

Boss JCB

Real-time equipment telemetry, built into Salesforce.

Industry: Construction

Region: United States

Engagement: Implementation

Headline results

CSAT SCORE

5.0

10/10 on every question

WORKSTREAMS SHIPPED

3

Telemetry, PDF, Recovery

USERS ON PERM SET

27

Across non-admin profiles

APIS AVOIDED

3

Native Salesforce chosen

The need

Boss JCB is a construction-equipment dealer. They needed real-time machine telemetry from the JCB LiveLink API — location, engine hours, fuel, fault codes — surfaced directly inside Salesforce on the Stock Unit record. Separately, the settlement team needed a one-click way to combine the PDFs attached to a Purchase Order into a single merged document, ready to send.

What we delivered

- JCB LiveLink integration on Stock Unit: equipment data tab, fault codes tab, geolocation, engine + fuel + service status.
- Storage management: daily cleanup job keeping a stable ~160 MB footprint instead of the unbounded growth that filled the old org.
- Purchase Order PDF Merge — native Salesforce solution after evaluating PDF.co, ILovePDF, and Adobe. No subscriptions.
- Permission Set deployment: 27 users across all non-admin profiles, plus bonus “email PO directly” compose-window feature.

CUSTOMER QUOTE — AUTHORIZED FOR PUBLICATION ON APPEXCHANGE

“Taylor is very knowledgeable and engaged in the process. Gets the job done.”

David Record, Salesforce Admin, Boss JCB · Survey completed 6/12/2026

How the engagement ran

Three workstreams. Each one shippable on its own.

LiveLink integration

Real-time equipment data surfaced on Stock Unit — geolocation, engine hours, fuel, service status, fault codes — plus a daily cleanup job to keep the org's storage footprint stable.

PDF Merge & PO email

Native Salesforce PDF merger triggered from a PO button. No external API subscriptions. Bonus compose-window feature for sending the merged PO directly from the record.

Recovery & rollout

When prior metadata went missing from production, we executed a recovery plan from local code. Permission Set deployed to 27 users across all non-admin profiles.

FEATURED ENGINEERING DECISION — THREE APIS EVALUATED, NATIVE CHOSEN

PDF Merge: free, no subscriptions, no third-party dependency.

Boss JCB's requirement looked like a perfect fit for an external PDF API. We evaluated PDF.co, ILovePDF, and Adobe PDF Services — each viable, each carrying an ongoing subscription cost and a third-party dependency. Instead, we built the merge natively in Salesforce. Result: working as of June 9, deployed to 27 users, zero recurring cost, zero vendor risk.

WHY BOSS JCB PICKED TGWS

- Sales Cloud-only focus. Deep platform expertise translates directly into integration craft.
- Engineering pragmatism. We pick the native path when it's the right answer — even if a vendor pitch is easier.
- Resilience baked in. Storage management, data recovery, permission rollout — all handled, not just the headline features.