



Vehicle Inspection Module for a Fleet Management Firm
SALESFORCE IMPLEMENTATION

PROJECT OVERVIEW

QBurst helped a leading fleet management service provider migrate from their legacy Oracle-based system to a cloud-based Salesforce platform. This enabled the firm to reconfigure the entire customer hierarchy, which led to greater visibility into customer relationship. The mobile-based solution helped to manage digital inspection reports.



CLIENT PROFILE

The firm, headquartered in the United States, manufactures wireless asset management systems for commercial and industrial vehicles.

BUSINESS REQUIREMENT

- ❖ Upgrade to a better system from the on-premises legacy system that required regular maintenance and updates
- ❖ Business processes involved numerous manual steps, consuming significant staff time
- ❖ The firm wanted to improve customer service. In that effort, they wanted to create a new customer hierarchy highlighting the relationship between various accounts
- ❖ To do away with the legacy invoice generation tool and to embrace a Salesforce supported system
- ❖ The firm wanted to monitor the condition of each vehicle and capture inspection details digitally

QBURST SOLUTION

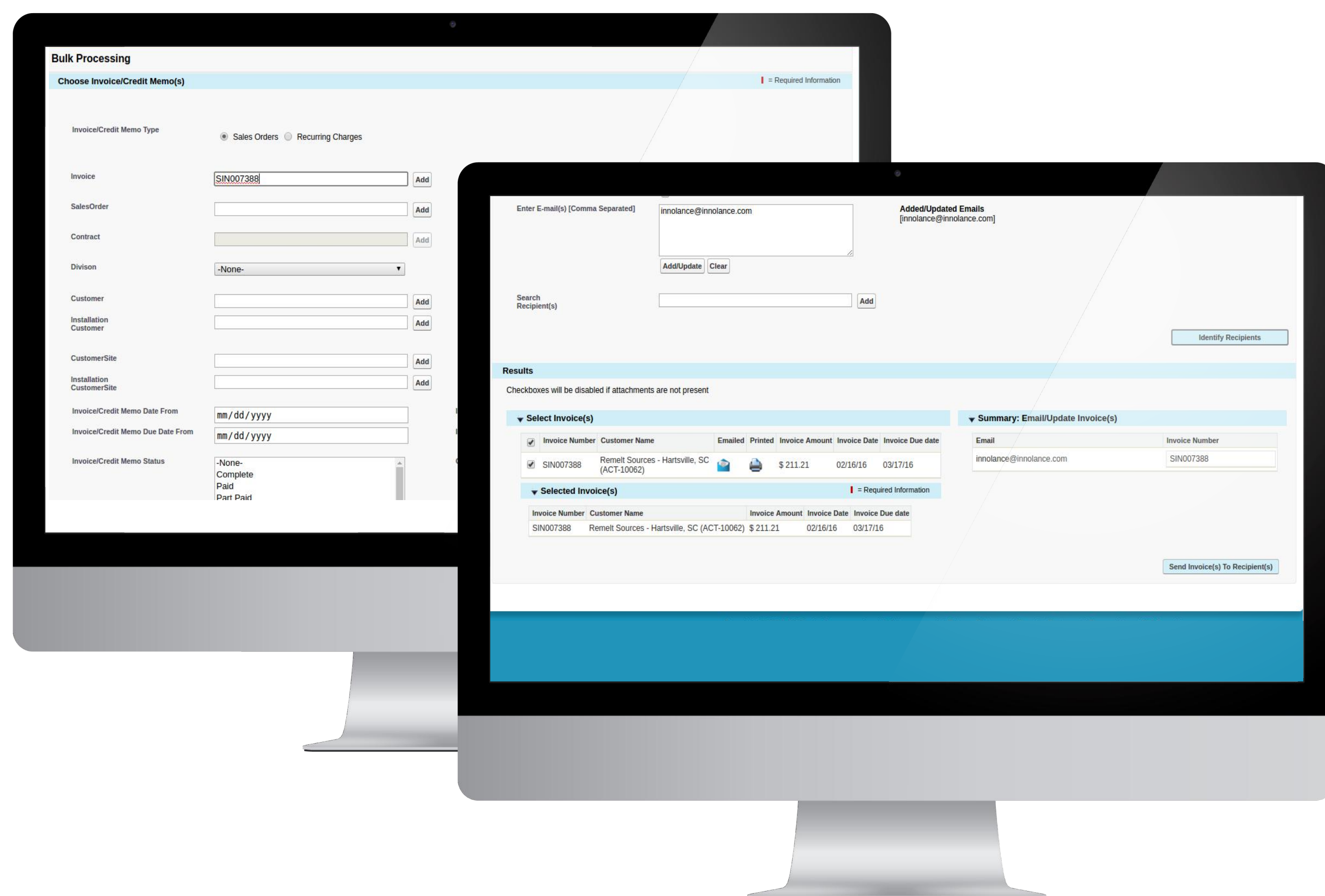
QBurst provided guidance during the deployment phase, ensuring a smooth transition to the cloud platform. We proposed a new architecture, deployed Salesforce, and migrated existing business processes. Partnering with the firm, QBurst guided them through the entire deployment phases.

Customized applications were built and integrated to cater to specific business requirements. QBurst redefined the customer hierarchy by creating customer sites to replace individual customer accounts. Along with customer, the mapping of the partner community also had undergone changes to reflect the changes on the customer end. To implement these advanced features, QBurst customized Rootstock and FinancialForce AppExchange solutions in their Salesforce system. Profiles and permissions were set up based on Rootstock objects.

KEY FEATURES

- ❖ Reconfigured the customer hierarchy for better management
- ❖ Mobility solutions to capture vehicle details on-the-go
- ❖ Customization of Rootstock and FinancialForce AppExchange solutions

TECHNOLOGIES



BUSINESS BENEFITS

QBurst deployed Salesforce, connecting back office data on vehicles and owners, so that technicians can instantly look up vehicle information and serve customers in a more efficient way. Additionally, with the new customer hierarchy, they succeeded in adopting a customer-centric approach. Along with mobility solutions, this approach helped to streamline the process, providing personalized and on-time service.

- ❖ **Better customer care:** New categorization based on customer site helps the firm to differentiate between installation sites and brought in a customer-centric view
- ❖ **Operational efficiency:** Partners and dealers can easily access installation site and main account for billing purposes
- ❖ **Automated processes:** Reduced time to process quotes and close deals.
- ❖ **Efficient invoice generation:** Simpler, quicker integrated invoice generation
- ❖ **Real-time:** Mobile apps help to track vehicle details and operational status.



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