

Pioneering Field Service Mobility Revolution with Salesforce

Challenge

- Absence of centralized database resulted in time wasted looking for information and delayed or lost opportunities.
- Need for a powerful and secure enterprise level mobile client that supports staff and customer notifications.
- Required a system to provide consistent information online, manage mobile workers efficiently and simplify the operational process.

Our Solution

- Implemented Salesforce to manage all the information on one platform.
- Set up notification module to send and receive job notifications - new, scheduled, rescheduled.
- Developed mobile app for Android & iOS to handle customer management, scheduling, workforce optimization, parts management, invoicing and billing.
- Enabled offline data capture which in turn increased platform adoption.
- Efficient and real-time retrieval of work orders, product details and price of parts, resulting in faster customer decisions and job execution.
- Implemented DocuSign to eliminate paper entry and improve reporting.
- Analysis reporting with built-in metrics on field agents.

Client Description

- Leading Field Service Management company aimed at managing real-time field staffs such as technicians, inspectors, service-oriented employees and investigators.



Service details submission time reduced from an hour to 6 minutes



15% more customers met in 6 months



18% rise in sales



Reports of data inconsistency reduced from 40% to 5%



Reduction in order rejections

About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.



✉ Email : info@cloudchillies.com | www.CloudChillies.com

📞 USA : +1-732-733-6991 | Australia : +61-261-452-397

India : +91-731-2927999



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