Cambridge Air Solutions: Moving from Salesforce Service Cloud to Dynamics 365 Customer Service

ORGANIZATION

Cambridge Air Solutions, based in Chesterfield, Missouri, has designed and manufactured commercial and industrial HVAC equipment for more than 60 years, guided by its mission to "Create Healthy Working Environments for Hard-Working People." Its product lines span HTHV space heating (S-Series and SA-Series), make-up air (M-Series), evaporative cooling (ESC-Series and E-Series), and freeze protection (Spec Air Series) for warehouse, distribution, manufacturing, industrial, and transportation facilities. Its Customer Service team supports Rep Firms, mechanical contractors, and end users from the moment equipment ships, with Applications Engineering supporting complex cases.

CHALLENGE

Cambridge's service work revolves around a specific unit and its serial number, but Salesforce cases were not organized around equipment. When a case was escalated to Applications Engineering or passed between team members, a customer's emailed reply often reached only the current owner, so earlier contributors never saw the update and follow-ups fell through the cracks. Case types such as Problem and Question overlapped, and RMAs and SPARs were mixed in as types.

Key service work also sat outside the CRM. The team answered pre-sale technical questions from a shared inbox and left them there until they were done. Training requests were logged as cases through the phone menu. Factory Startup progress and field visit findings were not tracked as structured records. Cambridge wanted a service platform that put equipment at the center, held the original rep accountable through escalations, and gave leadership dependable data on what drove calls.

TECHNICAL SOLUTION

Why XTIVIA: XTIVIA understood Cambridge's Service Cloud setup and the Dynamics 365 Customer Service and Power Platform tools needed to improve on it, including where out-of-the-box features fit and where a light custom pattern worked better.

XTIVIA implemented Dynamics 365 Customer Service Enterprise with cases linked to Assets synced from Epicor, so each case shows the equipment involved and the asset's age when it was added. Email-to-Case was set up for three mailboxes: parts, support, and a new engineering help address for pre-sale requests, which only creates cases from outside senders. Cases route to six queues. Case types were simplified to Parts, Technical Service, Incident, Feature Request, and Pre-Sale, while legacy types such as Warranty, Recall, and Missed in Shipment became sub-categories and SPAR and RMA became tags.

Because Cambridge does not run multiple support tiers, XTIVIA designed an escalation model that keeps the service rep as case owner. Escalating to Level 2 or Level 3 (Engineering) requires a written reason, sends an alert, and feeds a dedicated queue or list view, with further steps to Operations Engineering and a Level 4 path for widespread issues handled as parent Incident cases. A custom Case Notifications list adds every user assigned or escalated to a case, and Power Automate emails them all whenever the customer replies.

Cases owned by a departed user are moved to a reassignment queue. A FluentUI Tag Picker control lets reps apply multiple tags across Accessories, Electrical, Gas, and Air components, which drives top-call-driver and recurring-problem reports.

Canvas Apps let technicians create Factory Startups and Field Reports, with embedded photos, from the field. Factory Startups are created automatically when an Epicor order includes the startup line item and move through four audited stages. A training entity captures sessions and attendees and matches them to existing leads or contacts by email. The Vonage integration handles calls inside Dynamics, using background number-only phone fields so incoming calls match correctly. A knowledge base is set up for articles on cases and emails, ready to grow into customer self-service.

BUSINESS RESULT

Service reps now see the equipment, its orders, and its history on every case. Customer replies reach everyone who worked the case, so escalations no longer drop updates. Pre-sale engineering requests moved out of a shared inbox into tracked cases that can link to opportunities. Tag-based reporting gives Service and Engineering a clear view of top call drivers and recurring component issues, feeding back into product quality. Factory Startups are tracked stage by stage, so the team can measure time between stages and spot delays.

BY THE NUMBERS

- 40,000+ Cambridge installations supported
- 3 Email-to-Case mailboxes feeding 6 case queues
- 7 legacy Salesforce case types simplified into 5 case types, with sub-categories and tags
- 30+ component tags across Accessories, Electrical, Gas and Air
- 4 tracked Factory Startup stages, from Order Received to Complete

KEYWORDS

Salesforce Service Cloud to Dynamics 365 Customer Service, case management, equipment-centric service, case escalation, Email-to-Case, case tagging, field service mobile app, Factory Startup tracking, Vonage CTI

SOFTWARE

Microsoft Dynamics 365 Customer Service Enterprise, Microsoft Power Automate, Microsoft Power Apps (Canvas Apps), FluentUI Tag Picker (PCF control), Dynamics 365 Knowledge Base, Vonage, Epicor ERP, StarfishETL, Salesforce Service Cloud (source)

HARDWARE/PLATFORM

Microsoft Dataverse, Microsoft Power Platform, Microsoft 365 (cloud), mobile devices for field technicians

ABOUT XTIVIA

For over 30 years, XTIVIA has been a leading B2B technology solutions provider, empowering clients to leverage their chosen technology competitively. We bridge legacy systems with modern innovation through a comprehensive suite of services, including Data & AI, Apps & Integration, Cloud & DevOps, Business Solutions, QA Testing, and Managed Services. Partnering with industry leaders like Microsoft, Liferay, AWS, Databricks, and Boomi, our certified experts deliver customized solutions that drive measurable business results. If you can imagine the business outcome, XTIVIA can create it with intelligent technology and AI-powered solutions. www.xtivia.com