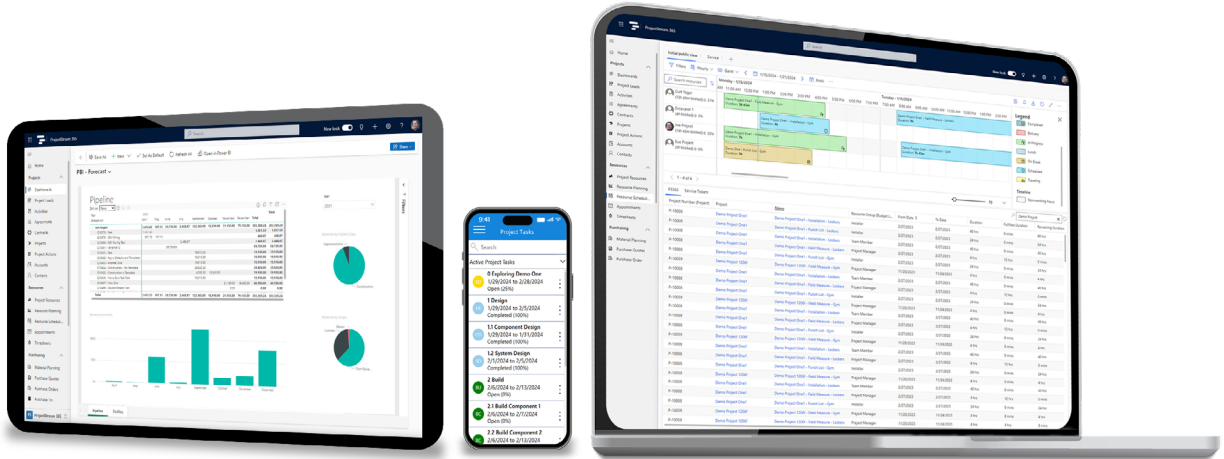


PROJECTSTREAM365

built on  Power Platform

The Premier All-In-One Operational Solution

Detailed Job Costing, Extensive Project Management, and Streamlined Field Service



Over the last decade much has evolved in technology, but the one thing that remains steadfast is WennSoft's dedication to engineering purpose-built solutions for the skilled trades. [Learn more](#) about WennSoft's legacy in field service and construction.

ProjectStream 365 is the culmination of more than ten years of development on the Microsoft Power Platform to deliver an all-in-one solution engineered with detailed job costing, extensive project management and streamlined field service.

ProjectStream 365 Integrations

Streamline business processes with a suite of integrations that are engineered to improve collaboration, operational efficiencies, and business insights.

- Integrated to Microsoft Dynamics 365 Business Central, Microsoft Dynamics GP, QuickBooks Online and other industry leading ERPs.
- Automated document management and collaborative workflows with Microsoft Teams and SharePoint
- Expense management integration via Plaid credit card integration to automatically import expenses
- Digital Takeoffs integrations to ProEst by AutoDesk and Bluebeam

Improve standard operating procedures to achieve higher growth, revenue, and profitability.

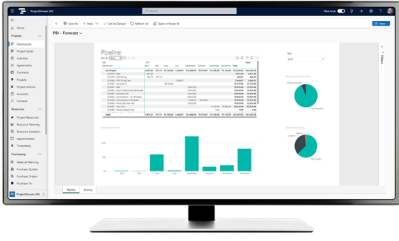
- Close more business with a sales process built on Microsoft Dynamics 365 with integrated estimating
- Take control of projects with integrated project management tools and resource planning
- Inventory management including multi-location inventory tracking and mobile inventory transactions
- Construction billing is complicated. ProjectStream 365 automates many of the unique field service and construction billing processes to accelerate invoicing
- Manage your service business with intuitive scheduling/dispatching, equipment tracking and service agreements

Built on the Microsoft Power Platform

The Power Platform is the most secure, scalable and customizable platform that is industry recognized as the leading low-cost, low-code development platform featuring integrations into the entire Microsoft ecosystem - Power BI, Power Apps, Power Automate, Power Virtual Agents, Power Pages, Dataverse, Copilot, Office 365, Teams, and SharePoint.



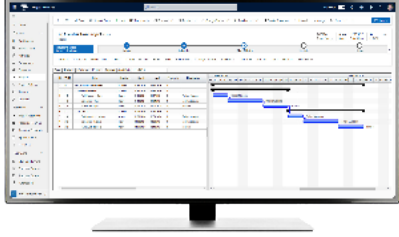
Core ProjectStream 365 Business Workflows Include:



PROJECT SALES CRM based sales processes ensure accurate job estimating which reduces the probability of lost opportunities with streamlined sales CRM process flows that conveniently convert won opportunities to jobs to begin generating revenue.

Core Features

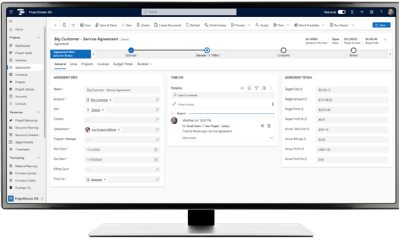
- Job/Service lead management
- Workflow driven activities and emails
- Bid calendar
- Project & service estimating with digital takeoffs
- Vendor RFQs
- Professional bid proposals



PROJECT MANAGEMENT prevents being upside down on unprofitable projects by accurately defining the project scope with comprehensive job costing to achieve project margin objectives.

Core Features

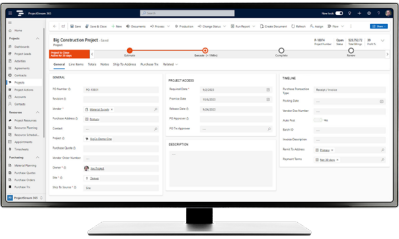
- Gantt chart / WBS project planning
- Resource requirements planning
- Submittal tracking
- Change order management
- Project action/issue tracking
- Automated project status reporting



SERVICE MANAGEMENT enables you to manage service processes profitability through an industry-proven solution that can grow with your business.

Core Features

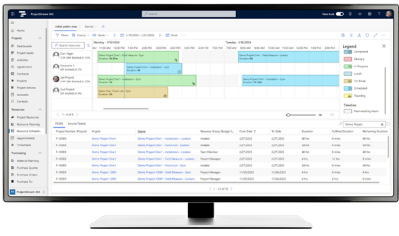
- Service agreements
- Service estimating
- Service work orders
- Scheduling / Dispatching
- Service purchasing / billing
- Service time and expense



INVENTORY MANAGEMENT is a mission critical function for both construction and field service teams. Inventory is integrated with sales, purchasing, projects and service, to streamline inventory processes.

Core Features

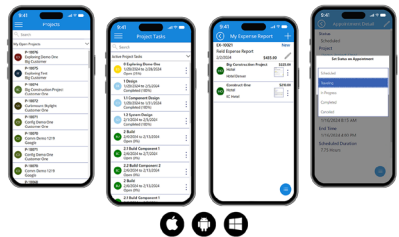
- Multi-location inventory tracking
- Integrated purchasing to inventory
- Inventory transfers and adjustments
- Mobile inventory transactions from the field
- Sophisticated product pricings
- Integration to back-office financials



UNIFIED RESOURCE SCHEDULER makes sure you dispatch the right resources at the right time with all the project and/or service-related details for technicians to effectively complete the job on-time and on-budget.

Core Features

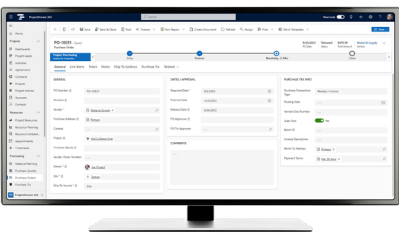
- Drag and drop resource scheduling
- Optimize scheduling resources based on job & tasks
- Assign project actions along with issue tracking
- Automated project status reporting
- Change order management
- Integrated with Project Mobile



FIELD MOBILITY addresses one of the primary reasons for project delays and overages - incomplete information. Get real time project updates to keep the field and back office synchronized.

Core Features

- View appointments and project details
- Track and complete project tasks
- Mobile inventory transactions
- Clock in/out with timecard entry capabilities
- Manage expenses with Plaid credit card integration
- Time and expense integrated to back office financials



PURCHASING & BILLING are key to optimize working capital to prevent negative cash flows. Automating complicated billing processes and purchase planning to improve working capital ratios.

Core Features

- Automatic PO generation
- Purchase to projects or inventory
- Purchase requirements planning
- Cycle / batch billing processes
- Fixed price / T&M | retainer billing
- AIA billing / Payment applications

[Request a demo today.](#)

WennSoft

Purpose Built Solutions for the Skilled Trades