

# Case Study: Apartment Management Services Provider

## Background

Our customer is a prominent provider of apartment management services. They undertake services of all kinds, from fan cleaning to colouring and tiles laying. They were using following systems to execute their business operations:

1. Salesforce – Sales and work order management
2. Jobber – To record the job done with pictures and various other aspects of job.
3. QuickBooks – for accounting purposes

## Problem

The above 3 systems that they were using did not have any connection in-between them. None of them was exchanging data to any other.

This led to lots of manual work copying data from one system to another, which created 2 types of problems:

1. Delays in executing services.
2. Requirement of additional resources just to copy data between systems.

## Solution

We suggested them a solution where Salesforce Field Service Lightning (FSL) replaces the Jobber, with offline function capability, and then connecting Salesforce and QuickBooks to automatically create invoices in Salesforce.

The core component of this solution was offline-capable FSL solution that allowed their supervisors to go in the field and record the work needs to be done, or inspect the work done with supporting images.

The solution also allows field technicians not only capture new work orders, but also edit them (without internet, in offline mode). Later when the internet is available, the latest version of all the work orders is synchronized to Salesforce.

## Benefits

This solution related into many benefits to customer:

1. There were no additional resources required to copy data from one system to another.
2. Jobber was removed from the IT, which saved money and time.
3. Salesforce become a single system of TRUTH.
4. Better leverage of current customers in sales and marketing activities
5. User always worked off latest service offering and pricing.