

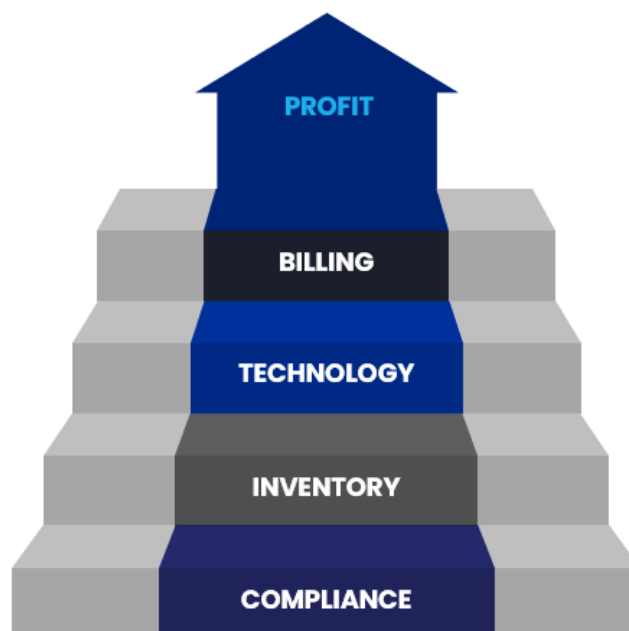
Work Order Automation Leads to Increased Compliance



For over 90 years, Baxter has delivered healthcare solutions in hospitals and homes. Baxter produces IV infusion products, which fall under heavy regulatory scrutiny. Baxter service technicians use Salesforce to manage field service calls. Since 2020, Baxter has used Pulsar to customize the Salesforce field service process and produce global compliance reports.

Executive Summary

Baxter field technicians may have unreliable internet connectivity during customer visits. Regulatory agencies require documentation that the correct parts were used for the repair of Baxter's medical devices. In addition, service reports are required in the local language. Baxter customized Pulsar to capture field service data, help the field technician find the correct parts, manage the parts inventory, and produce summary reports in the local language. Baxter also customized Pulsar and integrated an external app to create work order templates and forms. Baxter used Pulsar to meet regional compliance requirements, automate work order creation, and automate billing for parts and labor. Pulsar improves inventory management, automates compliance, and streamlines the field service process to improve Baxter's bottom line.



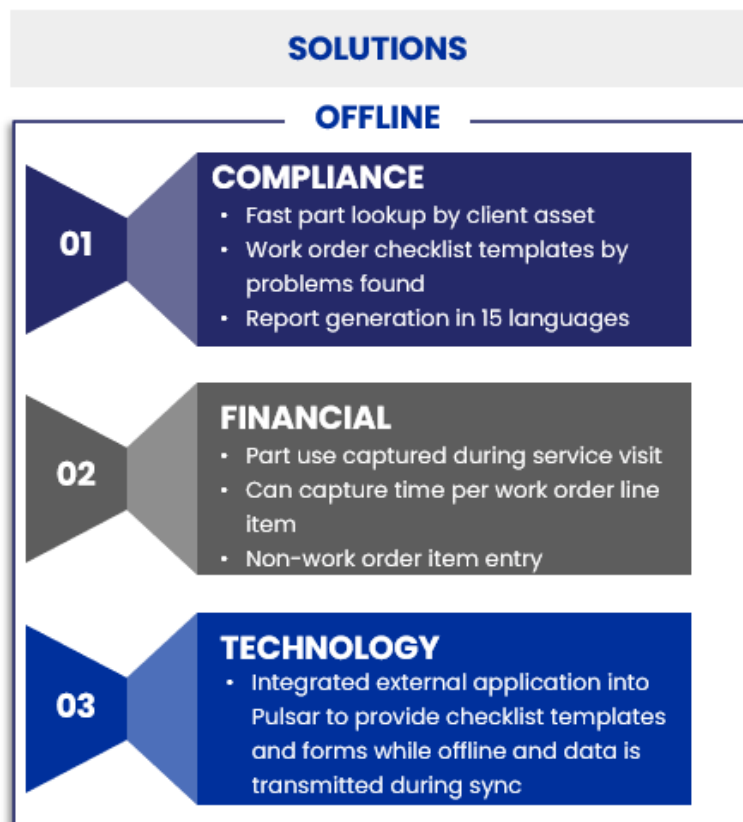
Challenges

1. **Compliance** – Baxter’s medical devices require verification that the correct parts are used during servicing. Also, the correct periodic maintenance and repairs need to be made to each device. Technicians need a way to quickly find the correct tasks and parts for each work order. Summary reports are required for compliance reasons. Reports need to be produced in the customer’s local language.
2. **Financial** – Service technicians need to inform other business areas of the type and number of parts used during service visits for good inventory control. Service technicians need to capture the parts used, work order tasks done, and extra billable items and send the data to other business areas for proper billing of customers.
3. **Technology** – Baxter uses a 3rd party application with Salesforce to generate business forms. These forms need to be available to service technicians for reporting in the proper format.



How Pulsar Helped

1. **Compliance** – Pulsar allows customized workflows with checklists and documents. Additionally, the app allows access to product information, such as parts lists, diagrams, and documentation. Pulsar generates service visit summary reports using the data gathered during the visit. Reports are available in 15 different languages, to support regional requirements.
2. **Financial** – Service technicians enter the parts used during the service calls. This data appears to the rest of the business in Salesforce after the next app sync. The service technicians can also see parts availability data from Salesforce. Service technicians use Pulsar to track the parts used and time spent per work order item. This information is summarized in work order reports and is also available to the rest of Baxter in Salesforce.
3. **Technology** – Baxter integrated a 3rd party application into Pulsar. Technicians can access checklist and form templates during service visits and transmit the data back to the external application when the app is synced.



Results

By providing service technicians with offline access to Salesforce workflows and automating the work order process, Baxter was able to improve the speed and accuracy of service data transmitted to the business. In turn, more complete and timely data helps Baxter adhere to business and compliance requirements while providing fast product service to customers.

1. **Compliance** – Baxter increased their compliance levels by using checklists and form templates to ensure service technicians perform the correct tasks to complete work orders. Additionally, an automated part lookup tool ensures that the correct parts are used on the correct customer asset. Service visit summary reports available in the local language help Baxter better serve their customers and adhere to compliance requirements.
2. **Inventory** – Baxter improved inventory control by transmitting parts usage and availability data between service technicians and the business. Accurate and timely parts data ensures that parts will be in stock and available for technicians.
3. **Technology** – Baxter customized Pulsar to integrate an existing 3rd party Salesforce application to automate checklist and form templates by work order task. This ensures technicians perform the correct tasks and adhere to compliance requirements when servicing products.
4. **Billing** – Baxter uses detailed work order summary reports to transmit accurate billing information to the business. Billing can occur quickly after the data is synced after the customer visit.

