



# CIRRIUS SOLUTIONS FIELD SERVICE ACCELERATOR



## Key Benefits

- Enhanced technician productivity through improved visibility to scheduling & work orders
- Improved customer experiences through communications & notifications for leads, to opportunities, to onsite service appointments.
- Technician empowerment with superior mobile capabilities in the field
- Faster executive decision making through real-time reporting and analytics

## Description

The Cirrius Solutions Field Service Accelerator is a pre-configured Salesforce Sales Cloud and Field Service managed package that supercharges time-to-value by cutting implementation time by 75% and reducing up-front implementation costs by 45%. Our accelerator leverages the knowledge and experience we have gained from over 800+ Salesforce implementations. You will receive a simple, lean, user friendly, and scalable Lead to Onsite Service CRM solution built on top of Salesforce implementation best-practices.

## Background

Salesforce Field Service is the industry-leading product from Salesforce to manage field service operations. The typical Field Service implementation involves a considerable amount of configuration and data to be managed to achieve success. Over the course of numerous implementations, the Cirrius Solutions team has identified similarities and best practices that we have built into the Cirrius Solutions accelerator package to significantly reduce overall cost and implementation time.

The Cirrius Solutions Field Service Accelerator is aimed to improve the efficiency of the baseline setup of your field service process. The application contains the following functionality:

### Sales Cloud:

Our Sales cloud setup is designed to enable your teams to manage Leads and Opportunities in your Salesforce org. This offering will help your sales team get organized and close more deals.

- User Setup which will include the creation of profiles and role hierarchy
- Home page setup of key reports and upcoming tasks
- Configuration of Lead, Account, Contacts, and Opportunities
- Lead process configuration (one process)
- Opportunity process configuration (one process)
- End-user training to ensure adoption
- Pre-built automations to auto-update information and reduce clicks in the process

### Service Cloud:

Our Service cloud setup is designed to implement Service Cloud to enable your Service teams to manage Cases and Work Orders. This offering will help your support team get organized and manage and respond to incoming service requests.

- User Setup which will include the creation of profiles and role hierarchy
- Home page setup of key reports and upcoming tasks
- Configuration of Cases
- Support process configuration (one process)
- Work Order creation from Cases or Closed-Won Opportunities when site visits are required
- End-user training to ensure adoption
- Pre-built automations to auto-update information and reduce clicks in the process



## What Makes Cirrius Solutions Different?

# 800+

We've Completed  
Over 800 Projects

# TOP 1%

We're in the Top 1% of All  
Consulting Partners.



Our 5 Star Average Rating  
on Appexchange



## Salesforce Field Service

Our Field Service accelerator was designed by our technical team with a comprehensive understanding of real-world field operations to deliver immediate value to your service team.

### General Installation

- Installation of the Salesforce Field Service managed package
- User Setup with the creation of field service permissions
- Flexibility to initiate the field service process from cases or sales opportunities
- Pre-built automations to auto-update information and reduce clicks in the process

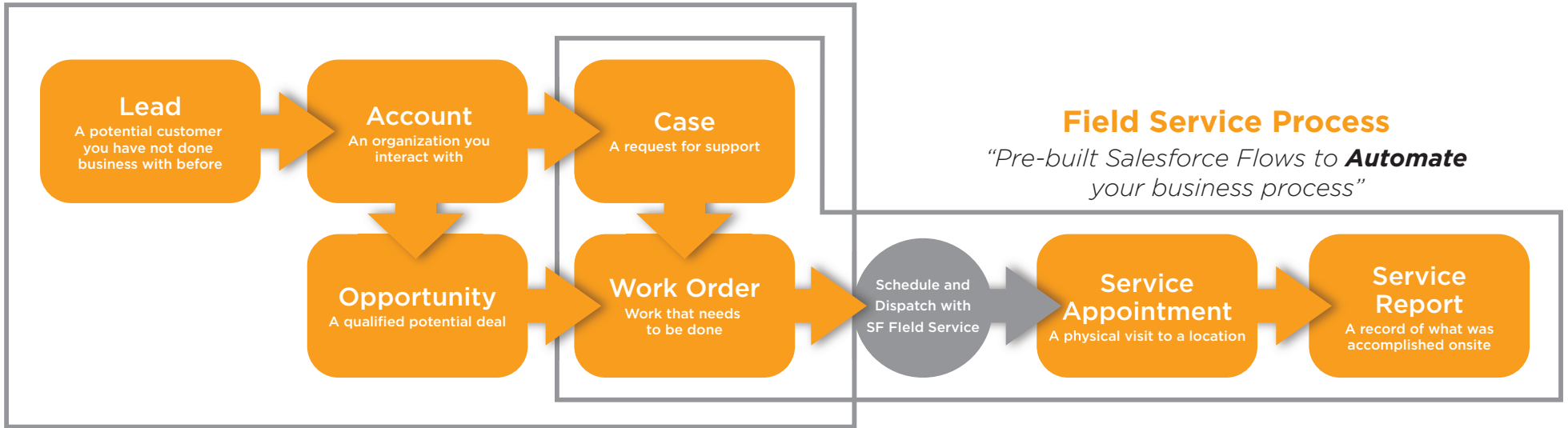
### Base Package Configuration

- Creation of operating hours to align with service appointments
- Setup of resource skills and work types
- Setup of work order management and service appointment dispatching
- Identification and setup of service territories
- Dispatch console to drive rep assignment efficiencies
- Configuration of resource absences
- Setup Field Service application pages and /or page layouts for your service team
- Work Order Setup
- Service Report Templates
- Mobile user application design and configuration
- End-user training to ensure user adoption

# Cirrius Field Service Accelerator

## Sales & Service Process

*“A complete **Lead to Onsite** solution built on the Salesforce Platform”*



*“75% Faster time to value AND 50% Lower Costs compared to standard Salesforce Field Service implementation”*



## Summary

Cirrius Solutions is a market leader in Salesforce Field Service implementation and the go-to provider for hundreds of companies across the United States. With 100% US-based resources comprised of over 50% military veterans and spouses, we exceed our client’s expectations by delivering forward thinking software and services. Our Cirrius Solutions Field Service Accelerator is one of the many innovations we have delivered to help our clients outpace their competition.

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## Ready to move forward on your next Salesforce project?

Learn more about how Cirrius Solutions can help you make the most of your Salesforce.com investment.

Please contact your Cirrius Solutions Account Manager directly at [info@cirriussolutions.com](mailto:info@cirriussolutions.com) for more information.

