



CASE STUDY

INDUSTRY: **RENEWABLE ENERGY**

Optimizing Home Service with Zoho FSM Integrated with Zoho CRM and Zoho Desk



Introduction

A leading solar panel installation company, with over 3,000 employees and a customer support department of more than 20 people operating on Zoho Desk, **faced significant challenges in managing technical visits and home maintenance services.**

With a fleet of over 50 home service teams and more than 1,000 work orders created monthly, the lack of a unified system to manage service visits and billing led to inefficiencies and errors.

To overcome these challenges, the company decided **to implement Zoho FSM integrated with Zoho CRM and Zoho Desk, aiming to optimize and centralize technical support management.**



What is Zoho FSM?

Zoho FSM, short for Field Service Management, is an application that integrates **a set of tools and processes designed to manage and optimize field or on-site technical services.**

It includes task scheduling, resource allocation, real-time tracking of field teams, inventory management, billing, and automated reporting. **Zoho FSM is essential for companies that provide technical support, maintenance, equipment installation, or any type of service in remote locations.**

By using Zoho FSM, businesses can achieve greater operational efficiency by reducing manual errors, optimizing work routes, and improving the customer experience with faster response times.



Challenges



Lack of integration between the ticket management system and work orders.



Scattered and duplicated information, affecting efficiency and accuracy.



Delays due to lack of real-time access to information.



High operational costs caused by reliance on manual processes.



Inefficiency in resource allocation due to the absence of a unified scheduling system.



Limited visibility between service orders and multiple visits.

Solution



Zoho FSM was implemented to efficiently manage the entire technical support cycle, from ticket generation to billing. Its key features include:

✓ Integration with Zoho Applications

Zoho FSM seamlessly integrates with **Zoho CRM**, **Zoho Books**, and **Zoho Desk**, streamlining the **creation of service orders and billing**.

✓ Easy Service Order Creation

From **Zoho Desk**, a service order can be automatically generated in **Zoho FSM** with the click of a button. This allows the dispatch team to quickly assign visits to support tickets that require on-site technical assistance.

✓ Reports and Dashboards

Zoho FSM provides detailed dashboards and reports to manage dispatching and service allocation, while also centralizing service reports generated by technicians.

✓ Centralized Information

Dispatchers, technicians, and other departments can **access all relevant data in a single platform**, ensuring **real-time visibility of ongoing activities**.

✓ Cost, Time, and Error Reduction

Process automation with **Zoho FSM** has replaced manual tasks, improving operational efficiency and service quality while minimizing error.

✓ Mobile Application

The **Zoho FSM** mobile app gives field technicians easy access to information, even without an internet connection.

Impact & Results

Since the implementation of Zoho FSM, the company has achieved significant improvements:



Increased Operational Efficiency

Centralizing activities has reduced administrative workload, allowing the team to focus on customer relationships.



Enhanced Customer Experience

Faster response times to customer needs have increased satisfaction levels.



Error Reduction

Automation has eliminated manual errors, ensuring a more precise and efficient workflow.



Greater Transparency & Control

Administrators now have full visibility of team activities, while users can efficiently manage their records.



Revenue Growth

Zoho FSM has increased billing by over 30% in the first month, while also optimizing cash flow by accelerating the invoicing process, enabling faster payments.



Improved Inventory Management

Zoho FSM helps track the parts and materials used by technicians in service orders, ensuring accurate billing upon job completion.

Conclusion

The implementation of **Zoho FSM** enabled the **renewable energy** company to efficiently manage its operations, optimizing every stage of the **home service cycle**. This solution not only provided **greater autonomy** to the teams but also significantly **reduced operational costs**, enhancing **transparency and accuracy** throughout the entire process.





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