

Enhancing Salesforce Field Service with Rootstock ERP

Connect Service, Inventory, & Supply Chain – All on Salesforce

Salesforce Field Service is a powerful solution that helps product-centric companies manage scheduling, dispatching, and field technician productivity. It ensures service teams are connected and responsive to customer needs. But to deliver truly seamless service for product companies, Field Service also needs real-time inventory, traceability, and operational depth. That's where Rootstock Cloud ERP comes in—seamlessly extending Salesforce Field Service with the inventory, supply chain, and financial capabilities you need to deliver faster service, increase first-time fix rates, and automate fulfillment from van stock to invoice. It also provides the unified data foundation that enables AI to surface smarter insights across service and operations.

Field Service Breaks Down Without ERP Integration

No real-time visibility into van stock or warehouse parts

Missed SLAs from manual handoffs and disconnected inventory

Inability to track serial numbers or manage RMAs efficiently

Field service demand isn't captured in inventory planning

Why Rootstock Is a Must-Have with Field Service

Real-Time Inventory, Including Van Stock

- Technicians access up-to-date parts, locations, and availability—even offline
- Includes mobile barcode scanning for fast part check-out/check-in
- Improved first-time pick rates in the warehouse (Handsfree: +25% scheduled WOs)

Automated Service-to-Fulfillment Workflow

- Work orders trigger inventory pulls, kitting, or assembly — no manual steps
- Fulfillment and costing happen in Rootstock as soon as the job is complete
- DRP auto-generates van stock replenishment suggestions to the warehouse

Integrated RMA, Warranty & Serial Traceability

- Manage returns and repairs across field and depot locations
- Full traceability with lot/serial number tracking tied to service records
- Warranty rules and statuses embedded within Field Service

Service Demand Feeds Supply Chain Planning

- Field item requirements roll into Rootstock MRP for demand forecasting
- Ensure inventory is positioned where service teams need it most

Automated Billing from Completed Work Orders

- Invoices are generated directly in Rootstock once work is closed
- Streamlines quote-to-cash with accurate costs and billing

Unified Platform, Mobile Ready

- Single customer and asset record across service, sales, finance, and ops
- Maintain offline capabilities and seamless field workflows in the mobile app

Customer Results

Handsfree Group

+25% more work orders scheduled

80% reduction in scrap inventory

80-90% of work orders completed on time

Watch our webinar to learn more >

888-524-0123
Rootstock.com

© 2025 Rootstock Software