

Salesforce Field Service Transforms Service Capabilities for a Global Manufacturing Company

Company

Electrical & Electronic
Manufacturer

Country

USA

Industry

Manufacturing

Implementation Partner



Teaming with the best



The client is a Fortune 100 company and a leader in innovative technologies addressing some of the biggest business challenges. They operate in the fields of airspace, safety, healthcare, consumer goods, manufacturing and markets various products worldwide.

They were determined to improve their field service operations capabilities and evolve their service offerings in response to the changing market conditions and digital transformation demands.

Challenges

The client faced challenges in primarily 3 areas:

- **Service Contracts Management** - Managing service contracts, especially service contract cancellations was one of the most pressing areas for the client to gain efficiency and result from their partners
- **Case Management** - Service leaders had to manually go through all existing work orders and service appointments on the service contract
- **Work and Resource Optimization** - Poor data quality and lack of real-time insight and knowledge base on their field service app led to poor planning & decision making

Solution

CRMIT built a custom Salesforce field service solution along with service cloud and community cloud to align with the customer's global design model and overcome the work order management challenges.

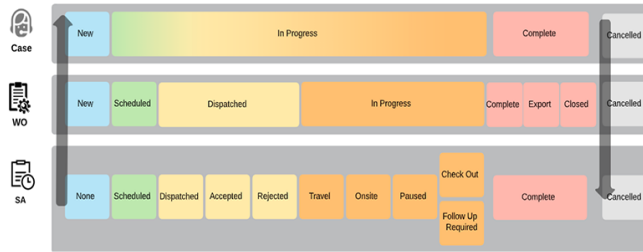
- The quality assurance team created test scenarios, test cases & an automation testing suite
- In the execution phase, the team prepared test data in the test environment, executed test cases, reported defects, and documented them

- An automated process is now created to push the service contract status down to associate work order maintenance plan
- Field service dispatchers received the ability to cancel all existing preventive maintenance work for the blocked service contracts/accounts and control over the new work order
- When a work order is created for the work type, the product required can now be populated with the pre-defined list and is made visible on the web & mobile devices
- Real-time lunch break prompts were configured on field service technician's mobile devices during daily timesheet submission (A confirmation that they have been provided the opportunity to take lunch breaks as per legal requirements)
- During work wrap upon an existing service appointment, a service resource can now request for a follow up on the same work order so that a subsequent visit can be scheduled

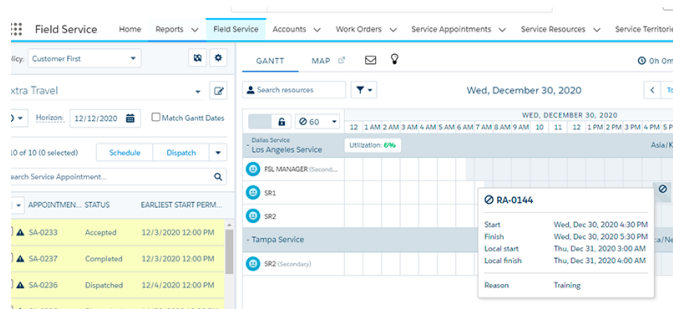
The screenshot shows a web application interface for service contract management. At the top, there is a navigation bar with 'Field Service' and various menu items. Below this, a service contract detail view for 'SP9Reg_SC3_1003' is shown, including fields for 'Service Contract Owner', 'Contract Number', 'Account Name', and 'Contact Name'. A 'Related List Quick Links' section contains icons for 'Contract Line Items (0)', 'Associated Locations (0)', 'Maintenance Plans (0)', 'Work Orders (5)', 'Cases (0)', and 'Service Contract History (3)'. The main section is titled 'Work Orders' and displays a table with 5 items, sorted by Work Order Number. The table has columns for Work Order Number, Work Type, Location, Account, Status, Start Date, and End Date. The first row is 'New', the second is 'Scheduled', and the last three are 'Canceled'.

Work Order ...	Work Type	Location	Account	Status	Start Date	End Date
1 00000413	PM_ONE	Test Location_1231	Hersha Hospitality Management (HHM)	New	12/22/2020 12:00 PM	12/31/2020 12:00 PM
2 00000414	PM_ONE	Test Location_1231	Hersha Hospitality Management (HHM)	Scheduled	1/22/2021 12:00 PM	1/31/2021 12:00 PM
3 00000415	PM_ONE	Test Location_1231	Hersha Hospitality Management (HHM)	Canceled	2/22/2021 12:00 PM	2/28/2021 12:00 PM
4 00000416	PM_ONE	Test Location_1231	Hersha Hospitality Management (HHM)	Canceled	3/22/2021 12:00 PM	3/31/2021 12:00 PM
5 00000417	PM_ONE	Test Location_1231	Hersha Hospitality Management (HHM)	Canceled	4/22/2021 12:00 PM	4/30/2021 12:00 PM

Service Contract Management



Case Management



Work & Resource Optimization

Benefits

- The application enabled the client, partners & employees to make an informed decision in an integrated way
- Service leaders can now prevent new work order creation in canceled service contracts
- Service managers can track the roll-up summary of the time consumed across all completed work orders on the service contract
- Field technicians were able to access any product parts required to perform their job