

60% Reduction in Manual Work and 40% Faster Product Deployment

with Field Service Lightning in
Salesforce Service Cloud



Client Overview



Industry
Electronics Manufacturing



Region
Washington, US



Company Size
1,001-5,000 Employees



Featured Solution
Salesforce Service Cloud; FSL

About the Client

The customer is a globally recognized manufacturer of industrial-grade test, measurement, and diagnostic equipment — trusted across industries for its precision, safety, and reliability. Known for their portable and user-friendly tools, they serve critical needs in electronic design, manufacturing, network troubleshooting, and calibration. Their high standards of quality and innovation have made them a go-to brand in sectors ranging from electrical and industrial to medical and process applications.

Manual Inventory Management = Decreased Efficiency

The customer had a manual inventory management system in place. For their agents to place a Work Order with 'Products Required', they had to manually look into the Product Items and Locations to find any 'stock' and then create Product Transfers to record the movement of existing items. As the customer's operations grew, automation was deemed necessary. The manual process was full of errors and was extremely labor-intensive.



The Business Impact: Disconnected Teams, Disrupted Operations

The manual inventory process wasn't just inefficient; it had a compounding effect across teams and workflows. As order volumes grew, the cracks widened. Ultimately, what began as a workaround for inventory handling became a bottleneck.

Inventory processes were slow, error-prone, and labor-intensive.

Workforce operations lacked coordination and visibility.

Disjointed workflows led to operational delays and lost productivity.

Configuring Salesforce FSL in Service Cloud to Maximize Efficiency

With growing inefficiencies and rising operational pressure, the customer needed a fast, effective solution. We stepped in with a tailored approach designed to streamline their processes and support scalable growth.

What Our Certified Experts Executed

- Configured FSL (Field Service Lightning) in Salesforce Service Cloud and developed a Lightning component that retrieved all the products and their details on the Location itself and displayed them on the Work Order Record with the Check Stock Action.
- Created a custom table that displayed the available Products and their quantities from the related Location to the Work Order record.
- Implemented a Check Stock section on the Work Order record to minimize back-and-forth between Work Order and Location records, eliminate errors, and maximize efficiency.

Optimizing the Product Records Process Through Automation

By introducing the Check Stock section on Work Order Records, we streamlined the processes and enhanced the user experience. Now, the customer no longer has to go back and forth for product records. This not only empowered the administrative staff to have an updated stock view but also provided managed inventory to close the work order faster.



Highlights

60%

Reduction in Manual Inventory Management

40%

Faster Product Deployment

30%

Fewer Inventory-Related Errors

Conclusion

The improved inventory visibility has streamlined things for us. It's made it easier for the team to track stock and move work orders along more smoothly.

