



**FIELDBOSS**  
CONTROL THE FIELD

# HVAC CONTRACTOR MANAGEMENT SOFTWARE

## **AUTOMATE OPERATIONS**

FIELDBOSS automates business processes to reduce back office turnaround time, cut paperwork and stop things from falling through the cracks so you can stay focused on growing your business.

## **CONNECT TO THE FIELD**

FIELDBOSS can tackle the most complicated HVAC contractor business challenges by providing a cohesive solution that connects your field technicians, your managers, your customers and your data so you can take on more jobs and strengthen customer & staff loyalty.

## **REDUCE BUSINESS RISK**

FIELDBOSS helps protect your company from unexpected events that can disrupt day to day operations. Manage risks, such as new regulations or key staff departures, by ensuring that all your company data and knowledge are collected and stored in one cohesive system.

## **IMPROVE COMPANY VALUE**

FIELDBOSS reduces stress and increases margins by giving you deep insight into the business which allows you to identify and improve profit throttling inefficiencies.



# THE FIELDBOSS ADVANTAGE

## FUNCTIONALITY:

- Microsoft Dynamics 365
- Equipment Tracking
- Customer Service
- Scheduling & Dispatch
- Work Order Management
- Maintenance Contracts
- Service Task Configurator
- Mobile App
- Billing Automation
- Automatic PO Creation
- Accounting
- Reporting and Dashboards
- Construction & Project Tracking
- Configurable Checklists for Maintenance Tasks

## FIELDBOSS 3.0:

With version 3.0 FIELDBOSS customers are now able to manage progress billing for construction projects and inventory stock levels within the system much more efficiently. In addition to the two major functionality improvements, version 3.0 adds new features and performance enhancements that continue to streamline HVAC contractor business processes.

## NEW FIELDBOSS FEATURES:

### Progress Billing

New to FIELDBOSS HVAC, Progress Billing allows project 'phases' to be tracked and billed as work on the phase progresses, with the system automatically managing retainage (holdback) for phases in accordance with AIA standards.

### New Inventory Functionality

New inventory management integrated with Dynamics GP allows customers to view stock levels at warehouse locations directly in Dynamics 365, and mark inventory items as allocated once the Work Order is created. Users also can receive a warning when placing a Work Order for items that are out of stock.

## Wage Categories

Wage categories provides the ability to ensure compliance with 'Prevailing Wages' as required by law and/or contractual agreement. When a Time Card is completed, FIELDBOSS will use the appropriate "burdened cost" for job costing purposes.

## Field Requests

The new ability to create a 'Field Request' is used by field technicians to create and track requests for services, parts, or other information on their mobile device. This request is routed to the office, which then tracks the request to completion.

## Major Update to Maintenance Contracts

In 3.0, a single Maintenance Contract can be used for many different billing cycles, including: monthly, annual, three-year and five-year on the same invoice. Additionally, a new view has been added to quickly identify contracts that are due for annual "escalations".

[WWW.FIELDBOSS.COM](http://WWW.FIELDBOSS.COM)



Microsoft Partner

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