End to End Workflow Solutions with DSMT

For Savings and Invoicing in the Energy and Utility Division

OBJECTIVE

To simplify a complex workflow, scheduling, and customer service process by migrating to a Salesforce DSMT application from a native system that could no longer handle the workload. To enhance the customer experience.

CHALLENGES

- Rerouting and scheduling workflows
- Merging workflow processes for an E2E solution for call center agents, field auditors, Tradeally, and internal CLEAResult business staff
- Improving invoice functionality with DSMT
- Providing the ability to generate PDFs as needed

APPROACH

- Online Google API service was integrated with Salesforce
- VF pages and custom controllers were configured based on each user's required workflow
- Building the tool in Salesforce using JQX grid, jQuery, Bootstrap, CSS, and JavaScript
- Trigger implementation on more than two objects to get the result on an invoice was configured
- Enhance the customer experience with Service Cloud – Case Management, Omni channels, and field service Lightning

BUSINESS BENEFITS

- Call center agents and Tradeally users are now able to efficiently schedule field auditors for appointments, filling capacity
- Manual processes have been reduced with implemented workflow processes, saving time for internal business users
- An online tool allows the whole building to be modeled and cost savings shown for parts added.
- Conga feature allows auditors to generate reports for customers in real time, on location
- Direct invoicing to utilities saves time and prevents human error on data entry
- Revenue was increased by speeding up processing time for assessments and invoices

INDUSTRY

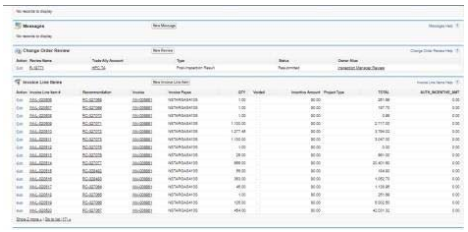
Energy Solutions

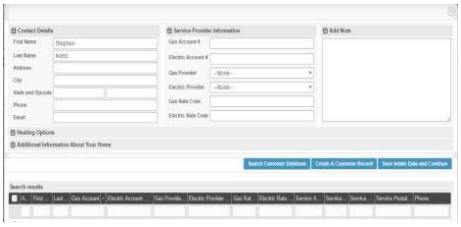
CUSTOMER PROFILE

US based leading energy solution providers for businesses and customers with 15+ years experience.

TECHNOLOGY AND TOOLS

- Sales Cloud
- Service Cloud
- CTI
- Field service integration with Google API, Conga, .NET





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CloudQ helps companies succeed by consulting, implementing solutions, and providing certified professionals. We're one of the INC 5000 fastest-growing private companies, and we're based in Alpharetta, GA. We specialize in cloud-based technology implementation and are a Silver Consulting partner with Salesforce and have a transparent, highly-efficient, customer-centric business model.

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