

## Customer Story

# RELIABLE MECHANICAL

Discover how Reliable Mechanical moved from paper-based chaos to streamlined control with FIELDBOSS, gaining faster invoicing, real-time data access, and confidence to grow.

When Alysia Carter acquired Reliable Mechanical, she inherited an HVAC company built on binders, carbon paper, and guesswork. With a background in large-scale operations, she knew change was non-negotiable. Discover why she chose FIELDBOSS as her digital transformation partner.

*I didn't just need software — I needed a system that would support where we were going, not just where we were. FIELDBOSS fit the vision.*

Alysia Carter,  
President  
Reliable Mechanical

## THE CHALLENGE

Reliable Mechanical's manual, paper-based system created roadblocks in every part of the business. Technicians wrote job details on carbon-copy paper, often in illegible handwriting. These forms were physically dropped off at the office, where staff then had to interpret and re-enter the information into QuickBooks, sometimes days later. Inaccuracies were common. Invoicing was delayed. Time entries were hard to verify.

Service history wasn't tied to equipment or job sites, so technicians had to call the office to ask what work had been done previously. Office staff would dig through files or scroll through invoice records to find the right details, often for one unit among many on a site. Maintenance contracts lived in spreadsheets, and tracking when to send a tech out (or when a contract was up for renewal) required manual reminders. Quotes were created and sent, but there was no system to follow up on them or track which ones had been accepted.



### COMPANY

Elevator Solutions

### INDUSTRY

HVAC

### LOCATION

Ontario, Canada

## BACKGROUND

Reliable Mechanical is a commercial and industrial HVAC contractor based in Ontario. The company provides heating, ventilation, and air conditioning services for a wide range of commercial properties and institutions.

In December 2020, Alysia Carter purchased Reliable Mechanical with a clear vision for growth. But she inherited a business run almost entirely on paper: handwritten work orders, triplicate carbon-copy forms, and no job costing in QuickBooks. Equipment histories were locked in filing cabinets. Maintenance contracts lived in spreadsheets. Quotes were managed manually and easily forgotten. Alysia, who came from large-scale organizations where processes and performance go hand-in-hand, knew that before she could scale the company, she needed to modernize it. And that meant starting from the ground up with the right field service management system.

“We didn’t know anything for certain. We didn’t know where people were, what jobs were open, or what had been quoted. We were operating in the dark,” says Carter.

The business couldn’t move forward confidently without visibility or connected systems. The team spent time reacting to the past instead of focusing on the future. And as Alysia began planning for long-term growth—she knew this way of working was unsustainable.

## THE SEARCH FOR THE RIGHT SYSTEM

Shortly after taking ownership, Alysia began evaluating options. She built a longlist of 20 field service software platforms, narrowed it to 7, and completed demos with six providers. Although she had a strong recommendation for FIELDBOSS from a trusted advisor, she did her due diligence to ensure it would truly meet her needs.

Alysia knew that implementing field service software was the first major process change, even before moving away from QuickBooks.

What stood out was FIELDBOSS’s integration with Microsoft tools. Alysia knew she would eventually transition from QuickBooks to Microsoft Dynamics 365 Business Central, and FIELDBOSS’s alignment with that ecosystem made the decision clear.

“We were already using Outlook, Word, Excel — it just made sense to keep everything in one ecosystem and have it all integrated.”— Alysia Carter

## WHY RELIABLE MECHANICAL CHOSE FIELDBOSS

After narrowing her shortlist, Alysia conducted live demos with six different providers. She was determined not to settle for a system that looked good on paper but failed in practice. Despite a strong recommendation for FIELDBOSS from a colleague who had already been through the process, she evaluated the platform critically alongside others.

Most systems she reviewed fell short in key areas. Some lacked robust mobile capabilities. Others felt clunky or overly generic. A few tried to serve every industry at once, with limited customization for the field service demands of HVAC contractors. One solution required too much internal IT support. Another had poor customer service ratings.

FIELDBOSS stood out because of its alignment with Microsoft technologies and because it was built specifically for HVAC contractors. The interface was clean. The mobile app was intuitive. And the long-term roadmap matched Alysia’s growth vision.

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*My background is in big business. So I knew immediately that this setup wouldn’t support growth. Even before I closed the deal, I was already researching systems.*

Alysia Carter,  
President  
Reliable Mechanical

“It wasn’t just about features. It was about support, scalability, and being part of something that would keep evolving with us,” said Carter.

Reliable Mechanical implemented FIELDBOSS in 2021 and initially ran it alongside QuickBooks. Alysia always intended to move to Business Central but wanted to ensure the field service side ran smoothly before making that leap. In 2024, with the team fully settled into FIELDBOSS, they transitioned to Business Central. Today, they’re preparing to onboard a third acquired company and upgrade to FIELDBOSS 6.0, further proof of the platform’s scalability and reliability.

Alysia also praises the FIELDBOSS team’s support and openness to feedback. Her team now holds regular calls with FIELDBOSS to discuss optimizations, ask questions, and raise suggestions, many of which have been incorporated into future product updates.

“As you make us experts in the system,” says Carter, “we become your best salespeople.”

## RESULT: DIGITAL CONTROL, CONFIDENT GROWTH

FIELDBOSS didn’t just replace paperwork — it redefined how Reliable Mechanical runs its business. From the field to the front office, the platform has streamlined operations, accelerated cash flow, and empowered the team with real-time insights. What was once a reactive, backward-looking process is now a connected, forward-moving system built for growth.

Reliable Mechanical’s journey shows what’s possible when a contractor gets serious about systems. With the right technology and a supportive partner, even the most paper-heavy business can leap to real-time visibility, proactive service, and scalable growth.

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*Information is power. And the faster you have it, the better decisions you can make. That’s what FIELDBOSS gives us — one version of the truth. We’re no longer second-guessing job details or scrambling for data. It’s all there when and where we need it.”*

Alysia Carter,  
President  
Reliable Mechanical

### REAL-TIME WORK ORDER MANAGEMENT

Field techs now create and close work orders from the mobile app. No more phone calls, illegible writing, or guesswork. Technicians can see service history tied to specific equipment on-site, saving hours and preventing repeat visits.

## FASTER INVOICING AND BETTER CASH FLOW

Invoices now go out within days, not weeks. Time entries are tied to work orders automatically. The delay from paper-based processing is gone, and with it, cash flow headaches.

## JOB COSTING AND DATA VISIBILITY

FIELDBOSS gives Alysia and her team clear insight into revenue and job costs — something they never had with QuickBooks alone. With centralized data, they're making faster, more confident decisions.

## SCALABLE PROCESSES FOR GROWTH

Weekly standing calls with the FIELDBOSS team ensure new ideas, process improvements, and support are never far away to enable future growth.

## EMPOWERED TECHNICIANS & OFFICE STAFF

Technicians no longer need to call in for history. Admins don't spend their days deciphering handwriting. Everyone works forward, not backward, allowing for more controlled and strategic alignment.

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*FIELDBOSS allows you to continuously work forward. Before, we were stuck looking backward, constantly reacting. Now, we're ahead of it.”*

Alysia Carter,  
President  
Reliable Mechanical

Ready to Take Your  
HVAC Business to  
the Next Level?

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