



The trusted Salesforce developer and consultant for nonprofits who want to **get it right**.

Salesforce Field Service

Transforming operations for efficiency and growth at a leading filtration company





Salesforce account representatives reached out to Inovi Solutions for help developing a customized instance of SFS for Carolina Filters, in addition to some unique features and components that are tailored to their exact business needs.

Inovi created customized standard quote templates that could handle numerous kinds of customer quotes, and added features to auto create Work Orders and schedule Service Appointments based on the recurring schedule of each unique job and the different service levels that each job requires – for example, some filters need to be serviced every 6 months, while others are on a 12-month or 24-month schedule.

We developed a customized Quote function that can handle multiple types of quotes as well as quotes for different service levels, and employees can also auto create Opportunity, Work Orders and Schedule Service from an approved Quote. Our team also automated the process for creating Appointments based on the recurring schedule of the job.

The outcome was an immediate improvement in productivity, optimized service based on the unique needs of each product being used by each customer, and significant gains in efficiency and service appointments.

"Carolina Filters is more nimble now, and we can respond to customer requests more quickly and with greater consistency. We're also more efficient and proactive in how we're scheduling and performing service."

–Robyn McLeod, Carolina Filters