WennSoft®

Service
Management
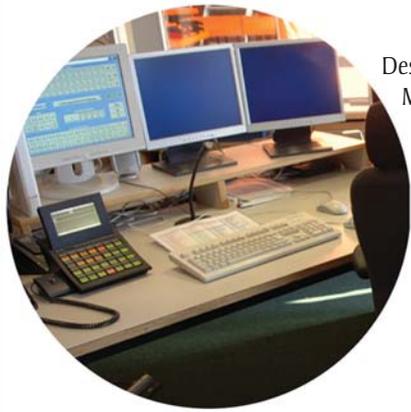# Series

Keeping your business on track.

Service Management Series

Realize Improved Service and Higher Profitability

Designed to meet the diverse needs of asset-based service organizations, the WennSoft Service Management Series can help you effectively manage your complex customer relationships. An extension to the solid foundation of Microsoft® Dynamics™, Service Management Series can be tailored to your specific needs.

The WennSoft Service Management Series helps you deliver superior service by facilitating:
- Service call capture and assignment dispatch
- Resolution tracking
- Contract management
- Execution, utilizing the powerful WennSoft tasking engine

## Identify and Resolve Customer Issues More Efficiently

Effective reporting and tracking solutions help you plan for and ultimately solve customer issues more efficiently. Containing detailed information, the Service Management Series provides the necessary information to understand your constantly changing field service situations.

Service calls can be created from e-mail, telephone, Internet or manually via multiple access points within the system. Dispatchers have instant access to pertinent data such as customer history, contracts and warranty information, resulting in expedited call resolution.

Once a call is entered, it is stamped with the time and associated data, providing the assigned technician accurate scheduling information, a detailed work order and a complete service history. Having this information readily accessible ensures that the right resources are assigned to the service call, allowing you to guarantee response times, measure results and enhance overall customer satisfaction.

## Leverage the Functionality of Microsoft MapPoint
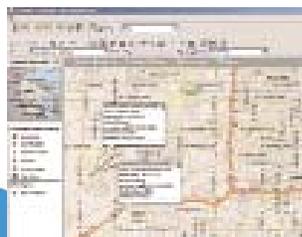
Microsoft MapPoint® allows technicians to easily access address-to-address driving directions, pinpoint service call locations and calculate routes. This functionality can be used in conjunction with WennSoft MobileTEC and WennSoft WebTECH to e-mail maps, routes and directions directly to field technicians. This facilitates more efficient dispatching, better communications and increased on-time performance.

Gain Insight with Sophisticated Scheduling and Dispatching

The Service Management Series leverages a sophisticated scheduling and dispatching system that provides visibility into the multiple aspects of complex customer relationships. All calls are visible on a dispatch board capable of multiple views, providing an easy way to check technician workloads, set or change appointments, update call statuses and monitor service-level agreement commitments.
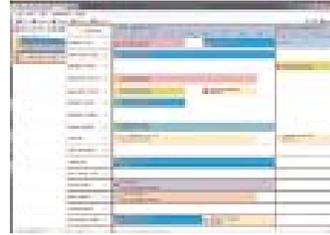
Additional functionality allows your dispatchers to schedule by skill level, geographic area or technician schedule to ensure that the best technician is selected for each call. Relative day scheduling, multiple frequencies and task lists for service calls are also available to help derive the highest value from your dispatching activities.

In addition to the standard dispatch board, the Graphical Schedule Board is available as an add-on module. It enables dispatchers to easily sort, filter and schedule appointments using a visual representation of scheduled service; including assigned, unassigned and unscheduled appointments. Service calls are represented by color-coded bars and user-defined settings allow you to select the background color of an appointment based on call type, problem type or service area and appointment status.

Manage Maintenance Contracts to Secure Future Revenue

Maintenance contracts are a key component to securing future revenue opportunities and providing proactive services to customers. Managing contracts to execution, renewal and service level is critical to delivering prompt service and generating revenue. The Maintenance Contract Management module provides control over the timely performance of maintenance services.

Flexible and detailed preventative maintenance plans provide for maximum availability of equipment under contract, with the option to suspend system-generated calls for equipment that may be out of service. Profitability can be tracked in user-defined categories on a per-contract basis by actual, estimated and forecasted costs. Tracking estimated costs separately from forecasted costs provides a metric to measure the accuracy of the estimate.

Preventative maintenance history and service call history are maintained at multiple levels. The application tracks skill sets, parts and tools required to complete preventative maintenance tasks. Additionally, extensive notes and task descriptions ensure that technicians arrive fully prepared to complete the service call.

Estimated costs and hours may be associated with each task, in addition to numerous task response options (e.g. meter readings, numeric readings and yes/no checkboxes). Users are provided the option to schedule preventative maintenance automatically in mass or manually, by contract, customer or location.

Additionally, contracts can be grouped for reporting or billing using the Master Contract functionality. Master Contracts used for billing purposes can be billed and renewed in mass or manually by customer, location or master contract.

Organize, Print and Share Information

The WennSoft Document Management solution alleviates the struggles often associated with finding files with cryptic file names and paths by providing drill-down functionality directly to documents. This ensures that the most current documents and information are always organized and available, eliminating last minute surprises and potential delays when preparing for reviews and delivery.

The Document Management module allows users to store, retrieve and attach files of virtually any format (e.g. CAD drawings, photographs, scanned documents, Microsoft Office files) to a service call, location, customer, maintenance contract or equipment record.

Reduce Time from Input to Invoice

By providing audit trails and history, users will have all of the information necessary to quickly respond to billing inquiries. Billing rates are set by location and automatically populate the invoicing system. Integration between the work order and invoicing systems ensures billable work does not get lost, reduces data-entry errors and allows subcontractors, vendors and other costs to be billed effectively.

Invoicing offers multiple management and reporting features including:
- Sales analysis
- Productivity and efficiency monitoring
- Billing history with invoice detail
- Billing rate override
- Cost accrual for work in progress
- Third-party billing opportunity
- Under-billing prevention
- Cost accrual for unbilled service work

Streamline the Collection of Labor and Related Expenses

TimeTrack allows you to enter time information once for use by multiple modules including Payroll, Payables Management, Job Cost and General Ledger. You can capture, validate, track, review, approve and post labor, travel and employee expenses to various projects or service calls.

Users can enter service, job cost and unbillable payroll transactions for an employee, all from the same window. The default value can be set for specific fields, resulting in a faster billing cycle, better cash flow and quicker management reporting cycles. TimeTrack also allows you to monitor, analyze and approve labor costs before committing to pay. Additional functionality allows you to build an export file for outside payroll services.

Employees working outside of the office can enter timesheet information over the Internet by utilizing eTimeTrack. An extension to the TimeTrack module, employees can charge time to jobs and service calls on a daily basis. Non-billable time or time not assigned to a job or service call can also be entered. eTimeTrack transactions are saved to TimeTrack and flow directly into TimeTrack batches.

Accommodate Multiple Currencies

In today's increasingly global business economy, accepting payment in multiple currencies can be a key component of customer satisfaction. Simplifying the management of global accounts improves profitability by cutting days from your billing cycle and reducing open accounts receivable.

The Multicurrency Management module allows you to comply with international currency standards when working with international clients and vendors. You can create invoices and credit work orders for preventative maintenance and non-preventative maintenance service calls in the currency specific to your customer. Maintenance invoicing and credit memos are tracked in the functional currency and all windows display functional currency amounts.

Give Your Customers 24/7 Access to Their Information
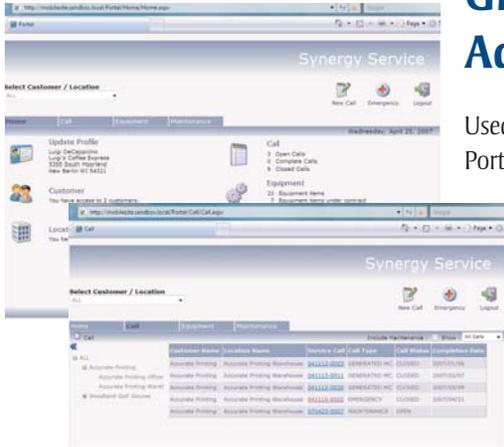
Used in conjunction with WennSoft Service Management, WennSoft Customer Portal utilizes the latest ASP.NET technology to allow you to provide your customers with a secure interface where they can submit service calls and access their open calls, service call history, equipment and equipment service history, maintenance contracts, notes and document attachments.

This information is customizable, allowing you to control the data that you share with your customers. Giving your customers 24/7 access to the information in their accounts lets them control their service experience and helps you retain long-term relationships.

Empower Your Sales Team

The Service Management Series Quoting module provides the tools necessary to help maximize your sales efforts by removing inefficiencies and providing the ability to:

- Manage customers on an account basis
- Monitor account coverage, contact and sales quote frequency
- Generate sales quotes quickly and accurately
- Track sales quotations and their timely follow-up
- Close the order and deliver service

Additionally, the Maintenance Quotes and Service Call Quotes modules can further extend the quoting functionality of the Service Management Series.

Maintenance Quotes – This module allows you to develop contract quotes that are driven by tasking. Tasking is the list of specific tasks to be performed for equipment covered by the contract, with estimated time for completion, descriptions, technician skill level requirements, parts lists and necessary tools.

Service Call Quotes – This module is designed to quote tasks or lump sum bids. An estimated cost is assigned to each task and the task is assigned to a service call. Upon assignment of all tasks, a quote can be generated. This is achieved by the summation of the estimated task costs to the quote where a markup can be applied.

- Fixed quotes are quotes in which the invoice billing amount is determined by applying a markup percentage to the estimated costs. In this scenario, actual costs are not used to determine the billing amount. Billing amounts in each cost category cannot be exceeded, regardless of the actual costs incurred.
- Not-to-Exceed (NTE) quotes are quotes in which the billing amount is determined by applying the location's pricing rules to the actual costs, up to the NTE amount. When this amount is reached, total billing must equal the NTE amount and cannot be adjusted.

Capture and Share Information with Your Field Force

Capturing information in the field is critical when measuring guaranteed response times. The Service Management Series offers a number of notification solutions to optimize the assignment process, ensure follow-up and increase overall service levels and customer satisfaction.

Paging – This option provides the flexibility to send pages from individual workstations. Pages can be received by numeric or alpha-numeric pager.

E-mail Paging – This option is ideal for organizations that send a high volume of pages. E-mail paging allows you to send messages to any device that can access an e-mail account. Dispatchers can communicate with field personnel via e-mail, freeing phone resources for customers. Delivery is guaranteed with store and forward technology, allowing messages to be queued until the technician is back in an active service area.

Two-Way Paging – Containing all the functionality of E-mail Paging, Two-Way Paging allows technicians to update appointments (appointment status, call resolution, completion date and call status) from the field. Additionally, user-defined responses, defined during system setup, can be attached to each message, allowing technicians to simply select and send the appropriate response to the dispatcher. The availability of this information assists dispatchers by keeping them up-to-date on pending customer commitments and technician availability, which eliminates redundant data entry, improves accuracy and facilitates reporting and analysis.

The Right Information at the Right Time

Ensuring that field resources have the right customer information at the right time is key to success in the field service industry. WennSoft offers a suite mobility solutions designed to keep you connected to your field staff.

MobileTEC

MobileTEC is a robust mobility extension to the Service Management Series. Available in versions for a Pocket PC, laptop or tablet PC, MobileTEC provides back-office information where technicians need it most, in the field.

With MobileTEC, daily activities such as initiating new service calls and call closeout are routine. Core functionality includes service call dispatch, maintenance tasking, resolution tracking and task response, allowing you to efficiently capture service call information in the field.

WennSoft WebTECH

WennSoft WebTECH is a platform and connectivity independent, browser-based application that allows technicians to access system data while leveraging existing hardware and connectivity methods.

Written in .NET technology, WebTECH utilizes a tab-based navigational structure that allows field technicians to access a number of different elements including tasks, appointments, call summary, service call detail, contracts and equipment.

WennSoft CRM Extensions

Microsoft Dynamics CRM is a customer relationship management (CRM) solution that provides the tools you need to create and maintain a clear picture of your customers, from first contact through purchase and beyond. With modules for sales, marketing and customer service, Microsoft CRM is an affordable solution that can help you maintain a closer relationship with your customers and achieve new levels of profitability.

WennSoft CRM Extensions, the integration between Microsoft CRM and WennSoft Service Management, allows you to share information from Service Management with non-traditional WennSoft users. Key integration points include customer account information, location dashboard and reporting. A focus on these areas allows you to easily share critical customer information with all members of your staff, enabling them to perform their jobs more effectively.

Equipment Management Series

If equipment management is a component of your business processes, the WennSoft Equipment Management Series, together with the Service Management Series, is the ultimate solution for managing and maximizing the effectiveness and profitability of your equipment operations.

The Equipment Management Series ties together equipment management, service management, resources and financials – everything you need to make better decisions, realize higher utilization and produce a better bottom line.
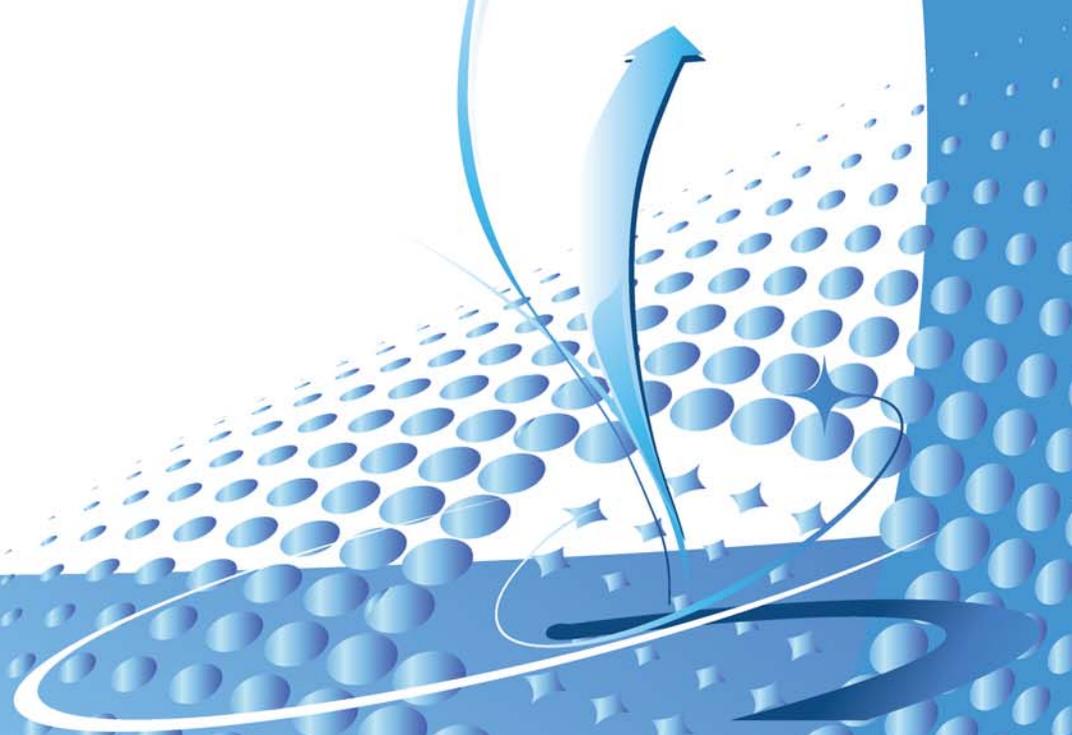
WennSoft provides innovative business management solutions for public and private sector organizations focused on project management, field service and equipment/fleet management.

Core products – Job Cost, Service Management Series and Equipment Management Series – integrate with Microsoft Dynamics GP to deliver a unique solution to the vertical industries we serve. Our solutions complement and enhance existing processes–improving efficiency, expediting reporting and creating cost savings for our customers.

WennSoft®