

# WennSoft Evolution

CONNECTED Business. REMARKABLE Field Service.



**WennSoft**

# REMARKABLE FIELD Service

It's what happens when your people are  
**connected**. It's what happens when everyone  
knows **"what's what"** with every customer.

It's what happens when  
**form meets function.**

**TAKE** the leading CRM platform. Add WennSoft Evolution®, a standard-setting field service solution built for a wide variety of industries. Mix in a trusted partner with a legacy of lasting relationships and you get Remarkable Field Service. Everything and everyone connected. And a more profitable business for you.

WennSoft Evolution helps you foster the connections you have with your prospects, customers, constituents and employees. With a connected organization, you can better manage the resources needed to build and maintain your competitive advantage.

All this is possible because Evolution is built on the Microsoft Dynamics® CRM Framework—where the foundational elements are purposely designed to support connections and the relationships they foster—relationships between customers and their work orders; between field technicians, sales and customer service; between assets, equipment and their location; and connections between a successful installation, a profitable maintenance agreement and long-term customer loyalty.



**Today's field technician is the ultimate mobile worker** and needs anytime access to work order and customer details. So do your customers. That's why Evolution was designed for the needs of both your people and your customers with flexible mobile and portal experiences.

Proactive process guidance, including workflows and alerts, coupled with strong reporting capabilities helps improve productivity for everyone in your organization.

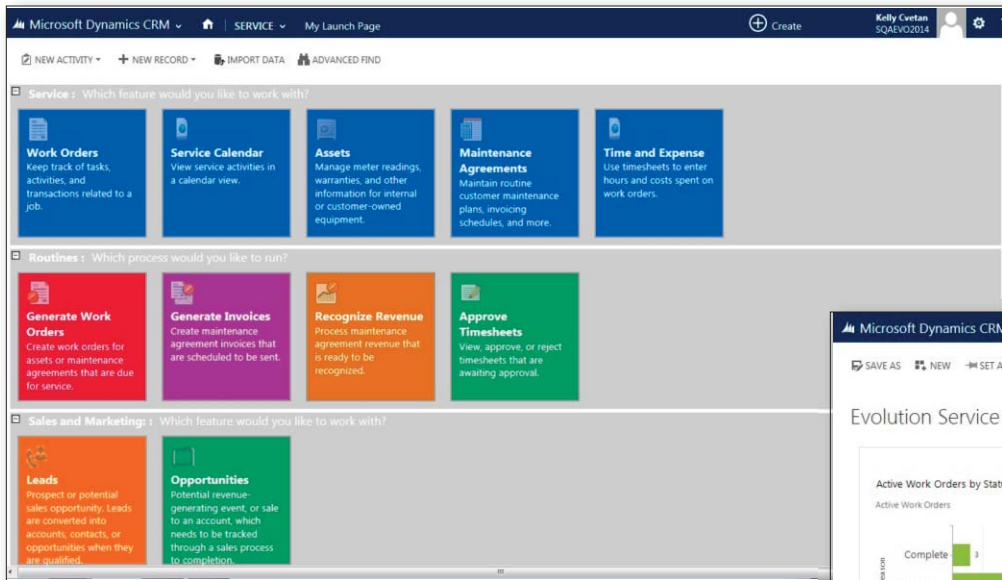
And whether that organization is in Oil and Gas, Power Generation, Fleet and Facilities Management, Specialty Trades or a variety of other industries, Evolution will help transform the way you profitably manage installation, maintenance and repair processes.

With roots forged in the "ins and outs" of the field service business, we are committed to the delivery of solutions that help you increase business efficiency, and help you deliver greater value to your customers.

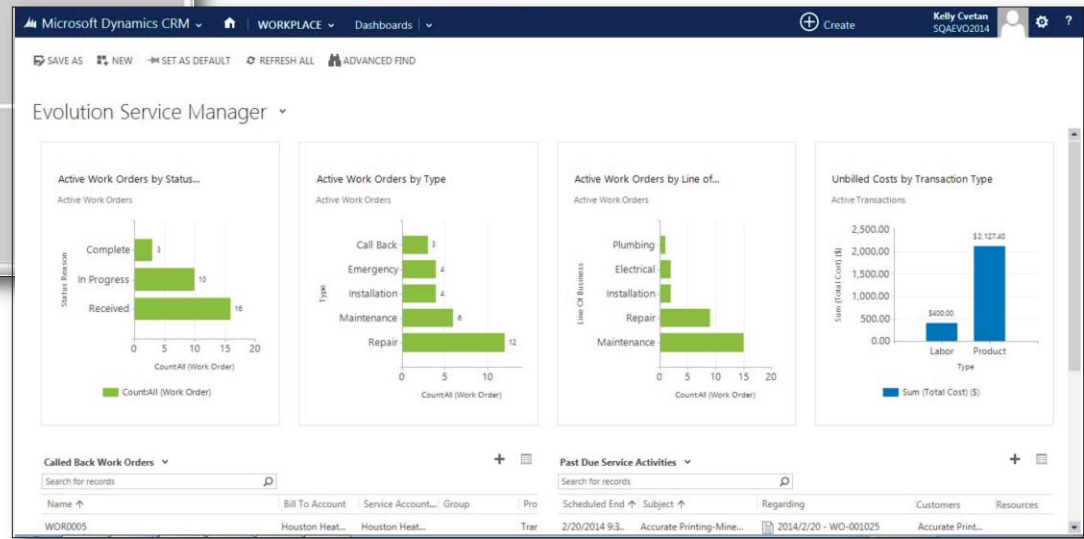
YOUR PEOPLE,  
YOUR PROCESSES,  
YOUR INDUSTRY

# A COMPLETE Solution for Connected Field Service

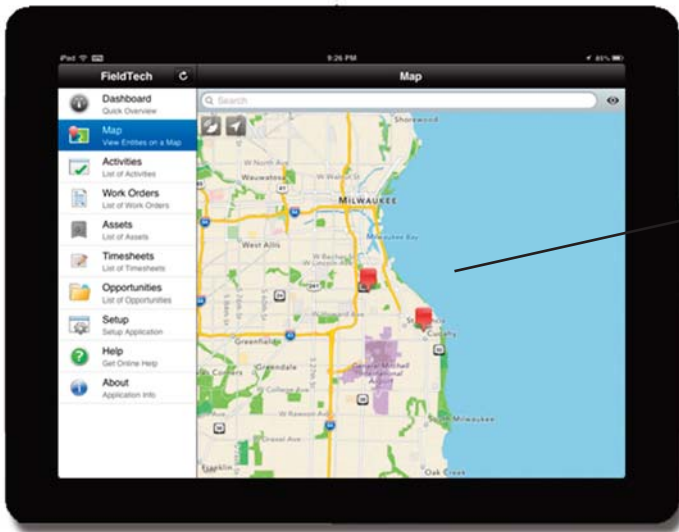
Evolution delivers the tools you need to connect your business operations end-to-end. Integrate with your existing financial solution or add Dynamics ERP; leverage the Dynamics CRM foundation; and you've got complete field service plus all the information you need to run your business.



**FORM, MEET FUNCTION:**  
Built in Dynamics CRM, Evolution provides access to all the business functions you need, the way you want to see it. Tailor the launch page for each user and the work they do.



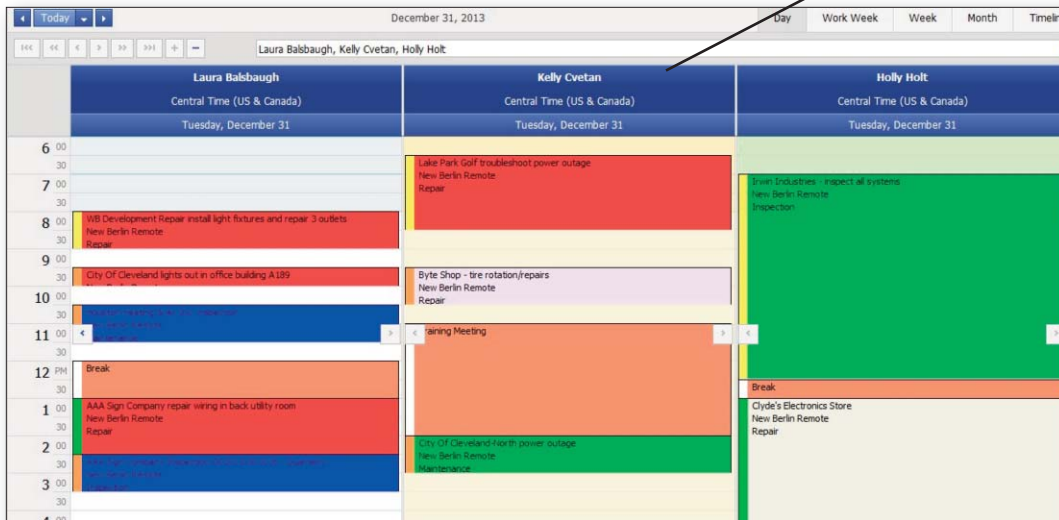
The Service Manager Dashboard looks and works like Dynamics CRM, putting the insight you need to manage work orders - and keep the business on track - right at your fingertips.



An integrated map view gives field technicians a visual of their destination.

**MORE TIME ON THE JOB:** Technicians can work offline, capturing all work order details and submit the information once connectivity is available.

Intuitive drag and drop scheduling helps efficiently manage and adjust resource assignments.



A familiar Outlook view makes it easy to schedule and manage service requests.

## MOBILE AND WEB:

Because today's office is everywhere.

Your team needs to be connected in the field, wherever they are. Your customers want access to their information 24x7. They're all trusting in you to deliver. Accessible via the web, on an iOS, Android and Windows-based mobile device, or right there in Microsoft® Outlook, Evolution information is available for your team members and your customers—virtually anyone you need to stay connected with—securely.

## SCALABILITY:

Because change is the one constant in business.

Built on Microsoft Dynamics CRM, Evolution is designed for flexibility and scale taking business value to a whole new level. Not only do you get the feature-rich, industry strength of Evolution, you also benefit from the full power of the Microsoft R&D platform investment.

## CHOICE:

Because you deserve options.

Available in the cloud, on-premise, or in a combined deployment, Evolution is available and accessible on your terms. On-premise is ideal for customers who want to manage their own solution and infrastructure. Online or "in the cloud" lets you easily access your solution and leave the day-to-day management to others and free your IT resources to focus on other business and technology goals. Evolution can be licensed through a purchase or subscription model.



## Sales and Service

- Sales and service teams share a single customer profile for full visibility and access to complete customer information like work order status, work order profitability, and cost and billing.
- Built in processes automate warranty and renewal communications, helping ensure customers receive timely information and no revenue opportunity is overlooked.
- Stay on-track from the beginning with quotes and workflows to ensure you hit deadlines, win bids or contracts and secure more profitable work.
- Rich, vibrant online communities help your customers help themselves and each other by viewing account information, monitoring work orders, and renewing maintenance agreements, as well as by interacting with peers in the WennSoft customer community.



## Asset and Equipment Management

- Manage the details of portable equipment as well as facilities or non-portable assets. Capture photos and track serial and barcode information to ensure the delivery of efficient service.
- Set up and view hierarchical relationships, such as attachments associated with assets, for more accurate asset tracking, service scheduling and billing.
- Track utilization, scheduling and charge out of assets by collecting accurate equipment usage including multiple meters, warranty, configuration, and preventive maintenance data.
- Maintain tight control of your assets, agreements, cost and revenue.



## Maintenance and Repair

- Streamline the management of maintenance agreements including creation, renewal or cancellation with reason codes to track changes. Include both billable and non-billable lines to agreements.
- Stay on top of your busy service responsibilities and resulting revenue with work order creation and tasking, whether initiated by customer request, from an ongoing maintenance agreement or through new work discovered on site.
- Have confidence that the maintenance being created and delivered supports tasking and the ability to break down the work for accurate scheduling and billing. Task lists can be added to maintenance records to build maintenance plans and scheduling.
- Keep a pulse on revenue and assess the profitability of maintenance agreements with profitability reporting, including access to a complete financial profile showing budgeted costs, actual costs and margin by line or agreement.

ROCK SOLID **operational** EFFICIENCY



## Advanced Scheduling

- A graphical view of scheduled and unscheduled service activities and appointments makes it easy to schedule and manage service requests based on employee availability and skill set as well as equipment and other assets.
- Identify resource availability easily, so you can ensure the right physical assets and people are available and where they need to be to better optimize your mobilization costs.
- Intuitive drag and drop scheduling helps resource coordinators efficiently manage and adjust resource assignments, balance workloads and visually spot availability.
- Automatically generate emails to notify resources of new appointments and share assignment details.



## Time and Expense

- Establish the level of approvals your business requires and set up workflows for efficient time and expense tracking.
- Track time and expenses by specific activities and categories.
- Assign pay codes, positions and labor rate calculations based on lines of business.
- Distribute hours by task.
- Retrieve and view supporting documentation associated with expenses to verify accuracy.



## Field Mobility

- Customer details, asset information, and more are available to your field technicians wherever they are.
- Access to customer information helps your team deliver better, more accurate service; capture new work needed; and complete it as approved on site.
- “Store and forward” capabilities ensure details are captured and ready for updating once internet or cell tower access is available.
- Record work done, time, parts used and secure signatures.
- Share details with the home office and your customer before moving on, speeding the invoice-to-cash timeline.
- Use the device(s) that work for your people including iOS, Android and Windows devices.

# YOUR TEAM

# equipped TO DO THEIR BEST WORK



# A complete VIEW OF YOUR BUSINESS...YOUR WAY.

## Connected Insight



- Get the transactional backbone you need in a stand-alone environment, including quoting, purchasing and invoice processing capabilities, so you can do what you need to get a bill out the door, regardless of the financial system you're running.
- For additional transaction power, Evolution is easily integrated with most financial management/ERP solutions.
- Finance, operations and sales personnel can access a complete, accurate view of work order and maintenance agreement profitability based on costs, billing and time.
- Dashboards give each employee the information they need to make informed decisions, act on business-critical activities and track key performance indicators (KPIs).
- Help Desk provides shared access to information so your support team is armed to deliver superior phone-based support.

## Integration and Extensibility



- Dynamically add fields or processes as needed; additional tools enable more sophisticated changes.
- Pre-configured integrations give you the flexibility to expand the solution to meet business needs with integration to other solutions or services.
- Create and extend workflows within or outside of Evolution.
- Integrate with SharePoint Server to leverage document management capabilities in Microsoft Dynamics CRM.
- WennSoft Evolution is integrated with Microsoft Office® at a platform level to support the Outlook-based client for traditional sales and marketing roles.
- Easily integrate to other web services, such as Bing or Google maps, and business applications such as payroll services, project management solutions and commerce sites.

Since 1995, WennSoft has been serving companies across a variety of industries in 23 countries. And one thing has stood the test of time—a foundation built on lasting customer relationships. Our goal is that you have the software, services, environment and licensing to help ensure WennSoft will be the last solution you'll need.

Visit [www.wennsoft.com](http://www.wennsoft.com) or contact us for more information about WennSoft Evolution, our services or our Last Solution Guarantee.

[www.wennsoft.com](http://www.wennsoft.com)  
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**WennSoft**  
Proven Solutions. Lasting Relationships.