PROASSIST

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3rd generation

Dispatch jobs in real time

Use digital mapping software
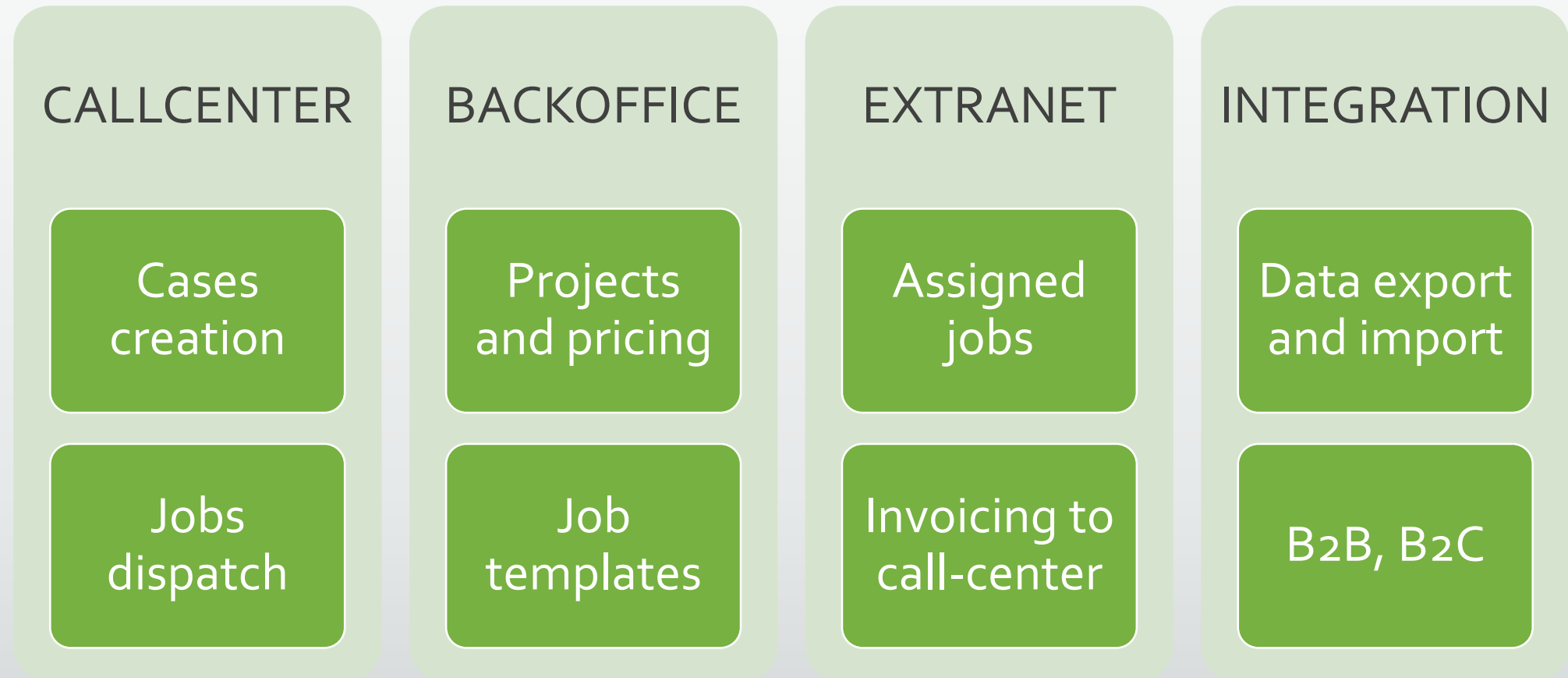
Preselect nearest workers automatically

Track job progress

All-in-one solution

Objectives

- Enable straightforward and configurable job dispatching
  - Mobile workforce management
  - Assistance call-centers of any kind
  - Taxi services, delivery services, logistics

- Automate repetitive tasks, avoid user mistakes

- Validate clients using your databases (policy number lookup, VIN code lookup, ...)

- Track history of important events

- Easily integrate with 3rd party systems using data import/export

PROASSIST structure

CALLCENTER	BACKOFFICE	EXTRANET	INTEGRATION
Cases creation	Projects and pricing	Assigned jobs	Data export and import
Jobs dispatch	Job templates	Invoicing to call-center	B2B, B2C

The daily routine

- Accept incoming requests from clients

- Create new cases, validate client's policy numbers

- Create specific jobs in case using configurable templates

- Find nearest worker for job, validate routes, compute distances

- Communicate with worker via SMS, email, mobile app

- Client first: control the case processing, check for late arrivals, track progress on map

- Compute the price of the job, distinguish between covered price and total price

- Import photos, generate documents

- Export invoicing data to accounting software

Configuration

- Projects and price books
  - Various case types
  - CSV import price book data

- Job templates
  - Per case type
  - Specify individual working steps in job

- Document templates
  - Use tokenized MS Word documents as templates

- Users management
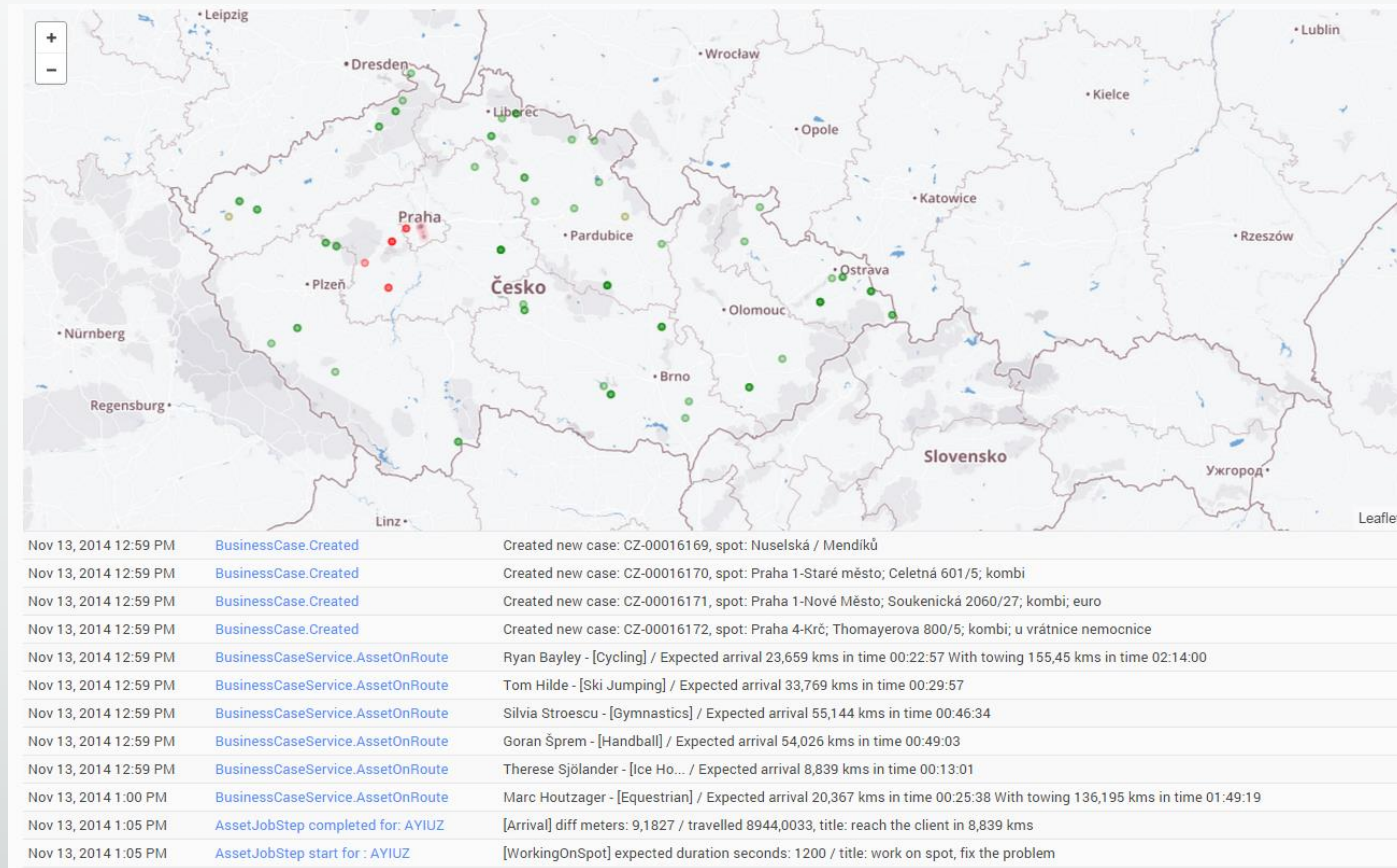 - Specify user group (operators, back-office, administrators)

Your workers network

- Companies
  - Basic company details
  - Addresses with geocoding
  - Configured branches, case types, job types
  - Configured vehicles, job types

Case processing

- Enter client details

- Set project, validate client

- Enter vehicle details

- Geocode client location

- Geocode final destination of the case

- Visualize route on map

Running simulation, self-testing

Job processing

- Add job to case

- Select job template

- Find nearest worker automatically

- Refuse worker (e.g. unreachable, has other work already)

- Confirm worker to job

- Send SMS to worker or client

- Track event times, job progress, visualize on map

- Enter invoicing and materials

- Mark job as done = close the job

Job processing – manual assignment

- Create another job in the same case

- Select job template

- Manually search for worker

- Compute routes and visualize routes

- Confirm worker to job

- Cancel the job or set as useless (50% invoicing)

Documents in case

- Upload photos

- Upload generic documents

- Create document based on template

Additional case processing

- Allow user to enter notes

- Track business events

- Allow user to cancel case if all jobs in case are cancelled

- Close the case if all contained jobs are closed

Reporting

- What reports do we need?
  - Count of cases per project
  - Count of cases per country, vehicle type
  - Count of jobs per job type
  - Job costs
  - Workers reliability – refused jobs, late arrivals, …

- http interface to collect data about cases & jobs

Integrations

- Telephony

- SMS gateway

- GPS data providers

- Data import and export

FINANCIALS

Incoming invoices

Issued invoices

Integrate with accounting software using custom bridge

Invoicing

- Export data in CSV format

- Enable http interface to collect the data

- Use buy & sell pricings [?]

- Compute provision orders [?]

- GOP handling vs. sell price books
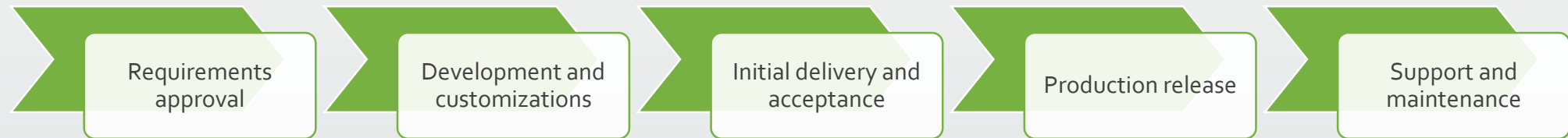
COMING UP...

Mobile app for iPhone + Android + Windows Phone

Pass the job to mobile worker

Leverage real-time location of workers

Create jobs directly on mobile app, offer as platform to workers

Project life cycle

Requirements approval

Development and customizations

Initial delivery and acceptance

Production release

Support and maintenance

Delivery of the software

- Software as a service (SaaS)

- Hosted on our servers, data backups included

- Secured HTTPS access

- Accessible via web browser from anywhere

GOT QUESTIONS? ☺

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