



Playing the Field Service

**The Simpala Guide to Salesforce Field
Service for Business Services &
Manufacturing**

Edition 2: Updated for 2026

The Automated Scheduling Revolution is Here

Many organisations successfully design, build and use their own systems for Field Service (including the trusty Excel spreadsheet). However, when a business grows, so do operational requirements, and these self-built systems often have a tipping point.

A purpose-built solution, like Salesforce Field Service, will save you time and money, transform your field workers' day-to-day, and improve customer experience. In this Simpala eBook, find out exactly which challenges it can solve, the benefits you can realise and some inspiring customer success stories.



Intrigued about the ROI from Field Service? Check out our [ROI Calculator here](#).



Daniel Simkin & David Okpala – Co-Founders, Simpala

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Chapter 01:

What is Salesforce Field Service?

As you might imagine from your own experience, say, an internet technician at your house, having a positive and efficient appointment with a field worker leads to improved customer satisfaction.

Built natively in the Salesforce platform, Salesforce Field Service is a smart module that enables organisations to manage and optimise their mobile workforce.

According to Salesforce research, 74% of mobile workers using this automation see that the technology offers a moderate to major benefit, enabling them to focus on their customers rather than planning a complex schedule.

Here are a few things you can do with the solution:

01

AUTOMATED SCHEDULING

Optimise your field workers' schedule with optimised routes and appointments, based on their skills, working hours, timesheets and location details.

02

SERVICE TERRITORIES

Set up local, national or global territories to represent the regions where your mobile workers provide services.

03

TRACKING

Track the location and status of your people, inventory, warehouses, service vehicles, customer sites and assets.

Work Order – you might use terminology like “job”. This is a request for one-time or recurring field service work. It includes the work type and all relevant information for scheduling the service appointment.

GLOSSARY

05

PLANNING & TEMPLATES

Create **maintenance plans** and **work plan** templates that you can reuse to ensure a standardised service for each field service task.

Maintenance Plan – Defines how often maintenance visits occur according to a schedule or based on usage criteria. It will automatically generate work orders for future visits.

GLOSSARY

04

CREATE WORK ORDERS

Schedule one-time or recurring **work orders** (or, “jobs”) for customers. Add details about service preferences, required skills and parts.

GLOSSARY

Work Plan – a set of prescribed work steps that guide frontline and back-office workers on how to complete a work order. It enables field service teams to complete assignments quickly, consistently, and with less guesswork.

06

SERVICE REPORTS

Generate and share service reports with customers so they are kept in the loop about their service progress and completed work is documented.

Field Service in Action: PSS

Power Saving Solutions (PSS) is a commercial battery rental company that offers clients a flexible hybrid generator. They work with customers across multiple industries, including construction, rail and utilities.

After rapid, exciting growth, PSS wanted to formalise its sales process and field service operations to support its ongoing, ambitious growth plans. However, the legacy, manual processes were inefficient – slowing down maintenance contract management and installation scheduling.

Thanks to Salesforce Field Service, the PSS team now enjoys optimised scheduling and routing, reducing the response time for service requests by more than half and allowing for **problem resolution within 24 hours**. Within the first quarter of their implementation, they were able to **increase their maintenance coverage to 98% of their asset base**.



>50%

CUT IN SERVICE
RESPONSE TIME

4 MONTHS

ROI FOR PROJECT &
LICENCE COSTS



Simpala on-site with PSS

Chapter 02:

How Field Service Can Help You

At Simpala, we take the time to understand every concern you and your team may have. Change is hard, and a poorly implemented system won't be adopted.

We design and implement a solution that solves your challenges and that your engineers want to use! That might be a simple set-up or a longer-term project enabling you to transition gradually.

Whilst the benefits are huge, many customers have some initial reservations about this kind of implementation — and that's normal.

If you're on the fence about moving over to a more sophisticated system such as Field Service, read through the green boxes of common challenges customers have (?), and how Field Service can help solve them (✓).

Do any of these sound like you?

? “WE’VE GROWN RAPIDLY, BUT NOW OUR IN-HOUSE SYSTEM CAN’T KEEP UP WITH THE TECHNICIAN DEMAND”

✓ Field Service can automate the scheduling of technicians and allow your dispatchers to focus on optimisation.

? “THE TEAM IS KNOWLEDGEABLE, BUT OUR PROCESSES ARE COMPLEX MAKING ONBOARDING NEW TEAM MEMBERS A LONG, DIFFICULT LEARNING PERIOD”

✓ Work Plans come with predefined steps to guide your team through the requirements for each job type.

? “MANUALLY SCHEDULING AND ALLOCATING ENGINEERS TO APPOINTMENTS TAKES A LONG TIME”

✓ Adjusting work schedules and dispatching engineers can be done with the click of a button, thanks to Field Service's smart, automated scheduling.

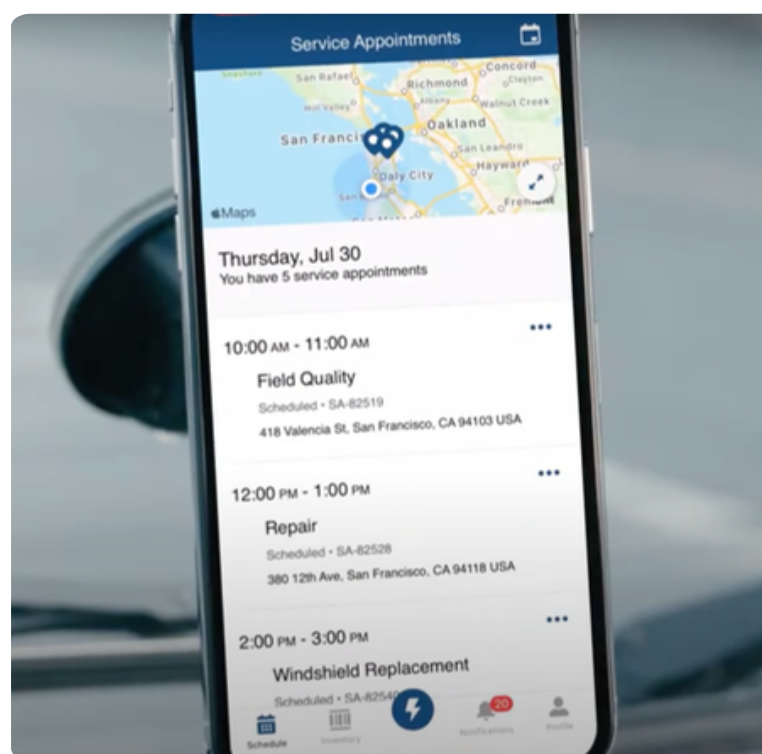


Photo Credit: Salesforce

? “THERE’S A BACKLOG OF SERVICE REQUESTS, AND IT’S STARTING TO AFFECT PROFITABILITY”

✓ Use Field Service to ensure you have an optimal allocation of work based on availability, complexity and location of engineers.

? “THE TEAM ON THE ROAD ARE FEELING THE PRESSURE OF TRAVEL TIMINGS, AND KEEPING CUSTOMERS HAPPY”

- ✓ Smart schedule adjustments optimise routes and automate customer notifications such as “I’m on my way. I should arrive at 09:40” directly from a mobile device — taking the pressure off your people.

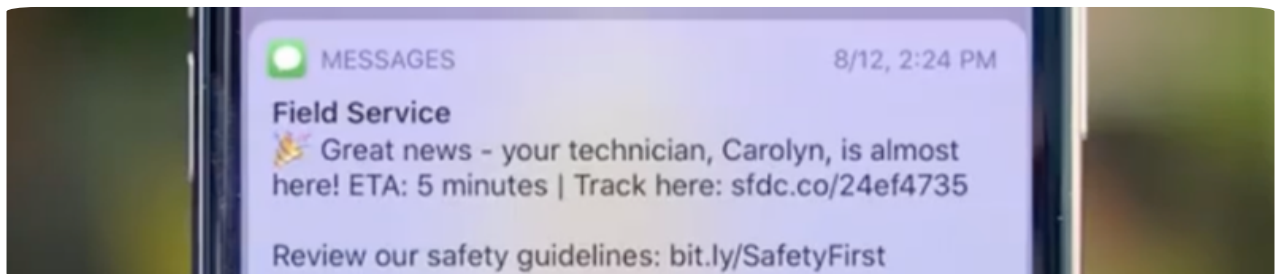


Photo Credit: Salesforce

? “INFORMATION AND UPDATES GET LOST DURING THE DAY, AS TECHNICIANS ARE TOO BUSY TO CAPTURE EVERYTHING IN DETAIL”

- ✓ Engineers can access a step-by-step so they can quickly and simply capture and track the right information, even if they have no signal.

? “I NEED TO IMPROVE UTILISATION; TOO MUCH TIME IS LOST ON THE ROAD”

- ✓ Ensure everything is scheduled optimally based on skill and location, with adequate spacing between jobs. Service territories and optimisation can schedule and re-optimize jobs when plans change.

Field Service in Action: Enviro Waste Management

Enviro Waste Management is a waste disposal company in London. They offer one-off collections and regular schedules, round the clock, for the disposal of waste from many industries, including hospitality, pharmaceutical and manufacturing.

The team had already implemented Salesforce Field Service, but was not getting the most out of the system — many processes still required manual input. Simpala came in to review the requirements and recommended optimisations that would reduce admin time and automate processes.

With the new configurations, the team have experienced standout results. A year of jobs is automatically generated from each contract. With custom maintenance schedules, customers can request waste disposal based on any cadence they choose, without any manual approvals. And, the new invoicing process automatically bills for any additional weight collected.



Photo Credit: Envirowaste



90%

REDUCTION IN
SCHEDULING ADMIN

100%

AUTOMATED INVOICE
GENERATION

Chapter 03:

Agentforce is Enhancing Field Service

Agentforce, a native AI capability built into the Salesforce Field Service solution, is empowering service agents, managers, schedulers and field technicians to save time, increase productivity and improve customer satisfaction.

Through automation, optimisation, intelligent insights, predictive analytics and tools that make the day-to-day just a little bit easier, AI is helping organisations find new value and new revenue opportunities.

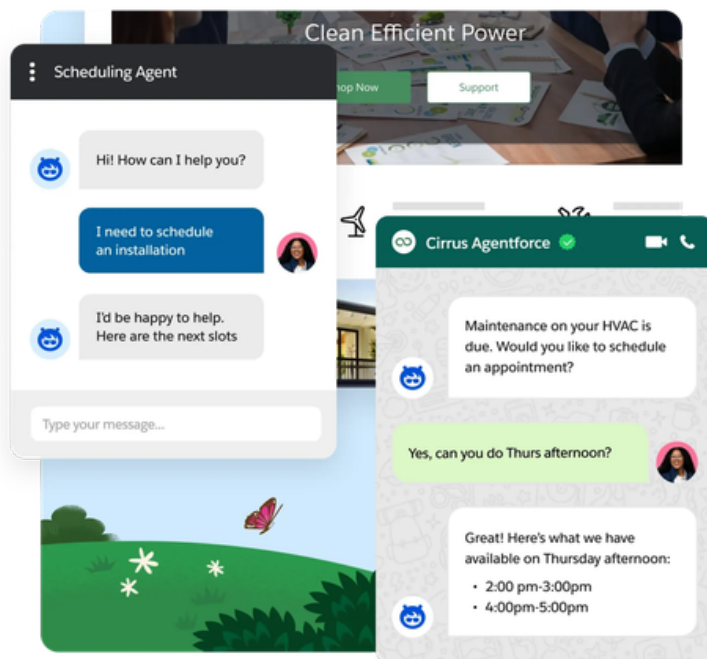


TRANSFORM MOBILE WORKER PRODUCTIVITY

One powerful app, available online or offline, gives technicians instant access to pre-work briefs, critical job details, real-time updates, intelligent workflows and guided data capture. They can resolve issues faster, improve first-time fix rate and deliver exceptional service on every job.

DRIVE CONTINUOUS IMPROVEMENT

With such easy ways to capture data, you can turn every service visit into insight. Track performance, spot trends, and identify opportunities to improve efficiency across teams, job types, and territories.



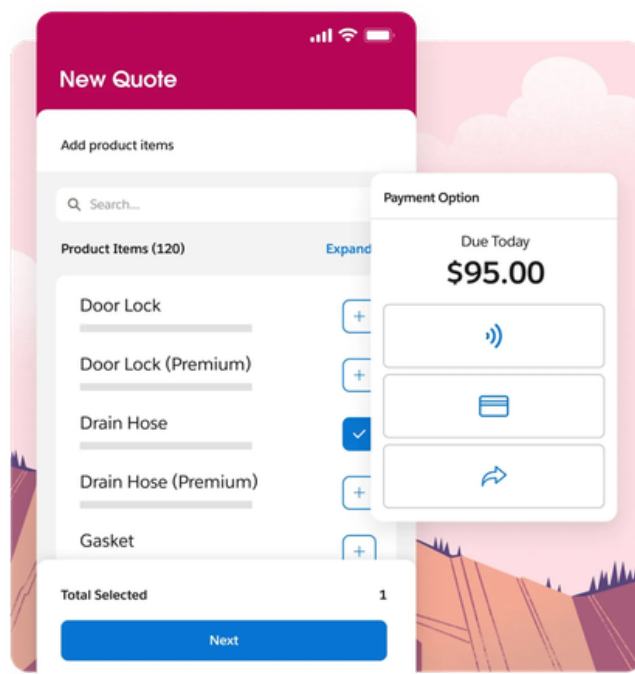
Automated Scheduling — Source: Salesforce

ELIMINATE MANUAL SCHEDULING

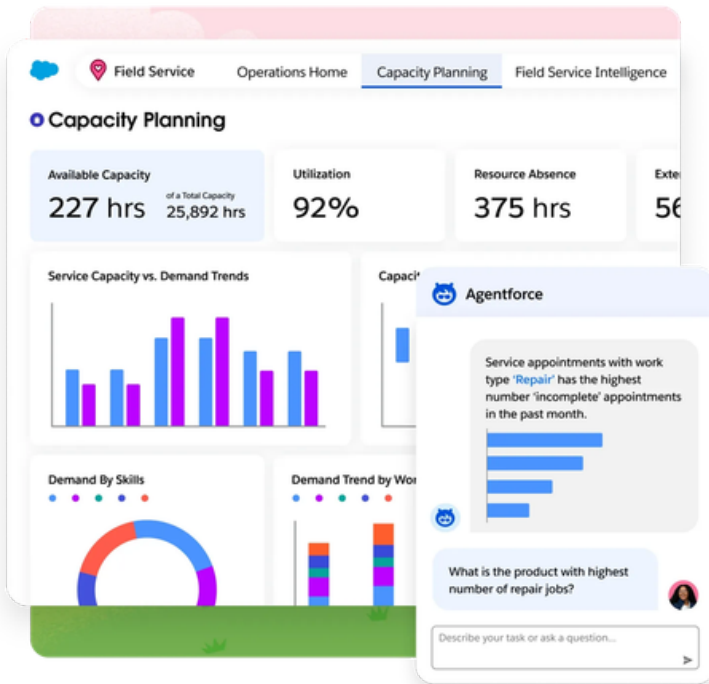
Available 24/7 across any channel, Agentforce lets customers easily book, change, or cancel appointments, and proactively schedules regular maintenance to maximise asset uptime.

INCREASE REVENUE IN THE FIELD

Empower your field engineers to spot upsell and cross-sell moments whilst they're on the job. Quickly generate quotes, convert ideas into new business and leave jobs with new revenue streams.



Revenue Generation On the Go — Source: Salesforce



Capacity Planning — Source: Salesforce

SAVE TIME WITH SMARTER PLANNING

Automate manual processes, minimise errors, and optimise inventory so technicians have what they need the first time. With fewer delays, fewer emergency orders, and fewer wasted miles, you can benefit from lower costs across the board.

REDUCE OPERATIONAL COSTS

Reduce travel, manage absences without disruption, and optimise every job so your team works at full capacity, and customers get the right expertise exactly when they need it.

A STANDOUT CUSTOMER EXPERIENCE

When your technician arrives to customers prepared, trust is built instantly. With full context of the job and clear communication, every visit will be a success, which drives customer satisfaction, loyalty, and long-term relationships.

Field Service in Action: Packaged Pump Systems



Packaged Pumps Systems (PPS) is a pump station manufacturer and installation/service specialist, working primarily B2B with housing developers, but also with B2C customers and eventual house owners.

The team were manually updating customer records, equipment data, and service schedules spread across **13** different systems. With thousands of pump systems installed and growing, PPS knew they could no longer operate with so many disconnected systems.



Photo Credit: PPS

SINGLE SOURCE OF TRUTH

Simpala designed a single platform, bringing together Salesforce Sales Cloud, Service Cloud, and Field Service. The team now operates from a single source of truth with data in one location, accessible by all.

With the implementation fully operational, **all customers, properties, assets, and field operations are managed end-to-end in one platform.** The field team can use the mobile app to manage jobs on-site, and leadership has real-time visibility into service performance and engineer productivity. The **solution is now the central business operating system**, putting PPS in a position to truly scale and meet the company's aggressive growth ambitions.

Chapter 04:

Who Can Benefit from Field Service?

Service Agents

In the Lightning Service Console, agents can set up a customer “case”, and when a call-out is required, they create the “work order,” which is what the schedulers work with.

Scheduler

The “Dispatcher Console” offers access to all the different pieces of information required to fulfil the work order.

Field Workers

The Mobile app enables the team to update the work order’s status and provide details on the go.



Curious about the potential ROI?

Calculate the benefits you could see from your schedulers and field worker with our [ROI Calculator here.](#)

Service Managers

Through the reports, views and analytics available within the Salesforce platform, this team can review the volume of call-outs, the efficiency of service and customer satisfaction.

From here, they can make recommendations, optimisations, and improve customer satisfaction.

Field Service in Action: Simplicity Group

Simplicity is a Belfast-based business communications provider. They specialise in fully managed services, delivering telephone systems, business mobiles, vehicle telematics and vehicle CCTV.

Before meeting with Simpala, the Simplicity team were duplicating work, manually updating multiple systems and dealing with a lot of service tickets from customers. Actions and opportunities were being missed, and the entire end-to-end process was very time-consuming for both schedulers and the field engineers.

The implementation of Salesforce Field Service has **dramatically improved the team's scheduling and operational efficiency**. With a **bespoke workflow that suits Simplicity's operations**, including complexities like managing multi-site installations, the team now have a single source of truth, a **proactive process for upselling** and cross-selling to customers and an **optimised schedule**.



Photo Credit: Simplicity Group

THE HEAD OF FLEET
REGAINED



30%

OF HIS TIME!

SINGLE SOURCE
OF TRUTH

Chapter 05: How to Prepare for Success

Our consultants have over 10 years of experience across multiple industries. In the last 18 months alone, we've completed 12 Field Service projects, and we've seen projects range from straightforward to challenging.

Whilst every customer has their own unique needs, there are some things you can do to help your team embrace the change and see the best results from a new system.



PLAN FOR THE FUTURE, NOT JUST YOUR LAUNCH

In the initial discovery phase, choose one goal but you must also think about the long-term vision for your business. You want the time, energy and cash investment into such a big project to be worthwhile, so add future plans and ideas into a long-term roadmap.



DEFINE INTERNAL PROCESSES FIRST

Set up clear sales and service processes first. Then you can determine improvements and benefits you want to see from the software.



BE OPEN TO THE ART OF THE POSSIBLE

You don't know what you don't know: we work with our customers to understand process pain points and define clear objectives. We then design a bespoke implementation plan and offer guidance on the features and benefits you might not have considered, from the get-go.

”

We're thrilled to now have Simpala as our long-term Salesforce partner and look forward to continuing this successful collaboration. Highly recommended!

**— Engineering,
Construction &
Real Estate Client**



BRING YOUR TEAM ALONG FOR THE RIDE

Get your teams excited! Share the tool and its benefits throughout the implementation project, not just at the end. Allocate an internal project champion to help with this – a point of contact for the internal comms, training and FAQ sessions. Celebrate the implementation with a party, give the solution a name - make it a fun addition rather than an arduous change!



GET REAL ABOUT YOUR DATA

The success of your solution relies on the quality of your data. Implement processes and practices within your team to ensure accurate and consistent data entry and management.



Photo: Simpala with a customer at the launch of their new 'business hub'.



We chose Simpala because they are the kind of people we would hire into the company.

— Robyn Lee, CEO, HSPG



Learn more from Head of Delivery and Co-Founder David Okpala about 'how to prepare your team for change and success in this blog/video — [click here](#)



TAILORED TEAM TRAINING IS ESSENTIAL

We offer comprehensive training, tailored to each team. The benefits for managers vs field service team members are generally similar, but the day-to-day nuances of how to get the most out of the system are different. We can help you understand and then enjoy using it.



TESTING 1,2,3

Once the system is set up, an additional Simpala tester, from outside of the project, reviews the setup with a fresh perspective.

Chapter 06: Why Simpala?

As a specialist Salesforce partner, we are uniquely positioned to help your company leverage Field Service to its fullest potential. By tailoring the system to your needs and sharpening up previously long-winded or confusing processes, we enable you to get the best out of the solution.

Here are some benefits of working with us at Simpala to implement Salesforce Field Service within your business.



**12 Field Service
projects delivered in
just 18 months**



We take the time to truly understand your business, its challenges and the growth opportunities. Every solution is tailored to your needs and the level of requirements within your organisation. Rather than delivering a complicated solution that is difficult to understand or get on board with, we choose the features that will give you the best results, quickly. No project is the same at Simpala.



Simpala has helped us to question our processes and visualise our critical data. They have quickly established themselves as an essential partner to our business.

— Manufacturing Client

Expertise and Experience



We work day-in-day-out with manufacturers and maintenance companies. Our team of experts understands field service operations and can provide valuable insights and guidance throughout the entire process. Whether it's the initial setup, training and adoption or ongoing support – we have it all and can't wait to guide you every step of the way.

Competitive Pricing

When considering new technology solutions, price is always a big factor. We know that, and we price our work aggressively to make Salesforce Field Service accessible to companies who may have previously thought it out of reach. Our goal is to provide exceptional value, and we help you do that without breaking the bank.

Seamless Integrations

In manufacturing, ERP systems are the backbone of all operations. We make sure Field Service is seamlessly integrated with your existing systems and that all your data is connected and accessible from a single platform.



We've been working with Simpala for our Salesforce support, and they have truly exceeded our expectations. It's crucial we have a partner who understands our business, and David has demonstrated a deep understanding of our goals and requirements. He not only grasps our needs but implements solutions quickly and efficiently.

**— Engineering,
Construction, & Real
Estate Client**

Get in touch

 **info@simpala.co.uk**

 **simpala.co.uk**

We believe Salesforce projects become too complicated too quickly, and building complex solutions can be time-consuming and expensive.

We are here to make sure that doesn't happen to you!

That's why we focus on your core requirements, taking into account all the different moving parts, and get you realising those benefits as soon as possible.

We run an open way of working during projects, keeping you up to date and always holding ourselves accountable.

So get in touch! We can't wait to work with you.



simpala