

Vehicle Inspection Module for a Fleet Management Firm: Salesforce Implementation

Transitioning a legacy asset management firm to a high-visibility Salesforce cloud platform to automate inspections and reconfigure complex customer hierarchies.

Overview

QBurst facilitated a smooth, incremental migration from an on-premises legacy system to a custom Salesforce cloud architecture. The solution redefined the client's entire customer hierarchy and integrated mobile-based digital inspection reports, providing real-time visibility into vehicle health and ownership data. By customizing specialized AppExchange solutions, we replaced manual workflows with an automated, customer-centric ecosystem.

- **Operational Modernization:** Eliminated legacy invoicing and maintenance bottlenecks by deploying FinancialForce and Rootstock ERP on the Salesforce platform.
- **Enhanced Field Service:** Empowered technicians with a native mobile application to capture vehicle inspection details on-the-go, ensuring 100% data accuracy.



Client Profile

Headquartered in the United States, the client is a leading innovator in wireless asset management. They specialize in the design and manufacture of high-end tracking and diagnostic systems for commercial and industrial vehicle fleets, focusing on optimizing asset utilization and safety.

Challenges: Legacy Inertia and Manual Bottlenecks

The client's existing infrastructure was a collection of fragmented Oracle databases and manual spreadsheets that hindered growth and service quality.

- **High Maintenance Overhead:** The on-premises legacy system required constant updates and manual intervention, consuming significant staff time and IT budget.

- **Obscured Customer Insights:** The existing data structure failed to highlight the relationships between various accounts, making it difficult to provide personalized service.
- **Inefficient Invoicing:** A standalone legacy invoicing tool operated in a silo, causing delays in billing and revenue recognition.
- **Paper-Based Inspections:** Monitoring vehicle conditions relied on manual records, leading to a lack of real-time data on fleet operational status.

QBurst Solution: Scalable Cloud Architecture

We proposed and deployed a new Salesforce-centric architecture, guiding the client through a phased transition to minimize operational risk. We focused on creating a unified "Source of Truth" by integrating back-office ERP data with front-office service tools.

- **Redefined Customer Hierarchy:** Replaced individual accounts with "Customer Sites," mapping partner communities to reflect installation-specific data for better site-level management.
- **ERP & Finance Integration:** Customized Rootstock and FinancialForce AppExchange solutions to manage complex manufacturing and financial processes within Salesforce.
- **Digital Inspection Module:** Built a mobile-first solution that allows technicians to look up vehicle information instantly and submit digital reports from the field.
- **Permission Logic:** Set up granular profiles and permissions based on Rootstock objects to ensure secure data access for partners, dealers, and staff.

Key Features and Technical Highlights

The solution prioritizes mobility and automated financial integration:

- **Mobility Solutions:** Native apps for capturing vehicle specifications and operational status in the field.
- **Automated Quote-to-Cash:** Streamlined the process of generating quotes and closing deals through integrated sales paths.

- **Site-Based Categorization:** Allows the firm to differentiate between installation sites and billing accounts for precise service delivery.
- **Unified Admin Console:** Centralized management of vehicles, owners, and technicians to ensure on-time service.

Impact

- **Improved Customer Care:** The new site-based hierarchy provides a clear view of every installation, enabling personalized and timely maintenance.
- **Enhanced Operational Efficiency:** Partners and dealers now have real-time access to billing and installation data, significantly reducing administrative friction.
- **Faster Deal Closure:** Automated processes have drastically reduced the time required to process quotes and generate invoices.
- **Technical Empowerment:** Back-office vehicle data is now instantly accessible to field technicians, improving first-time fix rates and customer satisfaction.