Optimizing Field Inspections with Salesforce FSL for CSA

Project Overview

CSA, a prominent standards and inspection organization based in Canada, sought to enhance its inspection workflows by leveraging Salesforce Field Service Lightning (FSL). The objective was to digitize and streamline the scheduling, execution, and reporting of field inspections across multiple geographies. TRooTech was brought on board to implement a fully customized FSL environment to support CSA inspectors with real-time, mobile-first capabilities.

Strategies In Action

- Analyzed CSA's legacy inspection process and mapped it with Salesforce FSL functionalities.
- Designed a unified system for job scheduling, resource allocation, and report logging.
- Configured mobile-first interfaces to support inspectors in remote environments.
- Applied business-specific automation to eliminate manual intervention and accelerate field data processing.

Major Challenges

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While no major technical challenges were reported, designing an automation flow tailored to CSA's unique inspection lifecycle required in-depth business analysis and iterative configuration.

Our Solution

- ✅ End-to-end implementation of Salesforce FSL tailored to CSA's inspection framework
- ✅ Streamlined inspector scheduling and dispatch with real-time sync capabilities
- ✅ Integrated job status tracking and centralized inspection data capture
- ✅ Automated notifications and report generation aligned with business logic

Main Features

- Automated Workflows: Configured Automated Job Assignments And Status Updates.
- Inspector Dashboard: Mobile-Optimized Interface For Daily Inspection Planning.
- Custom Templates: Predefined Templates For Structured Inspection Reporting.
- Real-Time Sync: Enabled Live Job Tracking, Reducing Manual Coordination.
- Smart Scheduling: Dynamic Scheduling Engine Based On Location And Availability.

Technology Stack

Salesforce : Field Service Lightning

Stake Holders

- ▸ CSA Field Inspectors

TRooTECH