

SALESFORCE SOLUTIONS

# Streamlining Order & Service Management for Rental Operations

Salesforce Revenue Cloud Transformation

---

Industry: Waste Management / Dumpster Rental Services

Sales Cloud

Revenue Cloud Advanced

Revenue Cloud Billing

Service Cloud

Agentforce



[www.quadranttechnologies.com](http://www.quadranttechnologies.com)

## Key Operational Challenges



### Manual Order Processing

Orders via calls, emails & spreadsheets  
Delays in scheduling deliveries & pickups



### No Real-Time Availability

Limited visibility into dumpster inventory  
No ZIP code-based tracking



### Vendor Coordination

Manual follow-ups with multiple vendors  
Inefficient scheduling processes



### Pricing & Billing Issues

No centralized catalog or pricing model  
Difficult margin and cost tracking



### Fragmented Customer Experience

Disconnected customer interactions  
Inconsistent communication & follow-ups

## Unified Salesforce Platform



### Revenue Cloud Advanced

- Centralized product catalog
- Dynamic pricing & quote automation
- ZIP code-based availability mgmt
- Automated order lifecycle



### Revenue Cloud Billing

- Automated invoice generation
- Recurring and one-time billing
- Vendor cost & margin tracking
- Payment reminders & collections



### Service Cloud

- Unified customer service console
- Case management & support workflows
- Automated notifications & comms

## Intelligent Service Operations



### AI-Powered Customer Support

- Dumpster availability inquiries
- Booking updates & scheduling assistance
- Invoice and payment support



### AI-Driven Operations

- Smart vendor assignment
- Route & delivery optimization
- Automated follow-up recommendations



### AI for Sales Teams

- Faster quote generation
- Predictive pricing insights
- Upsell and cross-sell recommendations



### Business Benefit

Reduced manual effort, faster response times, and improved customer experience through intelligent AI automation.

## Automated Rental Lifecycle



Jive Telephony Integration



Vendor Notifications



Real-Time Dashboards

## Real-Time Insights & Analytics



### Operational Dashboards

- Orders by region
- Dumpster utilization tracking
- Vendor performance monitoring



### Financial Reporting

- Revenue & margin analysis
- Outstanding invoice tracking
- Billing performance metrics



### Service Visibility

- Customer interaction history
- Case resolution tracking
- SLA monitoring



### Result

Improved decision-making through centralized, real-time reporting across all operational areas.

## Key Results Achieved



### Operational Improvements

- ✓ Faster order scheduling
- ✓ Reduced manual coordination
- ✓ Real-time availability visibility



### Financial Benefits

- ✓ Better pricing transparency
- ✓ Improved billing accuracy
- ✓ Enhanced revenue tracking



### Customer Experience

- ✓ Faster response times
- ✓ Improved communication
- ✓ Seamless booking process



### Scalability

- ✓ AI-enabled automation
- ✓ Centralized operations platform
- ✓ Ready for future growth

# Salesforce Revenue Cloud Success

By leveraging a unified Salesforce platform, the organization transformed its rental operations into a scalable, intelligent, and customer-centric solution.

Revenue Cloud Advanced (RCA)

Revenue Cloud Billing (RCB)

Service Cloud

Agentforce AI

## Key Takeaways



Automated order-to-cash lifecycle



AI-powered service operations



Improved operational visibility



Enhanced customer satisfaction