



## OIL & GAS ORGANIZATION FUELED WITH SALESFORCE FIELD SERVICE UNLOCKS OPERATIONAL EFFICIENCIES FOR SERVICE MANAGERS, TECHNICIANS, & BILLING TEAMS

### Overview

Cactus Wellhead manufactures and services pressure control equipment for onshore and offshore drilling operations. The business has grown and evolved throughout its 50-year legacy. However, field services operations remained rooted in the past.

### Challenge

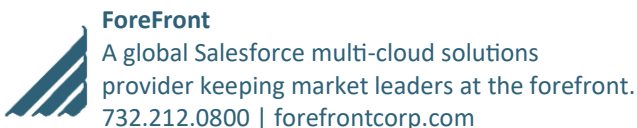
The company relied heavily on manual processes. Service managers handled cases within chaotic email inboxes, while dispatchers called technicians to relay schedules. Technicians had to make time-consuming warehouse stops to retrieve information for site visits. Additionally, billing administrators faced a lengthy invoicing process.

These inefficiencies hindered scalability, reduced efficiency, and threatened Cactus's competitiveness.

### Solution

ForeFront identified the client's needs, gathered requirements, and defined success criteria. From there, the solution was clear: A Salesforce Field Service implementation and integration with the company's existing ERP system, SyteLine. The final implementation included several customizations based on Cactus's unique business requirements, including:

- **Skill-based picklists on account objects** to manage work orders and assign the right technicians to jobs.
- **A mobile application** for technicians to add parts and manage timesheets on the go.
- **Custom service reports** so technicians can capture photos of physical work certification stamps.
- **Briefcase Builder**, which allows technicians to access information offline.

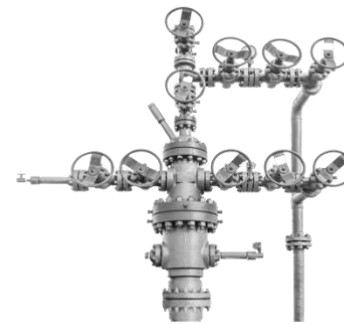


Salesforce Service Cloud  
Salesforce Field Service



SyteLine

Global Oil Field Equipment  
Market: \$132 Billion



### Outcome

Now, Cactus Wellhead has an efficient, effective, and scalable solution. Work orders are managed in Salesforce, not email. Technicians have visibility into their schedules, plus access to information needed during site visits in remote locations.

Field service management is a rapidly growing industry. ForeFront has extensive expertise in implementing Salesforce field service management and asset lifecycle management (ALM) solutions, making us an ideal partner for organizations looking to transform field service operations.



**ForeFront is part of NEORIS.** Together, we accelerate global digital business transformation. To learn more, contact: [marketing@forefrontcorp.com](mailto:marketing@forefrontcorp.com)