

“Smart Service Appointment & Warranty Automation in Salesforce”

- Service Agents, Support Teams, Managers, Customers

Problem Statement -

Customers often forget about their product/service warranty expiry or scheduled maintenance. This leads to product failures, poor customer experience, and missed revenue opportunities. Businesses also struggle to track service schedules and manage escalations efficiently.

Proposed Solution: Smart Service Lifecycle Automation

A Salesforce-based system that manages the entire post-purchase lifecycle. It handles warranty registration, service scheduling, proactive reminders, and customer support, while providing dashboards for monitoring service performance and customer satisfaction.

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Store product & warranty details in Salesforce (Product, Serial No, Purchase Date, Warranty Period).
- Automate service appointment scheduling and reminders.
- Trigger alerts before warranty expiry.
- Provide dashboards for warranty expirations, missed services, and customer satisfaction.
- Enable escalation for SLA breaches and complaints.
- Integrate SMS/email notifications for proactive communication.

Stakeholder Analysis

- Service Agents
- Support Teams
- Managers / Business Owners
- Customers

Business Process Mapping

- Customer record is created (Account/Contact).
- Warranty record is created and linked to product & customer.
- System auto-generates service schedule (e.g., preventive maintenance).
- Automated reminders sent before service/warranty expiry.
- Support team manages escalations and SLA breaches.
- Service managers monitor dashboards for performance and escalations.

Use Cases

- Product & Warranty Management: Register products and track warranty status.
- Service Scheduling: Auto-generate preventive maintenance schedules.
- Warranty Renewal: Send automated reminders and assign follow-up tasks.
- Customer Support: Escalate unresolved cases and auto-assign via Omni-Channel.
- Analytics & Dashboards: Track warranty expirations, missed appointments, CSAT scores.

AppExchange Exploration

- Field Service Lightning – Advanced scheduling & dispatch management.
- ServiceMax – Comprehensive asset & warranty management solution.
- Nexmo/ Twilio SMS – SMS reminders and customer notifications.
- SurveyMonkey App – Capture CSAT/feedback in Salesforce.