



Pipe Line Unique Services uses digital service reports and digital equipment tracking reports to streamline and improve the collection of field data.

**INDUSTRY**

Energy

**CUSTOMER SINCE**

2013

**FORMS**

- Service Reports
- Equipment Tracking Reports

# At-A-Glance

## Challenge

Pipe Line Unique Services needed a way to accelerate the delivery of service reports from equipment sites. Once a document was completed at a worksite, it would need to be hand-delivered to the office for processing – often resulting in lengthy wait times. Form delivery delays made it difficult to promptly present clients with billing and incident documentation, which became all the more frustrating as the company grew.

## Solution

Pipe Line Unique Services digitized their service reports and equipment tracking reports, allowing teams to fill out forms from job sites and instantly submit them to the back-office for processing. The 'real-time' nature of digital forms allows administrative teams to immediately access submitted forms, accelerating customer communication and form processing. Leveraging automated workflows and GoFormz reporting, service reports can now be automatically run and exported into Excel. These reports can then be regularly presented to important customers, detailing equipment performance and reliability.

## Results

- Simplified client communication with easy to access digital forms
- Automated reporting helps streamline analysis and improves insights
- Elevated compliance monitoring
- Reports provide evidence of equipment reliability and performance

## Why GoFormz

*"We have improved our trackable reporting for our customers, and we now have hard data to show them what we are doing and how reliable our equipment is." - Kelly Carpenter, Director of Business Operations, Pipe Line Unique Services*

## About Pipe Line Unique Services (PLUS)



Pipe Line Unique Services builds specialty injection equipment for the pipeline industry. With over 30 years of industry experience, Pipe Line Unique Services has placed equipment at pump stations across the United States and Canada.

# The Full Story

Pipe Line Unique Services (PLUS) provides specialty injection equipment to pipeline operations throughout North America. Originally, PLUS relied on paper forms to document critical equipment installation and servicing information, however this became problematic and unsustainable as the company grew.

“Our service technicians would go out to sites, service the equipment, and fill out paper service reports,” explained Kelly Carpenter, the Director of Business Operations for Pipe Line Unique Services. “But this meant when we wanted to reference documents when telling a customer about an incident or during billing, we would need to have our hands on a paper copy of the form.” This meant that paper service reports completed in the field would need to be manually delivered to office locations, resulting in frustrating delays. “As our business grew, we had more locations and were adding more service technicians, and the amount of paper forms was becoming overwhelming.”

To streamline service documentation, simplify access to completed forms, and support their operational growth, PLUS turned to GoFormz to digitize their forms.

## **Easy onboarding**

For PLUS, onboarding their field technicians with the GoFormz platform was easy. “We converted our paper forms identically into GoFormz, and this helped with the adoption by technicians,” Kelly recalled. “It

was virtually the same exact form, except they were filling it out digitally.” Now, technicians can easily complete and submit their Service Reports directly from their phones, tablets, and computers.

## **Digital in the field**

PLUS teams servicing equipment in the field rely heavily on Service Reports to complete their work. These reports detail information regarding what services were provided, as well as the equipment serviced. These forms require detailed information to ensure that equipment is compliant. “As you can imagine, being in the oil and gas industry, we have to make sure we are in compliance,” explained Jay Hyatt, who manages special projects for Pipe Line Unique Services. “So we collect quite a lot of data every time we go out to our equipment.”

Digital Service Reports have enabled PLUS technicians to capture thorough, accurate data, while remaining efficient. “We have upwards of 100 fields on that one Service Report, which has grown to be three pages long.”

## **Elevated equipment tracking**

In PLUS’ production departments, Equipment Tracking Reports are used to list and track critical equipment pieces. “When we build out our units we make sure to list out all of the major components that are in that particular piece of equipment, for easy reference,” Jay detailed. “Every time a piece of equipment leaves our shop and goes out in the field, the Equipment Tracking Report is being completed.”

## **Automated reporting, improved analysis**

Once submitted, data from Service Reports and Equipment Tracking Reports is used to instantly augment reports in the GoFormz Reporting tool, which are then exported in Excel. These reports are shared with customers as evidence of their equipment's performance and reliability – providing improved visibility into PLUS' service and equipment quality. "We have improved our trackable reporting for our customers, and we now have hard data to show them what we are doing and how reliable our equipment is."

### **Digital improvements - ROI**

Pipe Line Unique Services has elevated its customer communication and customer-

facing reporting with real-time insights from Service Reports and Equipment Tracking Reports. Leveraging Automated Workflows, form access and reporting can be easily automated, accelerating processing without increasing administrative demands.

### **What's next?**

Pipe Line Unique Services is now working to optimize and add to their workflows within GoFormz.