Yale/Chase Equipment and Services

Improve Business Performance with EquipSoft

Based in the city of Industry, CA, Yale/Chase has been the leading supplier of material handling products, services and solutions in South California and Hawaii for over 20 years. The company focuses on providing end-to-end solutions for their customers that includes core material handling equipment, complementary products, and services wrapped around those products to completely solve their customers’ requirements. The company has divisions for materials handling, industrial carts, construction, energy, terminal tractors, railcars and electrical repairs and services. They carry equipment from Yale, JCB, Princeton, Drexel, Bendi, Taylor-Dunn, Star, Capacity, Trackmobile and other lines.

The Challenge

Yale/Chase had some very specific challenges to solve with a new ERP solution. The primary need was to make sure that they could manage parts, sales, services and rentals in one system. On the rental side of their business, they needed a better view on their equipment availability tree so that they could better optimize booking schedules. On the services side, they wanted to make sure they could engage their technicians and get back accurate data and reports. They also needed to decrease the manual effort associated with stocking parts for consignment and service vans. From an operations perspective, they wanted to do a better job of optimizing preventative maintenance. Finally, they wanted to roll up their KPI’s so that the finance and leadership team had better insight into the performance of the whole business.
The Solution
EquipSoft has been implemented at all of Yale/Chase’s operating locations. Beyond the dealerships and head office, the product is used by their 100+ field service technicians. The company now leans heavily on customized reporting for key operational insights.

The Benefits
 EquipSoft has helped realize improvements across their rentals, parts, service and sales operations. A sortable availability tree means that they are not losing rental opportunities while trying to locate equipment, and the easy transfer of used equipment in and out of rentals also had an impact on their top line revenue. Establishing preventative maintenance scheduled on unit utilization, as opposed to calendars has saved Yale/Chase a lot of money they used to spend over-servicing their equipment. The robust service dispatching program in EquipSoft has made work easier for their field service technicians and made it possible to measure technician productivity. EquipSoft has made it possible to dynamically manage parts stocking of consignment and service vans. The system automatically sets up parts based on criteria entered, resulting in less labor and more accuracy. Finally, the customized reporting functionality within EquipSoft has given their leadership team the metrics they need to run the business more effectively.

“We selected EquipSoft because it offers more solutions out-of-the-box than other vendors; primarily in reporting and its capability to run multiple business units. We saw a return on investment from the EquipSoft system within the first two years.”

Roger Ketelsleger
President and CEO

For more information on the EquipSoft, email us at info@aptean.com.