

Process automation  
and real-time data accuracy with

# Capture OnTheGo™

This Objectif Lune customer prefers not to be named.

## ABOUT THE COMPANY

The company started 40 years ago and specializes in plumbing, heating, ventilation and air conditioning. Most of its 160 employees are field service workers who input data while on service calls. Capture OnTheGo is used to reduce manual tasks, automate processes and make their data more reliable.

**Region:** USA

**Industry:** Plumbing, heating, ventilation and air conditioning

## Identifying the Opportunity

More than 100 of their employees were mobile and used a manual paper-based work order system. To clock in while they were on the road, employees had to check in via smartphone. The company had separate payroll, inventory and document management systems, making day-to-day work complex and time consuming.



## Before

### THE ISSUES

- Administration spent the first two hours of every day calling employees to dispatch calls.
- One employee spent the entire day on payroll.
- The data from paper orders was entered manually, increasing the risk of errors.
- Work orders were not always submitted on time and the company sometimes paid significant overtime due to inefficiencies in processing.

## The Solution

With Capture OnTheGo, they now use e-forms on the mobile devices they already had in the company, allowing employees to capture data and information in the field.

Forms are sent back to the home office as soon as a connection is available.

Once the information is received, an automated process, like confirmation emails or billing system updates, is triggered.

With Capture OnTheGo's "GPS location pins" feature, they have increased the accuracy of invoices and prevented invoice disputes.



## Now

### THE BENEFITS

- Employees in the field clock in when they open the app on their first call. They are clocked out automatically when they close their last job. This significantly reduces errors and makes accounting more efficient, saving them at least 4 hours a day.
- A lot of processes are now automated, such as inventory and invoice generation.
- The company increased its productivity and reduced overtime costs.

**Capture  
OnTheGo™**

OL™ Software

[www.captureonthego.com](http://www.captureonthego.com)

**OL™**

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