Pentair Enhances Field Service Efficiency with Pulsar

For over 50 years, Pentair has delivered products and solutions that help people move, improve, and enjoy water. In addition, Pentair provides industrial applications for filtration and flow solutions. Their brands span residential, commercial, industrial, municipal, and agricultural spaces with products ranging from pool equipment to water softening to filters, pumps, and tanks. Since 2019, Pentair has used Pulsar to improve business efficiency and their bottom line.

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Executive Summary

Pentair field service technicians find themselves offline during service visits to client sites, where they need to log their time and enter data for work orders. Pentair needed better offline and customization capabilities than the Salesforce SFS mobile app. They wanted to customize the user interface to make data entry easy and intuitive for their technicians and allow offline access to more Salesforce records than they could using the SFS mobile app. They also identified the need for this solution to run on Windows devices since their technicians carry laptops to do their work onsite. Pulsar met all of these requirements and Pentair was able to enhance timesheet management, ease data entry, and enforce business logic to improve their bottom line.

Timesheet Management → Data Entry → Access to Records → Business Logic → **Improved Bottom Line**

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Challenges

1. **Connectivity** – Service technicians need access to the internet during customer service visits. Not all customers have access available to technicians.
2. **Metrics** – Timesheet activities must be recorded accurately for proper invoicing and performance tracking.
3. **Efficiency** – Service technicians need an easy way to enter data. In addition, they need to know when tasks are complete and work orders can be closed. Pentair wanted to use their own flows in a custom UI.
4. **Inventory Management –** Technicians need access to many more Salesforce records than the Salesforce SFS mobile app could provide. They need to see client assets and the associated service parts. Technicians need to log the parts used for proper inventory management and invoicing.
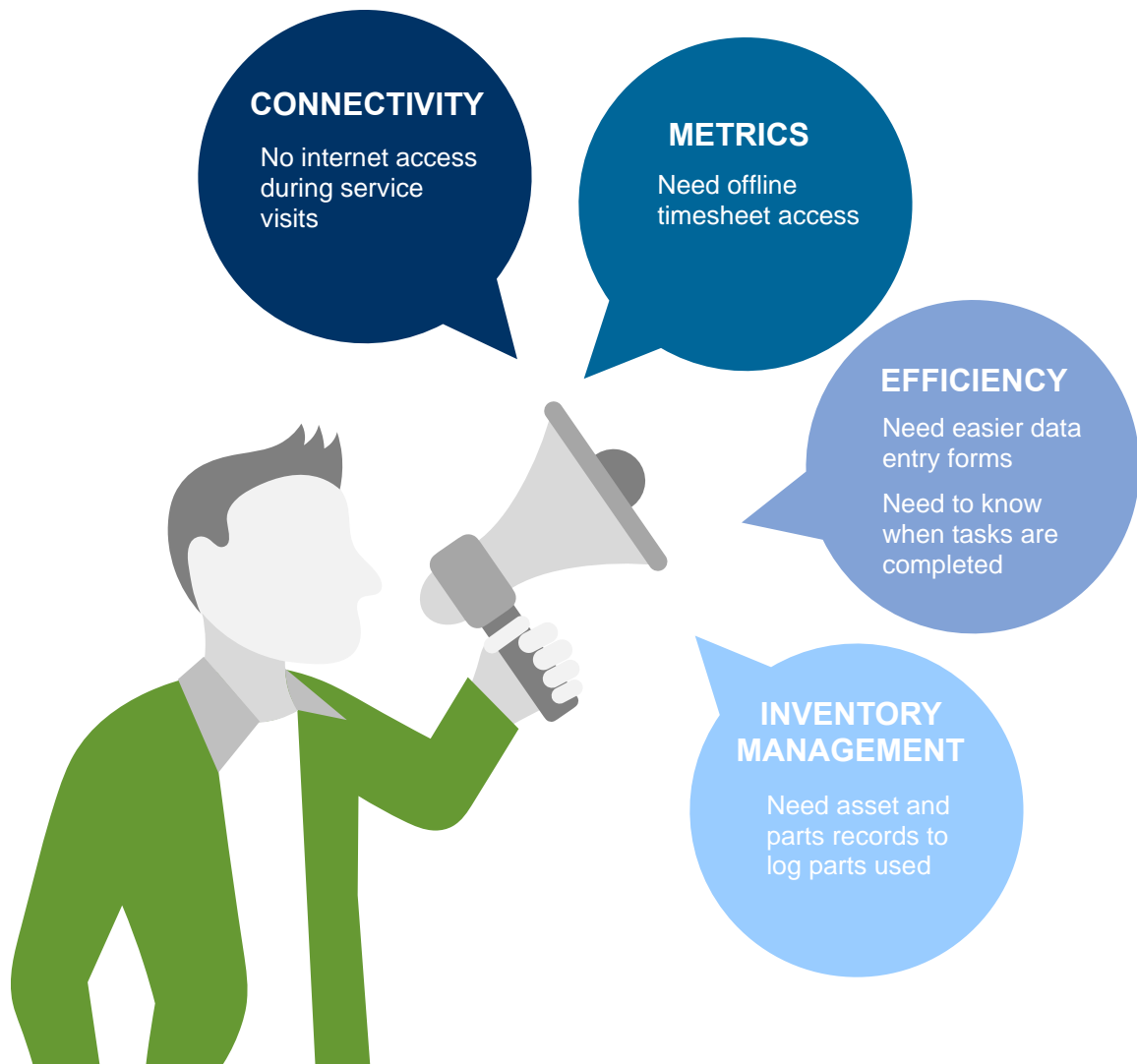
How Pulsar Helped

1. **Connectivity** – Pulsar allows the technician to go offline to complete work order tasks. When they return online, the work order data uploads to Salesforce, so other Pentair associates can manage inventory, process invoices, and analyze service metrics.
2. **Metrics** – Pentair technicians use Pulsar to access the Salesforce timesheet to record activities while in the field. They record the type of activity and when it starts and ends, whether online or offline. This allows the business to invoice customers correctly and to track service technician performance.
3. **Efficiency** – Pentair customized the data entry forms to help the service technicians work faster. Work order line items prompt service technicians to perform the correct tasks. Work orders cannot be closed until the line items are completed, ensuring that all tasks are done prior to leaving the customer site.
4. **Inventory Management** – Pulsar downloads many asset and part records to the technician's device for use offline. Technicians can access the list of customer assets and associated parts for each asset. While completing work order tasks, technicians enter the products consumed, which supports streamlined inventory management and invoicing.

CONNECTIVITY	METRICS	EFFICIENCY	INVENTORY MANAGEMENT
Offline work order task management	Timesheet data helps with invoicing and performance review	Custom data entry forms	Customer asset and parts records
Offline data capture		Work order status based on task completion	Product consumption recorded in work orders

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Results

By providing service technicians with offline access to customer asset and parts data, Pentair was able to improve service appointment efficiency and streamline inventory management for more accurate and timely invoicing. Service technicians can easily enter data in custom forms and see when tasks are completed. These improvements provide the business with timely, accurate data for inventory management and invoicing. With Pulsar, Pentair improves business efficiency and the bottom line.

1. **Connectivity** – Completion of timesheets and work orders offline.
2. **Metrics** – Timesheet data helps invoicing and performance evaluations.
3. **Efficiency** – Custom user interface for data entry forms eases service technician tasks. Business logic in work orders ensures completion.
4. **Inventory Management –** Access to asset and parts lists in work orders sends inventory and invoicing data to other business areas quickly.

Mobile Access with Pulsar

Internet Access

Timesheet Data

Custom UI for Data Entry

Asset and Parts Lists

Business Efficiency

Accurate Invoicing

Inventory management