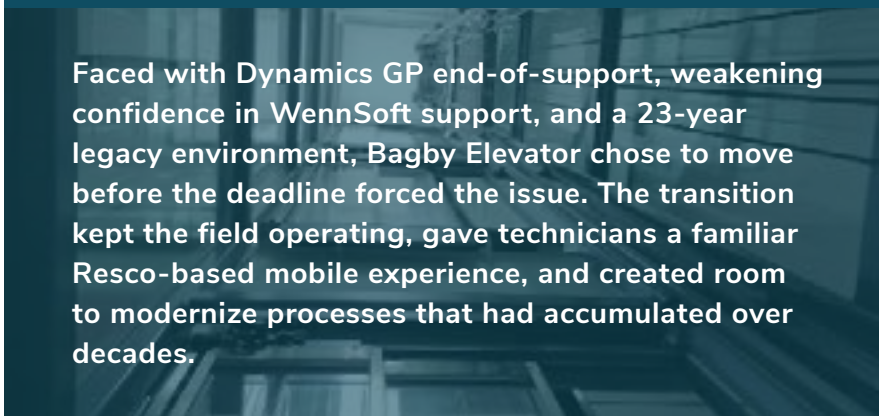
Customer Story

BAGBY ELEVATOR MOVES EARLY FROM WENNSOFT AND DYNAMICS GP TO FIELDBOSS



Faced with Dynamics GP end-of-support, weakening confidence in WennSoft support, and a 23-year legacy environment, Bagby Elevator chose to move before the deadline forced the issue. The transition kept the field operating, gave technicians a familiar Resco-based mobile experience, and created room to modernize processes that had accumulated over decades.

FIELDBOSS

COMPANY
Bagby Elevator Company

INDUSTRY
Elevator Contracting

LOCATION
Birmingham, Alabama USA

BACKGROUND

Founded in 1920, Bagby Elevator is a fourth-generation, privately owned elevator contractor providing maintenance, service, installation, modernization, custom fabrication, and specialized vertical transportation solutions.

The GP Deadline Made the Timing Real

Bagby Elevator has been solving elevator problems for more than a century. Founded in Birmingham in 1920, the fourth-generation family business has grown into one of the country's larger independent elevator contractors, with operations across the southern United States and capabilities that range from routine maintenance and modernization to custom fabrication and specialized marine work. Its technology environment had grown right alongside the business.

For roughly 23 years, Microsoft Dynamics GP sat at the center of Bagby's accounting environment, with WennSoft supporting service, maintenance, job activity, and mobile field operations. The setup was familiar, and no one at Bagby was looking for an excuse to take on a major ERP replacement. Leigh Bagby, a CPA who works across finance, payroll, HR, operations, and technology, had looked at alternatives years earlier and had even been advised that Business Central was not yet ready for the complexity of their business. So Bagby waited.

Microsoft's decision to end support for Dynamics GP changed the timing. Leigh did not want Bagby to drift toward the deadline and then discover that the company had fewer choices, less implementation capacity, or too little time to execute the move properly. The concern was not theoretical. By then, Bagby's confidence in WennSoft support had also deteriorated. Leigh described the support experience as

poor, while Software Manager Will Jones said that, from the customer side, support appeared to be dwindling. Staying on GP longer would have meant relying more heavily on a provider they were already less comfortable depending on.

That mindset shaped the project from the beginning. Bagby did not want to make a rushed decision, but it also did not want to confuse familiarity with safety. Once the GP timeline became real, the company used the forced transition as a chance to ask a bigger question: if it had to move anyway, what should the next operating environment actually look like?

The Real Risk Was Keeping the Business Running While Everything Changed

Bagby considered other ERP options, including NetSuite, but staying in the Microsoft ecosystem carried real weight. The company wanted less on-premises infrastructure, fewer servers to patch and protect, and a stronger cloud foundation for disaster recovery and long-term administration. As Leigh put it, once a company is deeply invested in Microsoft, moving away can make the environment more disjointed rather than less.

FIELDBOSS entered the conversation through peers in the elevator industry, and choosing FIELDBOSS effectively meant choosing Business Central as the financial foundation underneath it. Bagby was comfortable with that direction, but the team was not pretending the change would be easy. The existing GP environment had more than two decades of history, add-ons, tables, custom processes, and data spread throughout the system. Will had spent much of his first year and a half at Bagby learning GP, only to help the company get off it.

The fear was practical. Technicians had to keep receiving service calls, entering buildings, completing work, and reporting back. Payroll had to run correctly in a heavily unionized industry with different classifications, negotiated rates, and job-costing considerations. Vendors still had to be paid. Customers still expected service. Bagby could tolerate a learning curve, but it could not tolerate an operational standstill.

That is also why Bagby was firm about timing. The company wanted to complete its year-end audit before putting finance and operations through a conversion, then target March 2026, when internal resources could actually support the work. FIELDBOSS ultimately aligned around that timeline.
On the data side, the implementation team worked closely with Bagby to extract and reorganize information from the long-running GP environment so the company did not arrive at go-live wondering what had been left behind.

Since going live, Hart Lifts runs a tighter, more predictable operation.

> *We are not going to be the last person scrambling to find software to run our company.*
>
> **Leigh Bagby**
> **Bagby Elevator Company**

The Field Team Was the Biggest Adoption Test, and One of the Smoothest Parts of the Move

For other WennSoft customers, the field transition may be the most important part of Bagby's story. Bagby was already using Resco through WennSoft, so technicians were not moving from a familiar mobile workflow into something completely foreign. FIELDBOSS also uses Resco for mobile field service, which meant that while the system around the technicians changed, the underlying way they interacted with tickets, buildings, notes, and field activity remained recognizable.

That continuity mattered because Bagby's previous mobile environment had real problems. Leigh described it as electronic, but glitchy. A saved ticket might fail to generate an appointment summary. Data issues could require clearing information from a technician's phone, reopening and resending a ticket, and, in some cases, having the technician return to a customer to capture a required signature again. Those were not abstract annoyances. They created extra work for the office, extra frustration for technicians, and avoidable risk in the customer experience.

Bagby trained technicians in groups of about 15. Will sai
d the sessions averaged about an hour and a half, even after allowing time for every question the group had. The general workflow made sense quickly because the field team already understood the concepts. They knew what a ticket was, where to find the building, where notes belonged, and how to move through the work.

There were still differences to learn. The login experience changed, for example, with technicians moving from static passwords to Microsoft credentials. But from an IT perspective, that was an improvement, not another compromise. More importantly, Bagby was seeing very little of the mobile data trouble that had been common in the old environment. The move did not erase change, but it kept the field team from having to start over while the rest of the business was already absorbing a major ERP transition.

> *The techs need to be able to operate, and we need to be able to pay our people. Those were, in my mind, how we focused when we converted and when we went live.*
>
> **Leigh Bagby**
> **Bagby Elevator Company**

FIELDBOSS Made the Transition Manageable by Staying Close to It

Bagby also went into the project with a decision that made the implementation more expensive in the short term and much safer in the long term: training was not where they would save money. Planning was done in person. FIELDBOSS consultants came onsite for training. Employees from other offices traveled in to participate directly. The implementation team returned for go-live, then continued with remote labs and follow-up support where teams still needed help.

The company paired that external support with unusually strong internal ownership. Bagby held weekly cross-department meetings, but instead of collecting a wish list, Leigh kept the question grounded in operations: What is preventing you from being successful in your job? If someone could still do the work, the request could wait. If a process was stopping the business from functioning, it became a priority. That discipline helped Bagby separate normal discomfort with change from actual go-live risk.

It also surfaced people inside the company who became advocates for the new system. Employees in payroll, maintenance, job costing, dispatch, and parts began learning the new workflows deeply enough to help others. One of the parts employees surprised Leigh by writing procedures for the entire parts operation. Instead of routing every question to IT, people increasingly turned to colleagues who had already learned the task. In Leigh's words, "every department kind of got a hero."

The FIELDBOSS team's pod model reinforced that confidence. The same consultants stayed close enough to learn Bagby's business, people, and working styles. Leigh praised their patience and the way they adapted training for different users rather than expecting everyone to absorb the material in the same way. Will valued the continuity just as much, especially because Bagby had no interest in repeating another major system migration a few years down the road. The combination of technical depth and personal support felt materially different from the support environment Bagby had been leaving behind.

> *The vast majority of technicians were up and functioning the next day.*
>
> **Will Jones,**
> **Software Manager,**
> **Bagby Elevator Company**

The Goal Was Not to Rebuild GP on New Technology

A migration this large can easily become an exercise in recreating every old process simply because people are used to it. Bagby made a conscious decision not to do that. The team identified the pieces that genuinely had to work a certain way because of the elevator industry, union requirements, or the company's operating model. Everything else was open for discussion.

That approach required some uncomfortable conversations. During the move, Bagby discovered accounting and reporting processes that had accumulated over years without anyone stopping to ask whether the work was still useful. Leigh pointed to cost allocations being pushed down to entries worth only a few cents, even though the resulting information did not yield meaningful insight. Other roles had similar moments, where employees had to distinguish between work that supported the business and work they were doing simply because that was how the old software worked.

FIELDBOSS consultants helped Bagby make those distinctions without over-customizing the new environment. When the team asked for a modification that could interfere with core Microsoft functionality or make future updates harder, the consultants explained the trade-off. Sometimes the right answer was to modify the system. Other times, the better answer was to change the process. Bagby was willing to hear both.

That same modernization is beginning to show up outside field service. Salespeople who had relied heavily on Excel and paper now have a documented pipeline, including opportunities that can originate with technicians in the field. SharePoint integration ties documents directly to records instead of requiring Bagby to maintain a separate file-server structure around the ERP. The company is also beginning to work with Power BI, with more reporting and automation still to come as the team gets further into the new environment.

Two Months In, the Most Important Result Was That the Business Kept Moving

Bagby was only about two months into FIELDBOSS and Business Central when Leigh and Will shared their experience, so they were careful not to manufacture a long list of ROI claims before the data existed. They had not even completed a full cycle of financial reporting in the new environment yet. Still, there were practical improvements the team could already see.

Will estimated that the old process for correcting technician tickets created roughly two hours of administrative work each week and involved manually editing PDFs on a file server. In FIELDBOSS, technicians catch more issues before a ticket reaches the office, and when a correction is still required, the adjustment takes far less time. Leigh is also seeing stronger technician reporting on arrival times, time on site, and work completed, which is increasingly important as customers expect clearer evidence of what happened during a service visit.

The more meaningful result, though, is what did not happen. Bagby did not lose control of field operations. Technicians were not sidelined for weeks learning an entirely new mobile experience. Payroll kept moving. The implementation team did not disappear after configuration. Employees who were nervous about the new system had people to call, people onsite, and colleagues inside Bagby who could help them work through it.

The migration was still a major undertaking. Bagby invested heavily in planning, training, data work, and internal time, and some users felt overwhelmed along the way. But the company had deliberately started early enough to absorb those challenges without turning them into a crisis. That is the part of the story Leigh comes back to: they did not wait until the GP deadline left them scrambling.

For WennSoft customers facing the same decision, Bagby's experience does not suggest that moving is effortless. It suggests something more useful. The move can be planned. The field can stay productive. Familiar mobile workflows can reduce the shock of change. A strong implementation team can take a significant amount of risk out of the process. And if the business moves while it still controls the timeline, the migration can become an opportunity to fix old problems rather than simply carry them forward.

See FIELDBOSS in action—book a 20-minute walkthrough and get your rollout plan.

Book A Demo Today