



FIELDBOSS® MOBILE:

**40 WAYS  
TO CONTROL  
THE FIELD**

# CONTENTS





## INTRODUCTION

Not too long ago, being away from the office meant a complete information blackout. That's not the case anymore. FIELD BOSS® Mobile offers infinite possibilities to take your business on the road. In fact, it will change the way you work. It will boost productivity, improve data quality, increase communication and help make sure that being out of the office doesn't mean being out of the loop.

We're talking about productivity beyond the obvious—the ability to access the information you need, when you need it, from wherever you are. Not tomorrow, but now. We're talking about enabling faster, more accurate communication and collaboration with your data, your people and your customers.

Everyone's talking about how important it is to implement mobile solutions for your business. But can FIELD BOSS® Mobile really make a difference to the bottom line?

 **The answer is YES!**   
**And we have 40 ways to prove it.**

With FIELD BOSS® Mobile, your teams are always prepared, connected and highly productive.

Whether you are new to FIELD BOSS® Mobile, thinking about becoming a client, or you have already adopted it, this eBook will help you discover all the cool ways (40 ways) that FIELD BOSS® Mobile can help you control the field.

Once you use FIELD BOSS® Mobile, you'll wonder how you ever worked without it!





## **Chapter 1:** Any Time, Any Place, Your Device

1. Exceed Customer Expectations
2. BYOD (Bring Your Own Device)
3. Tear Down Your Office Walls
4. No Signal? No Problem – Work Offline!





## Chapter 1: Any Time, Any Place, Your Device

# 1. EXCEED CUSTOMER EXPECTATIONS

In the age of the connected customer, delivering the ultimate, end-to-end customer experience has never been more important. Let FIELDBOSS® Mobile lead your service technicians to exceed customer expectations by empowering them with real time customer and equipment data,

intelligent scheduling, warranty and contract information and more, all on their mobile device. The ability to download and sync information with the back office gives techs the capacity to receive and input data on-site. They can access the information they need any time, any place.



## Chapter 1: Any Time, Any Place, Your Device

# 2. BYOD (BRING YOUR OWN DEVICE)

Deciding what smartphone or tablet to use? We built FIELDBOSS® Mobile to work on major mobile device platforms because we know people are used to certain devices and have strong opinions about others. So no need to

argue about which one is best. Everyone can have what they like and feel comfortable with. Native applications are available for iPhone, iPad, Android smartphone, Android tablet and Windows devices.



## Chapter 1: Any Time, Any Place, Your Device

### 3. TEAR DOWN YOUR OFFICE WALLS

Having access to all your critical information on a phone or a tablet is an obvious benefit of FIELDBOSS® Mobile. It gives you around-the-clock access to data so you can be productive whenever and wherever you happen to be.

Whether you are management heading to an important meeting or a technician heading out to a job site, you will always be prepared. Work how you want, where you want, whenever you want!



## 4. NO SIGNAL? NO PROBLEM – WORK OFFLINE!

Nothing is more frustrating than investing in a mobile solution only to have it fail in the field due to a lost connection. With your technicians located at countless types of job sites, it is vital to have a mobile app that allows you to manage your inspections, service activities and signatures, even when there isn't a cellular connection. FIELDBOSS® Mobile works offline, without cell

reception. Offline access means you are working with the data stored on your mobile device: when you're offline, you can still view, edit and manage data like normal. When you're back online, all new information will be synced back and forth, and you'll receive new messages. No information lost. Equip your technicians with the right information, every time, no matter where the job is.





## **Chapter 2:** Customer Relationships

- 5. Put Your Best Foot Forward
- 6. Don't Date Your Customers, Marry Them!
- 7. Schedule with Confidence
- 8. Communication is Key
- 9. Relationships are Built on Trust



## Chapter 2: Customer Relationships

### 5. PUT YOUR BEST FOOT FORWARD

What happens when your technicians consistently arrive on-time, offer smart recommendations, fix the problem on the first visit, and make the billing process convenient and easy for customers? You retain more customers who purchase more products and services from you and refer new

business. FIELDBOSS® Mobile helps you to do more with less, by making every service technician your best — with a wealth of knowledge and experience in making service more reliable and customers more confident in your business.



## 6. DON'T DATE YOUR CUSTOMERS, MARRY THEM!

Sure, everyone wants to have productive workers and a field force that runs efficiently. That being said, businesses are realizing that productivity isn't the only indicator of field service success. Companies, now more than ever, are really focused on customer satisfaction. FIELDBOSS® Mobile will help your company provide service that customers can't get elsewhere to keep

them happy and loyal. By enabling field service technicians to receive service tickets on their mobile device, organize daily schedules by priority, transmit real time status updates, and access customer's equipment and service history, your customers will always be satisfied and never feel the need to look elsewhere.



## 7. SCHEDULE WITH CONFIDENCE

Automated scheduling and dispatch together with FIELDBOSS® Mobile creates a two-way connection between schedulers and technicians. Technicians can update their status so dispatchers see their availability and skill set (technical knowledge, certifications and training) and know the right person to schedule for each

job. Technicians receive job details, addresses, and service information on their mobile device and, with integrated mapping, always know the quickest way to the job site. Since many service organizations receive dozens of calls per day, saving as little as five seconds per call adds up to thousands of dollars per year.





## Chapter 2: Customer Relationships

### 8. COMMUNICATION IS KEY

FIELDBOSS® Mobile has changed the way field service companies communicate with customers and vice versa. With FIELDBOSS® Mobile, you can 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. When you connect with, listen to and learn from your customer, you make more money and they get more value.



## Chapter 2: Customer Relationships

# 9. RELATIONSHIPS ARE BUILT ON TRUST

Customers feel safe when your technicians have comprehensive knowledge about their site and equipment. Using the customer files that are continuously updated and always accessible through FIELDBOSS® Mobile, show

up to the customer site fully prepared with their account information and service history of their equipment. Customers will be impressed with your fast, productive and informed interactions.



## **Chapter 3: Management**

- 10. Keep Your Team Connected
- 11. Stop Wondering Where Your Techs Are
- 12. Real-time Visibility
- 13. Customize the Mobile App Yourself



## Chapter 3: Management

# 10. KEEP YOUR TEAM CONNECTED

FIELDBOSS® Mobile connects management with their staff and the work they're doing in real-time, making for a more connected, more accountable team. Always know where your people are and

what they're doing. You can't be everywhere at once, but with the right mobile software you can run things as if you are.





## 11. STOP WONDERING WHERE YOUR TECHS ARE

Ever wonder whether your techs were actually where they said they were? Capture their geolocation every time they update their status, sync their device or create a record to easily view and verify their location. FIELDBOSS® Mobile

provides 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.



## 12. REAL-TIME VISIBILITY

Data-driven decisions are better than educated guesses, and real-time data is better than month-old data. This morning's field work can become this afternoon's business intelligence with FIELDBOSS® Mobile. Once you collect the information you want to analyze, service dashboards display it in easy to read, real-time charts and graphs. With real-time data

sharing comes the ability to identify and target opportunities that would otherwise go unnoticed and unaddressed. FIELDBOSS® Mobile guarantees that management will always have the freshest data possible to make well-informed decisions on the fly instead of waiting for end-of-quarter reports.



## 13. CUSTOMIZE THE MOBILE APP YOURSELF

We can easily train you to customize and administer the app. No programming required. The FIELDBOSS® Mobile interface is completely configurable so that field service organizations

can seamlessly integrate their unique service processes without requiring any custom code. A complex business with an easy solution.



## **Chapter 4: Field Staff**

- 14. View Open Service Tickets on a Map
- 15. Utilize that 360° View of the Building Location and Equipment
- 16. Take in that 360° View of the Customer
- 17. Happy Technicians Are Productive Technicians
- 18. Designed for Life in the Field
- 19. Empower Your Field Team
- 20. Turn your Techs into Sales People





## Chapter 4: Field Staff

# 14. VIEW OPEN SERVICE TICKETS ON A MAP

Got some spare time between service calls? Catch up with a maintenance job closest to your location. The map shows you your current position, and you can easily zoom in and out to

see which of your upcoming maintenance jobs are nearby. Then it's just a matter of inputting the address into your map and off you go. No more time wasted between service calls.



## 15. UTILIZE THAT 360° VIEW OF THE BUILDING LOCATION AND EQUIPMENT

Service the right equipment at the right location. For mobile workers who are constantly on the go, trying to figure out which piece of equipment needs repair and where that equipment is located can be a chore, especially if there are multiple locations, assets and tasks. With FIELDBOSS® Mobile, the building address is automatically

populated into the service activity. The technician can also see the complete make, model and serial number of the equipment along with its location in the building and its warranty status. No more guessing which piece of equipment needs what type of service.



## 16. TAKE IN THAT 360° VIEW OF THE CUSTOMER

FIELDBOSS® Mobile allows your techs to service your customers smarter by providing better access to information and offering a better picture of your customers and their needs. Technicians are able to have 360-degree views of the customer to help better address service problems and even

offer new services to customers who might need them. See what problems they had in the past, if they're on a maintenance contract, or what upgrades they might need. This 360-degree view allows technicians to spot opportunities for sales, as well as predict other potential service needs.



## 17. HAPPY TECHNICIANS ARE PRODUCTIVE TECHNICIANS

FIELDBOSS® Mobile not only makes your customers happy, but it can also make your technicians happy. Switching from paper-based systems to mobile creates engaged, loyal employees that have all the tools they need to focus on providing superior service instead of having to keep track of loads of paperwork and perform repetitive administrative duties. Mobility

also takes training out of the office and gets new technicians out in the field sooner. Thanks to FIELDBOSS® Mobile, new technicians will have all the training tools they need along with direct access to their peers and colleagues who can help them through more difficult fixes. Happy technicians are productive technicians.



## 18. DESIGNED FOR LIFE IN THE FIELD

There are very few jobs that demand the use of mobile technology more than that of a field service technician which is why FIELDBOSS® Mobile was designed specifically for the way field technicians work. 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 they'll 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. Extra truck rolls will be a thing of the past.



## Chapter 4: Field Staff

# 19. EMPOWER YOUR FIELD TEAM

For service-oriented businesses, field staff are playing more important and multidimensional roles than ever before. Not only are field employees the first line of defense against customer dissatisfaction, but they are the frontline of the customer experience. Being the face of the company also puts field staff in a strong position

to influence sales and collect valuable information about clients and industry trends. FIELDBOSS<sup>®</sup> Mobile creates a more responsive, efficient, and intelligent field team which is a major asset, helping to reduce operational costs, bolster revenue streams, and provide reliable business intelligence.



## 20. TURN YOUR TECHS INTO SALES PEOPLE

Often technicians find themselves at a job when a customer approaches and asks for a quote on a new job, or a new piece of equipment that needs service. FIELDBOSS® Mobile enables your field techs to communicate sales opportunities right on their mobile device. With a click of a button a new

case can be created and sent off to the sales team for immediate follow up. Don't throw away money that's already in your pocket with lost paperwork, forgotten emails, and missed opportunities. With a powerful, cohesive mobile tool your team can turn quotes around in hours instead of days.



## **Chapter 5:** Enhanced Processes

- 21. Stop Wasting Time
- 22. Turn Your Mobile into a Handy Gadget
- 23. Don't Repeat Yourself
- 24. Less is More, Don't Accessorize with Paper
- 25. Free Up Your Time
- 26. Remember The Details
- 27. Make Time Tracking a Breeze
- 28. Consistency is key
- 29. Print to Mobile or Customer Printers
- 30. Leverage SharePoint
- 31. Automate Your Checklists
- 32. Sign Here Please





## 21. STOP WASTING TIME

Want to save time *and* resources? FIELDBOSS® Mobile can help you do both. By automating work order processes, FIELDBOSS® Mobile eliminates paper from the operation. That means no more illegible hand writing, lost invoices or important

forms, and no more time wasted re-entering data. Empower your entire team by making critical data readily accessible in the field and in the office, providing the visibility and velocity you need to succeed in this competitive environment.



## 22. TURN YOUR MOBILE INTO A HANDY GADGET

FIELDBOSS® Mobile can automate inspection processes for your technicians by turning their mobile device into a handy gadget. Whether they do maintenance, service, surveying, or construction, they can easily perform their inspections on site without carrying stacks of paper. As well as getting automatically notified for each new inspection on their to-do list, they can

also easily navigate to the site, fill in checklists, capture photos of the current condition, save their GPS position as proof of actually being on site, verify the outcomes with signatures, and get the final report to the back-office in a matter of minutes. Save time, avoid fines and keep everyone safe. It's a win-win!



## 23. DON'T REPEAT YOURSELF

FIELDBOSS® Mobile will connect your field service technicians to the back office, dispatch teams, and management to eliminate duplicate data entry and enable seamless data sharing. Data entered once is instantly synched across the company. Manual paper systems require a significant amount of hand processing and re-keying. Each time a person has to process a document, potential for errors increase and the

speed of information slows down. Information is often re-entered two or three times between the original customer call, recording the services, labor, expenses and parts on the job, and then entering the same information back into the order system to close the job and invoice the customer. FIELDBOSS® Mobile allows the technician to enter data once and eliminate thousands of man-hours of duplicate entry and re-keying errors.



## 24. LESS IS MORE, DON'T ACCESSORIZE WITH PAPER

Physical copies of policies, procedures and memorandums create paper bottlenecks that can make your office a clutter nightmare. FIELDBOSS® Mobile eliminates unnecessary paperwork and

consolidates the information in more convenient and readily accessible digital libraries that will give your field techs quick access from wherever they are, whenever they need them.



## Chapter 5: Enhanced Processes

# 25. FREE UP YOUR TIME

Wouldn't it be nice to let the app do the work for you? Or, at least, parts of it? With an intelligent set of rules, you can automate tasks that take up your time or occupy your mind. For example, the job site address can be already pre-filled when you create a service ticket for an existing customer.

Or a record will not be saved unless it's filled in correctly. Let **FIELDBOSS®** Mobile automate the routine tasks such as service activities, building locations, equipment, and contacts. Save time and always have up to date, accurate information.



## 26. REMEMBER THE DETAILS

The drive after visiting a customer location gives your technicians plenty of time to forget key service details that may be helpful in preparing the next technician who must visit the site. And, companies that are reliant upon a paper- or email-based process suffer by wasting valuable opportunities to better communicate needed

information. FIELDBOSS® Mobile 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 the customer's location.



## Chapter 5: Enhanced Processes

# 27. MAKE TIME TRACKING A BREEZE

FIELDBOSS® Mobile makes it easy for technicians to let the office know where they are and what their status is. With the click of a button, techs can set their position as on route, job started or job complete. Their time is automatically synced to the back office making payroll a breeze.

With mobile capabilities such as time sheet input based on clock-in/clock-out, task status and more, tedious and error-prone time entries are eliminated opening up time for additional work while freeing field professionals from administrative chores.



## Chapter 5: Enhanced Processes

# 28. CONSISTENCY IS KEY

Old school means of field data collection, like paper and disconnected spreadsheets, make it tough to enforce consistency. With FIELDBOSS® Mobile, it's easy to build and centrally modify

standard field forms such as inspections, checklists, audits, and more, requiring the data you need in order to close out work.





## 29. PRINT TO MOBILE OR CUSTOMER PRINTERS

Although FIELDBOSS® Mobile allows you to go completely paperless, there are going to be times when you need to print a contract or certificate while onsite. FIELDBOSS® Mobile allows our

customers to pull up information and attachments from the app and select “print”. This will allow work information to be printed to PDF and emailed or printed on a mobile printer.



## Chapter 5: Enhanced Processes

### 30. LEVERAGE SHAREPOINT

Making fast decisions and staying in contact are critical when making organizations more effective. Your ability to access information on the go is now a workplace necessity. FIELDBOSS® offers the ability to upload pictures and store

documents in SharePoint. Documents stored on your SharePoint can be accessed through the FIELDBOSS® Mobile app. You can modify them as well as upload new ones.



## Chapter 5: Enhanced Processes

# 31. AUTOMATE YOUR CHECKLISTS

Replace paper-based checklists for maintenance and service work with customized automated checklists. FIELDBOSS® Mobile empowers you to drive the standardization of processes and

procedures across the whole organization. It is a straightforward way for you to provide guidance, work instructions, compliance and quality to every service activity for every technician.



## Chapter 5: Enhanced Processes

### 32. SIGN HERE PLEASE

FIELDBOSS® Mobile gives your technicians the ability to electronically capture customers' signatures while still on site. Get customer

confirmation and have signatures on service history. Signatures can also be printed on emails and customer invoices.



## **Chapter 6:** Cash Flow

- 33. Plug the Revenue Leaks
- 34. Arrive on Time
- 35. Get Paid Faster
- 36. Invoice Accurately



## Chapter 6: Cash Flow

### 33. PLUG THE REVENUE LEAKS

Warranty and service contract leakage happens when a technician performs a service at no charge, assuming it's covered by the customer's contract. FIELDBOSS® Mobile will not only help you spot the "leaks," but also "plug" them by

providing your dispatchers and service techs with the data they need, when they need it, to ensure you won't give away service or parts for free. That means more money in your pocket!



## 34. ARRIVE ON TIME

Turn by turn directions ensure safe arrival, on time, without getting lost. FIELDBOSS® Mobile is integrated with Google Maps to calculate the quickest and most fuel efficient route for every technician you send into the field, all while saving back office time. Technicians receive their

schedules directly on their mobile device, helping improve customer service, create tighter packed schedules, and include more stops per day and efficiency in the field. FIELDBOSS® Mobile will ensure your drivers arrive on time, every time.



## Chapter 6: Cash Flow

### 35. GET PAID FASTER

When service calls are your business, how long it takes customers to be invoiced is directly correlated with when you get paid. FIELDBOSS® Mobile empowers your techs to record and close service activities in real time while on-site. Your customers can sign-off electronically and approve

the work done, parts used and labor time spent. With this information instantly and accurately captured in the system, your back office team can issue the invoice to the customer on the same day. Now that's fast.





## **36. INVOICE ACCURATELY**

When techs rush to fill out paper invoices and forms, they make mistakes. FIELDBOSS® Mobile enables the pace your organization needs for fast invoice turnaround without the mistakes traditional paper processes create. By capturing

the data electronically, using auto populated fields, and eliminating the errors with re-keying, you will always have accurate invoices, happier customers, and more money in your pocket.



## **Chapter 7:** Collaboration & Information Sharing

- 37. Improve the Flow of Information
- 38. Capture, Document & Share
- 39. Build the Company Knowledge Base



## 37. IMPROVE THE FLOW OF INFORMATION

FIELDBOSS® Mobile facilitates information sharing. It enables technicians to have continuous access and visibility into customer and equipment history, which means they can diagnose the problem quickly. There's no need to rifle through files of work reports to see what repairs were previously done and who performed them.

Technicians can update, store, and view job data from the field, giving them a real-time, virtual link to the back office. They can also view information like daily schedule of job visits, customer histories, and billing information on demand. And best of all, data is always consistent, accurate and updated in real-time.



## 38. CAPTURE, DOCUMENT & SHARE

Having a functioning camera is one thing, but having an integrated camera application that makes it easy to capture, document, and share photos is even better. Technicians can capture knowledge with FIELDBOSS® Mobile through pictures or video to use for a future task. For example, being able to capture the steps to

complete a fix through pictures or video and saving that information to a mobile device ensures that other technicians can learn from that knowledge. Technicians can also perform work area assessments and can upload a time-stamped photo of a work area to the service ticket or case following a completed job.



## 39. BUILD THE COMPANY KNOWLEDGE BASE

FIELDBOSS® Mobile is a collaboration tool. By linking field techs with each other and with back office personnel, mobile technology keeps everyone within the organization in sync, transcending the limitations of geography. Whether you have technicians that are retiring, off sick, or busy on another job, automating

and sharing data reduces the risk of having a single point of information. FIELDBOSS® Mobile helps build easily accessible knowledge bases so field workers can access information anywhere, anytime, regardless of their location. It is increased collaboration that leads to increased productivity.



## **Chapter 8:** Security

40. Lock or Wipe the Application Remotely



## 40. LOCK OR WIPE THE APPLICATION REMOTELY

Lost or stolen phones are bound to happen but you can leave your worries behind when it comes to the safety of your data. With FIELDBOSS® Mobile you have the option to lock the device or wipe out data from it should something unexpected happen. And you can do it all remotely. Admins can also set up an automatic

wipe if the application has not connected to your CRM server for a defined period or if a user exceeds a specified number of incorrect password entries. So no need to panic if you lose a mobile device full of your valuable data. We've got you covered!