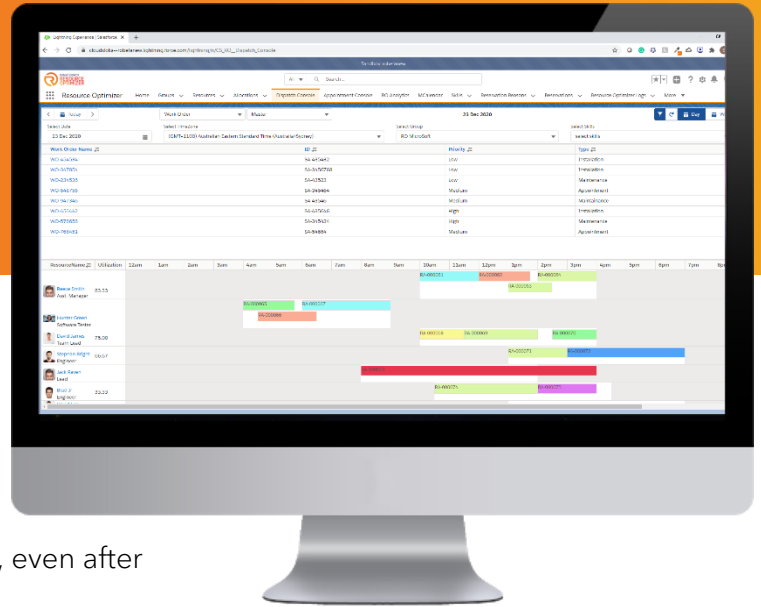


Scheduling & Optimization

Empower your Resource Managers & Resources within Salesforce

Resource managers often find themselves spending a significant amount of time on data management and trying to assign jobs to the appropriate resources, all while having minimal visibility into customer data. Meanwhile, resources frequently switch between various applications to access customer and work data, even after completing the job.



In today's rapidly changing business landscape, companies are searching for efficient ways to accomplish their goals, whether it's task management or field service management. To streamline the process and ensure that work is allocated to resources with the necessary skills, every resource manager needs effective solutions.

Enter Resource Optimizer (RO), a cutting-edge application that allows you to get the job done from any Salesforce object to any resource, in any time zone, all within Salesforce and the Salesforce mobile app. With RO, data management and job allocation are no longer tedious tasks that consume valuable time and resources. RO empowers resource managers to focus on their core competencies and make informed decisions with real-time data. It is the ultimate solution for businesses looking to optimize their resource allocation process and stay ahead of the competition.

Problems

- ▲ Mandatory work order processes which can impede business flexibility.
- ▲ Limited visibility of customer data during work allocation.
- ▲ Difficulties in managing multiple applications.
- ▲ Issues with multiple allocations.
- ▲ Inability to schedule appointments across different time zones.
- ▲ Unable to assign work to oneself.
- ▲ Implementation time and cost

Why Resource Optimizer?

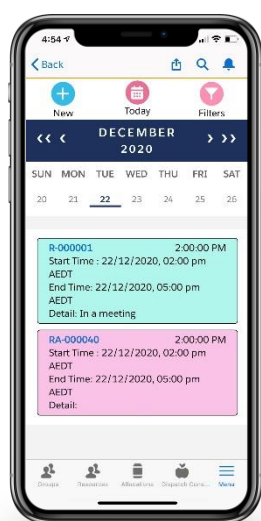
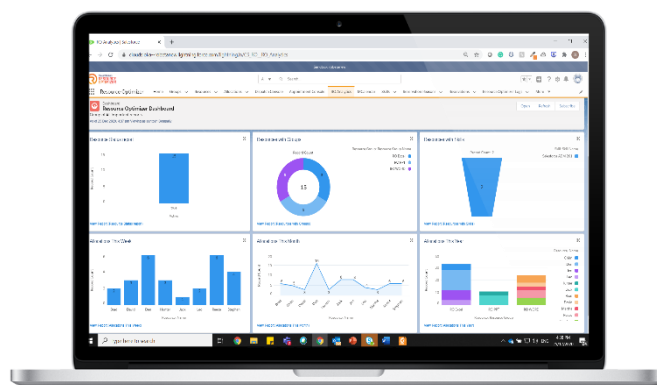
- ▲ Easy, customizable setup for work generation and scheduling.
- ▲ Generate work from any Salesforce object effortlessly.
- ▲ Book appointments in any time zone with ease.
- ▲ Intuitive drag-and-drop Dispatch console for easy management.
- ▲ Manage resource absences effortlessly.
- ▲ Out-of-the-box analytics to aid workforce planning.
- ▲ Mobile-first strategy for effortless digital adoption.

RESOURCE OPTIMIZER

Scheduling Simplified on Salesforce

Capabilities

- ✦ Resource Optimizer is designed to work with *Any Salesforce Object*, in *Any Timezone* and on *Any Device*.
- ✦ Maximize the efficiency of your resource allocation process with our powerful and intuitive *Dispatch Console*.
- ✦ Empower your business with powerful, out-of-the-box analytics to support your workforce planning and drive informed decision-making.
- ✦ Effortlessly track your resource utilization across multiple frequencies - from daily to weekly and monthly - with our intuitive solution.
- ✦ *Book appointments/Allocate work* in any Timezone.
- ✦ Unlock the power of *smart resource suggestions* and take the guesswork out of allocation.



- ✦ Experience seamless digital adoption with *Salesforce's mobile-first strategy and all-in-one app functionality*.
- ✦ Effortlessly manage your workforce with our *mobile calendar* displaying work allocation, reservations/absences, and reschedule requests.
- ✦ E-Signatures, file uploads, seamless map navigation and more.
- ✦ Create instant *Google/Zoom/Teams* meetings.
- ✦ *Automatically* allocate work and create work demands with ease.
- ✦ Seamlessly manage *time sheets and shifts* for your workforce.