

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

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 📋 💥		
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	
Estimated Hours	1.00	
Skill Level	~	
Priority		
Completion Date		
Actual Hours	0.00	

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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.



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<	Appointment	
Service Call	200512-0002	
Appointment	0001	
Start Date	5/12/2020 12:30 PM	\sim
Estimate Hours	0.00	
	Description	
Status	RECEIVED	\sim
Technician	Andrew Seltzer	
XOi Workflow	Open XOi Vision	
XOi Site History	Open XOi Vision	
1	Customer Notes	
10	Location Notes	
1	Service Call Notes	
2		
Appointment	Notes Job Safety Tas	ks Map

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Next to "**XOi Workflow**", click the link to open the corresponding XOi job and begin capturing content in a workflow.



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<	Appointment	ā =
Service Call	200512-0002	
Appointment	0001	
Start Date	5/12/2020 12:30 PM	\sim
Estimate Hours	0.00	
	Description	
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1	Customer Notes	
10	Location Notes	
1	Service Call Notes	
2	Appointment Notes	<u> </u>
Appointment	Notes Job Safety Tas	ks Map

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.



3:16 -		
< 4	ppointment	
	Notes	+
↑ Title	•	Ŧ
Q Search		
XOi Resolution		9/15/2021
XOi Site Histor	у	9/15/2021
XOi Transcript _{xoi}		9/15/2021
XOi Transcript _{xoi}	2	9/15/2021
XOi Transcript _{xoi}	3	9/15/2021
XOi Workflow _{xoi}		9/15/2021



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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.



