

## ConnectWise Features Beneficial to Efficiency Engineers' Clients

ConnectWise PSA is the leading provider of Professional Service Automation (PSA) software for the IT services industry. ConnectWise PSA combines help desk, dispatching, service level management, project management & CRM into a single, web based application, with integrated time-tracking, billing & reporting. This tool is the automated interface to connect with Efficiency Engineers.

### Customer Portal

The client portal is a web based application offered to our clients where they can view & manage all activity related to their account. They can enter new service requests, view project statuses, & see accounting history. It helps by putting together all service tickets in one central place accessible to all users & clients. This avoids the problem of collecting technical issues/problems from different clients communicated through different formats like emails, faxes, phones, etc. & then compiling them together. It is a more efficient way of managing service tickets.

As service tickets are entered by clients, they are visible on the service boards utilized by Efficiency Engineers. This allows us to set priorities for service tickets, assign resources, & track the life cycle of the service ticket.

### Closed Loop Service

Closed loop service is a customized process that is set for each service board. It provides a method of continuously updating & providing feedback to both the customer & the Efficiency Engineers staff.

The components of this feature are automatic emails & updates to the detail, resolution, & internal analysis fields on the service ticket while creating a time record of all activity related to the ticket. By capturing the entire communication thread in one place, it enables us to increase our efficiency at resolving & closing tickets.

### Managed Service Provider Solution Integration

The MSP Add-on enables a connection between ConnectWise & our MSP solution platform. This integration allows the NOC Help Desk to launch services ticket in ConnectWise; provides data used for reporting, updating agreements, invoices, & customer configurations; & creates Executive Reporting for clients reflecting key managed service metrics.

This ensures proper reporting, response time, & invoicing from both the standpoint of Efficiency Engineers and their clients.

## ConnectWise PSA – Business Operating System

### ConnectWise Automates & Integrates Efficiency Engineers' Business Processes

Professional Service Automation (PSA) software provides the same benefits as the ERP systems purchased by enterprise organizations. The difference is that business automation software is designed specifically for organizations that are services-oriented, project-based & human resource intensive.

To be competitive & achieve long-term success, it is critical for Efficiency Engineers to have complete control & transparency into its processes. Its solutions must streamline, automate & integrate the delivery of services & projects, & address the unique requirements for specific vertical markets.

### Efficiency Engineers is Knowledgeable & Skilled at Managing:

- Business Intelligence Management: Knowing
- Process Management: Doing
- Performance Management: Measuring

ConnectWise allows Efficiency Engineers to **know** what to do, facilitates an effective method of **doing**, & **measure** what we have done. ConnectWise PSA gives Efficiency Engineers the tools to increase our proficiency in these three key areas.

- **Knowing:** ConnectWise PSA is a single integrated system in which information flows freely between modules, it gives Efficiency Engineers everything we need to know about our business- immediately & conveniently.
- **Doing:** Built on a process-based view of our business, all critical workflows that lead to success are fully supported, complete with the information we need to continually optimize our company's performance.
- **Measuring:** Objective & real-time or historical, we can pinpoint high performance or identify weaknesses for immediate action, allowing us to drive excellence.



## Example of Client Portal Log In

Efficiency Engineers' Client Portal can be accessed by going to this link: <http://www.myconnectwise.net/eesystems> There you will be prompted for your email address and password. The password will be set up by your administrator and is typically your first name. You will be able to change you password after logging in.

## Example of Client Portal

Once you log in, this is the typical screen you will see as a standard user. All service requests will be tracked & processed in this system.

Ticket#	Summary	Type	Contact	Entered	Status	Updated	Assigned	Required	Closed
604	I am having an issue with a d...		Julie Westbrook	2/18/2010 12:14:55 PM	New (portal)	2/18/2010 12:14:55 PM		-	-