



WennSoft Service Management and Microsoft CRM – easy-to-use, affordable and profitable.

Key integration points between WennSoft and Microsoft CRM:

Customer Account Information

- Location
- Invoicing Summary
- Receivable Summary

Reports

- Key Performance Indicators
- Revenue Growth Planning
- Cost Analysis by Maintenance Contract and Call Type
- Service Call Process Analysis (Open to Complete, Complete to Closed)

Location Dashboard

- Open and Historical Service Call Summary
- Equipment and Contacts at Location
- Job Summary
- Maintenance Contract Summary
- Maintenance Contract Quote Summary

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.

Based on proven, industry-standard technology, Microsoft CRM is easy to learn and work with. Because it works with and looks like other Microsoft technologies, Microsoft CRM delivers lower training costs, broader user adoption, increased productivity and a quick return on investment.

Benefits of Microsoft CRM and WennSoft Service Management Integration

Are there people in your organization that aren't trained to use your back office solution but would benefit from the information it contains? The integration between Microsoft CRM and WennSoft Service Management allows your sales representatives to easily access customer information that will help them to perform their jobs more effectively.



Key integration points between Microsoft CRM and WennSoft Service Management include customer account information, location dashboard and reporting. A focus on these areas allows you to easily share critical customer information with non-traditional WennSoft users. This expansion of visibility and scope will help your sales team provide a new level of customer support.



Customer Account Information

Allowing your staff to access customer account information will help them quickly and accurately respond to customer questions.

Customer Location – Access a list of all customer locations in Service Management and easily drill down to location-specific details and the location dashboard.

Open Jobs – View all open jobs and drill down to see additional job information in the location dashboard.

Customer Invoicing Summary

Each of the summary rows will indicate the total revenue for the product; Job Cost, Service Management, Equipment Management and all other sales for fiscal year to date, last fiscal year and last two fiscal years. You can then drill down to the WennSoft Customer Transaction inquiry window and further drill down to the invoice detail of any document.

Customer Receivable Summary

- Credit limit
- Current outstanding balances, by aging periods
- Last payment, invoice, statement date and amount summary
- Highest balance/average days to pay
 - Year to date
 - Life to date
- Non-sufficient funds count and amount summary
 - Year to date
 - Life to date



Location Dashboard

Providing your staff with a 360-degree view of the customer greatly enhances their knowledge, resulting in increased user productivity, improved service and additional sales opportunities.

Service Call Details

- View open calls and call history
- Initiate a new service call for this location
- Drill down in a service call or service call quote to view additional data including the appointment(s), task and time stamp
- Filter the view by call type (Maintenance Contract, Maintenance Call Contract or all)
- Posted invoice information is available from the invoice summary

Equipment at Location

- Initiate a new service call for a specific equipment ID
- Drill down to the Equipment Master to view additional equipment data
- If the equipment exists in Equipment Management Series, an asterisk will appear beside the equipment item as a visual indicator of this relationship

Maintenance Contracts

- View open contracts and contract history
- Drill down to view additional maintenance contract data

Job Summary

- View open jobs and job history

Quote Summary

- View open and expired Maintenance Contract quotes
- Drill down to view additional maintenance contract data

Contacts at Location

- If using the Contact Management module, local and agency contacts will be displayed in summary format
- If not using the Contact Management module, contact data for the first and second contact will be displayed
- Drill down on any record to view additional contact information

Reports

Key Performance Indicators

Increase sales and revenue awareness throughout your organization with service-related Key Performance Indicator (KPI) reports including:

- Top/bottom five customers by revenue year to date
- Top/bottom five customers by profit year to date
- Top five technicians by billed hours
 - Last week
 - Last two weeks
 - Month to date
 - Year to date

Revenue Growth Planning

Help your sales management team trend revenue growth by providing a detailed revenue billing summary by company.

- Last week
- Last two weeks
- Month to date
- Year to date

Revenue by Call Type

Provide your service management team with statistics regarding the number of non-maintenance related calls or quotes that have been created by call type.

- Number of calls generated this month, percent of total calls, total cost, total billed, margin, profit
- Number of quotes generated this month, percent of total calls, total cost and percent of total cost

Maintenance-Related Call Statistics

The following reports provide statistics regarding the number of maintenance-related calls that have been created and will help your service management team determine where the highest cost is generated and where the greatest percentage of work is performed.

Cost Analysis by Maintenance Contract and Maintenance Call Contract Call Type

- Number of Maintenance Contract and Maintenance Call Contract calls generated this month, percent of total calls, total cost, percent of total cost

Service Call Statistics by Call Status

- Number of calls opened, completed and closed last week, last two weeks, month to date, last month, year to date
- Average days to complete from open and to closed from complete for this month, last month, year to date

Preventive Maintenance Statistics

- Number of Maintenance Contract and Maintenance Call Contract calls generated this month, percent of total calls, total cost
- Total contract billing for the month
- Percent of margin, profit by contract type





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