

Salesforce Field Service Lightning

COMPANY OVERVIEW:

Last-Mile Fuel Distribution Company



LOCATION San Mateo, CA



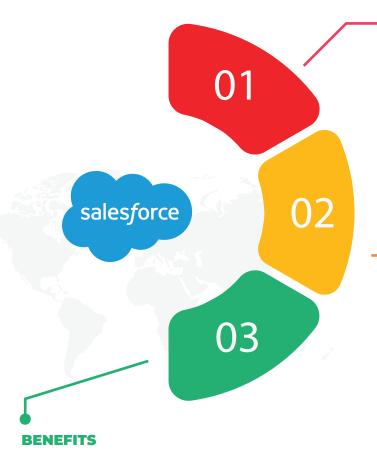
EMPLOYEES 300



Energy



SOLUTION(S) Field Service Lightning



- Automated & digitized Field Service operations and unified performance management
- Drastically improved operational efficiency of Field Service operations
- Reduced services costs and average time to repair
- Reduced travel costs by 10% with efficient dispatch and scheduling
- Improved Field Service performance which facilitated business expansion
- Successful implementation with positive customer feedback

CHALLENGE

- 🐥 Manual field service processes with email, excel sheets, and word documents
- Manual creation of Work orders and Service Appointments for customers
- Manual Service Appointment assignments to internal and external technicians
- 📥 Service Resource Tracking done in Excel
- 🛖 Limited Service reporting capabilities
- 🛖 Excel based inventory tracking

SOLUTION

- Implemented Territory and Skills to align the appropriate resource for Service Appointments
- ✓ Configured Salesforce standard objects in Field Service Lightning
- Configured Work Rules and Service Objectives
- Configured Scheduling Policies, Recipes, and Scheduling Automation
- Implemented Service Resource tracking for Service
- Enabled Dynamic Gantt for operations management
- Configured Location & Product Items to track Inventory
- Configured Service Reports for performance management
- Managed business processes completely with Salesforce by transitioning all manual work to Field Service Lightning

Why dotSolved





Agile Implementation Methodology

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Consulting, Implementation & Managed Services