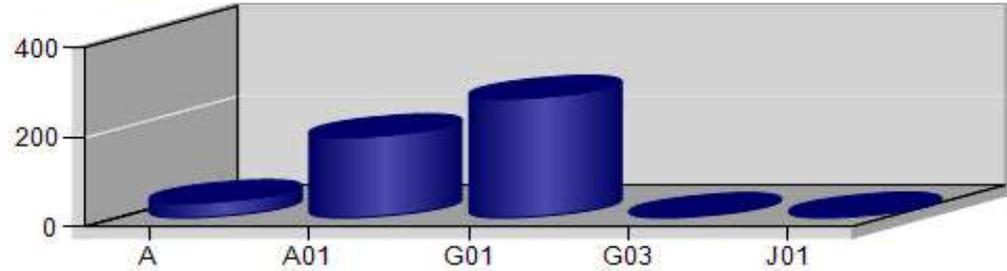
- **Typical Stock Room**
  - 30k – 200k Value Of Parts
  - 5-20% Annual Shrinkage
  - Some Parts 5+ Years Old
  - Costly Counter Person
- **Typical Service Van**
  - Over / Under Stocked
  - Critical Parts Not Stocked
  - 5-20% Annual Shrinkage
  - Hoarding Of Parts

*\*\* Based On Customer Survey \*\**

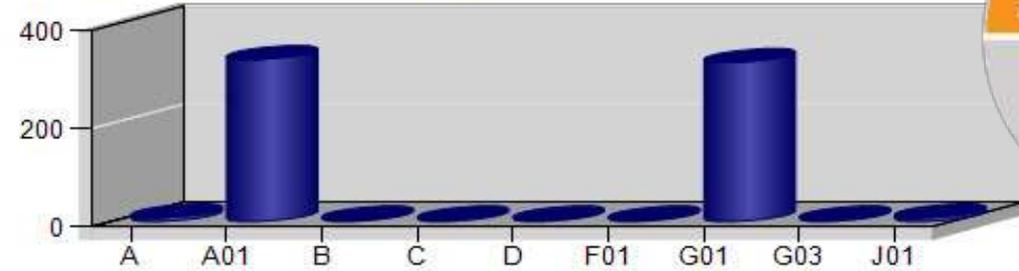
# Service Contract Dashboard



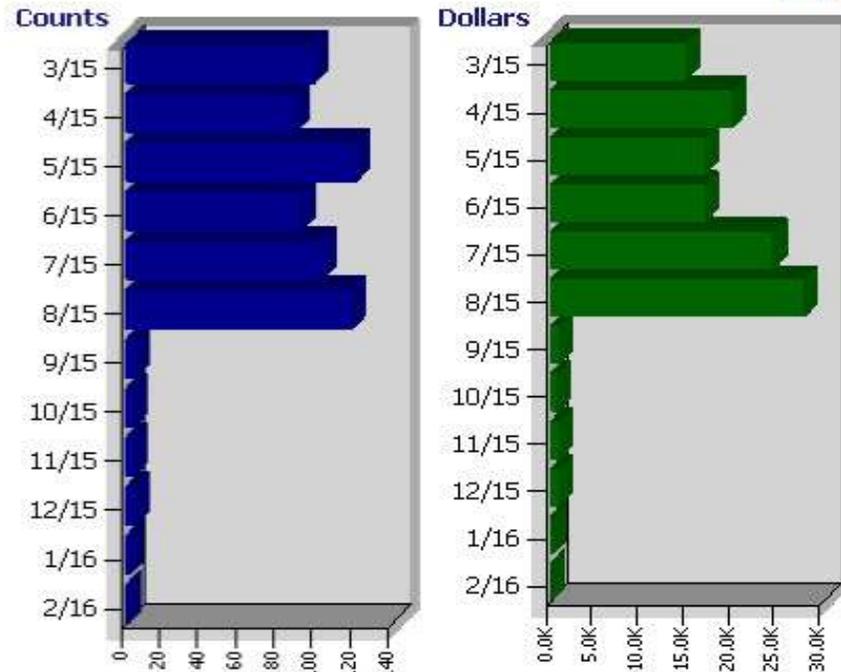
Active Service Contracts



Contracts not Renewed (Last 12 Months)



Expected Contract Renewals - Next 12 Months



	Count	Dollars (Annual)	Average Dollars
<i>Active Contracts:</i>	485	\$122,523	\$253
<i>Contracts not Renewed in the last 12 Months:</i>	680	\$188,552	\$277
<i>Contracts Renewing in the next 12 Months:</i>	644	\$129,383	\$201

Active Contract Details	Count	% of Total	Avg Days Since Cleaning	Service Locations w/No Cleaning	Avg Days Since Last Service	Service Locations w/No Service
<i>Atlas 2 (2753)</i>						
<u>A</u>	33	6.80%	Not Covered	33	246	5
<u>A01</u>	180	37.11%	Not Covered	180	2,665	29
<u>G01</u>	266	54.85%	249	200	1,984	5
<u>G03</u>	1	0.21%	No Cleanings	1	254	0
<u>J01</u>	5	1.03%	246	4	648	0



# CHALLENGES

# Implementation Challenges

UPFRONT HARDWARE  
COSTS



INSTALLATION AND  
TRAINING TIME



BUY-IN FROM  
DRIVERS / TECHS



# Strategies to Overcome Challenges

- Start small
- “Train the trainers”
- Demonstrate the direct benefits to drivers / techs





# BACK OFFICE INTEGRATION

# Why is Back Office Integration Important?

 **STREAMLINE OPERATIONS**

**AUTOMATE TIME INTENSIVE PROCESSES**



**KEEP ALL IMPORTANT INFO IN ONE PLACE**

**MAKE DECISIONS BASED ON ALL AVAILABLE INFO**



**MINIMIZE HUMAN ERROR FROM MANUAL ENTRY**

# ADD Systems

- Provides back office and mobile solutions for propane and petroleum companies
- Learn more about us at [addsys.com](https://addsys.com) or call us at 800-922-0972
- Visit us at the **NPGA Show Booth #649**



# Contact Us

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# Thank You

- Questions?



# Contact Us

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