Güntner leverages GoFormz mobile forms and the Salesforce integration to dispatch forms pre-populated with Salesforce data to service teams in the field – improving efficiencies and professionalism.

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FORMS
- Service Reports
- Quality Assurance Forms

At-A-Glance

Challenge

Güntner service providers were burdened by the large number of cumbersome tools and documents they were required to carry with them to each job site, as each equipment installation and servicing requires different tools. Additionally, Güntner relies on Salesforce as their CRM of choice, meaning whichever digital forms solution they selected to use would need to seamlessly integrate with the Salesforce platform.

Solution

Leveraging GoFormz mobile forms and the Salesforce integration, back-office teams can automatically dispatch digital forms pre-populated with customer and equipment information to service teams in the field. When an installation or repair is completed, service teams will then enter what work was done, collect a customer signature, and submit the form from their tablets in the field. All of the relevant information is instantly routed back into the corresponding Salesforce record.

Results

- Data is easily passed between Salesforce records and Güntner's mobile forms
- Forms pre-populated with Salesforce data increase visibility into a project's scope
- More accurate, consistent data capture reduces opportunities for error and saves time
- Digital data capture eliminates the need for cumbersome, manual resources
- Improved professionalism leads to elevated customer confidence

Why GoFormz

"GoFormz makes it easy for our service teams. All they need to do is capture a few necessary fields on the job site, versus needing to capture everything that Salesforce has already populated."– Alejandra Cruz, Business Analyst, Güntner

About Güntner

Güntner is a worldwide leader in component manufacturing for refrigeration and air conditioning, providing innovative, high-quality world-class products and services.

The Full Story

Güntner, a global manufacturing company, needed a more effective means of communicating installation and equipment servicing details. When relying on paper forms to document service details, Güntner employees would need to carry all of their tools and paperwork with them to each customer location. Due to the slow, manual nature of paper forms, it was difficult to communicate service details efficiently, which often resulted in service teams rarely knowing what tools they would need and how long each project would take.

A digital solution

Seeking a more efficient, modern solution, Güntner leveraged GoFormz to digitize their Service Report, a document used to initiate and communicate important customer case details. This form acts as a general agreement of work and is used to capture equipment repair and installation information. With their Service Report digitized, Güntner teams could now enter service information directly within forms on their mobile devices – eliminating the need for their employees to carry additional documents with them.

Streamlined service, end-to-end

To further streamline service calls and further simplify data capture for field teams, Güntner integrated their GoFormz account with Salesforce, their operation's CRM. Now, when a customer calls requesting an installation or repair, a Güntner employee will create a case within Salesforce, leveraging the customer's existing information in Salesforce, and including new information such as the model number of the equipment that needs to be serviced, details about the issue, and a proposed solution, summarizing how the issue can be solved.

Once the case has been created within Salesforce, a digital Customer Acceptance Form is instantly dispatched via GoFormz to the service provider. This form includes all of the case information gathered within Salesforce, allowing service teams to accurately plan what equipment they will need ahead of time. At the service site, once they have completed the work required of them, Güntner personnel will enter what work was done and how long it took, into the form on their device. The

customer will then sign off that the work has been completed as recorded and the form can be submitted. After the form is submitted, the new data is routed back into Salesforce to update the existing case record, and a PDF version of the form is automatically attached to the case within Salesforce. This allows the Güntner team to quickly find the actual form that was completed during the job and also be able to easily reference other information found in the case record.

"GoFormz makes it easy for our service teams," explained Alejandra Cruz, a business analyst for Güntner. "All they need to do is capture a few necessary fields on the job site, versus needing to capture everything that Salesforce has already populated."

Digital benefits

With GoFormz and Salesforce, Güntner has achieved significant time savings and efficiency improvements across their service teams. Forms pre-populated with Salesforce data not only accelerate form completion, but also reduce human error. Service teams prefer digital forms as they make preparing for and completing jobs far simpler. "Another big benefit is the

practicality," detailed Alejandra. "It is more practical to have all of the information going into the job, versus trying to carry a bunch of paper to the job site." Digital forms and data capture has also resulted in improved professionalism and an increase in customer confidence.