

# FIELDBOSS HVAC CONTRACTOR MANAGEMENT SOFTWARE

## Built Within Microsoft Dynamics 365



## THE FIELDBOSS DIFFERENCE

### **CONFIGURABLE & FLEXIBLE SOFTWARE:** WORK THE WAY YOU WANT

Start where you are.

We configure FIELDBOSS best practices to align with the way your organization is structured, and we can adjust things as you add customers, contracts, and staff.

### **MICROSOFT 365 TECHNOLOGY PLATFORM:** SECURITY AND INNOVATION

We let Microsoft do the heavy lifting so we can focus on the HVAC industry.

Microsoft Cloud security means you're always protected and future proof. Embedded integration with Outlook, Excel, Word, SharePoint & PowerApps means the interface is already familiar to users.

### **SERVICE & SUPPORT:** CUSTOMER OBSESSED

We are obsessed with providing effective and timely support and making sure our customers are happy. Customer success drives every feature we create, every best practice we support through our software, and every innovation we bring to the industry.

### **LOW COST, RAPID IMPLEMENTATIONS:** FOR CONTRACTORS OF ALL SIZES

FIELDBOSS offers hundreds of HVAC specific features right out of the box. Its native functionality and strength of the base system allows you to get up and running with little need for customizations.

# FIELDBOSS FEATURES

## BEST PRACTICE BACK-OFFICE OPERATIONS

- Advanced account, building and device tracking
- Integrated equipment inspection reports
- Focused on estimate -> job -> invoice velocity
- Configurable maintenance contracts, scheduling, and invoicing
- Project tracking including AIA billing, project task management and more
- Integrated SharePoint document management
- Do it yourself service calendar views
- Do it yourself dashboards
- Do it yourself automation – workflow, time approval, maintenance billing, and more

## CUSTOMER PORTALS BY MICROSOFT POWER APPS

- Configure to meet your client needs

## SALES SO YOU CAN GROW YOUR BUSINESS

- Real time margin on service jobs, maintenance contracts, and installation projects
- Integrated service call estimating, job management and invoicing process
- Dynamics 365 lead and opportunity management

## MOBILE YOUR WAY

- Mobile configured to match your technician management needs
- Extensive checklist functionality
- Mobile Inspections
- Mobile health and safety procedure checklists and enforcement
- Secure app that is either Android Play Store or Apple App Store download
- True offline mobile capabilities
- Voice control to fill out forms while keeping hands free

## FIELDBOSS TECHNOLOGIES



Contact us for a free consultation,  
online demo or cost estimate:

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