Salesforce Field Service
Lightning Implementation
for Leading Manufacturing Company

All-in-one solution that enables field service agents to access work orders, field reports, and other information required to complete a service order or field activity.

Project Overview

Implemented Salesforce Field Service Lightning suite to modernize workforce and improve integration of tasks for sales agents, dispatchers, and mobile employees across manufacturing sites. The project also involved management of Salesforce instances; providing technical support, and establishing a mobile-friendly field service hub for technicians with real-time access to information. The solution enhanced employee efficiency and productivity while minimizing turnaround time with the help of automation, leading to exceptional service delivery and greater customer satisfaction.

Client Profile

A leading US-based manufacturing company spread across 220 locations across the globe. Founded in 1930, the client's subsidiaries comprise over 100 brands that offer analytical instruments; monitoring, testing, calibration devices as well as pumps, electrical motors, and interconnects.

Business Requirement

The client required a streamlined system to efficiently manage field service activities. There was a need for a unified platform to manage on-demand repair and scheduled maintenance jobs.

- Enable seamless integration and management of work orders
- Assign tasks to the right resources automatically
- Complete visibility into mobile employee workload and schedules

- Integrated dashboard view of customers and service interactions

- Manage and monitor assets on site

- Enable access to work order and related information via mobile devices

QBurst Solution

We designed the solution using the Salesforce Field Service Lightning package built on top of Service Cloud. We configured the Field Service Lightning package to set up 'service resources' and 'territories' and implemented a dispatcher console to manage service appointments. Field Service mobile application is set up to provide employees online/offline access to work orders, field reports, and other information required to complete a service order or field activity.

- Dispatcher console manages mobile operations, displays alerts for issues that require attention, schedules bulk jobs, and tracks mobile employees in real-time

- Work orders can be managed, tracked, and integrated with accounts, assets, cases, entitlements, and service contracts

- Smart scheduling for instantly booking appointments via Lightning console—automatic assignment of appointments based on location, time, and skills of employees

- 'Advanced Assets' help manage and track products and leverages asset hierarchy to track products that contain several parts in a single view
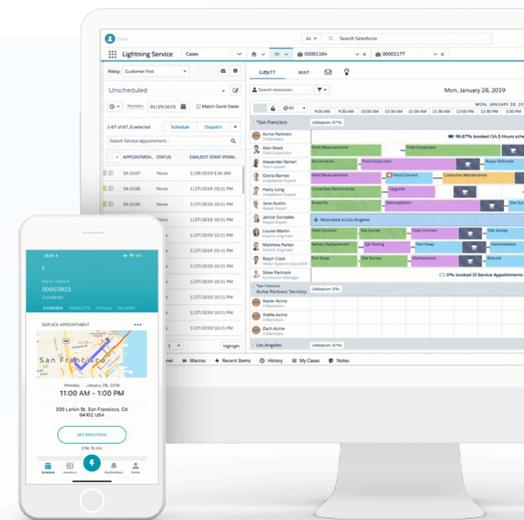
Key Features

- Work order configuration to manage service jobs with multiple work types for on-demand and scheduled maintenance jobs

- Auto-generation of work orders at scheduled intervals

- Service contracts and maintenance plans for scheduled preventive maintenance activities

- Dispatcher console for scheduling and dispatching service appointments

- Automatic scheduling features based on skill, territory, and resource availability

- Inventory management using standard Field Service objects such as product requests and products consumed

- Automatic skill-based and territory-based job scheduling to find the right technician for the job

- Dispatcher console Gantt chart for managing appointments and tracking resources:

  - Bird's-eye view of scheduled appointments

  - Map view of technicians and job locations in real-time
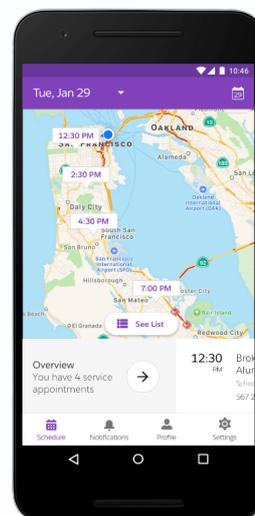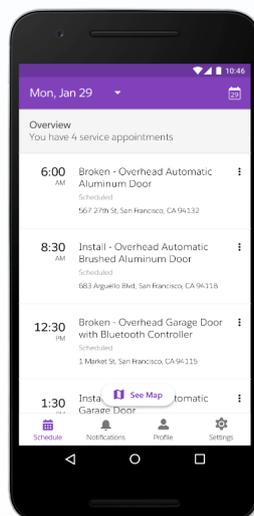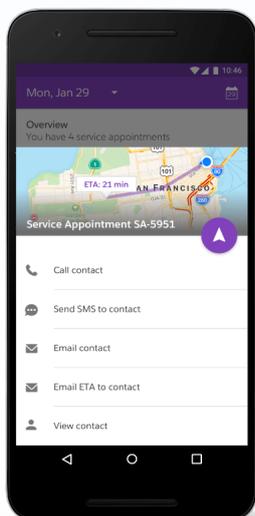
Tools and Technologies Used

Salesforce CRM   **Field Service Lightning**   **Apex**

Visualforce   **LWC, Aura**

Business Benefits

- 42% boost in First Time Fix Rate (FTFR)

- 23% increase in jobs handled per technician

- Automatic scheduling optimization reduced travel time for technicians

- Enhanced employee efficiency and productivity

- Improved customer satisfaction index

- Achieved real-time visibility into operations

QBurst

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