Energy and Utility Solutions -E2E Workflow including Savings and Invoicing

OBJECTIVE

Our Customer was using Catalyst, EM home System to run their Complex, workflow, Scheduling and Customer Service process. The Native System couldn't help them to run their process efficiently and resulted in the inefficient process and less Customer Journey for them. The Customer moved from the native system to Salesforce DSMT application to build their complex business workflows and the changing business user demands.

CHALLENGES

- Routing and Scheduling Workflow.
- Building E2E workflow process for Call center agent, Field Auditor, Tradeally and internal CLEAResult business staff.
- Transitioning the Online Field tool from the old system (EM Home) within DSMT Salesforce.
- Building Invoicing functionality within DSMT Salesforce.
- PDF Generation.

APPROACH

- The online Google API service integrated with Salesforce.
- Configuration of VF pages and custom controller based on required work flow as per user.
- Building the tool in salesforce using JQX grid, jQuery, Bootstrap, CSS, Javascript.
- Trigger implementation on more than two objects to get the result on invoice object.
- Customer Journey with Service Cloud - Case Management, Omni Channels and Field Service Lightning.

BUSINESSBENEFITS

- Call center agents and the Tradeally users can efficiently schedule the Field auditors for appointments filling up their capacity for the day.
- The whole workflow process makes life easy for internal business users and has reduced the manual process to negligible.
- Online tool provides the whole building modeling to be done along with cost and savings for the parts added. And the added Conga feature allows the auditor to generate reports in real-time at the customer location.
- Helped the Business User to invoice directly to the utilities removing the manual hassle of creating the excel sheets looking at each line item.
- The above mentioned implementations increased the processing time for the assessments till it reaches the invoicing and that in turn increased the invoicing rate to the utility per month and brought a tremendous increase in the revenue.

INDUSTRY

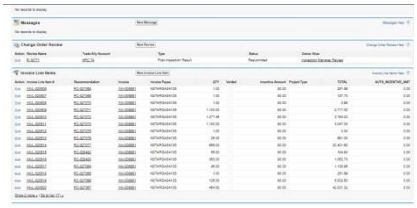
Energy Solutions

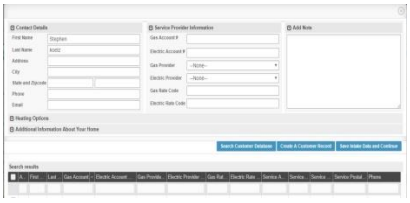
CUSTOMER PROFILE

US-based leading Energy Solution Providers for Utilities, Business and Customers. Having 15+ years of Experience as Energy Providers.

TECHNOLOGY AND TOOLS

- Sales Cloud
- Service Cloud
- CTI
- Field Service Integration with Google API, Conga, .NET





About CloudQ

CloudQ is one of the INC 5000 fastest-growing private companies based in Alpharetta, GA. We specialize in cloud-based technology implementation. Our clients attribute us to our transparent, highly efficient and customer-centric business model. We are the Silver consulting partner for Cloud based Technology in Salesforce.

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