



FIELD SERVICE LIGHTNING INVENTORY MANAGEMENT



Quick Facts

- Top 1% of Salesforce Consulting Firms
- We have 95% of the certifications available on the platform
- We practice Salesforce best practices from start to finish
- Over 85 5-star reviews!
- Over 500+ Successful implementation across the globe



Virtually every company that manages a modern field service team will need to manage inventory across multiple teams, trucks, distribution centers, and warehouses. The Salesforce Field Service Inventory Management application is built on the premise that the physical location(s) of a product's lifecycle should be tracked in a single platform and managed with ease.

Inventory control is the process of ensuring the right amount of supply is available within the organization and ultimately to your field service agents. With the appropriate internal production controls, a good process ensures the company can meet customer demand in the field at all times. Successful field service inventory control requires data from purchases, reorders, shipping, warehousing, storage, receiving, loss prevention, and returns. Salesforce Field Service inventory management enables the maximum amount of profit from the minimum amount of inventory without affecting customer satisfaction.



Why Use A Certified Partner?

- Accountability for quality & delivery
- Development done right the first time
- Rapid time to value
- Deliver scalable solutions to meet growth needs
- Help you drive user adoption

HOW FIELD SERVICE INVENTORY MANAGEMENT CAN IMPROVE YOUR BUSINESS

Implementing proper field service inventory control procedures can help ensure a business is running at optimal financial levels and that products meet your customers' needs and expectations.

One of the most utilized features of the Salesforce Field Service Lightning (FSL) application is the inventory management feature. The application allows you to track and manage inventory at every stage of the lifecycle. This will ensure that your mobile workforce has the right parts in stock to do their job. Whether parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

Benefits that the Salesforce Field Service Management Application can help solve:

- Track Inventory Locations - warehouses, customer sites, stockroom, or work vehicles where inventory is stored
- Track Product Details - serial numbers, model category, model numbers, asset state (in stock - available), etc.
- Associated Responsibilities - the person that requested the asset or is using it, as well as employees responsible for its maintenance
- Financial Data - asset cost, invoice number, vendor, cost center, a general ledger account, etc.
- Inventory Depreciation - depreciation method, residual value, the asset cost at the end of its useful life (salvage value), etc.
- Product Disposal - retirement date (planned vs actual), reason, resale price, etc.
- Product Transfers - track the transfer of product items between inventory locations
- Product Requests - orders for products and notifications when stock is running low
- Return Orders - return orders to facilitate the return and repair of items sold to customers
- Contractual Data - contract the asset is tied to and the warranty expiration date
- Associated Entitlements - asset's hardware, software, user entitlements
- Related Activities - asset state changes and comments added
- Track Shipments - track product items while they're in transit between locations with products on board, the shipping carrier, and expected delivery date
- Integration - build integrations with your data warehouse and ERP systems using Mulesoft



What Makes Cirrius Solutions Different?

800+

We've Completed Over 800 Projects

TOP 1%

We're in the Top 1% of All Consulting Partners.



Our 5 Star Average Rating on Appexchange

HOW DOES FIELD SERVICE MANAGEMENT HELP THE EXECUTIVE TEAM?

By capturing all of this information, the executive team will have real-time access to their key service questions. We can provide search results and prebuilt reports to provide the following information.

- Visibility into which location a particular product is stored
- Volume of product stock at a particular location
- Track inventory consumption for all field service activities
- Track return orders for a specified period of time and by customer
- View the current inventory for all products in real-time
- Specify which parts are needed to complete a work order in the field
- Get notifications when inventories reach a minimum level
- Request a transfer of parts between inventory locations
- Notify customers immediately of a back-order item
- Automatic reordering of inventory as products are consumed
- Track when parts and inventory are consumed at a customer site
- Track the return of unused inventory from individual jobs
- Predict product component replacement timing
- Traceability of inventory in the warehouse, trucks, and across customer sites

There are many factors that go into inventory management, but the bottom line is that you need to make sure you have just enough inventory in the hands of your field service agents at the right locations to meet customer expectations.

Salesforce Field Service Inventory Management offers many native tools and features to help you quickly optimize the tracking of inventory in multiple locations, safety stock, reorder points, cycle counts, demand planning, and distribution to agents in the field.

Ready to move forward on your next Salesforce project?

Learn more about how Cirrius Solutions can help you make the most of your Salesforce.com investment.

Please contact your Cirrius Solutions Account Manager directly at info@cirriussolutions.com for more information.

