



The XOi / WennSoft integration is designed to create a seamless technician experience between the two applications.

The integration simplifies the process while still empowering the technician with the full value that XOi Vision has to offer.

In this guide are the steps outlining how the XOi / WennSoft integration works from the technician's perspective.

Value for Tech



Automatic job creation



Internal/external transparency



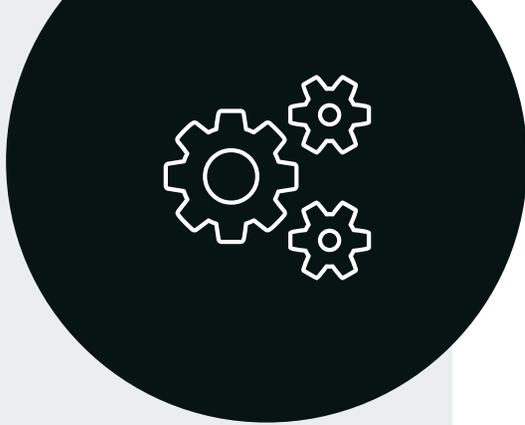
Helps eliminate manual note-taking



Seamless technician experience

STEP

1



When technicians are scheduled for a WennSoft appointment, an XOi job is created. The Customer Name, Job Location and Work Order Number will automatically be added to the XOi job.

Service Appointment

Save Cancel [trash] [wrench] [calendar] [keyboard] [document] [phone] [grid] [print] [share]

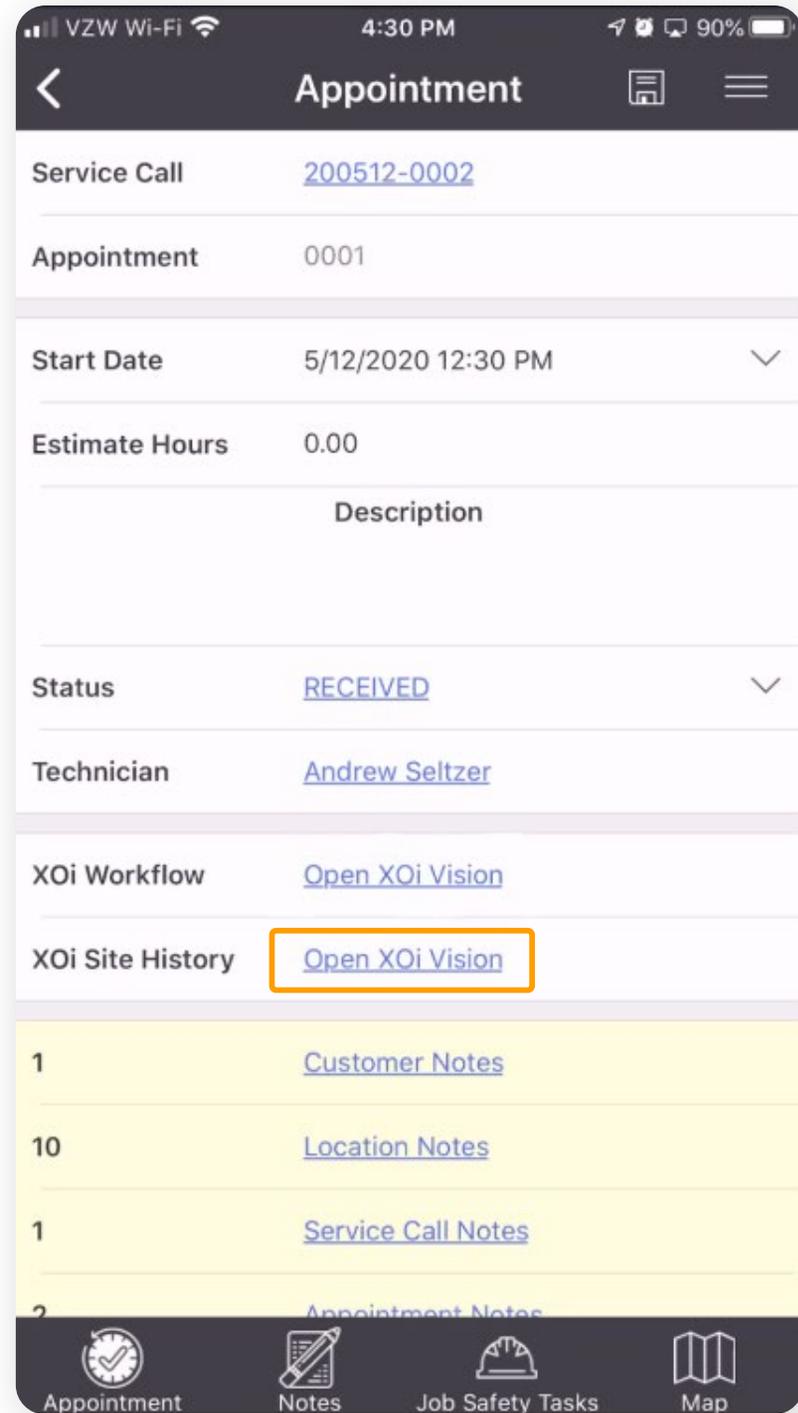
Customer Name	ACCURATE PRINTING
Location Name	ACCURATE-12500 CLEVELAND AVE
Service Call	160318-0002
Appointment	0051
Description	XOi Appointment
Status *	DEFAULT ▾
Resource *	Anderson, Bart ▾
Start Date *	9/15/2021, 2:00 PM [calendar]
Estimated Hours	1.00
Skill Level	▾
Priority	
Completion Date	[calendar]
Actual Hours	0.00

STEP

2

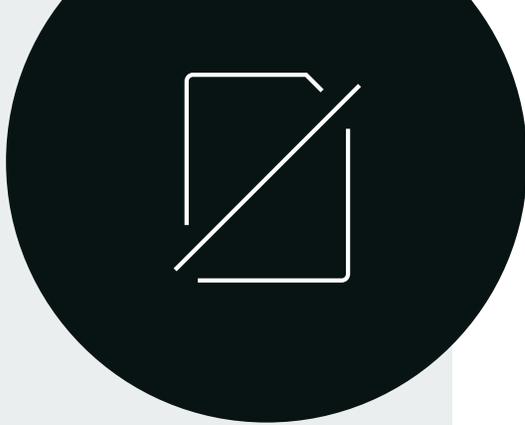


Within MobileTech, the **XOi Site History** link directs you to the visual history of this job location. This will open the XOi Vision app and perform an activity search for past jobs at this location.

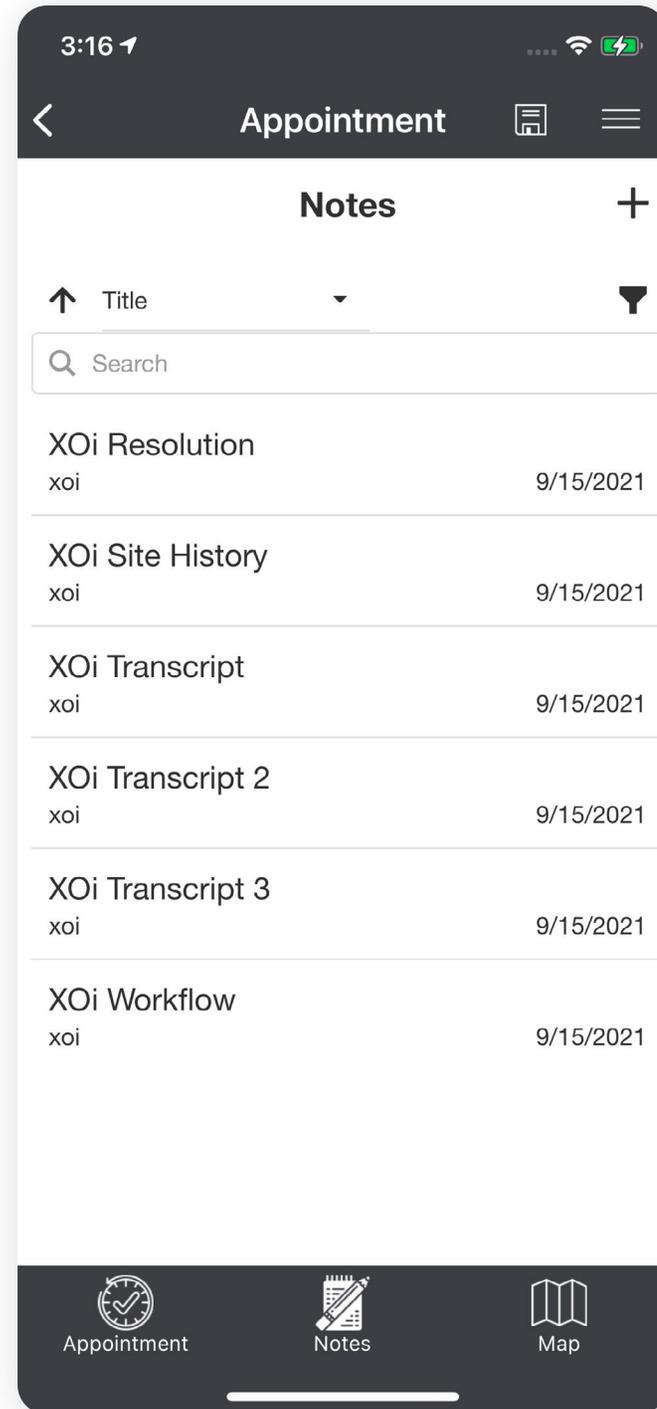


STEP

4



If your company uses integration traits, up to 3 video transcriptions can pass back to WennSoft. This is a simple way to record and summarize your work performed with less typing, for example.



STEP

5



When finished, click the **Complete Job** button in XOi. The public share link, for your customers, will be stored in an XOi Resolution Note. This can be accessed through either the MobileTech, Signature or Schedule.

