



FIELDBOSS Mobile App:

35 Ways to Control the
Field From Anywhere





Welcome to the Future of Field Service Possibilities

One day it'll be hard to believe that field service companies ever operated without mobile apps. Like the change from analog to digital, the benefits of modernizing your operations are game-changing.

Catering to the modern customer's demand for convenience and superior service, [field service mobile apps](#) connect field technicians and office employees with vital information across the organization, with or without Wi-Fi. This constant connectivity results in reduced downtime, enhanced productivity, and a seamless workflow that boosts business growth. At FIELDBOSS, our highly configurable mobile app was developed to do exactly that.



[FIELDBOSS](#) is a field service management solution built on Microsoft Dynamics 365 specifically for the elevator, HVAC, and specialty contracting industries. Available in both Android and Apple stores, our user-friendly mobile app allows everyone on your team to seamlessly track equipment and materials, record time tracking data, create purchase orders, conduct inspection checklists, and stay in control of tasks from anywhere.

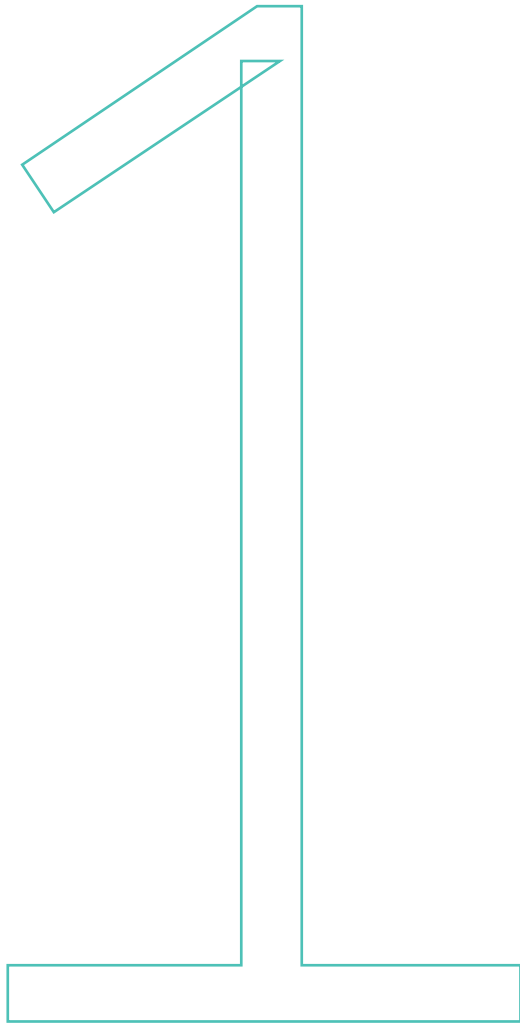
The FIELDBOSS mobile app can be easily customized to fit your unique business needs and requirements. But don't just take our word for it. This guide is going to show you exactly how our mobile app can improve your field service operations, impacting everything from communication and customer satisfaction to cash flow and security.

There are 7 key areas of your field service contracting business where the FIELDBOSS mobile app will have the biggest financial and operational impact:

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Navigate directly to these sections to discover what 5 valuable features are included in the FIELDBOSS mobile app.

You can also [click this link to watch a short video overview of the app.](#)



1- Build Better Customer Relationships

Deliver the exceptional, personalized service wanted by today's customers.





1. Schedule with Confidence

As field service experts with decades of hard-earned experience, we have seen firsthand how the right software can remove growth barriers and drastically improve productivity, drive cost savings, and boost customer satisfaction. Today's HVAC field service management software is designed for HVAC organizations of all sizes and complexities to efficiently manage and scale their operations.

2. Communicate Better

The FIELDBOSS mobile app improves communication between techs and customers with the ability to notify customers of technician arrivals or delays. Technicians can send a field service report directly to the customer with job details, photos, and their signature when the service activity is completed. Customers can request appointments, sign off on service activities and even have their own customer portal where they can look up service history and warranties.



3. Establish Client Trust

Customers feel safe when your field service technicians have comprehensive knowledge about their job site and equipment. Using customer files, which are always accessible through the FIELDBOSS mobile app, technicians can review past service history, and be fully prepared to take on the service call. Customers will be impressed with fast, productive, and informed interactions.

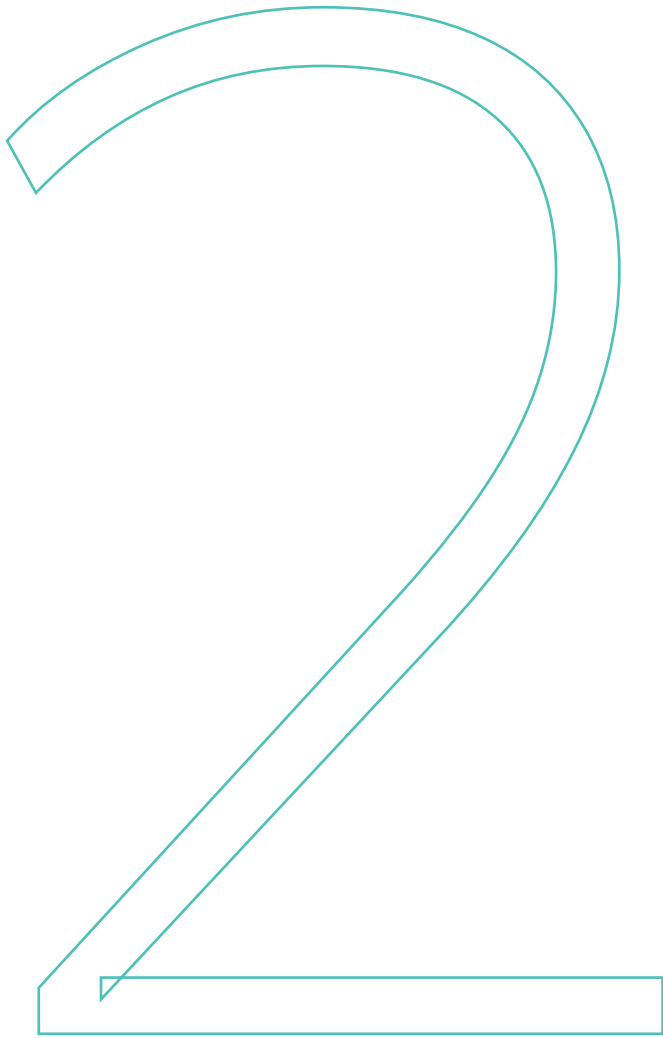
4. Set a Good First Impression

The FIELDBOSS mobile app helps make your service delivery more reliable and keeps your customers confident in your business. By providing a wealth of knowledge and information at their fingertips, your field service technicians will have the accessible tools they need to consistently arrive on-time, offer smart recommendations, fix the problem on the first visit, and make the billing process convenient and easy for customers. That means you retain happy customers who purchase more products and services from you and refer new business.

5. Increase Satisfaction

Efficiency is no longer the only indicator of field service success. In today's competitive world, customer satisfaction is key to a company's growth and profits. Mobile functionality enables field service technicians to access vital information to complete their job with ease, including customer equipment and service history. This quick access allows technicians to transmit real time status updates and provide a level of service unmatched by anyone else, thereby increasing customer satisfaction.





2- Give Management Visibility

Access real-time information to make informed business decisions.





1. Keep Your Team Connected

You can't be everywhere at once, but with the right mobile software you can run things as if you are. The FIELDBOSS mobile app gives management full visibility into your entire operations, promoting a more connected, accountable team.

2. Stop Wondering Where Your Techs Are

Effortlessly view and verify the location of your techs. The FIELDBOSS mobile app allows technicians to report their geolocation every time they update their status, sync their device, or create a record. This provides management with a comprehensive audit trail of your technician's location and data entry activities, so you never have to wonder again. The ability to audit and monitor time reports can also help reduce incidents of falsely reported overtime.

3. Get Real-Time Visibility

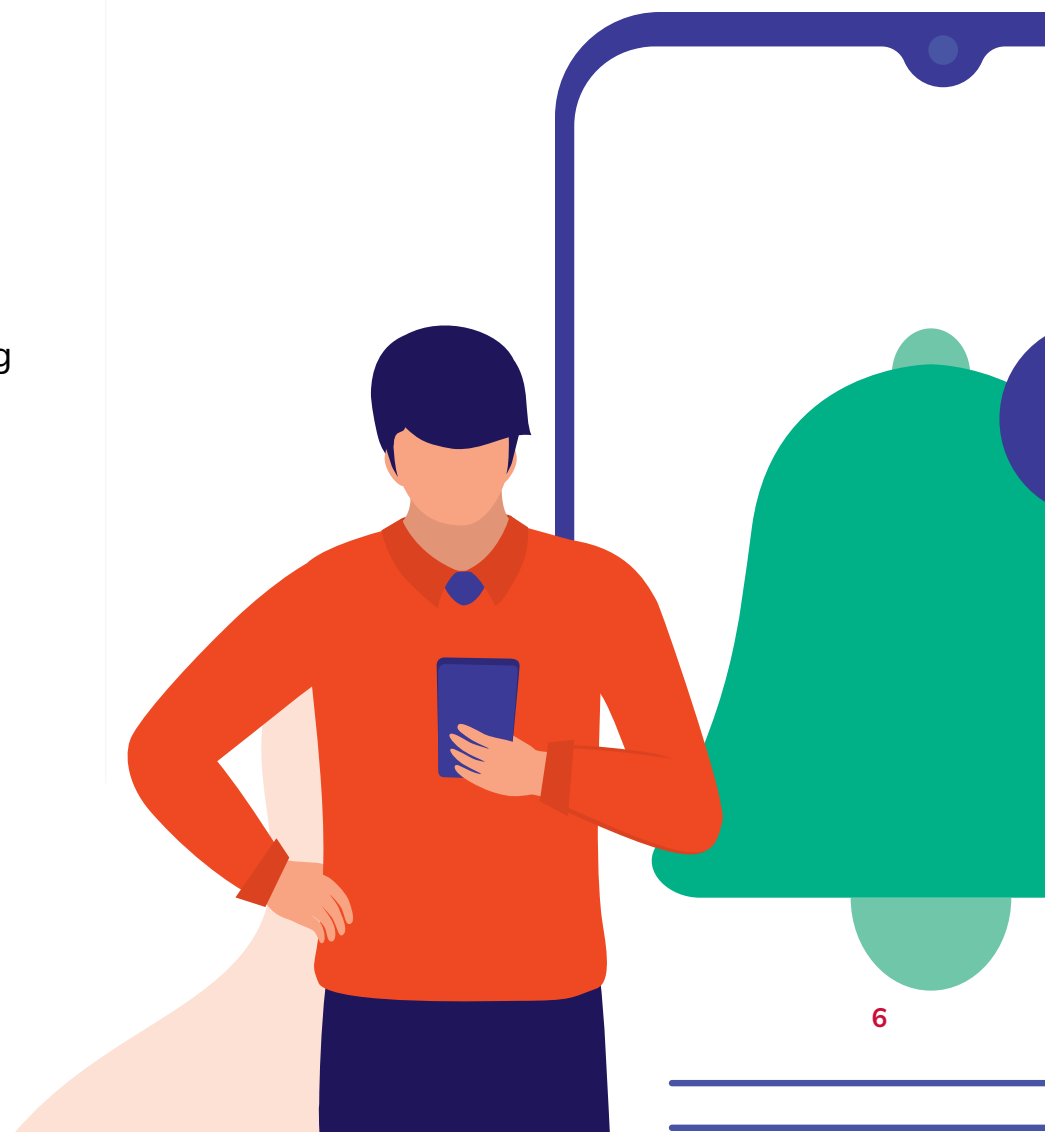
This morning's field work can become this afternoon's business intelligence with the FIELDBOSS mobile app. With real-time data sharing comes the ability to identify and target opportunities that would otherwise go unnoticed and unaddressed. FIELDBOSS guarantees that management will always have the freshest data possible to make well-informed decisions any day, any time, instead of waiting for end-of-quarter reports.

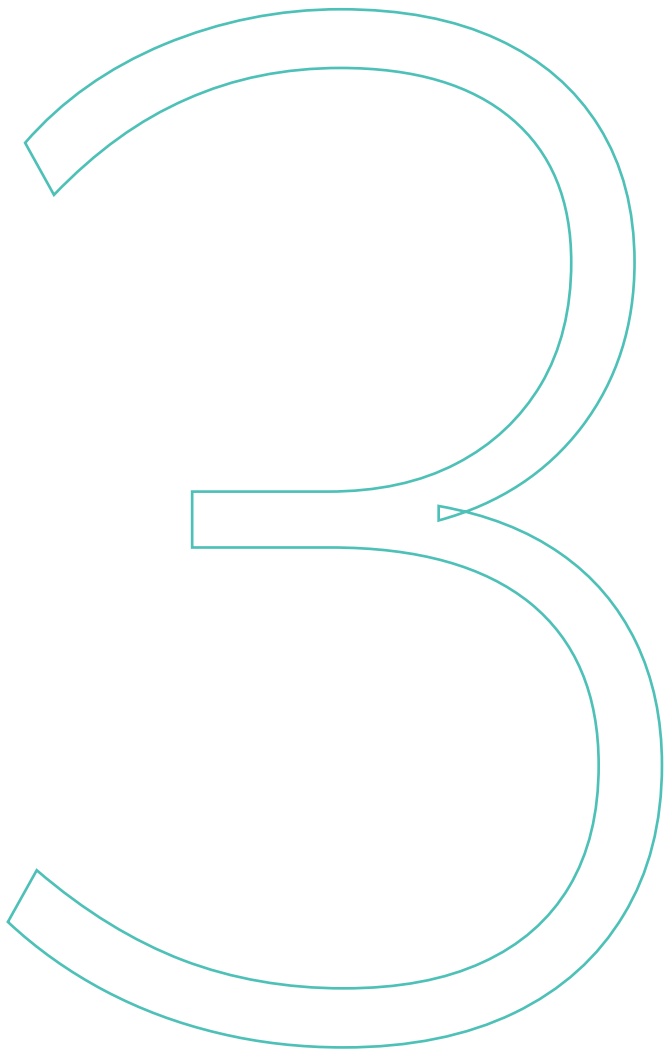
4. Customize Your Mobile App

Easily customize the FIELDBOSS mobile app to suit your specific business needs. Our mobile app interface is completely configurable so that field service companies can seamlessly integrate their unique service processes without requiring any custom code or programming.

5. Set Your Techs Up to Thrive

The FIELDBOSS mobile app was designed specifically for life in the field. Having continuous access to critical information will make your technicians' job easier. Prep time for service calls will be significantly reduced, and customer issues will be solved on the first visit. With just a few clicks, technicians have a complete overview of the client, details on previous service, and information on what needs to be done. With a real-time flow of information, problems are diagnosed and fixed quickly so your techs can move on to the next job.





3- Empower Your Field Staff

Give your employees the information and tools to excel during every service call.





1. View Service Tickets on a Map

Easily see if any service tickets are open near the current job site and save time between calls. The FIELDBOSS mobile app features an interactive map that shows your current position, and if any upcoming jobs are nearby for optimal efficiency.

2. Get a Complete View of the Building Location and Equipment

No more guessing which piece of equipment needs what type of service. The FIELDBOSS mobile app auto populates the building address and service activities. Technicians can easily see the complete make, model, and serial number of the equipment along with its location in the building and its warranty status, so the right equipment is repaired during the call.

3. View Full-Service History

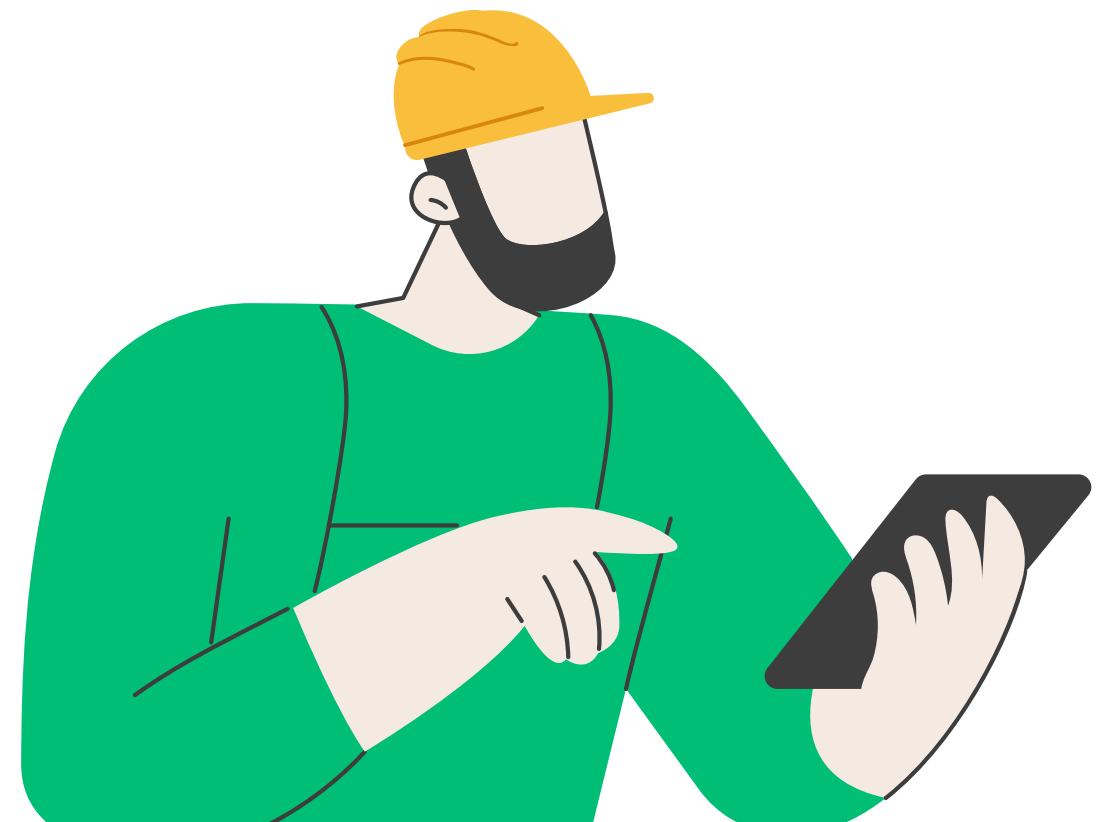
See what problems customers have had in the past, and if they're on a maintenance contract, or what upgrades they might require. The FIELDBOSS mobile app enables technicians to service customers smarter, and spot opportunities for sales, as well as predict other potential service needs.

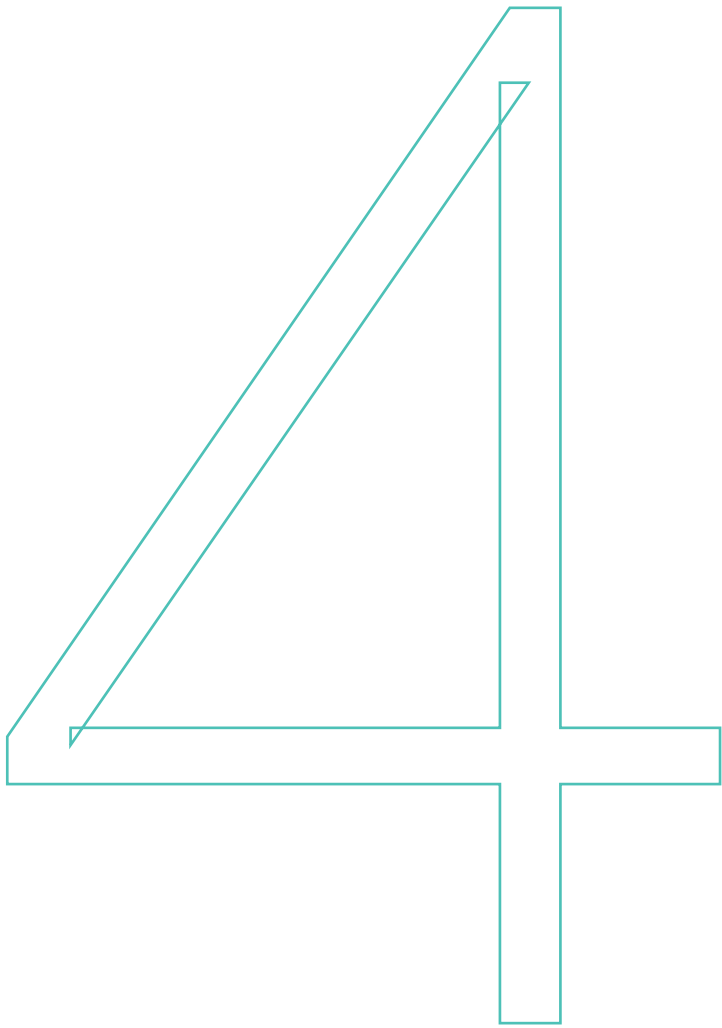
4. Say Goodbye to Paperwork

Switching from paper-based systems to mobile creates engaged, loyal employees. When techs have all the tools they need, they can focus on providing superior service instead of having to keep track of loads of paperwork and perform repetitive administrative duties.

5. Turn Your Techs into Salespeople

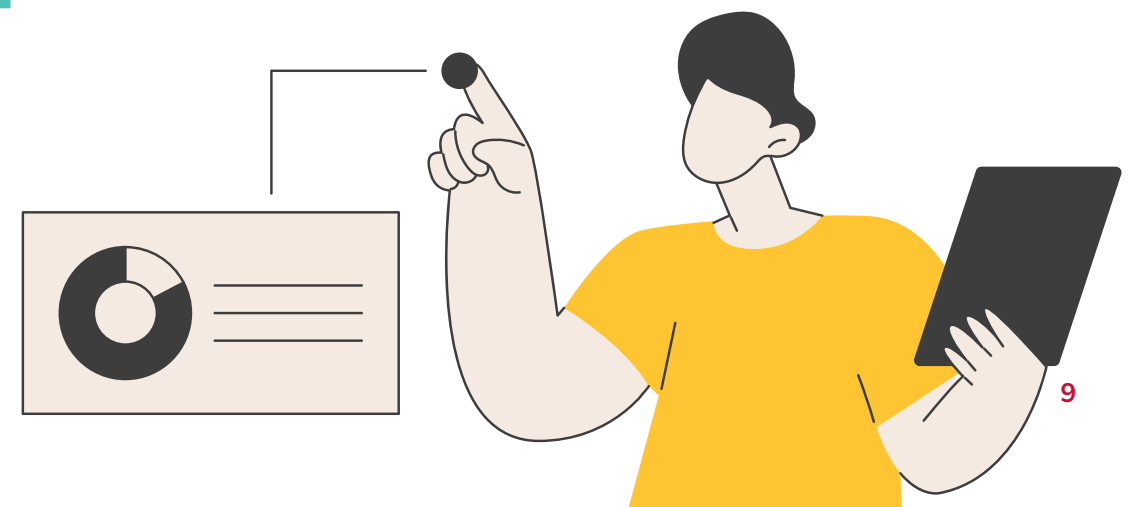
The FIELDBOSS mobile app enables field technicians to spot and act on new sales opportunities. Since technicians frequently find themselves chatting with customers who request a quote, or a new piece of equipment that needs servicing. Our app allows techs to communicate these opportunities to the office for easy follow-up.





4- Automate Key Processes

Streamline your field service operations by automating manual processes.





1. Stop Wasting Time

Save time and resources with the FIELDBOSS mobile app. By automating key work processes and digitizing operations, FIELDBOSS empowers your entire team to make important decisions using critical data when they need it the most. No more waiting on calls to the back office, or unnecessary second visits.

2. Transform Your Workforce

The FIELDBOSS mobile app has the power to revolutionize your entire operation, starting with how your technicians work. Using digital technology and handheld mobile devices, field technicians can perform their tasks at optimum efficiency having quick access to vital information and job checklists. The FIELDBOSS mobile app notifies techs of new work orders, helps navigate them to the site, tracks their location, and improves the flow of communication with customers, and the office. Tasks that previously took hours now take a few minutes!

3. Eliminate Unnecessary Paperwork

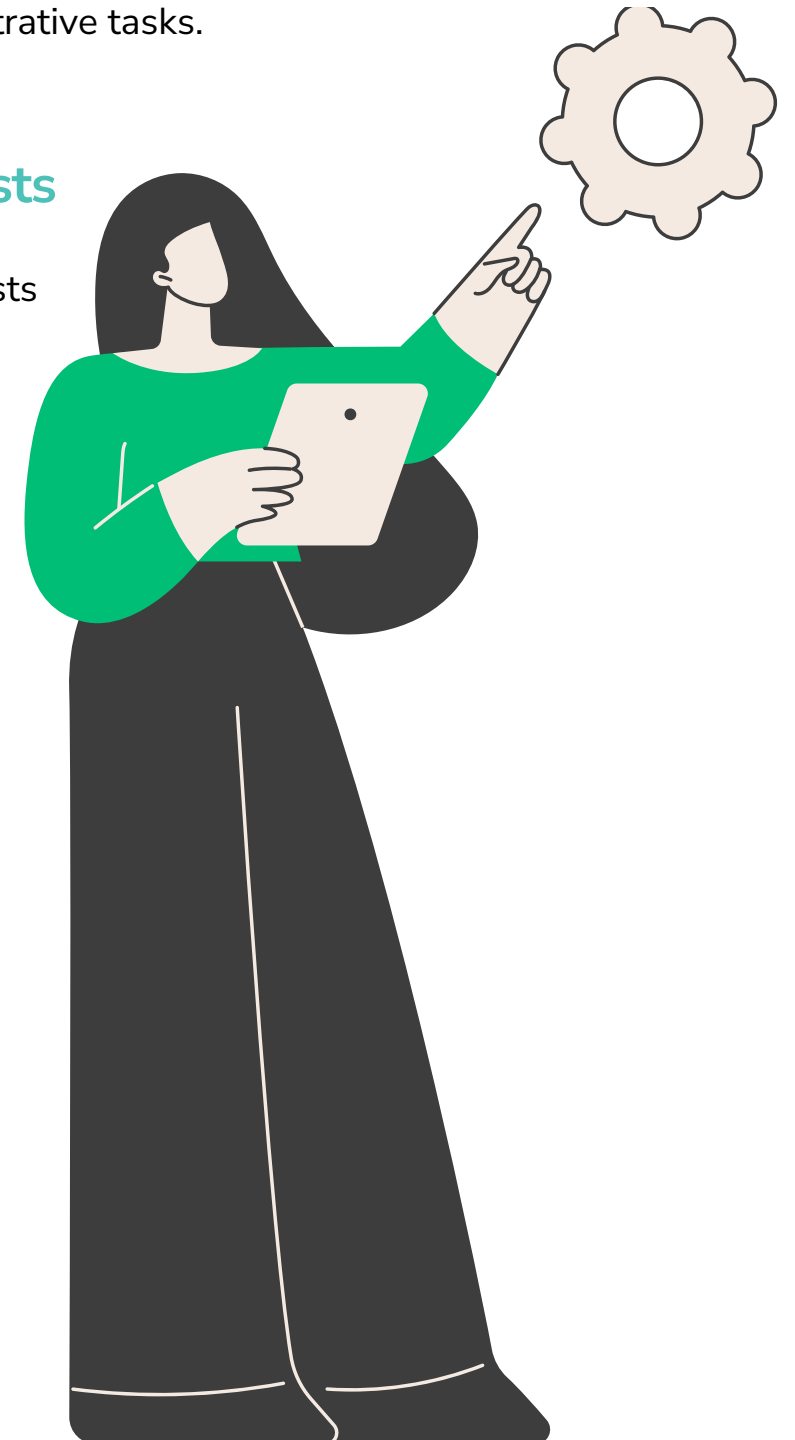
Physical copies of policies, procedures, and memos create paper bottlenecks that can make your office a cluttered nightmare. The FIELDBOSS mobile app eliminates unnecessary paperwork and consolidates information into convenient and readily accessible digital libraries that will give your field techs quick access from wherever they are, whenever they need them.

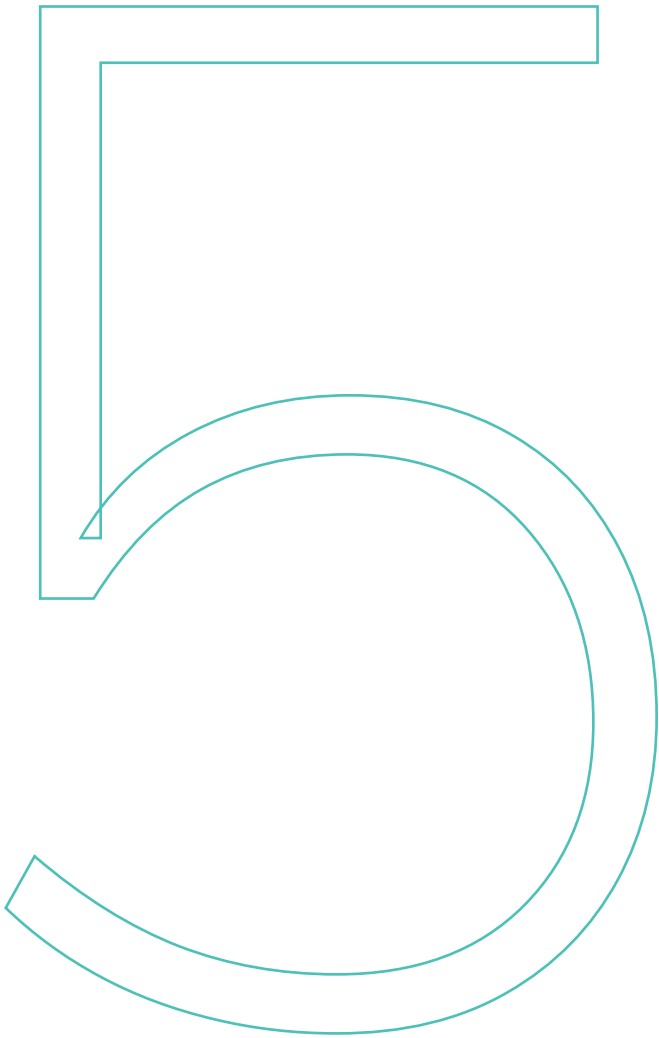
4. Stop Duplicating Data Entries

Enter data one time, and one time only. Since the FIELDBOSS mobile app connects field technicians to the back office, dispatch teams, and management, it eliminates duplicate data entries and the possibility of human error. With seamless data sharing, there's no need to re-enter information between departments by hand, so you can focus on the core mission of your business, and not get hung up in repetitive administrative tasks.

5. Automate Checklists

Replace paper-based checklists for maintenance and service work with customized automated checklists. The FIELDBOSS mobile app drives the standardization of processes and procedures, and most importantly, it ensures compliance. By customizing and automating checklists, your technicians never have to worry about skipping an important step.





5- Increase Your Cash Flow

Optimize resources and get paid quicker with fast job completion and invoicing.





1. Plug the Revenue Leaks

Stop warranty and service contract leaks. Instead of unknowingly providing free parts or services assuming it is covered by the customer's contract, the FIELDBOSS mobile app was designed to help spot revenue "leaks" and helps "plug" them by providing dispatchers and service techs with the data they need, when they need it, to ensure you won't give away parts or services for free.

2. Arrive On Time

With the FIELDBOSS mobile app, technicians receive schedules directly on their mobile device, helping to create more tightly packed schedules, improve customer service, and include more stops per day and efficiency in the field. Using Google Maps integration, the FIELDBOSS mobile app picks the quickest and most fuel-efficient route and provides turn by turn directions to technicians to ensure their safe and timely arrival.

3. Get Paid Faster

Issue invoices on the same day and get paid faster. The FIELDBOSS mobile app allows technicians to record and close service activities in real time while on-site. Customers can approve the work, sign-off electronically, and be invoiced immediately, increasing the timeliness of customer's payments.

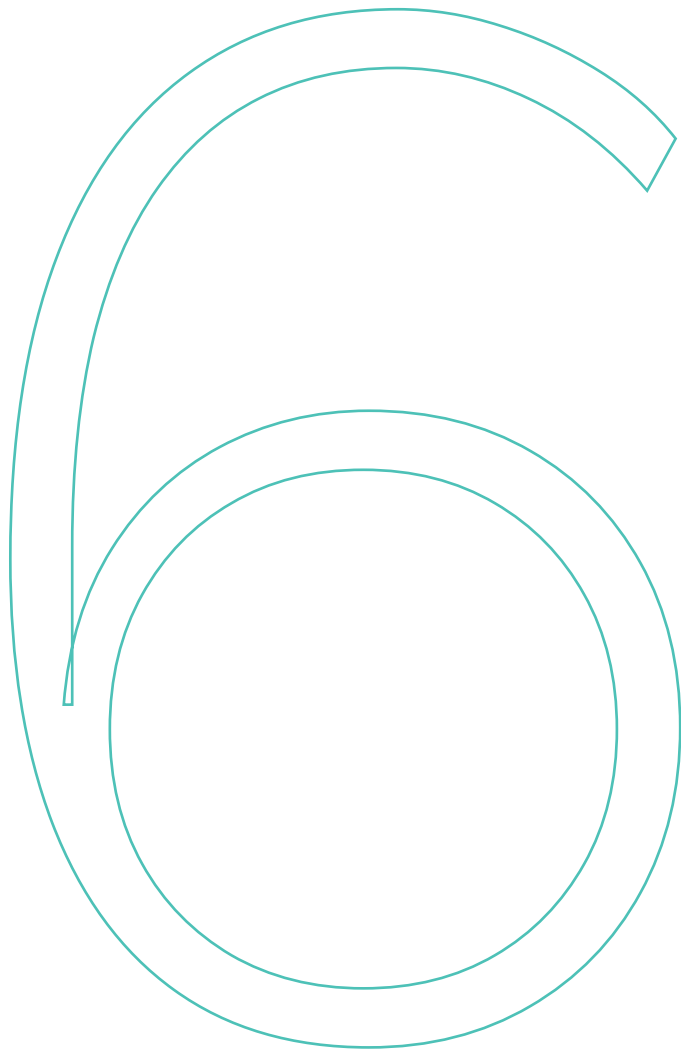
4. Invoice Accurately

Digital records help ensure fast invoice turnaround without the mistakes traditional paper processes create. By capturing data electronically, the risk of errors with re-typing is gone, and instead, you get accurate invoices and satisfied customers.



5. Make Time Tracking a Breeze

The FIELDBOSS mobile app makes it easy for technicians to update their job status, and effortlessly communicate it to office staff. With the click of a button, field techs can set their position as en route, job started, or job completed. Their time is automatically synced to the office, making payroll a breeze. With mobile capabilities such as timesheet input based on clock-in/clock-out, task status, and more, ensuring tedious and error-prone time entries are eliminated.



6- Collaborate Efficiently

Foster increased productivity and connectivity with the seamless sharing of real-time information.





1. Improve the Flow of Information

Instead of manually going through files of work reports to see what repairs were previously done and who performed them, the FIELDBOSS mobile app facilitates digital sharing of information. By providing field technicians with continuous access and visibility into customer and equipment history, they can diagnose and fix the problem faster.

2. Capture, Document, and Share

The camera application integrated into the FIELDBOSS mobile app makes it easy to capture, document, and share photos and videos. This valuable feature helps capture vital information and create a knowledgebase to share. For example, field technicians can use pictures to outline how to fix an issue, then share it so other technicians can learn from that knowledge. Technicians can also perform work area assessments and upload time-stamped photos of a work area to the service ticket or case following a completed job.



3. Build the Company Knowledgebase

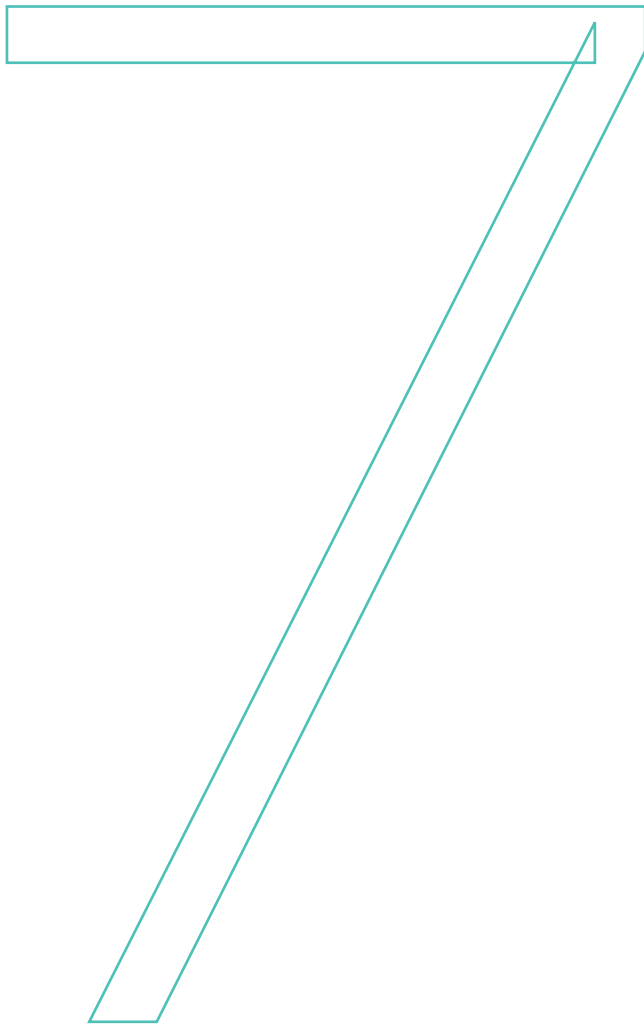
The FIELDBOSS mobile app was designed to be a collaborative tool that makes it easy to capture and share information. The digital entries ensure that field technicians are linked to office staff, regardless of location. Sharing information creates a foundational database full of knowledge and expert information that influences the company to work together. Automating and sharing data reduces the risk of having a single point of information so that service calls can be performed meticulously, regardless of whether you have technicians that are off sick, retiring, or busy on another job.

4. Make Instant Recommendations

Easily transfer sales recommendations from technicians' phones to new work orders with a simple click. The FIELDBOSS mobile app helps you organize, track and manage recommendations to customers during every interaction, with notifications and alerts.

5. Be Consistent

Older methods of field data collection, like paper and disconnected spreadsheets, make it tough to enforce consistency. The FIELDBOSS mobile app makes it easy to build, centrally store and modify standard forms such as inspections, checklists, audits, and more.



7 - Keep Your Critical Data Secure

Eliminate data security worries with trusted Microsoft cloud technology.





1. Remember the Details

The drive after visiting a customer location gives your technicians plenty of time to forget key service details that need to be documented. And companies that are reliant upon a paper or email-based process suffer by wasting valuable opportunities to better communicate needed information. Secure important information using the FIELDBOSS mobile app, which allows for the immediate input of job details, including capturing photos and videos for more accurate documentation, as well as alerting future personnel of potential safety concerns of a job site before they leave a customer's location. Information is stored safely and immediately with no fears of losing paperwork or forgetting job details.

2. Lock or Wipe the Application Remotely

Never fear about the safety of your data if your field staff's mobile devices are lost or stolen. The FIELDBOSS mobile app allows admins to lock the device, or wipe data from it remotely, should something unexpected happen. They can also set up an automatic wipe if the application has not connected to your server for a defined period, or if a user exceeds a specified number of incorrect password entries.

3. Leverage Microsoft Cloud Security

The FIELDBOSS mobile app was built using reliable Microsoft cloud technology. Microsoft Cloud Security encompasses a range of services and features designed to protect data, applications, and infrastructure hosted on Microsoft's cloud platform, Azure. Microsoft regularly updates its services to address emerging threats and vulnerabilities, making it the most trusted, secure software available.

4. Role-Based Security

The FIELDBOSS mobile app ensures that sensitive company data is accessed responsibly by implementing role-based security measures. This feature permits only authenticated users with the appropriate privileges based on their specific role within the organization to access certain data and functionalities. By doing so, it maintains the integrity of your business information while facilitating efficient and secure workflows tailored to each staff member's duties and responsibilities.

5. Data Encryption

FIELDBOSS mobile app takes the security of your data seriously by employing robust data encryption. Built on the reliable Microsoft Azure cloud platform, this key feature provides peace of mind as any information stored or transmitted remains protected against unauthorized access. Whether your technicians are onsite or interacting with the app remotely, data encryption acts as a stalwart defender of sensitive information, ensuring that what belongs to your business stays secure, regardless of where your field operations take you.





Take a Closer Look at FIELDBOSS

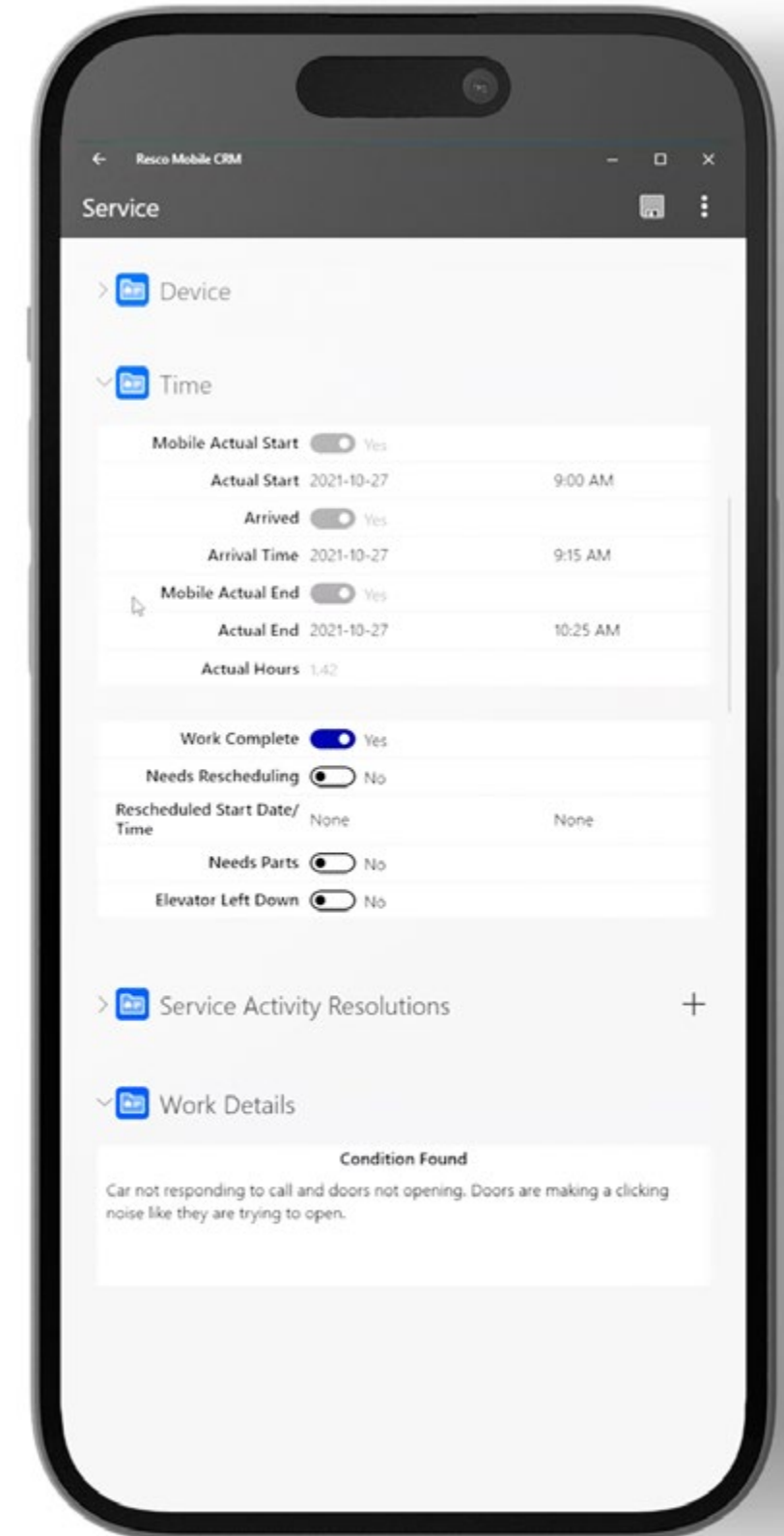
Incorporating mobile solutions into everyday operations isn't merely a trend; it's a strategic step to sustain a competitive advantage and foster continual growth.



At FIELDBOSS, we recognize that investing in a [mobile app for field service management](#) isn't as simple as buying a cup of coffee, it's a big investment. Before you decide, thoroughly evaluate all aspects of a modern field service mobile app. By keeping these factors in mind, you'll gain clarity on what to expect and avoid the costly consequences of selecting a mobile app that doesn't meet your needs.

At [FIELDBOSS](#), we know the needs of HVAC, elevator, and specialty contracting industries. Driven by technology adoption and customer success, our goal is to modernize field service businesses across North America. Wherever you are on your field service software journey, we are here to help.

[BOOK A DEMO](#)





All-in-one field service
management software
you'll never need to replace.



FIELDBOSS is the only field service management solution built within Microsoft Dynamics 365 and specifically for the HVAC and elevator industry. From field to finance, FIELDBOSS works directly out-of-the-box and provides complete visibility into every aspect of service performance.

FIELDBOSS focuses exclusively on the needs and demands of the elevator and HVAC industry. Our unique, proven approach to business change management and technology adoption ensures success, with the least disruption, in every FIELDBOSS implementation, engagement, and project.



Trusted
Microsoft
Platform



Field Service
Industry
Veterans



Dedicated
Technical
Experts

BOOK A DEMO



FIELDBOSS can scale with your business very efficiently. Since inception, our business has nearly quadrupled! We have over 40 field technicians now and FIELDBOSS easily grew with us and adapted.

Levi Laseur, ICOM Mechanical

