



From 114% Storage Overload to 83% Savings: Salesforce + AWS S3 Integration in Facility Services



Headquarters
Arlington, Virginia, US



Industry
Facility Service

OVERVIEW

DCS Business Service Contractors is a trusted all-in-one provider specializing in the property management industry. They handle various commercial service needs for multi-dwelling communities, including janitorial services, painting, drywall, complete turnovers, maintenance, disinfection, electrical, plumbing, and HVAC.

Team DCS primarily relied on Salesforce Field Service, where field agents frequently uploaded images of job progress, completed repairs, inspections, and property turnovers. With over 75 field agents actively adding files, their Salesforce storage started filling up at a rapid pace. Very soon, storage management became a challenge. To address this, the team realized that the quickest and most cost-effective solution was to offload these files using a third-party application.

CHALLENGES

- Salesforce's default storage space quickly filled up due to the continuous accumulation of images and files.
- They hit 114% of file storage capacity, exceeding the limit and grace space. This caused: inability to upload new documents and slower CRM performance.
- The team decided to move documents out of Salesforce but struggled to identify the best solution or the right cloud storage provider.

A key requirement emerged during evaluation:

- For Field Service users, images related to Work Orders need to be available immediately after upload, but only for 1–2 days, until the work order is closed.
- After the job is completed, these images have to be removed from Salesforce and made inaccessible to field agents.

SOLUTION

- Since the team was unsure about which cloud storage to adopt, our experts recommended AWS S3 due to its cost-effectiveness and ability to handle images larger than 6MB, bypassing Salesforce's heap size limitations.
- Using the XfilesPro document management solution, their Salesforce org was seamlessly connected with AWS S3.
- The existing 59.2GB of files were migrated to S3 with the XfilesPro Export Utility tool.

Process flow for new files:

- FSL users initially upload files into native Salesforce file storage.
- These files remain until the related Work Order is completed.
- Post completion, the Auto Export Utility tool transfers them to Amazon S3, supporting file sizes up to 35MB.
- Export criteria: Work Order Status = Completed, Invoiced, or Canceled.
- Once the files were moved to Amazon S3 through XfilesPro, only standard Salesforce license users could directly access them. Field Service agents, who usually needed temporary access to job-related files, lost visibility since they didn't hold licenses to use XfilesPro.
- A file preview feature was enabled, allowing users to preview documents directly within Salesforce without downloading or navigating to S3.

BENEFITS

DCS streamlined file management by offloading 59.2GB from Salesforce to Amazon S3 with XfilesPro. The solution improved CRM performance, enabled secure and temporary access for field agents, supported larger files, and provided a scalable, cost-effective storage foundation.

83%**Cost Savings****2X****Faster CRM Performance****2X****Scalability**