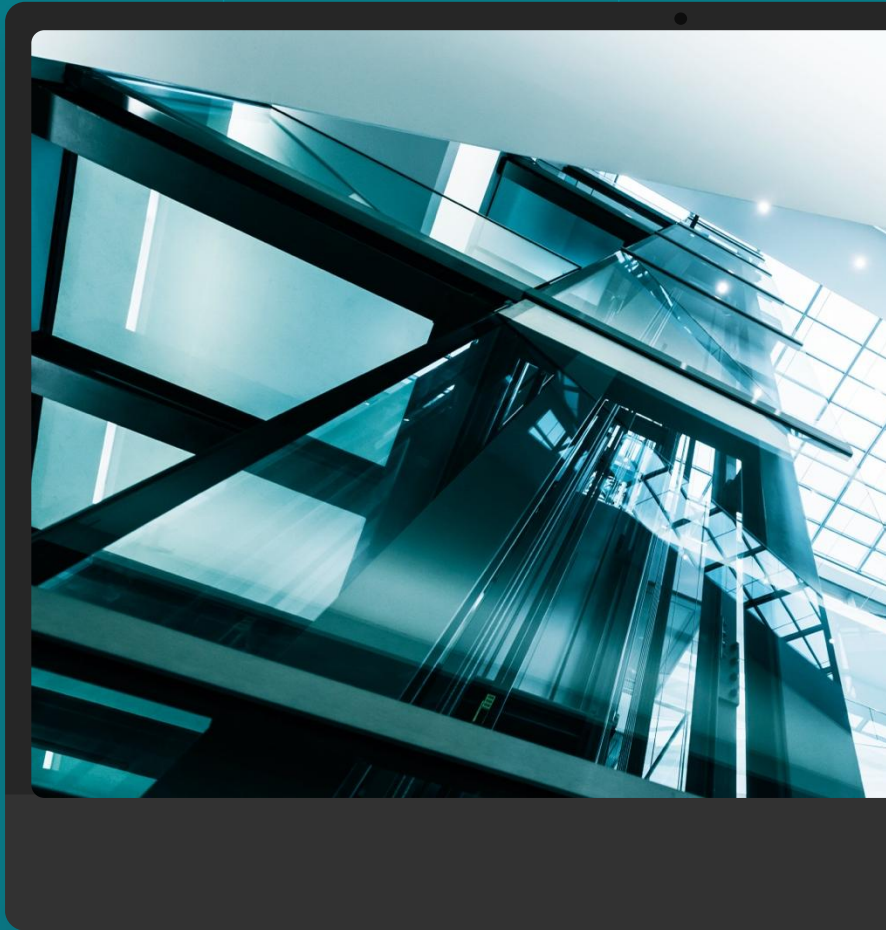




# FIELDBOSS 6.0 Release Notes

Last Updated January 12, 2025



○ SPECIALTY

○ ELEVATOR

○ HVAC



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### Introduction

Rimrock Corporation regularly updates the FIELD BOSS software, introducing new features, enhancements, and bug fixes. Major new releases are driven by customer-requested features and technology enhancements, as well as updates to align with the latest changes in the Microsoft Dynamics 365 platform. These updates leverage new capabilities from Microsoft while ensuring FIELD BOSS remains compatible by adapting to deprecated Microsoft features and technologies.

The intention of these release notes is to provide an overview of the new features. Detailed user documentation is available from the FIELD BOSS consulting team as part of the upgrade planning and training process.

### Releases

6.0.0.1 – The initial FIELD BOSS 6.0 Release; available as of October 14, 2024

6.0.0.2 – The second version available of the release, available as of January 10, 2025. All items specific to this version of the release have been identified with a <sup>2</sup> after the feature name





## FIELDBOSS 6.0 Sales Highlights

### Enhanced Account Level Billing

Prior to the 6.0 release, FIELDBOSS only allowed one email address plus one contact at the Account level to be emailed invoices through our automation. Users can now choose two additional billing contacts at the account level. These options have moved to a new “Billing” tab on the Account form.

### Default Price List on Building Location

Users can now set a default Price List on the Building Location form. When a Quote or Work Order is created, the building price list will take priority over the account price list.

### Default Wage Category on Building Location

Users can now set a default Wage Category on the Building Location form. When creating a Quote, Work Order, Project, or Maintenance Contract, the Wage Category from the building will default in.

### Date Won field on Quotes

A Date Won field has been added to the Quote form (and is available for views). Microsoft captures the date that a quote is won on a related Quote Close record, which made it difficult to use in custom reporting. We now capture that date in the new Date Won field on the Quote record for better visibility and to simplify reporting.

## FIELDBOSS 6.0 Service Highlights

### Enhanced Basic Dispatch

Users will now be able to utilize the basic dispatch functionality on Building Locations and Work Orders without the requirement of a Resource. This will allow users to create Service Activities and utilize the schedule board drag and drop functionality or scheduling from the Service Activity at a later date.

### Service Activity Copy Enhancements

Previously the SA copy function was used to create identical copies that typically needed to be edited for dates or resources. Users can now supply input values such as service, resource, and start time when creating copies, making it easier to use for rescheduling or creating SAs for additional resources. Users also have the option to use the copy feature to reschedule an SA that is Done (but not closed).

### Multi Device/Equipment Relationships

FIELDBOSS users will now have the ability to relate multiple Devices/Equipment to a Quote, Work Order, and Service Schedule. You will see a new tab on Quotes and Work Orders. The Service Schedule has a new subgrid for adding Devices/Equipment.

### Enhanced Work Order Cancellation Features

Previously users were able to edit a cancelled Work Order. FIELDBOSS has been updated to prevent users from editing or scheduling against a cancelled Work Order. Please note, cancelled Work Orders can still be updated by reopening the work order.

### Last Service Performed Field on Work Orders

A new field has been added to the Work Order form (and is available for views) to show the date of the last Service Activity closed as completed.





### Identify a Service as a Callback

Users will be able to identify specific Services as a Callback service to assist in building and field staff reporting functionality.

### Additional Expense Fields and Mileage on Time Cards

Time Cards now have three additional configurable expense fields similar to additional pay codes, that will roll up cost to the associated Work Order records and can be exported for expense payout. There will also be a mileage tracking field. Mileage comes with configuration options for automatic calculations.

### Mobile Coordinate Stamping

FIELDBOSS now offers the ability to capture the GPS coordinates when field users' clock in, arrive and clock out of a Service Activity. These fields are available for custom reporting. This feature needs to be enabled in mobile, and users need to have location services enabled for the Resco Mobile FIELDBOSS App.

### Larger Description Fields<sup>2</sup>

The description fields for the following entities have been increased from 2,000 to 10,000 characters:

- Quote (Description)
- Work Order (Description)
- Invoice (Description)
- Field Request (Description)
- Service Activity (Reason for Work)

## FIELDBOSS 6.0 Project Highlights

### Project Tasks Estimated Time vs. Actual Time.

Field users will now have the ability to associate Project Tasks to their Time Cards. They will be able to create additional Time Cards on mobile to split out their time over multiple project tasks. In FIELDBOSS office users will be able to view information like est. vs. actual time on Project Tasks for a more comprehensive break down of labor on Projects. This reporting will be available on the Project form as an embedded Power BI report. A breakdown of the task timeline is also included in this report in an easy to view Gantt chart format.

### Project Task Statuses<sup>2</sup>

New Project Task Statuses were added. The original "Active" becomes "Incomplete", and new statuses of "In Progress", "Complete", and "Review Needed" were added.

### Equipment/Device Lookup on Project Tasks

Users will now have the ability to identify specific devices/equipment on a Project Task record, making it easier for users to identify work to be completed on site.

### Purchase Order Report on Projects

Purchase Orders do not have a direct relationship to Project within FIELDBOSS. With the use of Power BI, users will now be able to see a report of all Purchase Orders on a Project through the Work Order association.





## FIELDBOSS 6.0 Maintenance Highlights

### Service Tasks for Maintenance

Service Tasks have been enhanced for maintenance. Users can now configure Service Schedules to have a predefined group of tasks for each device, for each month of the year. Tasks can be used as a simple checklist for the field user to show which devices have been completed, to communicate details to the field user about work to be completed, or even to default in a Resco Inspection to be completed. After the maintenance has been completed, the tasks can be used in the office for visibility of what was completed at the device level. Service Tasks can also be used for forecast capacity.

### One Step Maintenance Scheduling and Invoicing

A new process has been added to FIELDBOSS that will allow users to schedule or invoice all maintenance that is due for a specific time frame. These new options will be available in the FIELDBOSS Processes entity. The functionality will have distinct filtering mechanisms that can be used to pull all the required records to be run. This will eliminate the need to run workflows on multiple pages and help eliminate processing records more than once.

### Maintenance Invoicing Consolidation by Account

Users will now have the ability to consolidate maintenance invoices created via Contract Billing by Account. This means that multiple maintenance contracts can appear on one invoice when the Account on the maintenance contract is the same. Building Location and Tax information is carried over to each line on the invoice and line is linked back to a contract billing record.

### Service Schedule Products

Users will now have the ability to add Service Schedule Product Lines. Users specify the product, quantity, and price and then these product lines are added to every work order creating through the new maintenance scheduling feature. This feature can replace the legacy quoted maintenance method of creating a quote against a service schedule (when invoicing work orders), or simply to specify a list of parts or supplies to bring or to cost against a maintenance work order.

### Maintenance Contract Cancellation Date

A new Cancellation Date field has been added to the Maintenance Contract form. This field will be required when the contract is cancelled and can be utilized in maintenance reporting.

### Last Service Cancelled on Service Schedules

A new field has been added to the Service Schedule that will automatically update when the last scheduled Service Activity has been cancelled. This will help the office and mobile users identify when a maintenance service has been missed and can be identified as a priority to complete. Once a service activity has been completed, it will be cleared.

### Service Activity Due Date for Maintenance

Service Activities created from a Service Schedule will now have a due date for the last date of the period they were created for. The due date is automatically set to the date of the following service activity. This will provide better visibility in the office and in the field of any 'overdue' maintenance. Field users will be able to make these overdue maintenance Service Activities a priority.





### **Contract Billing Escalation Fields on Quick Create Form**

When creating a new Contract Billing record on a Maintenance Contract, users will be able to fill out all escalation information directly on the Quick Create form during creation. This will limit the need to open the record after creation to update this information.

### **Maintenance Hold on Device<sup>2</sup>**

There is a new option to put a device on maintenance hold. While a device is on maintenance hold, the device will be invoiced at \$0 in maintenance invoicing, and it will not be included on scheduled maintenance work orders. This feature helps to keep scheduling and billing in alignment for devices that are down for mods or repairs and helps with visibility and reporting.

## **FIELDBOSS 6.0 Mobile Highlights**

### **Simple and Full Mobile Service Activity Forms**

There is a new simplified Service Activity form that is available on mobile. By default, all service activities will use the standard form, but Power users can specify at the Service record level that service activities for that service should instead use the simple form.

The simple form will have a limited number of fields so mobile users only need to provide minimal information. This was to assist with the need for most field resources working on major projects not being required to fill out many of the fields on the Service Activity form.

### **Self-Dispatch on Mobile**

There is a new optional feature that allows mobile users to self-dispatch in the field. This feature brings both the building basic dispatch functionality from the office and a subset of the SA copy feature to the field users.

Some scenarios that this feature was designed to assist with are:

1. When performing a maintenance visit and identifying that a billable repair needs to take place
2. When performing an after-hours service call (to replace the after-hours Field Request)
3. When performing a service call where the customer has reached out to the field resource directly
4. When a subsequent visit is required to complete work on site (to replace the needs rescheduling Field Request)

Please note that additional licensing is required for mobile users to take advantage of self-dispatch.

### **Purchasing on Mobile**

FIELDBOSS mobile users will now have the option to create purchase orders in the field for Service Activity products. This will allow field users to provide PO numbers to vendors in the field without the need to call the office.

## **FIELDBOSS 6.0 Additional Highlights**

### **New FIELDBOSS Configuration App**

Replacing the FB Resource Scheduling app, the new FIELDBOSS Configuration app will be a consolidated location for system administrators to access all system set up records, limiting access to regular users.



**Power BI Embedded Financial Reports**

Embedded Power BI reports will replace calculated financial fields on the following entities, Accounts, Building Locations, Maintenance Contracts, Projects, Quotes, and Work Orders. The primary goal of this feature is to improve performance, by only performing the calculations on demand with Power BI.

Please note, if you are using the financial calculated fields in personal views within FIELDBOSS, these fields will no longer update.

**Safety Test Type Frequency Update**

Users will now be able to set up Safety Test Types with a frequency of up to 10 years (120 months), as this is required in some jurisdictions. The previous maximum frequency was 5 years (60 months).

**Editable Grid to Resolve Defects**

Users will now have the ability to mark multiple Defects as Resolved without opening each record individually.

**Work Order Completed Date Automation<sup>2</sup>**

When a Work Order is closed as either "Invoiced" or "Closed NB" a completed date is set. Previously it was set to the current day, but is now set to the last completed service activity date. It can be edited by a user if a different date is desired.

