



# CASE STUDY



## CUSTOMER

Transport Refrigeration Services

## INDUSTRY

Refrigeration Service & Support

## CHALLENGE

Information access & process visibility across a distributed workforce

## OUR SOLUTION

eForms with Intelligent Workflow

## OUTCOME

Process optimisation, information sharing and audit efficiencies, and compliance mitigation

## QUALITY CARE & SERVICE FOR TRS CUSTOMERS

Transport Refrigeration Services (TRS) was established over 40 years ago and is a recognised leader in refrigeration services and support for the Australian refrigerated transport business. With humble beginnings in repairing refrigeration units on trucks and trailers, TRS has grown to also include vehicle rental and purchase, along with spare parts supply. With a reputation built on prompt, reliable, and client-focused services and support, TRS service vehicles for their refrigerated road transport clients who deliver everything from fresh food to healthcare products.

## OVERCOMING DISORDERLY & MANUALLY INTENSIVE PAPER PROCESSES

With mobile service technicians around the country, TRS are ready at a moment's notice to provide support to clients who need repairs or new refrigerated transport solutions. However, initiating repairs or services is a paperwork-intensive business, and TRS was suffering under the weight of manual, handwritten forms and processes.





The company's existing enterprise resource planning (ERP) solution couldn't support its field service requirements, so technicians were using books and pieces of paper to manage their jobs. They would write down what they had done, and then those handwritten notes would sit in the technician's van until they had time to go into the office and hand over the paperwork.

Daniel Wilton, General Manager, Transport Refrigeration Services, said, "Technicians work independently and may not come into the office for a week. Meanwhile, they would provide customers with unprofessional-looking, handwritten forms documenting their repairs. These wouldn't include photographs or any other proof of what had been done.

"And, because the paperwork wasn't immediately available to office staff, it could take days or weeks to respond to a customer, send an invoice, ask for a purchase order, confirm the work done, or replenish the technician's van with the parts that had been used."

TRS needed a more standardised solution that would streamline this process and add a professional element. It needed to digitalise the entire workflow and provide mobile access to electronic forms and information.

At the same time, TRS needed to update its quality control mechanisms as more than half of its business produces truck bodies with refrigeration units and tailgates. Providing and monitoring an exceptionally-high quality of workmanship and a perfect finished product is important to TRS, so it needed a way to manage this process.

**“ The Upstream solution helps ensure we have the right checks and balances in place and vastly improves visibility from a compliance perspective.”**

— Daniel Wilton —  
General Manager

Daniel Wilton said, "The system we had couldn't produce reports that provided enough detail to confirm to customers what work had been done. TRS needed to provide a checklist to customers and sales representatives that would confirm what service, repairs or equipment had been performed or fitted to the vehicle, including photographs. This would not only create a professional document but also confirm everything was up to scratch and according to the original plans.

"TRS also needed a way to speed up access to information for supervisors so they could expedite the process of fixing issues."



**“ Our entire process is faster and more accurate, and there are no longer questions about what work was done because of the quality information we can now provide.”**

— Daniel Wilton —  
General Manager

## MOBILISING & DIGITISING CRITICAL BUSINESS DOCUMENTS WITH EFORMS

TRS had an existing relationship with Upstream who had previously provided a managed print solution and additionally modernised the invoicing workflow with Accounts Payable automation, among other projects.

Daniel Wilton said, “TRS has a strong relationship with Upstream and we trusted their expertise. When we approached the team with our needs, Upstream immediately went about investigating possible solutions for TRS.”

### DIGITISED SERVICE & REPAIR PROCESS

Upstream developed an eForms solution, using M-Files, to digitise the service and repair process, solving the issue around technicians using handwritten documents. The job information was populated and distributed digitally to the technicians. This meant that the technicians could pick up new work orders on the go using their existing devices. They could then capture all the related job information electronically, including the work performed, what parts were used and even add photographs, providing a visual record.

Upstream also added a workflow that provides the customer with an emailed copy of the report, so there can be no dispute over what was done. The information from the eForm is then used to replenish used stock in the technician’s van so they have the parts they need sooner.

### STOCK REPLENISHMENT AUTOMATION

Daniel Wilton said, “This solution has sped up replenishment, invoices and purchase orders. It has made the entire process

faster and more accurate, and there are no questions around what work was done. It’s also helped create visibility from a compliance perspective.”

For the quality control solution, Upstream created a customised workflow and checklist using M-Files. Similar to eForms, the checklist includes all the steps of the work performed on the trucks along with photos to confirm that the work has been done properly. Additionally, the checklist and photos can be sent to the customer periodically to keep the customer updated, improving their experience and adding to their excitement about the status of their new truck.

Daniel Wilton said, “The solution means we can easily check before a truck leaves our premises that it has been completed according to our standards and the customer’s expectations. If there are issues, we can quickly rectify them before the truck reaches the customer. Supervisors now have access to information in real-time so they can ensure the job is completed properly. They can also alert other staff members when their part in the project is finished. Then, they can let the customer know that the truck is complete and on its way for delivery.”

## DIGITISATION & AUTOMATION BENEFITS

The Upstream solution has created comprehensive, up-to-the-minute information at the fingertips of all TRS staff members, letting the organisation operate more smoothly and provide a better quality of customer service.



## THE BOTTOM LINE



Improved customer service by digitising and automating processes



Reduced potential for errors, inefficiencies, and compliance issues



Freed up technicians from manual capture and processing and automated parts replenishment on the go

Daniel Wilton said, “With the Upstream solution, anyone can search for any document or file at any time. It’s a very robust solution for TRS and, as more people use it, the more invaluable it becomes to the business.

“For example, a staff member was having trouble finalising invoices for customers, previously unsure where to look for contractor invoices in the absence of her supervisor and thereby causing delays. With all the job and invoice information available in the Upstream solution we were able to search for the invoice number and access it immediately – something we previously were unable to do. That search functionality is second to none. And, being able to use it on mobile devices is exceptional because the TRS team is, primarily, a field service team.”

These projects are just the latest in a long line of solutions provided to TRS by Upstream, all of which put crucial information in the hands of the people that need it.

Daniel Wilton said, “Like a lot of businesses, TRS relies on the quality of information coming in from technicians and other field staff. Customers rely on us to do the right thing. The Upstream solution helps us put the right checks and balances in place, and provide access to documents and information instantly. This builds trust as customers know that TRS is delivering the right service or product for them. The solution also creates that competitive advantage based on the quality of information we have and the speed at which we can provide it.”

## UPSTREAM HELPS BUSINESSES WORK SMARTER, DIGITALLY

With a history spanning over 30 years in the print and document management industry, Upstream is one of Australia’s leading content, workflow and print management solutions companies.

Our strengths lie in understanding the immediate and long-term goals for improving processes and reducing paperwork, data entry and duplication, effectively streamlining and optimising workflow. We deliver flexible, cost-effective solutions that alleviate your administrative burden and provide real value to your business.

Upstream’s suite of award winning products are uniquely tailored to suit your business needs.

Our solutions include workflow, content management, ‘Smart’ barcode forms, cost recovery, regulatory compliance, and print management to name a few. We specialise in business processes such as POD, HR onboarding, Accounts Payable automation, Sign on Glass mobility solutions, as well as having extensive experience in document storage and retrieval.

Have you identified document processes in your business that are weighing you down? Get in touch with our specialists, we’re always here to help.

**Need a better way to manage documents & processes?**

Contact us today  
**1300 772 772**  
**[upstream.com.au](http://upstream.com.au)**