



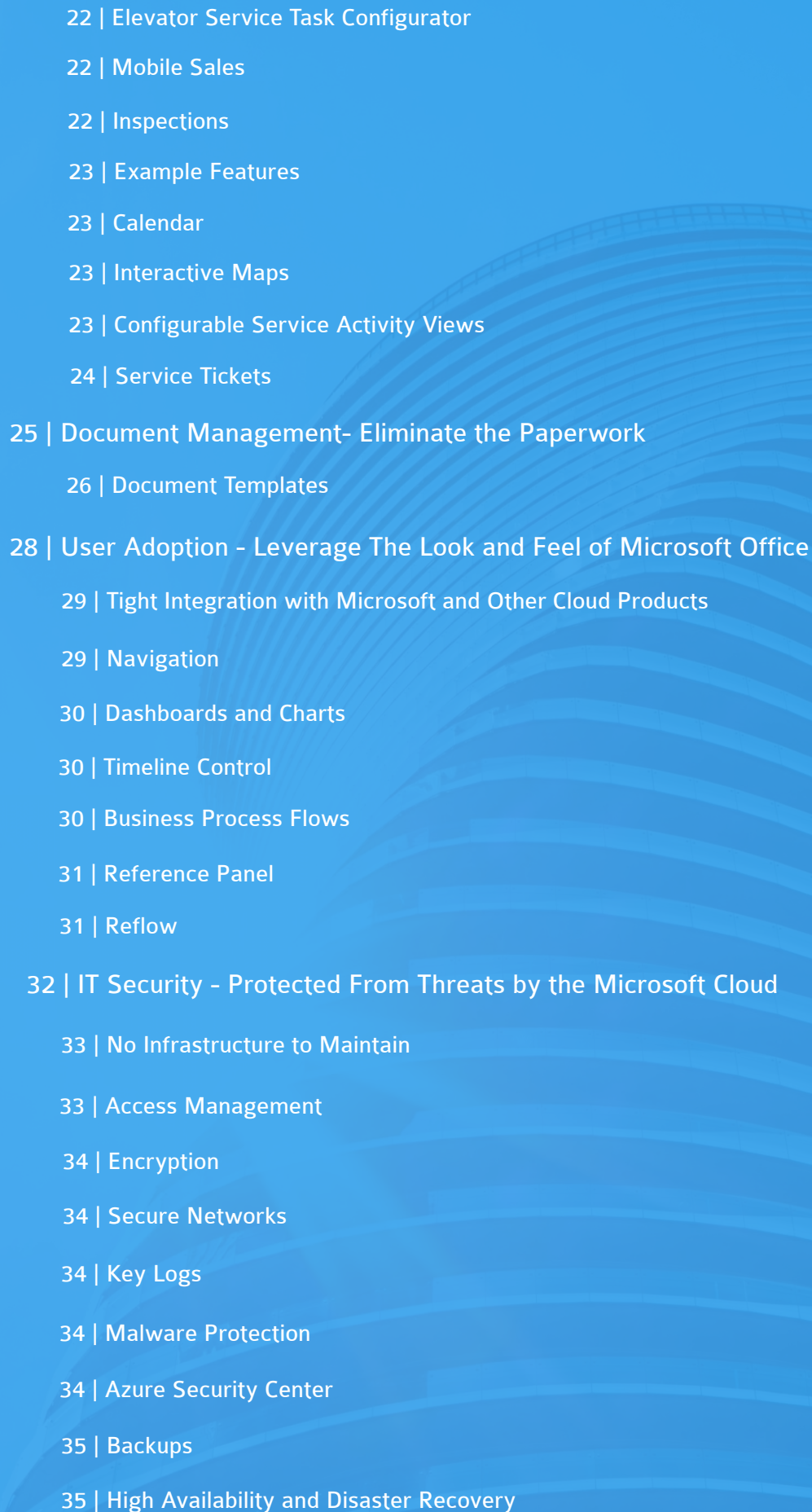
The Resourceful Contractor

Elevator Contracting in the
Microsoft Cloud Platform

Powered by FIELDBOSS

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Part I

Contractor Management in a Data Driven World

Contractor Management in a Data Driven World

For businesses today, access to actionable data insights is a necessity that just keeps growing. Elevator contractors must incorporate analytics into both their day-to-day operations and strategic vision to make better, faster decisions.

The contractor management software you choose to use, and your ability to access and act on data, will have transformational effects on growth, risk, and your company's valuation both today and tomorrow.

Elevator contractors using older technologies have big decisions to make, as their industry becomes even more data driven and connected. They must plan and implement technology solutions that stay current and competitive. The speed at which innovation and technology are moving makes it difficult to keep pace.

Field Service Software is Different

Field service software is more complex than software used by other industries because the office is disconnected from the work performed. Contractors need solutions that can schedule jobs accurately and efficiently and equip mechanics with the resources they need. At the same time, they require increasingly more sophisticated back office capabilities for customer management, compliance, and to deliver on staff expectations for their day-to-day work experience.

Disconnected Software Leads to Silos of Data

Many elevator contractors have, over time, ended up with a hodgepodge of software systems. This results in contractors operating with silos of data because their systems are not integrated. Examples include separate systems for accounting and finance, sales management, scheduling, contract administration, and billing. Some use Excel spreadsheets or paper to manage all the operational and administrative functions. This results in inefficiencies and wasted time trying to keep things organized and up to date.

Owners become completely dependant on the one or two people who know specific critical parts of the operation. Contractors in this predicament typically suffer from:

- Disconnected processes from estimating and quoting through to service delivery
- Time approval errors
- Billing and purchasing errors
- Duplicate data entry
- Lack of or stale financial insights into service, maintenance, and projects margins
- Multiple sources of customer and other business data
- Inability to access and consolidate customer information on a timely basis

Elevator Contractors are at an Inflection Point

Elevator contractor business owners continuously lament that they can't find downtime to implement new software, are worried about how all the change will affect staff, and that the cost is too expensive. They find it easier to kick the can down the road or put a technology Band-Aid on the problem.

Aberdeen Group's research has shown that the #1 pressure that top-performing companies face in the field service space is streamlining operations, and the old disconnected tech stack is standing in the way of realizing that. Today's processes are causing companies to leave money on the table, both in terms of inefficiencies and lost revenue. Organizations therefore have an obligation to their stakeholders, customers and their staff to re-evaluate their technology platform and the applications used.

A photograph of an elevator shaft with a control panel above the door. The panel has an upward arrow, a red floor indicator showing '8', and a downward arrow. The shaft walls are light gray with vertical lines. A dark blue rectangular overlay covers the bottom right portion of the image, containing white text.

Part 2

Microsoft Cloud Elevator Contractor Management Platform

Microsoft Cloud Elevator Contractor Management Platform

FIELDBOSS is built within the Microsoft Power Platform, which includes Dynamics 365 – a collection of business applications that empowers your elevator contractor business to transform and evolve.

This makes FIELDBOSS a scalable, flexible and configurable solution that forward-thinking contractors can use to support their profitability and growth strategy. This solution connects CRM (customer relationship management) for sales with job costed based service, maintenance and project tracking with ERP (enterprise resource planning) accounting capabilities layered with elevator industry specific functionality that work seamlessly as one connected system. The result is a powerful platform that will increase productivity, cut costs, streamline processes, meet customer needs, and position you to capture new opportunities.

The entire solution resides within Microsoft Azure, which is a cloud computing service created by Microsoft for building, testing, deploying, and managing applications and services through Microsoft-managed data centers. It provides software as a service (SaaS), and infrastructure as a service (IaaS) to natively support Microsoft-specific and third-party add on software such as FIELDBOSS. The result is a solution that delivers the following benefits to elevator contractors.

Fast Infrastructure Implementation

Like all SaaS platforms, with FIELDBOSS 365, you're consuming a service rather than installing a product. Without the need to install the software on individual machines, configuring and deploying FIELDBOSS is much faster than a traditional implementation.

The solution utilizes point-and-click setup wizards so that users can get up and running quickly. Of course, the more businesses want to modify the service, and the further away from the turnkey, "out of the cloud" iteration they move, the more complicated implementation will become. However, deploying in the cloud is still considerably simpler than rolling out software on-premise.

Scalability

Elevator contractor users can scale the size and scope of their FIELDBOSS solution up or down at any time. With on-premise software, facilitating business growth often means investment in new servers and processors to cope with increased demand. With cloud-based software, customers are paying for the ability to use the software, and not the computing power or space to run it, so adding or removing users, or even apps, is as simple as issuing a service request. FIELDBOSS is as large or as small as you need it to be and will flex to your current situation and requirements.

Always Up to Date

Users of FIELDBOSS cloud receive updates sooner, and more often, than other solutions, as Microsoft regularly releases platform updates. Cloud users have the choice of whether to accept these updates or not and can test them in their development sandbox instance to ensure compatibility before implementing them.

For the past few years, Microsoft's motto has been "cloud first, mobile first" and when it comes to business applications, Microsoft's focus is most definitely on Dynamics 365 in the cloud.

By getting on board with Dynamics 365 online, users put themselves in position to utilize the cutting-edge developments being worked on by the Dynamics 365 team. Cloud users will be at the front of the line when it comes to getting more from their CRM and ERP solutions, putting them at a competitive advantage in their contracting target markets.



Part 3

Reporting and KPI's- Situational Awareness for Owners and Managers



Reporting and KPI's – Situational Awareness for Owners and Managers

Dynamics 365 includes a variety of out of the box tools, including configurable Views and Charts which can be brought together to create role specific dashboards that will empower staff to do their jobs more effectively.

SSRS Reports

The system includes out of the box reports developed using SQL Server Reporting Services, (SSRS) that can be used to prepare and deliver a variety of interactive and printed reports.

Margin by Technician							
Summary:		Total					
Work Orders	Hours Worked	Total Hours	Total Billed	Costs	Margin \$	Tech Revenue	Tech Margin
Projects	261.43	1,048.18	\$580.00	\$101,495.10	(\$8,889.35)	\$144.66	(\$2,217.12)
Total	1,054.00	2,078.00	\$1,159,897.78	\$781,244.56	(\$225,726.78)	\$588,321.59	(\$114,492.79)
	1,315.43	3,126.18	\$1,160,477.78	\$882,739.66	(\$234,616.13)	\$588,466.25	(\$116,709.92)

Work Orders B							
		Total					
Technician	Hours Worked	Total Hours	Total Billed	Costs	Margin \$	Tech Revenue	Tech Margin
Corey Barss	63.43	229.43	\$0.00	\$22,327.60	(\$22,327.60)	\$0.00	(\$5,513.49)
David Alberto	53.25	230.00	\$360.00	\$22,287.50	(\$21,927.50)	\$83.35	(\$5,076.69)
Erez Yaron	24.00	144.00	\$0.00	\$14,400.00	(\$14,400.00)	\$0.00	\$2,700.00
Jeff Winters	16.00	48.00	\$0.00	\$3,360.00	(\$3,360.00)	\$0.00	\$4,680.00
WO-01066-D9J1	8.00	24.00	\$0.00	\$1,680.00	(\$1,680.00)	\$0.00	\$2,340.00
WO-01066-D9J1	8.00	24.00	\$0.00	\$1,680.00	(\$1,680.00)	\$0.00	\$2,340.00
Jonathan Taub	23.00	76.00	\$0.00	\$6,520.00	(\$6,520.00)	\$0.00	(\$1,649.34)

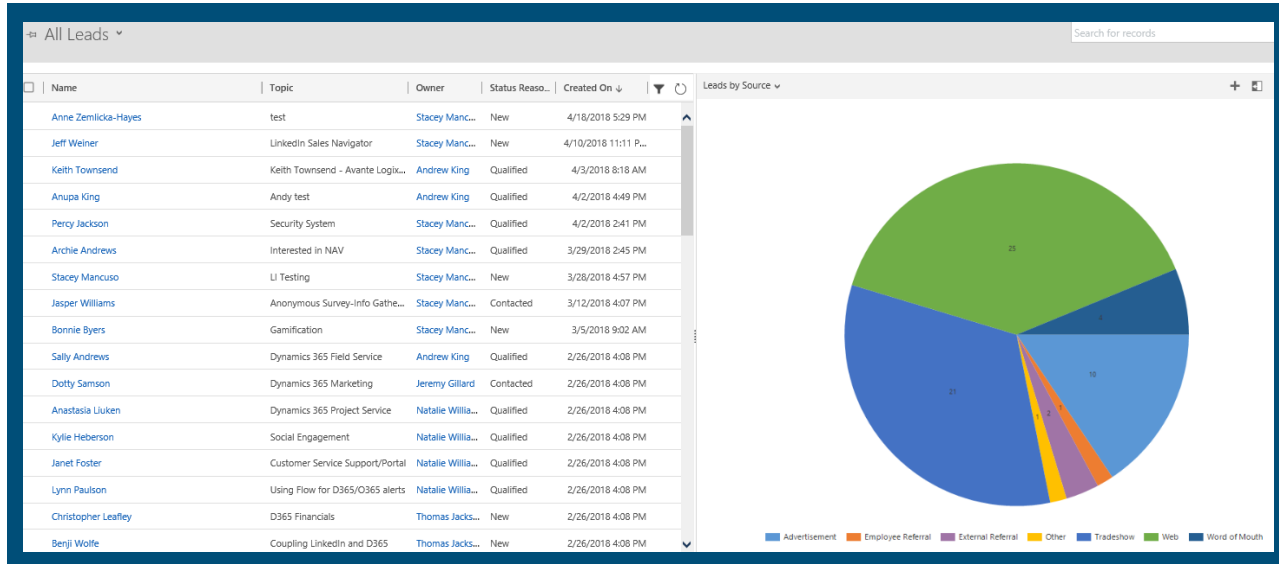
Dynamics 365 Grid View

Grid views are displays of a static data field within the underlying database. Users can self-select columns and filters to present list views of data.

All Leads ▾					
<input type="checkbox"/>	Name ↑	Topic	Owner	Status Reaso...	Created On
	Addie Grace	Interested in new product offer...	Stacey Mancuso	Qualified	1/8/2018 7:12 PM
	Amber Sloane	Amber Sloane-Bliss Retreats-Tr...	Stacey Test	Qualified	2/12/2018 7:43 AM
<input type="checkbox"/>	Anastasia Liuken	Dynamics 365 Project Service	Natalie Williams	Qualified	2/26/2018 4:08 PM
	Anastasia Richards	Anastasia Richards-Sinnlig Esse...	Rahim Jiwani	Qualified	2/12/2018 7:43 AM

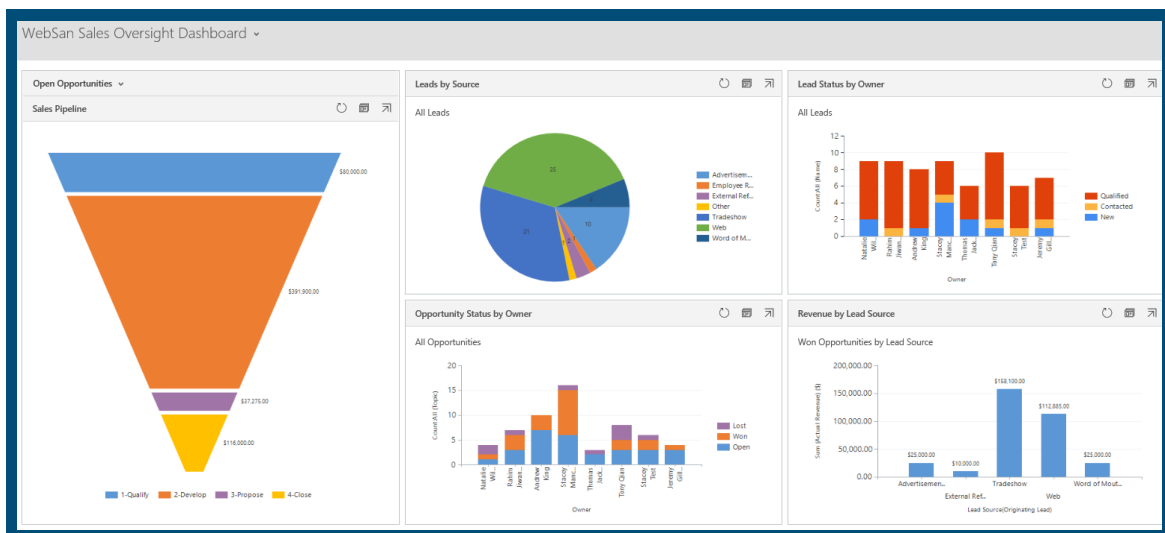
Dynamics 365 Chart View

Users can add charts to their grid views the same way charts are created in Microsoft Excel.

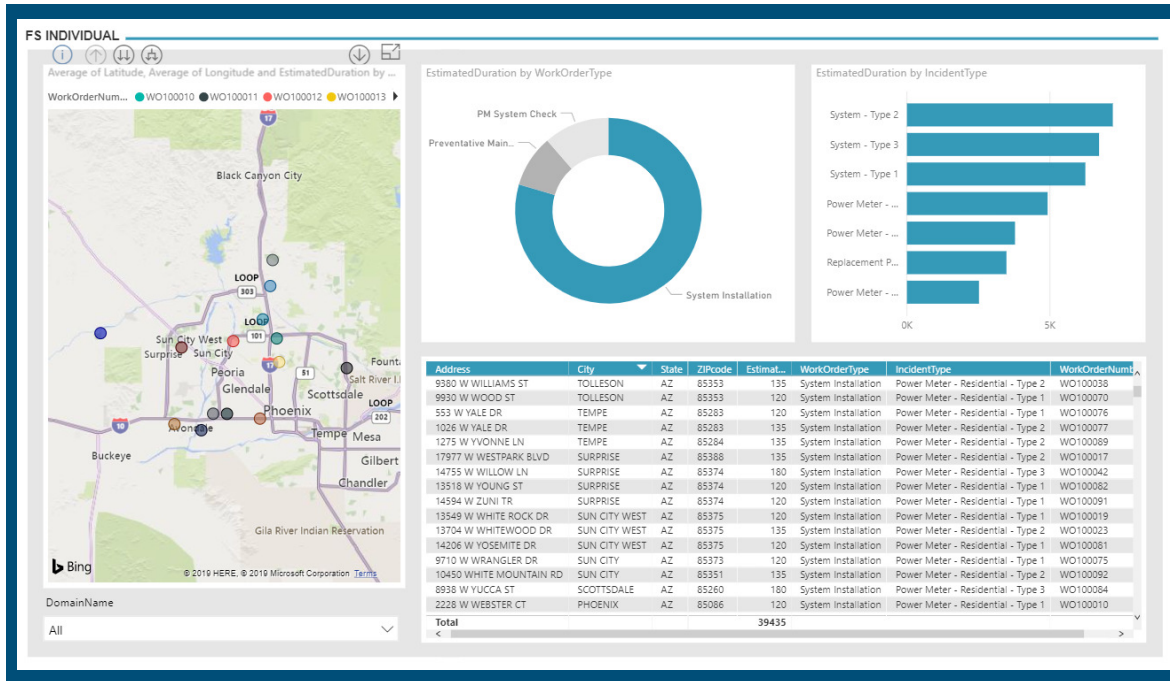


Dynamics 365 Dashboard View

Dashboards are collections of grid and chart views. Each dashboard component can be expanded for further analysis.



Microsoft PowerBI





Part 4

Configurability – Run Your Business Your Way

Configurability- Run Your Business Your Way

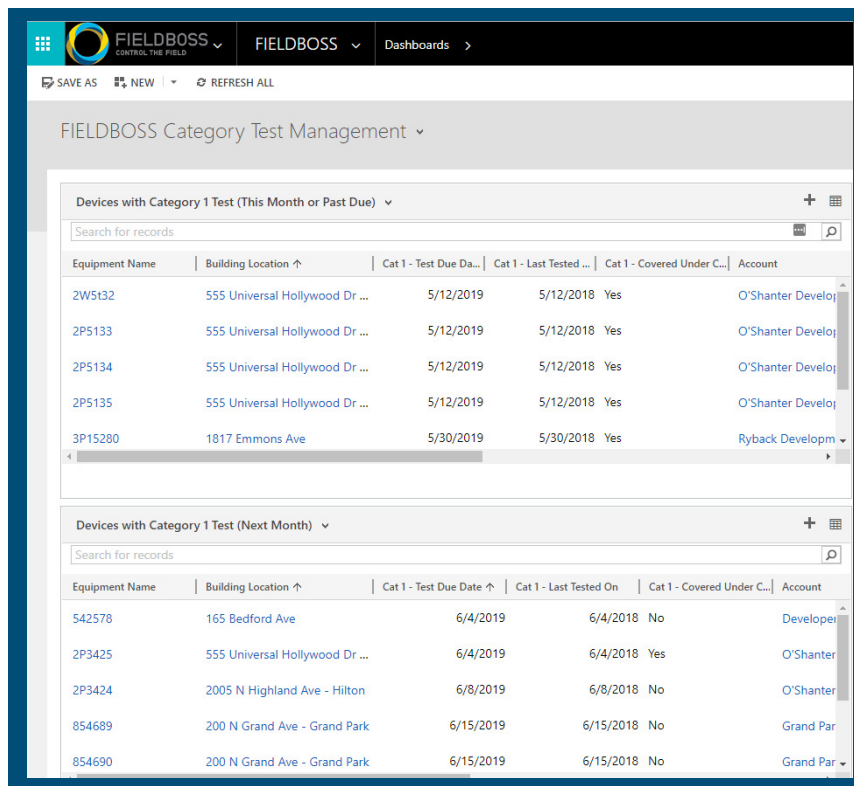
Dynamics 365 allows users to configure the system to accommodate specific fields and forms required in the elevator industry.

Dynamics 365 Custom Fields

With FIELDBOSS, fields define the individual data items that can be used to store data in an entity. Fields are sometimes called attributes by developers. You can use the customization tools in the solution explorer to edit system fields that allow customization, or to create, edit, or delete custom entities.

Elevator Industry Configuration Examples

Testing Management



The screenshot displays the FIELDBOSS Category Test Management interface. It features a top navigation bar with the FIELDBOSS logo and a 'Dashboards' menu. Below the navigation bar, there are buttons for 'SAVE AS', 'NEW', and 'REFRESH ALL'. The main content area is titled 'FIELDBOSS Category Test Management' and contains two tables of equipment test data.

Table 1: Devices with Category 1 Test (This Month or Past Due)


Equipment Name	Building Location	Cat 1 - Test Due Date	Cat 1 - Last Tested On	Cat 1 - Covered Under C...	Account
2W5t32	555 Universal Hollywood Dr ...	5/12/2019	5/12/2018	Yes	O'Shanter Develop...
2P5133	555 Universal Hollywood Dr ...	5/12/2019	5/12/2018	Yes	O'Shanter Develop...
2P5134	555 Universal Hollywood Dr ...	5/12/2019	5/12/2018	Yes	O'Shanter Develop...
2P5135	555 Universal Hollywood Dr ...	5/12/2019	5/12/2018	Yes	O'Shanter Develop...
3P15280	1817 Emmons Ave	5/30/2019	5/30/2018	Yes	Ryback Developm...

Table 2: Devices with Category 1 Test (Next Month)

Equipment Name	Building Location	Cat 1 - Test Due Date	Cat 1 - Last Tested On	Cat 1 - Covered Under C...	Account
542578	165 Bedford Ave	6/4/2019	6/4/2018	No	Developer
2P3425	555 Universal Hollywood Dr ...	6/4/2019	6/4/2018	Yes	O'Shanter
2P3424	2005 N Highland Ave - Hilton	6/8/2019	6/8/2018	No	O'Shanter
854689	200 N Grand Ave - Grand Park	6/15/2019	6/15/2018	No	Grand Par
854690	200 N Grand Ave - Grand Park	6/15/2019	6/15/2018	No	Grand Par

Field Requests

FIELDBOSS includes capabilities to monitor requests in real-time made by field staff to cut down on phone calls, paper work, and unnecessary office visits.

<div> <div>  <div> <div>FIELDBOSS</div> <div>CONTROL THE FIELD</div> </div> </div> <div> <div>Service</div> <div>Field Requests</div> </div> <div>SANDBOX</div> </div>								
<div> <div>+ NEW</div> <div>DELETE</div> <div>EMAIL A LINK</div> <div>RUN REPORT</div> <div>EXCEL TEMPLATES</div> <div>EXPORT TO EXCEL</div> <div>IMPORT DATA</div> <div>CHART PANE</div> <div>VIEW</div> <div>...</div> </div>								
<div> <div>Active Field Requests</div> </div>								
<input type="checkbox"/>	FR Number ↑	Type	Status Reason	Building Location ↓	Equipment	Account	Priority	Contact
	FR-0000034	Quote Request	Active	46 Mercer St	1P2308	O'Shanter Development Comp...	Normal	Tim Sunderlan
	FR-0000002	Quote Request	Active	451 West Broadway	1P42139	Halstead Property	Normal	Adam Pearce
	FR-0000024	Recommendation	Active	38 East 29th St	568524	Slate Property Group	Normal	
	FR-0000004	After Hours Service	Active	233 S Walker Dr - Willis Tower	289786	Willis Tower	High	Vito Mancini
	FR-0000014	Health and Safety	Active	233 S Walker Dr - Willis Tower	289782	Willis Tower	Normal	Vito Mancini
	FR-0000008	After Hours Service	Active	23 Lascelles Blvd	189156	O'Shanter Development Comp...	High	Jacob Mason
	FR-0000028	Quote Request	Active	23 Lascelles Blvd	189156	O'Shanter Development Comp...	Normal	Jacob Mason

Maintenance Control Program

FIELDBOSS

CONTROL THE FIELD

FB Settings

+ NEW

DEACTIVATE

DELETE

ASSIGN

...

SERVICE TASK REQUIRED : FB - SERVICE TASK REQUIRED

STR-0000005

Machine Room

Governors - rope, grip, jaws, and switches no oil

No

Tank level. (ON - Oil Loss Monitoring Program)

False

Record of Oil Usage.

False

Outside Hoistway

Hoistway door unlocking devices and escutcheons.

False

Hoistway access switches.

False

Pit

Gland Packing and Seals.

False

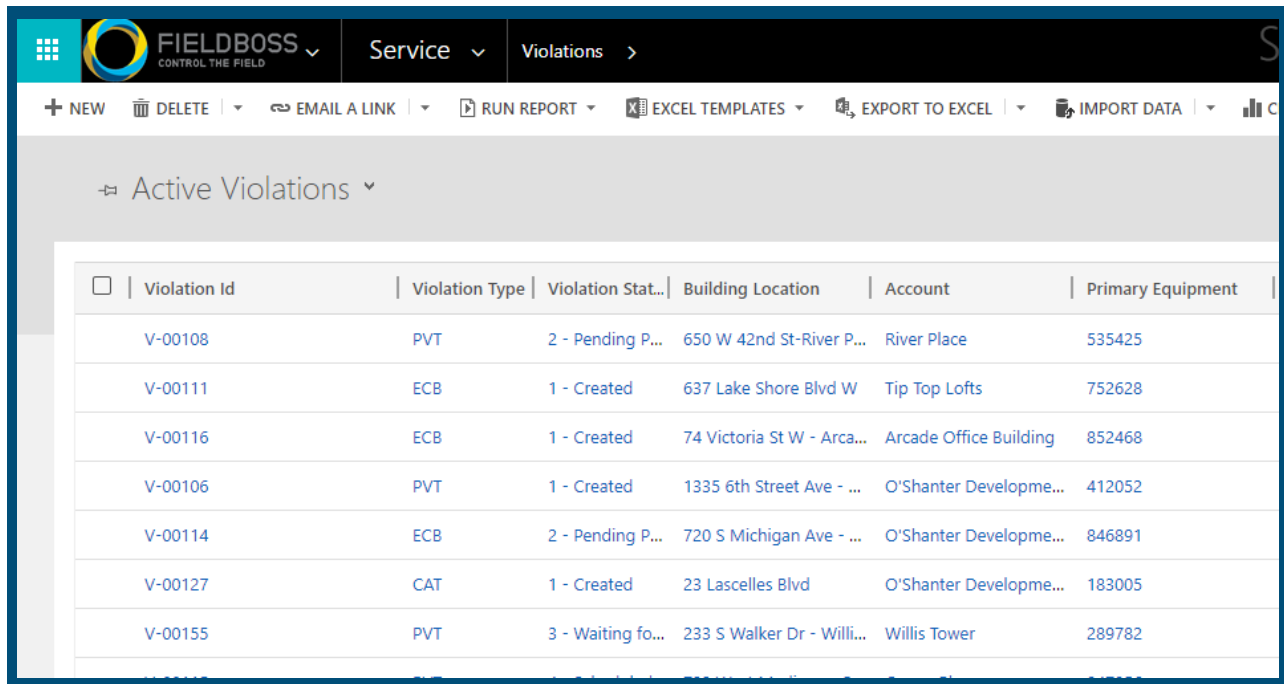
Special Provisions

Two-Way Communication Means.

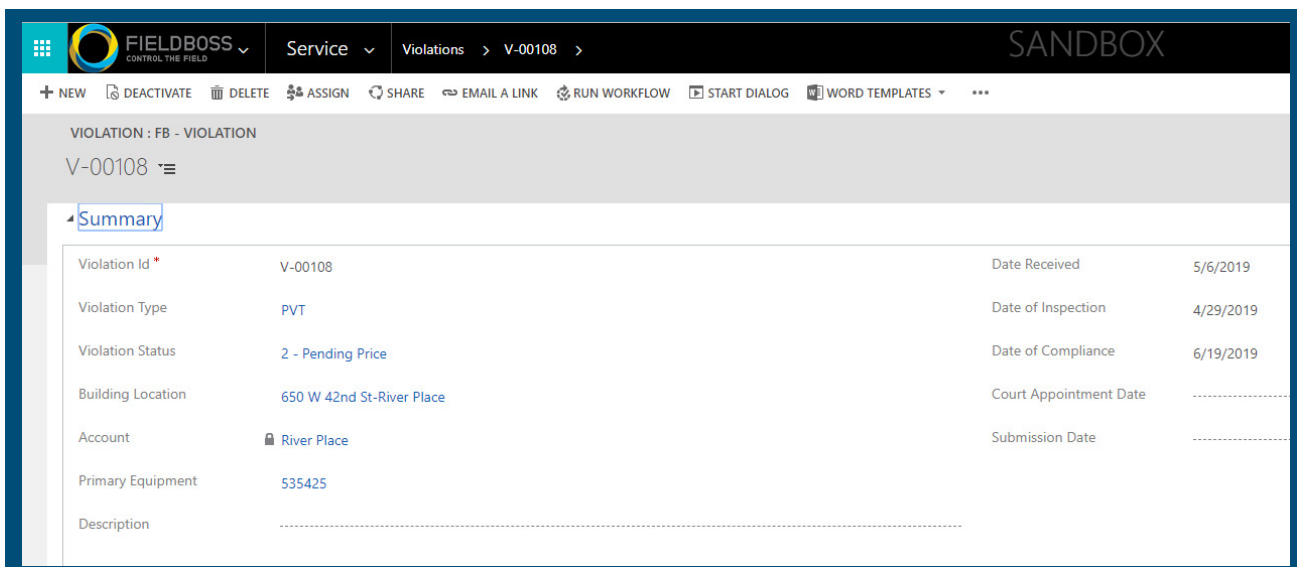
False

Violations Management

The configurability of the platform allows for elevator industry specific configurations such as violations management.



<input type="checkbox"/>	Violation Id	Violation Type	Violation Stat...	Building Location	Account	Primary Equipment
	V-00108	PVT	2 - Pending P...	650 W 42nd St-River P...	River Place	535425
	V-00111	ECB	1 - Created	637 Lake Shore Blvd W	Tip Top Lofts	752628
	V-00116	ECB	1 - Created	74 Victoria St W - Arca...	Arcade Office Building	852468
	V-00106	PVT	1 - Created	1335 6th Street Ave - ...	O'Shanter Developme...	412052
	V-00114	ECB	2 - Pending P...	720 S Michigan Ave - ...	O'Shanter Developme...	846891
	V-00127	CAT	1 - Created	23 Lascelles Blvd	O'Shanter Developme...	183005
	V-00155	PVT	3 - Waiting fo...	233 S Walker Dr - Willi...	Willis Tower	289782



VIOLATION : FB - VIOLATION

V-00108

Summary

Violation Id *	V-00108	Date Received	5/6/2019
Violation Type	PVT	Date of Inspection	4/29/2019
Violation Status	2 - Pending Price	Date of Compliance	6/19/2019
Building Location	650 W 42nd St-River Place	Court Appointment Date
Account	River Place	Submission Date
Primary Equipment	535425		
Description		

FIELD BOSS
CONTROL THE FIELD

Service

Defects > DEF-0000084 >

+ NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

DEFECT : FB - DEFECT

DEF-0000084

Summary

Defect Number *

DEF-0000084

Violation

V-00108

Equipment

535425

Defect Part

85

Violating Condition

D

Suggested Remedy

8

Comment

Description

85D8 - Skirt Deflection Device Unsecured Regroove

Responsibility

Contractor

Record Information

A photograph of a modern office interior with glass walls and doors. A blue rectangular overlay covers the bottom right portion of the image, containing white text. The background shows reflections on the glass and some office equipment.

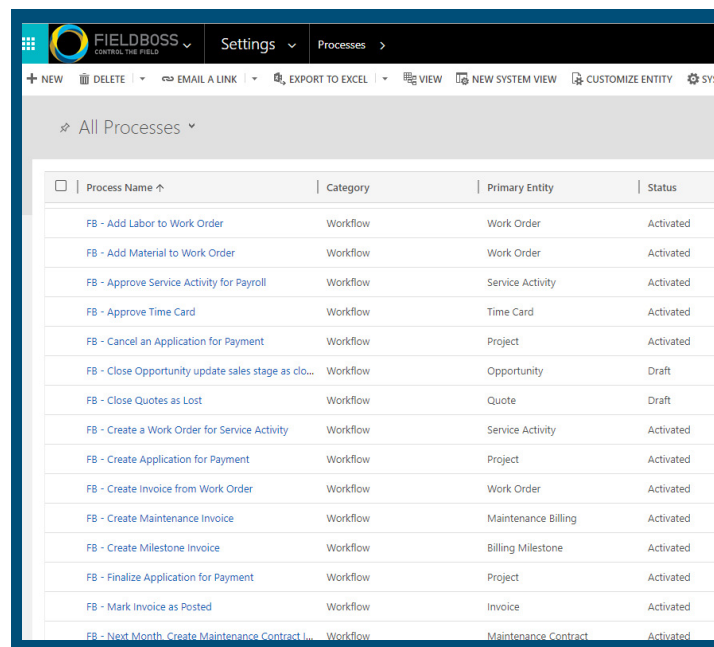
Part 5

Business Process Automation– Improve Yield on Payroll

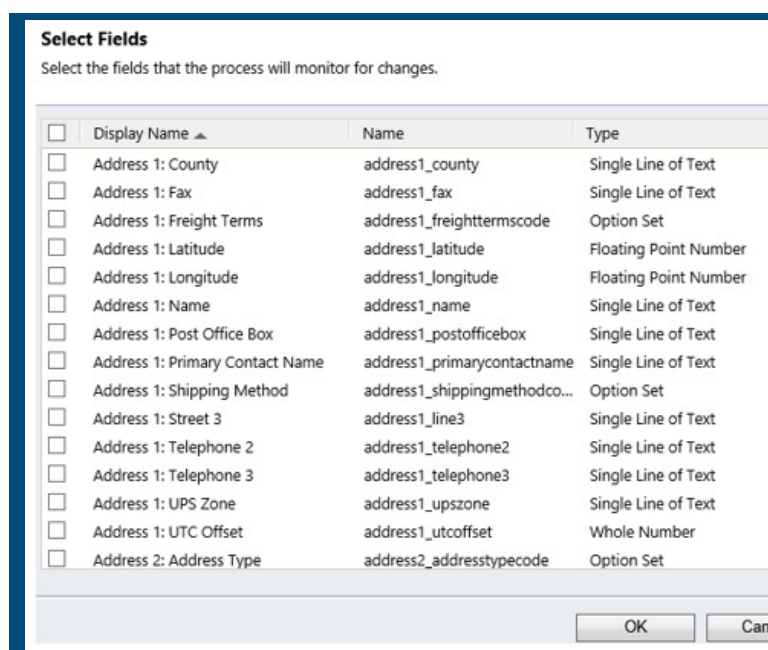
Business Process Automation- Improve Yield on Payroll

Dynamics 365 Workflows - Streamline Repetitive Tasks

Microsoft Dynamics 365 workflows are tools that allow for simple or complex automation of tasks within Dynamics 365. These can make an incredible difference to an organization, and often act as an alternative to building custom software program plug-ins.



<input type="checkbox"/>	Process Name ↑	Category	Primary Entity	Status
<input type="checkbox"/>	FB - Add Labor to Work Order	Workflow	Work Order	Activated
<input type="checkbox"/>	FB - Add Material to Work Order	Workflow	Work Order	Activated
<input type="checkbox"/>	FB - Approve Service Activity for Payroll	Workflow	Service Activity	Activated
<input type="checkbox"/>	FB - Approve Time Card	Workflow	Time Card	Activated
<input type="checkbox"/>	FB - Cancel an Application for Payment	Workflow	Project	Activated
<input type="checkbox"/>	FB - Close Opportunity update sales stage as clo...	Workflow	Opportunity	Draft
<input type="checkbox"/>	FB - Close Quotes as Lost	Workflow	Quote	Draft
<input type="checkbox"/>	FB - Create a Work Order for Service Activity	Workflow	Service Activity	Activated
<input type="checkbox"/>	FB - Create Application for Payment	Workflow	Project	Activated
<input type="checkbox"/>	FB - Create Invoice from Work Order	Workflow	Work Order	Activated
<input type="checkbox"/>	FB - Create Maintenance Invoice	Workflow	Maintenance Billing	Activated
<input type="checkbox"/>	FB - Create Milestone Invoice	Workflow	Billing Milestone	Activated
<input type="checkbox"/>	FB - Finalize Application for Payment	Workflow	Project	Activated
<input type="checkbox"/>	FB - Mark Invoice as Posted	Workflow	Invoice	Activated
<input type="checkbox"/>	FB - Next Month, Create Maintenance Contract L...	Workflow	Maintenance Contract	Activated



Select Fields

Select the fields that the process will monitor for changes.

<input type="checkbox"/>	Display Name ↑	Name	Type
<input type="checkbox"/>	Address 1: County	address1_county	Single Line of Text
<input type="checkbox"/>	Address 1: Fax	address1_fax	Single Line of Text
<input type="checkbox"/>	Address 1: Freight Terms	address1_freighttermscode	Option Set
<input type="checkbox"/>	Address 1: Latitude	address1_latitude	Floating Point Number
<input type="checkbox"/>	Address 1: Longitude	address1_longitude	Floating Point Number
<input type="checkbox"/>	Address 1: Name	address1_name	Single Line of Text
<input type="checkbox"/>	Address 1: Post Office Box	address1_postofficebox	Single Line of Text
<input type="checkbox"/>	Address 1: Primary Contact Name	address1_primarycontactname	Single Line of Text
<input type="checkbox"/>	Address 1: Shipping Method	address1_shippingmethodco...	Option Set
<input type="checkbox"/>	Address 1: Street 3	address1_line3	Single Line of Text
<input type="checkbox"/>	Address 1: Telephone 2	address1_telephone2	Single Line of Text
<input type="checkbox"/>	Address 1: Telephone 3	address1_telephone3	Single Line of Text
<input type="checkbox"/>	Address 1: UPS Zone	address1_upszone	Single Line of Text
<input type="checkbox"/>	Address 1: UTC Offset	address1_utcoffset	Whole Number
<input type="checkbox"/>	Address 2: Address Type	address2_addresstypecode	Option Set

OK Cancel

Options for Automatic Processes

Scope

Start when:

User

Business Unit

Parent: Child Business Units

Organization

☐ Record is assigned
☐ Record fields change
☐ Record is deleted

Select

Process: Account Assigning Example

Working on solution: Default Solution

Information

Common

Information

Audit History

Processes

Workflows

General Administration Notes

Hide Process Properties

Process Name: Account Assigning Example

Entity: Account

Category: Workflow

Activate As: Process

Available to Run

☐ As an on-demand process
☐ As a child process

Options for Automatic Processes

Scope: Organization

Start when:

☒ Record is created
☐ Record status changes
☐ Record is assigned
☐ Record fields change
☐ Record is deleted

Add Step + Insert - Delete this step

Assign new Account to specific User.

Assign: Account to Sean [User] Set Properties

Send User an E-mail with a direct URL to the Account.

Send e-mail: Create New Message Set Properties

Stop workflow with a status of Succeeded.

Stop workflow with status of: Succeeded

Process: Account Assigning Example

Send E-mail

E-mail

From: [Created By/Account]

To: [Creating User/Account]

Cc:

Bcc:

Link to Survey:

Subject: [Account Name/Account] was assigned to you

Regarding: [Account/Account]

Form Assistant

Dynamic Values

Dynamic Values

Operation:

Set to:

Look for:

Account

Account

Add

X + -

Default values:

OK

<hyperlink><name>[Account-{Account Name}]<name><value>[Account-{Record URL/Dynamic}]</value></hyperlink>

A person wearing a white lab coat is holding a white smartphone in their left hand and using their right index finger to tap the screen. The background is a soft, out-of-focus white.

Part 6

Mobile– More Than Just Time Sheet Submission

Mobile- More Than Just Time Sheet Submission

FIELDBOSS mobile gives sales and field staff the power of the Dynamics 365 platform in the palm of their hand. It has numerous capabilities to deliver data in near real time to operations and other back-office team members.

Fully Customizable

From custom entities to the look and feel of the user interface, you may customize every aspect of FIELDBOSS Mobile to make it truly yours and improve user acceptance and onboarding.



Work Online and Offline

FIELDBOSS Mobile works offline with a locally stored (and securely encrypted) database and automatically synchronizes the changes when you are connected again. Users can work online and modify the data on your server instantly.



Elevator Service Task Configurator

Give your team a step-by-step guide for repairs used on-site, and ensure the task gets done quickly and accurately. Notify your field workers instantly when you create a schedule for them. Log any photo documentation, edit pictures, and actually display what the problem is and what has been fixed.



Mobile Sales

FIELDBOSS sales gives your team the all-in-one mobile tool they have been looking for. FIELDBOSS Mobile Sales is packed with everything they might need when on the go: calendars, activities, presentations, communication tracking, direct order creation, electronic signatures and much more.

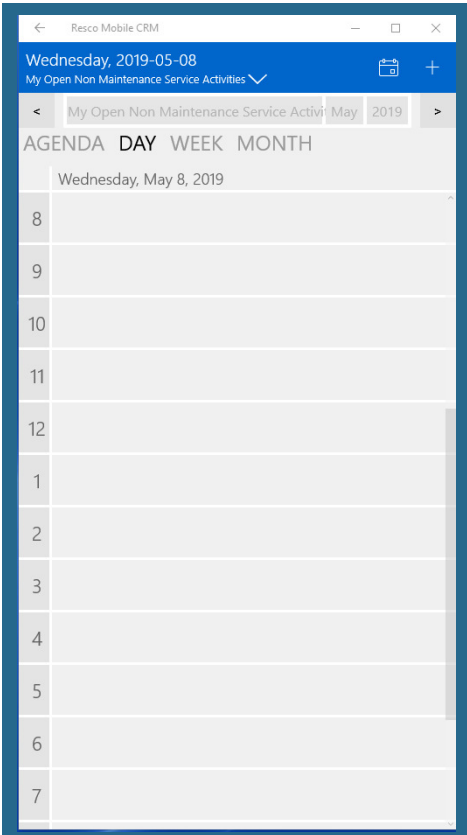


Inspections

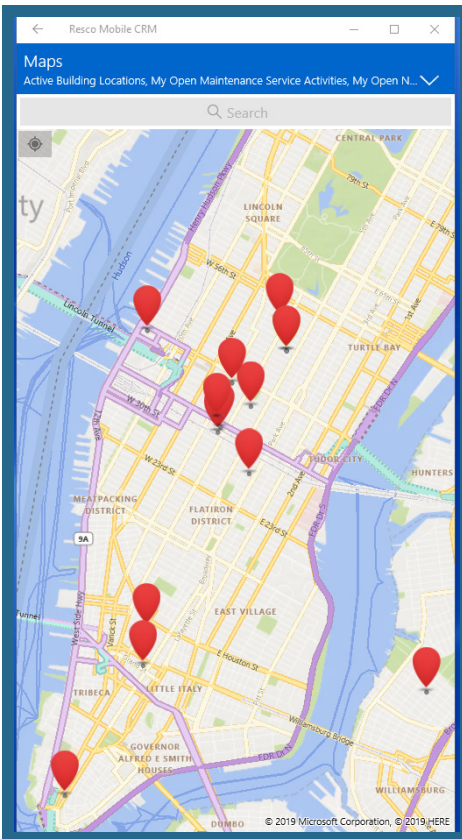
Create, assign, complete and evaluate field inspections with ease. Set up dynamic forms, unique questionnaires, checklists, and even to-do lists. Assign them to your staff in the field and give them the tools to complete inspections effectively. Management can analyze collected data in real-time.

Example Features

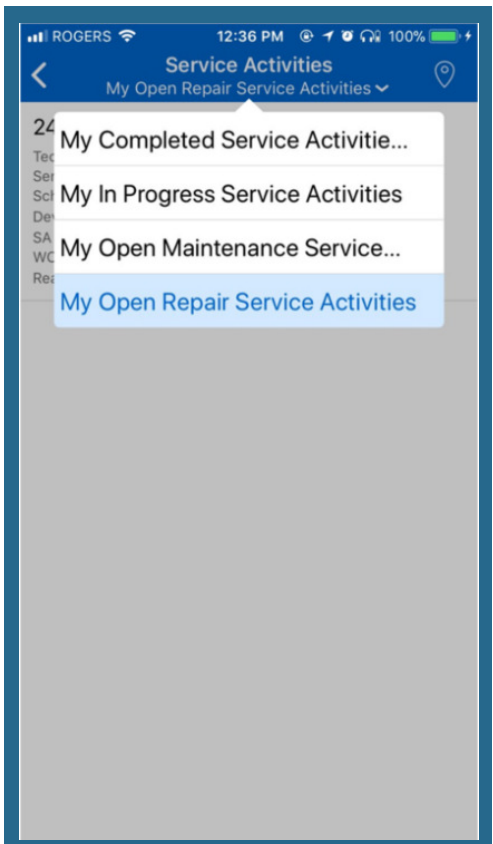
Calendar



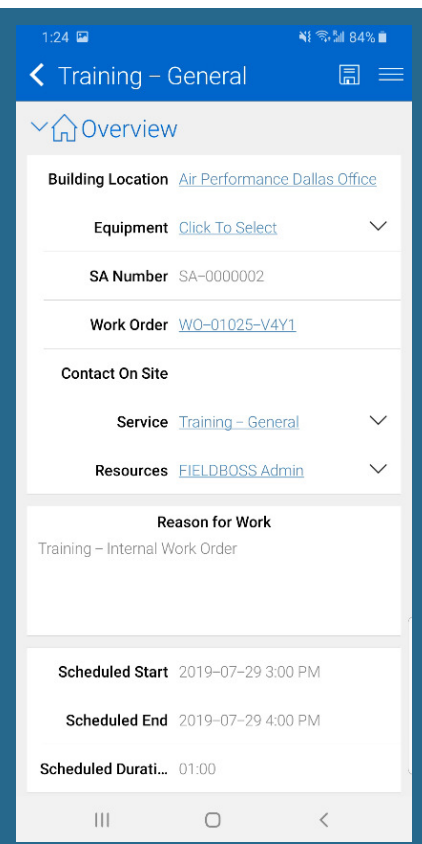
Interactive Maps



Configurable Service Activity Views



Service Ticket



Example Features

Service Ticket

1:32 Training - General

Time

Mobile Actual St... Yes

Actual Start 2019-07-29 1:32 PM

2017	May	27 Sat	11	20	
2018	Jun	28 Sun	12	25	AM
2019	Jul	29 Mon	1	30	PM
2020	Aug	30 Tue	2	35	
2021	Sep	31 Wed	3	40	

Arrived No

Clock Out No

Work Complete No

Inventory Products

Motor Adapter
Quantity: 1.00000

Motor Bushing
Quantity: 2.00000

Service Ticket

1:41 Training - General

Work Details

Condition Found
Explanation of the conditions upon arrival

Work Performed
Description of the work performed

Material Used
List of non inventory items used on this visit, if you cannot find an inventory item in the products list you can write here as well

Recommended
Recommendations for sales. Any data in here will auto create a field request once you mark the service activity as done

Field Requests
My Field Requests

Service Ticket

1:35 Service Task Required

Info

Service Task VFD Inspection

Service Activity Training - General

Building Location Air Performance Dallas O...

Equipment Click To Select

Location of Equi...

Make

Model

Serial

TIME

Form Started 2019-07-29 1:35 PM

Form Ended 2019-07-29 2:05 PM

Status

Unit Rating 4

COMMENTS

Service Ticket

ROGERS 1:17 PM 100%

Note

Title Note created on 2018-03-21 1:1...

Description

Signature

Capture Picture

Choose Picture

Record Audio

Record Video

Use Last Photo Taken

Open From...

Cancel

Service Ticket


Resco Mobile CRM

Service Activity

Signature

Signature

Overview Map Time Equipment Products List Service Tas... Signature

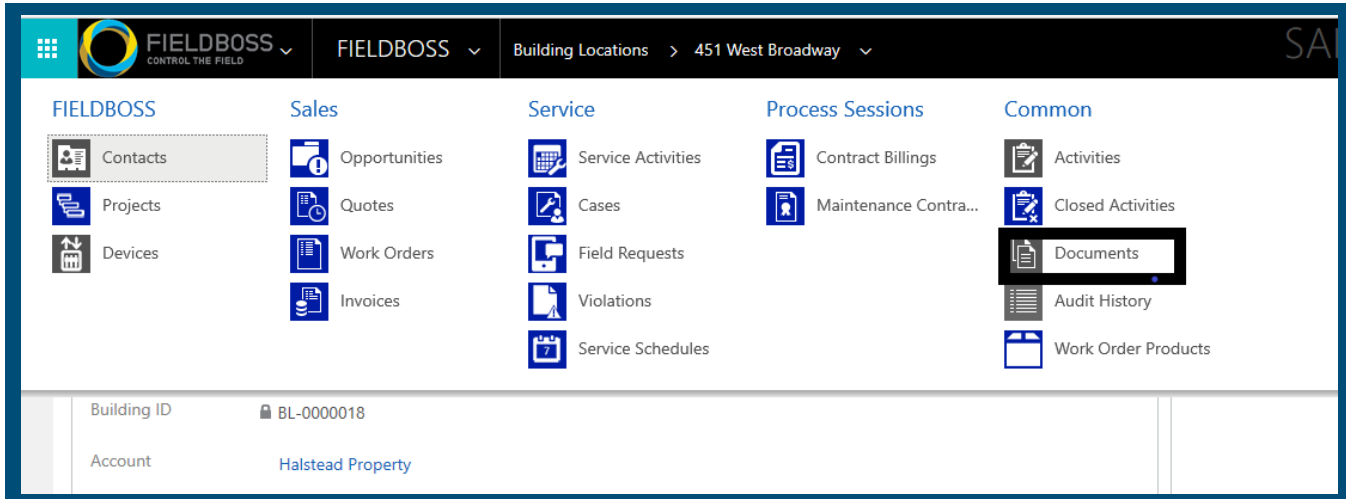


Part 7

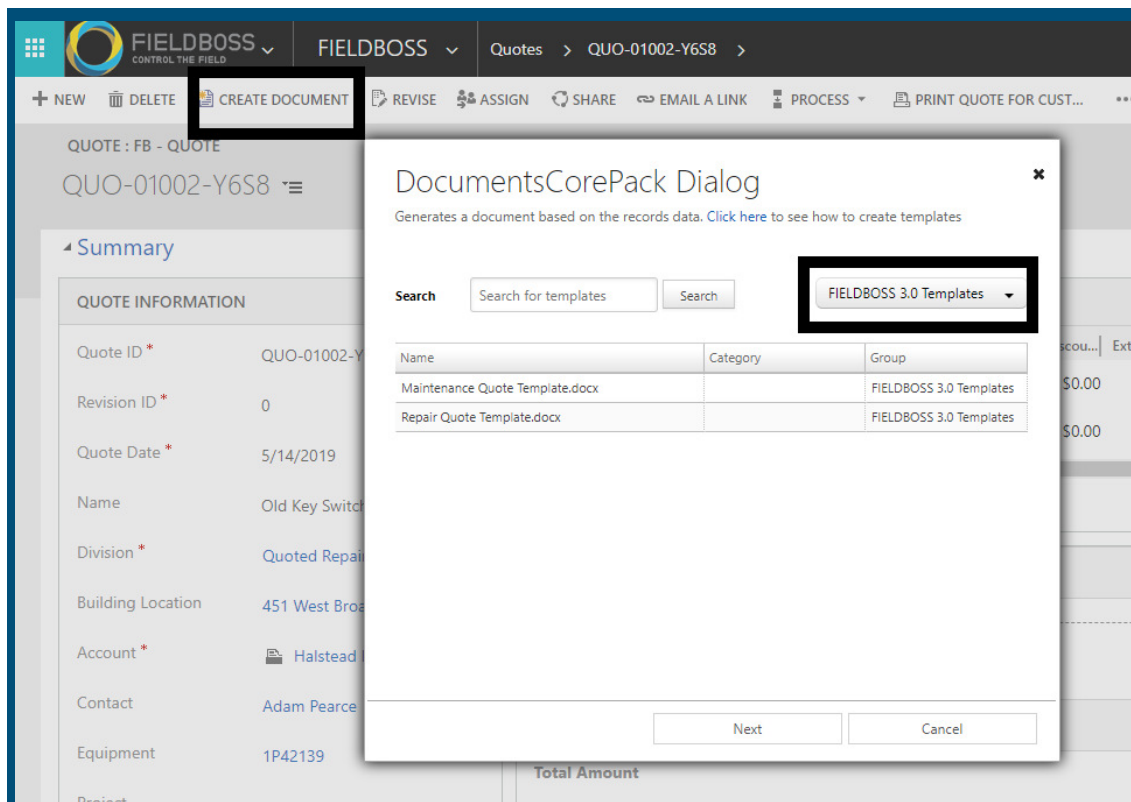
Document Management– Eliminate the Paperwork

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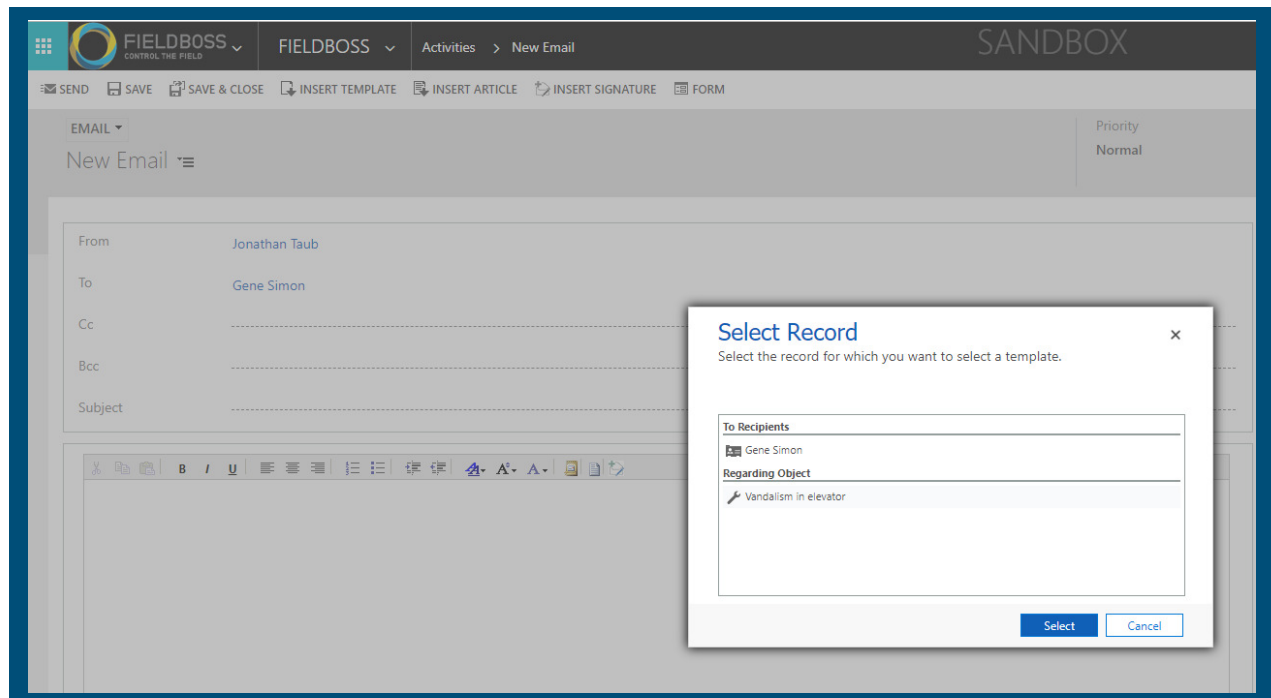
SharePoint document management is embedded into the Microsoft Dynamics 365 platform. SharePoint is a web-based collaborative platform that integrates with Dynamics 365 and Microsoft Office 365. This means there is no need to manage paper forms, manuals, instruction guides, or product catalogs and brochures. Field staff can obtain a completed service task form signed off digitally, on the device's screen.



Proposal Estimate Templates



Customer Service Email Response





Part 8

User Adoption – Leverage The Look and Feel of Microsoft Office

User Adoption – Leverage the Look and Feel of Microsoft Office

With the release of Dynamics 365 for Customer Engagement apps version 9.0, FIELDBOSS uses a new user experience. The Unified Interface uses responsive web design principles to provide an optimal viewing and interaction experience for any screen size, device, or orientation.

The new Unified Interface brings all the rich experiences to any device that you are using. Whether you are on a browser, tablet, or phone, you will be able to consume similar experiences such as forms to update and view your records and interactive dashboards to view your information and drill down into it.

Tight Integration with Microsoft and Other Cloud Products

The cloud's interconnected nature allows FIELDBOSS to work closely with other cloud-based products, particularly those within Microsoft's productivity suite.

Not only does FIELDBOSS in the cloud integrate seamlessly with PowerBI, but it also cooperates with other popular services such as Office 365, SharePoint, and Outlook.

Being able to connect your Word, Excel, and email data to FIELDBOSS helps build a fuller picture of your business and increases productivity by breaking down barriers between the programs you use every day.

Dynamics 365's tight integration means you can track emails, view contact information and history, and create new records directly from Outlook, edit Excel and Word files in the Dynamics interface, and use OneNote to take meeting notes and attach them to FIELDBOSS records.



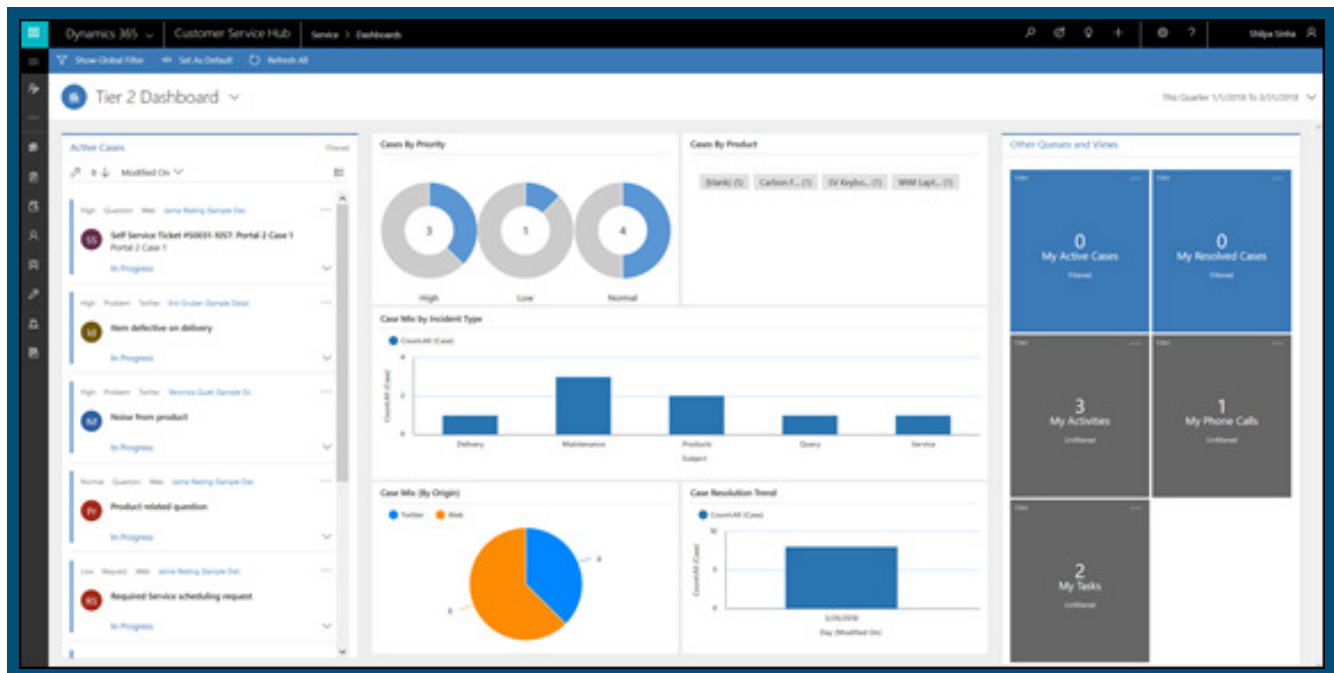
Navigation

The new menu options let you swiftly navigate the different apps in the system. It provides quick access to recently viewed records and pinned favorites.



Dashboards and Charts

You can access all the system and user dashboards from within your Unified Interface apps. The interactive dashboards are now available for all record types with richer interactive dashboard capabilities.



Timeline Control

The timeline view helps you collaborate with your team by tracking customer communication in a record on a single page in an easy to read view. You can see everything from posts and voice attachments, to emails and notes. It provides a quick way to see the entire communication thread.

Business Process Flows

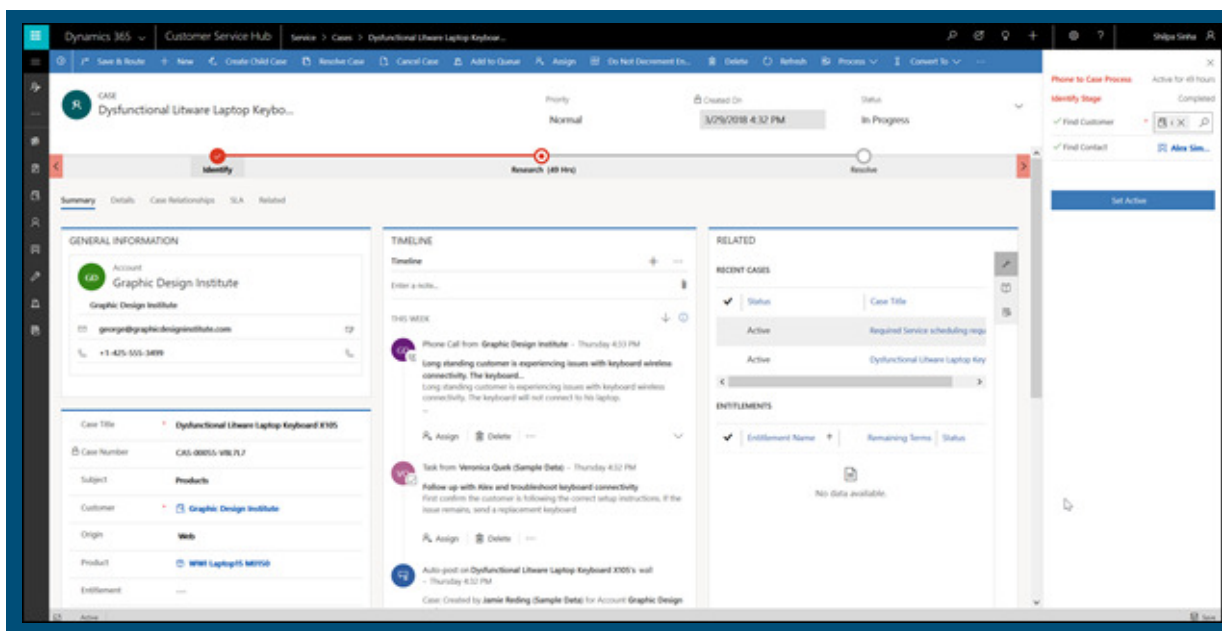
The business process flow has been improved by the docking mechanism. You can dock the business process stage on your screen to help you stay focused on the task at hand in your business process flow. This is especially useful when the stage of the process has complex steps to complete.

Reference Panel

Use the reference panel for apps built on Unified Interface like Dynamics 365 for Customer Engagement apps for Customer Service. The reference panel is a great way to get work done without clicking away from the screen you are on. You can look up other things like knowledge base articles within the context of the record you are viewing.

Reflow

The app also scales by reflowing the components on the screen. The responsive design adapts to your environment based on screen size, so the more available space that you have the more information is displayed.





Part 9

IT Security – Protected From Threats by the Microsoft Cloud

IT Security – Protected from Threats by the Microsoft Cloud

All of Microsoft's cloud products, including cloud-based deployments of Dynamics 365, are hosted on the company's own cloud platform, Azure.

Azure is operated from Microsoft data centers located all over the world; which data center an organization's data is physically housed in will depend on where the organization is based, and the product it is using.

The company also operates the Microsoft Cyber Defense Operations Center: a cybersecurity and defense facility manned by security experts and data scientists that work to protect Microsoft's cloud infrastructure, detecting and responding to threats around the clock.

Microsoft invests over \$1B a year in ensuring the security of their users and their digital property. When it comes to Azure, there are many critical layers to its security model:

No Infrastructure to Maintain

Hosting your Dynamics 365 software in the cloud means you don't need to spend time and money managing your in-house servers and hardware. All you need to access your solution is an internet connection; there's nothing to install on individual machines.

With cloud deployment, you don't need to worry about hardware issues, or data loss or corruption, as the infrastructure supporting your software is all hosted off-site in a secure location.

Access Management

Azure is protected by Microsoft's Multi-Factor Authentication service, a two-step verification method of authentication that adds a second layer of security to user sign-ins and transactions. MFA requires two, or more, of the following verification methods to grant access to users:

- A password
- A trusted device
- Biometric verification such as a fingerprint or a facial scan

Encryption

Azure utilizes industry-standard transport protocols to encrypt data in transit between users and datacenters, as well as within the datacenters themselves. Data at rest is encrypted by a wide range of capabilities up to AES-256, with users able to select the encryption solution that best fits their requirements.



Secure Networks

Azure's Virtual Network Gateway allows users to create encrypted IPSec tunnels, and segment instances within multiple deployments in one customer subscription by using private IPs and subnets that act as virtual firewalls.



Key Logs

Azure keys are secured with 256-bit AES encryption, and Microsoft's Security Vault uses FIPS 140-2 Level 2 validated HSMs that help simplify and automate tasks for SSL/TLS certificates.



Malware Protection

Integrated protection can be enabled through the Azure management portal to help protect your Dynamics 365 instance from malware, ransomware, and other online threats.



Azure Security Center

Azure Security Center is a user's one-stop-shop for everything they need to keep their Azure-hosted cloud solutions safe. The Security Center offers security management and advanced threat protection features, and from it, you can set security policies, manage your threats, and detect and respond to attacks. The Security Center also provides actionable recommendations for improving your defenses.



Backups

Backing up data should be second nature to all businesses, but it's one of those tasks that often gets pushed down the agenda. Cloud deployment gives users peace of mind by not only removing the need to safeguard their own servers, but also automatically backing up data, so no information will ever slip through the cracks.



High Availability and Disaster Recovery

With a financially backed, 99.9% uptime guarantee, you can also be safe in the knowledge that Microsoft has you covered should any kind of disaster recovery be necessary. In the event your services are interrupted, Dynamics 365 includes some of the most robust disaster recovery features on the business application market. Built to help organizations bounce back from both planned and unexpected service outages, Microsoft's recovery protocols include keeping a synchronized, duplicate copy of a company's data on a second server, allowing users to continue their operations with minimal disruption.



FIELDBOSS Elevator Contractor Management is an end-to-end solution built within Microsoft Dynamics 365. FIELDBOSS is a flexible and configurable platform that allows you to work the way you want to work, now and in the future. Our focus is to help you get the most out of your labour resources and deliver the information you and your staff need to run your business more efficiently, profitably, and with lower risk.

Software Description



FIELDBOSS was developed by its parent company, Rimrock Corporation. Rimrock is a consulting firm specializing in Microsoft Dynamics 365, Azure and Dynamics GP software solutions for the field service industry. Established in 1989, our staff are both Microsoft technology specialists and elevator industry experts drawing upon their years of system implementation experience to deliver quality solutions and support to our clients.

Company Description

Get in touch:

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