# Partner In Profit Proposal

## Background

Dalworth have purchased DIGIUM IVR system that allows trucking call flow events <http://developers.digium.com/switchvox/wiki/index.php/UrlManagerAPI_overview>. System will allow connection between phone calls and sources of how these calls were generated. By assigning different phone numbers to different sources or leads, system would allow to identify which marketing activity resulted in the phone call. System must support multiple companies – Restoration & Rug Cleaning, Carpet Cleaning

System must be able to receive leads for restoration, rug cleaning or carpet cleaning on any phone number. System would allow business partners login and see status of the leads generated.

Document is written under assumption that both Dalworth Rug Cleaning and Restoration will use the same system.

## Users and Definitions

1. **Lead Source** - Lead source can be web site, business partner, franchisee, contractor, printed advertising. Anything that can generate a lead.
   1. **Business Partner** - is a lead source that can login to the system and see list of calls that were generated.
   2. **Sales Rep** – Sales Rep is a special type of business partner. Sales Rep can create his own leads and can see leads generated from leads sources that she controls. Contractors and Franchisees are sales reps
   3. **Lead Web Site** -This type of lead source needs to capture click history and associate phone call with the clicks
2. **Company Owner –** System must support at least two business owners. (James and Shane). Each owner represents different company and sees leads that are generated for his company.
3. **CSR**
   1. Csr is not really user of this system. However, she is using it without even knowing it
4. **Customer** 
   1. Customer just calls or clicks and then calls
5. **Administrator –** Needs to be able to setup business partners, provision phone numbers

## Use cases

### Business Partner Lead Review

#### Users

Business Partner

#### Flow

1. Business Partner review list of leads received from his phone numbers. For each lead
   1. Date Created
   2. Lead Type (Can be either rug cleaning, restoration, carpet cleaning)
   3. Project status (never created (shopper), pending, in process, cancelled, completed)
   4. If project completed and closed in accounting, Closed Amount (project amount completed)
   5. Listen the phone conversation associated with the lead
2. Business partner can filter out by dates
3. By default business partner can see leads for the current month, pending leads first
4. Business partner can filter out by phone number if business partner assigned multiple phone numbers

### Company owner Lead Review

#### Users

Company owner

#### Flow

1. System determines which company owner is logged in (Restoration, Rug Cleaning)
2. System shows list of leads received from all business partners
3. Show leads generated for other company (Leads for restoration by carpet cleaning)
4. System shows summaries and totals – Total Amount Closed, Total Leads Received, % of Leads Converted

### Handle Call (Carpet Cleaning)

#### Users

Customer, CSR

#### Flow

1. Customer calls one of the phones
2. CSR picks up the phone
3. Digium notifies the system which CSR picked up the phone and that the phone call is in progress. System figures out based on extension that this is Carpet Cleaning phone call.
4. System creates a record with CSR ID in Restoration System
5. CSR goes to servman and create new order or modifies existing order. Servman logs history into Transact table each action in a separate row grouped by transact id
6. Digium notifies that phone call is completed
7. System is updated that phone call is completed (date and time)
8. Background process runs every 20 minutes and associates calls with servman transactions.
9. Information about completed order is synchronized back into Restoration System to be later shown on the web site

### Handle Call (Restoration)

#### Users

Customer, CSR

#### Flow

1. Customer calls one of the phones
2. CSR picks up the phone
3. Digium notifies the system which CSR picked up the phone and that the phone call is in progress. System figures out based on extension that this is Dalworth Restoration phone call.
4. System creates a record with CSR ID in Restoration System
5. Restoration CSR sees his screen pulled either for new customer or for existing customer.
6. Restoration job is completed. Phone call is associated with the project
7. Digium notifies that phone call is completed
8. System is updated that phone call is completed (date and time)
9. CSR can listen through all the phone calls related to the project

### Redirect a call

This is situation when customer calls a phone number of one business partners of one company and gets redirected to another company. (Joe the Plumber who is Terry Hedgers partner calls with the flood lead. Joe gets redirected to restoration department).

1. If phone call was redirected, system must react and create a record or the transfer. Lead would be associated with the project where phone call terminated

### Connect Clicks to Calls

System will implement phone rotation for a web site (If web site is a lead source). System would allow correlation of clicks and calls.

### Create Business Partner

#### Users

Admin

#### Flow

1. Provision phone numbers in Digium system
2. Create new business partner
   1. Specify if it is a person or web site
   2. IF it is a person, invite that person to login to the system
   3. If it is a franchisee or contractor, select from the list of franchisees. Dalworth technicians will be able to see leads generated from the same site as smart schedule daily settings
   4. Specify list of phone numbers assigned

### Create Business Partner by Business Partner

Example – Terry Hedger creates a business partner of his own (Joe the Plumber). Joe the plumber can offer services from Dalworth.

#### Users

Business Partner, Sales Rep

#### Flow

Business Partner can create business partners under him

1. Create new business Partner
   1. First Name, Last Name, List of phone numbers this business partner may call from
   2. If there is a need to assign a phone number to a business partner, select one of phone numbers assigned that is not assigned to anybody yet.

# Phase 1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Step** | **Boris** | **Sergei** | **Jammie** | **Date Estimate** |
| 1. Determine Servman actions that must be logged into Transact table | 4 | 4 | 4 | 12/22/2010 |
| 1. Review with Jammie . Jammie will start Servman modification | 2 | 2 | ? | 12/22/2010 |
| 1. ~~Code Digium event handling, create logs of calls~~ | 24 | 24 |  | 12/27/2010 |
| 1. Import all tickets into Restoration application so they can show on the web site and sync tickets status | 40 | 80 |  | 01/12/2011 |
| 1. Modify restoration application to produce log | 8 | 16 |  | 01/14/2011 |
| 1. Merge call log, servman log and restoration log and assign how project was generated, voice files | 12 | 24 |  | 01/19/2011 |
| 1. Create web site to show calls to owners, business partners (IPad friendly) | 40 | 80 |  | 02/04/2011 |

# Remaining steps to convert from FoxPro by end of 2011

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Step** | **Boris** | **Sergei** | **Jammie** | **Date Estimate** |
| 1. Move smart schedule sync from servman to restoration system |  |  |  |  |
| 1. Add to Technician web site manage daily settings (IPad friendly) |  |  |  |  |
| 1. Quickbooks Accounting integration for Carpet Cleaning |  |  |  |  |
| 1. Implement all reports that Servman supports to be available from restoration system. |  |  |  |  |
| 1. Booking for CSR’s (does it need to be web based?) |  |  |  |  |
| 1. Add to Technician web site ability to Book jobs |  |  |  |  |
| 1. Integration of orders coming from Dalworth.com directly into the system |  |  |  |  |
| 1. Implement Dispatch and integrate it with Smart Schedule |  |  |  |  |