


Salesforce Field Service Lightning

COMPANY OVERVIEW: Last-Mile Fuel Distribution Company

LOCATION
San Mateo, CA


EMPLOYEES
300


INDUSTRY
Energy


SOLUTION(S)
Field Service Lightning


salesforce
01
02
03
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 Appointments
- ✓ 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

BENEFITS

- 👍 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

Why dotSolved


POD Model of Engagement



Agile Implementation Methodology



Consulting, Implementation & Managed Services



Catalog of Accelerators

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