



<https://excelnearshore.com/job/senior-salesforce-services-cloud-techno-functional-analyst/>

Senior Salesforce Services Cloud Techno Functional Analyst

Description

Excel Nearshore is seeking a **Senior Salesforce Service Cloud Techno Functional Consultant**, to support our managed services engagement optimizing our client's customer support processes within Salesforce Service Cloud (Lightning), focusing on service tickets, field service management (FSL), knowledge base, and case handling.

This role ensures efficient, compliant support for neuro/sensory devices in a medtech environment, addressing high volumes and integration latency with Oracle EBS. You'll integrate L1/L2 support duties into the POD, collaborate with Sales Cloud and Oracle EBS Service teams, and drive automations/AI (Einstein) to enhance service delivery and support cost reductions year-over-year. This is a fully remote and full-time position.

Responsibilities

- Provide techno functional expertise for Service Cloud, Field Service: Configure and troubleshoot cases, entitlements, service contracts, knowledge articles, omni-channel routing, and FSL (scheduling, dispatching, mobile apps for field techs).
- Own the Salesforce Case Management lifecycle, including case intake, categorization, prioritization, routing, escalation, SLA tracking, and closure.
- Integrate Salesforce with Oracle ERP and legacy systems.
- **Salesforce Service Cloud & Case Management:**
 - Administer and support Salesforce Service Cloud, including case lifecycle management, queues, escalation rules, entitlements, and SLAs.
 - Configure and maintain workflows, flows, validation rules, assignment rules, and automation to optimize service processes.
 - Support omni-channel service operations (email-to-case, phone, chat, and digital channels).
 - Monitor system performance and troubleshoot issues related to case routing, notifications, and user access.
 - Data Upload for Cases into Salesforce based on business needs.
- **Field Service Management (FSM):**
 - Configure and maintain Salesforce Field Service, including work orders, service appointments, scheduling policies, territories, and dispatch consoles.
 - Support dispatchers and field operations teams to ensure efficient scheduling and resource utilization.
 - Manage technician skills, availability, and service territories.
 - Analyze and improve field service processes to reduce response times and increase first-time fix rates.
- **Mobile Applications for Field Technicians:**
 - Support Salesforce Field Service Mobile and custom mobile applications used by field technicians.
 - Ensure reliable offline/online functionality, data synchronization, and

Hiring organization

Excel Nearshore

Employment Type

Full-time

Beginning of employment

ASAP

Duration of employment

Indefinite

Industry

MedTech

Job Location

México / Costa Rica

Remote work from: México / Costa Rica

Date posted

August 4, 2026

- mobile performance.
- Manage mobile configurations, permissions, and device compatibility.
- Partner with training teams to support technician onboarding and adoption of mobile tools.
- **Salesforce Knowledge Base:**
 - Administer Salesforce Knowledge, including article types, data categories, and visibility settings.
 - Support content lifecycle management (creation, review, publishing, and retirement).
 - Enable knowledge usage within Service Cloud and Field Service mobile applications.
 - Monitor knowledge effectiveness and adoption through reporting and analytics.
- **Salesforce Administration & Configuration:**
 - Administer and configure Salesforce objects, fields, page layouts, record types, and validation rules.
 - Manage users, roles, profiles, permission sets, and security settings.
 - Configure and maintain workflows, Flow automation, approval processes, and assignment rules.
 - Support standard Salesforce features including reports, dashboards, and list views.
- **Oracle ERP Integration (Case, Asset, and Service Contracts):**
 - Support and maintain integration between Salesforce and Oracle ERP systems.
 - Ensure accurate synchronization of: Cases and service requests, Installed assets and equipment history and Service contracts, warranties, and entitlements.
 - Partner with integration teams to troubleshoot data issues, errors, and latency.
 - Validate data integrity across systems and support reconciliation activities.
- **Reporting, Analytics & Data Management**
 - Develop and maintain Salesforce reports and dashboards for service operations, field performance, asset utilization, and contract compliance.
 - Monitor data quality and implement controls to ensure accuracy and completeness.
 - Support audit and compliance requirements related to service and asset data.
- **Governance, Security & Best Practices**
 - Manage user roles, profiles, permission sets, and security models.
 - Ensure solutions follow Salesforce and enterprise architecture best practices.
 - Support release management, change control, and environment management.
 - Handle integrated L1/L2 support: Triage and resolve service tickets (case closure issues, escalation delays, FSL routing errors) during business hours; provide on-call for P1 incidents impacting customer satisfaction or device support.
 - Support end-to-end service flows: Analyze requirements, conduct fit-gap assessments, and implement configurations/enhancements for support orchestration, including integrations with Dayforce (HR/employee data), Oracle Service (contracts/install base via MuleSoft/SOA), and third-party tools (GLINT for feedback).
 - Conduct root cause analysis (RCA) for issues, implement corrective/preventive actions (CAPA), and optimize processes to improve

service metrics in medtech contexts.

- Enforce compliance and security: Align service processes with ISO 27001, HIPAA/GDPR (for PHI in tickets), and FDA guidelines; manage user access (RBAC), audits, and data encryption.
- Drive automations and AIOps: Identify opportunities for AI enhancements (Einstein Case Classification for auto-routing, predictive service analytics) to support year-over-year cost reductions and innovation initiatives.
- Collaborate with POD teams (e.g., Sales/Revenue Cloud, Oracle Service) on cross-functional issues; contribute to QBRs with insights on medtech trends.
- Maintain documentation for configurations, flows, and change management; participate in Change Advisory Board (CAB) reviews and user training.
- Support minor development: Assist with Flow Builder, Triggers, Apex/ Visualforce, and testing for updates/ migrations.

Success Metrics

- Achieve 98% case resolution SLAs and 95% FSL dispatch accuracy, measured monthly via Service Cloud reports, minimizing medtech support disruptions.
- Reduce MTTR for service incidents by 15% YoY through RCAs and automations, tracked in ITSM tools.
- Complete 100% of quarterly compliance audits (ISO 27001/HIPAA) with zero findings in service areas.
- Implement 10-15% process automations (Einstein classifications) annually, contributing to Y2/Y3 cost reductions and reviewed in innovation fund reports.
- Attain CSAT scores >4.5/5 on handled tickets and QBR feedback, with demonstrated business value (e.g., 10% faster resolution times via optimizations).

Qualifications

- 5+ years of techno functional experience with Salesforce Service Cloud, Field Service Management, Knowledge Base, Mobile APP for the Field Technicians,
- Strong understanding of end-to-end service flows, including case management that covers technical support, field service and depot repair processes; integrations with ERP (Oracle Service via SOA/MuleSoft), and feedback tools in regulated industries like healthcare/medtech.
- Proficiency in configuration (case assignment rules, entitlement processes, FSL schedules, service territories, service resources), troubleshooting, and reporting (service dashboards).
- Experience in Salesforce Administration to set up users, permissions, roles, profiles and security settings.
- Knowledge of Apex, REST/SOAP APIs, and integration patterns.
- Familiarity with ITIL processes (incident, problem, change management) and ITSM tools for ticket handling.
- Knowledge of healthcare standards (PHI in support, FDA traceability for devices) and ISO 27001 controls (access/logging in CRM data).
- Excellent analytical and communication skills; ability to translate business needs into Service Cloud solutions empathetically, focusing on impacts ("This routing fix will accelerate device repairs, minimizing patient downtime").
- Bachelor's degree in Business, IT, or related field.

Preferred Certifications:

- Salesforce Certified Advanced Admin
- Salesforce Certified Platform App Builder
- Salesforce Certified Service Cloud
- Salesforce Certified Field Service Consultant
- ITIL Foundation preferred.

Contacts

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