PK4 Tech

How MercuryGate plugged revenue leakage from Support Cases

Intro

As one of the leading transportation management software providers, MercuryGate International simplifies and centralizes freight transportation for logistics companies across the world. Their platform supports all modes of transport including ocean, air, rail, truckload, last-mile, parcel, and intermodal. Based out of Cary, NC, Mercury Gate has been recognized as one of the Top 100 Logistics IT Providers by Inbound Logistics Magazine. MercuryGate also provides integrations, technology, and managed services partnerships.

Challenges

MercuryGate Support is billed separately to some of their customers. For those customers, it is not a part of their subscription fees.

With a Services Implementation team, a Customer Support team, and a developer group all working on customer-facing issues, MercuryGate had a hard time keeping track of the actual time spent on specific customer cases.

Since Services Implementation was usually a timed project service, that team used a Professional Services Automation tool called OpenAir to track their time. And that worked very well for the Services implementation team. However, as the Tier 1 and Tier2 Customer Support teams grew, it became imperative for the Support team to track their time. In addition, the developer group needed to spend time on Customer Support cases too, which also needed to be tracked.

Disparate Platforms: The Services Implementation team used OpenAir to track their time and material-based projects. The Customer Support team worked on Cases within Salesforce but needed to additionally log into OpenAir just to track the time that they spent on customer cases. The developer group used Atlassian's Jira to keep track of their work. But they too needed to log in to OpenAir to record their time.

Siloed Systems: None of the systems talked to each other. Each group worked in a separate silo. It was hard to convince the Customer Support and Developer teams to record their times in a separate system.Following that, the accounting team needed to run reports in OpenAir to get an extract of the time worked on Cases and then download those reports as Excel sheets to send over to their billing system.

Poor integration: Since the Support Team spent the maximum amount of time on Customer Cases and worked completely in Salesforce, MercuryGate needed a system that would work easily and accurately within Salesforce.

This prompted MercuryGate to look for an alternative solution that could meet its evolving needs for time tracking.

Solution

In 2021, MercuryGate implemented PK4's Time Tracker for Salesforce. PK4 added in a webhook module to automatically bring in developer work logs from Jira identified by Salesforce Case Number back into Salesforce.

Results

Intuitive, efficient time tracking for Support Team

MercuryGate implemented PK4 Time Tracker's Salesforce Lightning component within their Case object. The support team now saves time and has a much more intuitive system, because they can now stay on the Case in Salesforce. They no longer need to access a separate system to track their time. And ALL hours spent on a Case are now accurately tracked.

Improved Time Tracking Convenience

PK4 TimeTracker automatically brought the Jira work logs that were already being used by the Developer Group directly into Salesforce, tied to the specific customer case. Developers previously had to double-log their time in Jira and OpenAir.

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Now, they did not even need to click on a button to get their hours into Salesforce.

The hours that the developers recorded in Jira are automatically brought into Salesforce through a webhook, provided by the PK4 TimeTracker.

Sometimes, the Professional Services Team that did the original implementation for the Customer needs to work on a customer case. Most of the PSA team does not have access to Salesforce. Those team members now use the PK4 Time Tracker web app to log the time that they spent on a specific Case. And that data too is automatically synced to Salesforce.

Decreased time and inaccuracies.

Before the PK4 TimeTracker was implemented, the Tier 1 and Tier 2 support teams needed to log into OpenAir to log their times. Because Accounting billed customers based on their Case numbers, the support team needed to create a task in OpenAir with the Salesforce Case number. Since the support team spent most of their time working on cases in Salesforce, they needed to spend additional time at the end of the day recording all the Cases worked during the day in OpenAir. This led to a lot of dropped hours and inaccuracies in the Case numbers.MercuryGate was reconciling time between Jira, Salesforce, and OpenAir making the whole process inefficient and inaccurate. With the PK4 TimeTracker in place, the whole operation now is streamlined and smooth.

Increased billing

Within the first month of implementation, MercuryGate noticed that the billed time for the development group and the PSA group had gone up. Because of the double logging issue, developers were reluctant to log into a second system and record their time. Now with the Jira work logs being brought automatically into Salesforce, all work hours spent on billable cases are being accurately recorded. This has turned into real dollars for MercuryGate since the developers were doing billable work for customers that were not actually being billed.

Tech Components

- Salesforce Sales Cloud
- PK4 TimeTracker in Salesforce
- PK4 TimeTracker Web
- PK4 TimeTracker Jira Integration

"Things are going well for us with the TimeTracker. It saves time for our folks logging time against Cases in Salesforce and it's more intuitive. Billed time for our dev and PSA groups has gone up. That turns into real dollars for us that we didn't bill before."

Jason Liner

VP, FP&A