
Manufacturing Industry

ALLENDALE MACHINERY SYSTEMS

A CASE STUDY BY JOLT CONSULTING GROUP



ALLENDALE | SALESFORCE: FIELD SERVICE LIGHTNING



Allendale Machinery Systems, a third-generation company, delivers industry leading machining technology, tooling, automation and engineering expertise to deliver turn-key manufacturing solutions. With offices in New Jersey and New York, their facilities are strategically located to be responsive to customer needs. The service department provides machine installation, CNC/machine training and offers 24-hour response time to troubleshoot in-warranty and out-of-warranty problems. The entire Allendale team strives to offer the best manufacturing solutions, engineering, and application support to ensure customers achieve their return on investment goals. When Allendale embarked on a critical project for their company to transform their current SFDC ServiceMax field service management package to the SFDC Field Service Lightning package, they enlisted the expertise of JCG.

Business Challenges

A few business challenges that were identified prior to the conversion included:

- Ensuring no loss of historical data in the conversion from SVMX to FSL
- Allendale team not using SVMX to its full capability due to user buy-in and work arounds
- Technicians out in the field were experiencing difficulties with the mobile applications
- Inventory was not being tracked with their current SVMX instance

Our Solution

- Transfer historical SVMX data to FSL objects for full-service history in the new FSL tool using [LightningJolt](#)
- Introduce work order management, scheduling and dispatch, product inventory, Timesheets and USR HAAS integrations into the org
- Deliver a fully mobile work force by enabling capabilities in iOS and Android devices
- Wanted to make their work more efficient by reducing the number of clicks they needed to complete work

Our Results

- JCG implemented a one-click solution that made sure all necessary fields of the service report were populated – tracking inventory, hours, labor – and is now efficient in capturing all necessary info - saving technicians a great amount of time and ensuring no information is lost
- Automated labor calculations through technician time stamps to drive efficiency with billing/invoicing
- Created a unique view for an autonomous technician to be able to self-assign and provide visibility to the scheduling and dispatch team
- Mapped out technician territories and assigned to geographical locations (by county) to aid with dispatch and work order assignment
- Allendale has capability to manage their consignment inventory received from HAAS v. their owned inventory supplies allowing them to conserve resources and maximize inventory levels
- Gained ability to provide a customer quote straight from Salesforce (whether a technician is needed or not)
- Work Order Management - automatically populates with the exact tools the technician will need for the visit; service appointments auto-create amount of time needed for each type of Work Order saving time and increasing customer transparency and efficiency
- Automated warranty process to update records and decipher between warranty v. non-covered service appointments