



# Solar Company Boosts Solar Operations with **Integrated FSM Solutions**

# Overview

A leading solar installation and service company in San Angelo, Texas, has established a strong reputation for exceptional customer service and has built a loyal client base over many years. However, with business growth and rising service demands, maintaining peak efficiency and the same level of unmatched customer satisfaction has become increasingly difficult.

To streamline operations, they've implemented numerous field service solutions, including field service management software and other integrated platforms. Unfortunately, these solutions haven't met expectations, creating issues with limited customization and integration problems.

In their search for a better solution, they came across Zuper. Zuper's powerful integration capabilities caught their eye, offering the potential to unify their service and installation process. With a unified system, they hope to overcome the challenges they've been facing and deliver an exceptional customer experience once again.



## Challenges

While they initially implemented various field service solutions, these resulted in fragmented data and manual processes. This led to issues like scheduling conflicts, communication breakdowns, and inefficient inventory management. Let us look into the challenges they faced before they implemented Zuper.

### — Fragmented data

Customer information resided in a labyrinth of platforms. Contact details lived in the CRM software, while financial data resided in a separate financial software program. Payment processing details were scattered across various platforms.. This data fragmentation created a logistical nightmare.

Calculating the total cost of a project became a time-consuming and error-prone exercise. Piecing together accurate data from disparate sources was a constant struggle.

Incomplete or inaccurate customer information often leads to delays and errors in invoice generation. This resulted in frustration for customers and additional work for accounting staff.

Obtaining a holistic view of a customer's relationship with the company, including past service calls, interactions, and preferences, was nearly impossible due to disjointed data.

### — Manual processes

Scheduling, dispatching technicians, and managing work orders relied heavily on manual processes, primarily spreadsheets and phone calls. Manual data entry is a breeding ground for mistakes. Scheduling errors, technician misallocation, and inaccurate work order details became recurrent problems, disrupting service calls and delaying project completion.

Time-consuming manual scheduling and dispatching processes often led to delays in getting technicians to service calls. This frustrated customers waiting for service and impacted technician productivity.

Without real-time data on technician availability and workload, dispatchers were flying blind. Assigning technicians to jobs efficiently became a challenge, impacting overall productivity.

### — Limited visibility

Field technicians lacked real-time access to crucial information, hindering their ability to deliver exceptional service. Technicians may have lacked complete customer profiles, hindering their ability to personalize service, address customer concerns comprehensively, and build rapport.

Incomplete or outdated job details could lead to misunderstandings about service requirements. This could cause delays or require additional trips to the site, further disrupting the service call and frustrating the customer. Without real-time inventory data, technicians might arrive at a service call only to discover they lack the necessary parts. This led to delays, additional trips to the warehouse, and ultimately, dissatisfied customers.

### — Poor communication

Communication gaps existed between office staff, technicians, and customers. Inconsistent communication across departments could lead to misunderstandings and missed updates. This lack of clarity could impact customer service and create frustration for everyone involved.

Delays in responses, lack of clear communication on appointment times, or conflicting information could frustrate both customers and technicians. This negatively impacted overall customer satisfaction and technician morale.

Without a clear and timely communication channel, valuable feedback from technicians or customer questions might not be addressed promptly. This led to missed opportunities to improve service delivery and address recurring issues.



## Solution

Recognizing the need for a comprehensive overhaul, the solar company implemented an integrated Field Service Management (FSM) software solution. This decision marked a turning point in their quest for operational efficiency and superior customer experience. Let's delve deeper into how the integration addressed the challenges:

### ✓ Seamless integration with CRM and accounting software

A data bridge was built between the CRM platform and the FSM software. Technicians received comprehensive customer profiles directly on their mobile apps. They could now access contact details, service history, and past communication records. This empowered them to deliver personalized service and improve the overall service experience.

The integration provided a centralized platform for communication. All relevant information and updates regarding a project were readily available to both technicians and office staff, ensuring everyone was on.



#### ✓ QuickBooks integration

Real-time job data from the FSM platform synced automatically with QuickBooks. The integration eliminated the need for manual data entry, reducing errors and ensuring accurate tracking of project expenses.

Invoice generation became faster and more efficient, and QuickBooks automatically calculated project costs. This improved cash flow and financial management processes.

Consolidated data provided a clear picture of project costs—allowing the solar company to identify areas for cost optimization.

#### ✓ Payment processing integration

Secure integrations with Stripe or Square provide a convenient solution for the company. Customers could now make secure online payments directly through the FSM software after service completion. This simplified the payment process, eliminated delays associated with traditional methods, and enhanced the overall customer experience. Faster payment processing accelerated cash flow, providing the company with greater financial flexibility.



## 31%

Average increase in Revenue  
using Zuper [field service  
management service software](#)



## 9 Hrs

per week saved on  
average using [Zuper Pro  
Mobile App](#)



## Results

Integrating Zuper's field service management software with their existing payment, accounting, and CRM systems transformed the solar business's operations. This seamless connection eliminated data silos and manual processes, leading to significant improvements.

Streamlined communication, transparent invoicing through automated billing cycles, and personalized service delivery thanks to technician access to complete customer profiles led to a significant increase in customer satisfaction and loyalty.

  
**48%**

Improved collections, reduced late payments, and boosted cash flow.

  
**70%**

Slashing time for invoicing and ensuring on-time billing

  
**65%**

Improved cost calculation accuracy and better financial planning

  
**60%**

Increased job efficiency and error-free smooth workflows



Free up your time to focus on what matters – growing your business. Let Zuper handle the rest. If you're interested in improving your solar business, learn how Zuper can automate your business operations

**Talk with us**