MODULE 2 – PROVIDER PROFILE
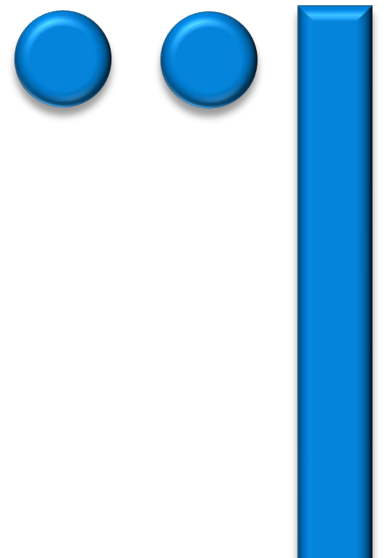
# Table of Contents

1. OVERVIEW

Module 2 of the Provider Manual steps you through the different aspects of the Provider Portal.

Follow these steps to learn how to better navigate your portfolio, execute jobs/services, update compliances, maintain company details and finalise invoices.
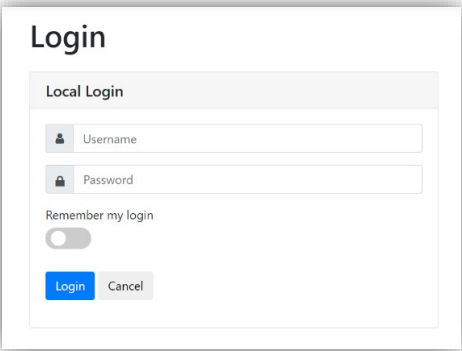
2. PROVIDER PORTAL

2.1. How to Access the Provider Portal

▪ Once you've registered, you'll receive a welcome mail email with a link to access the portal. Login using the credentials you created when registering.
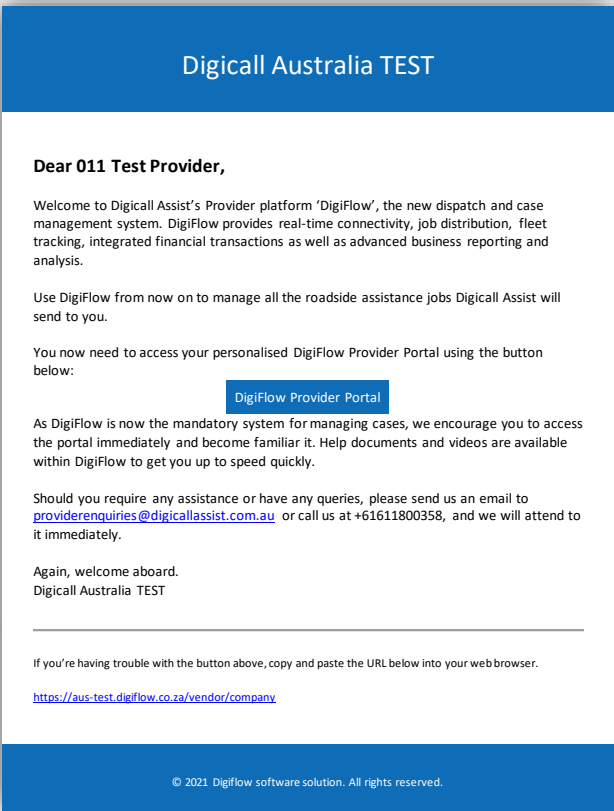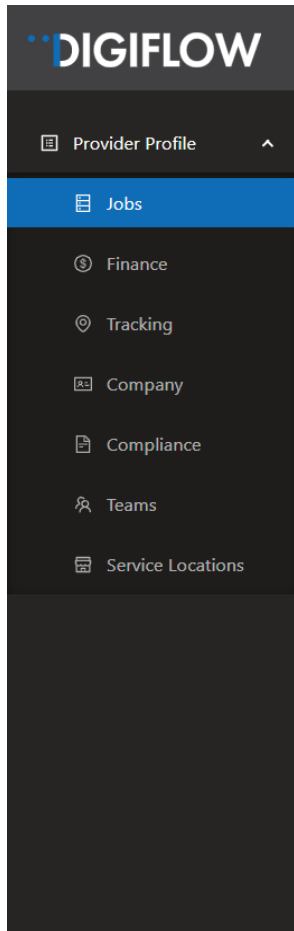

▪ or access the following URL:-
https://portal.digiflo.com.au/vendor/company

and completing the Username and Password set-up during registration

2.2. Provider Portal Overview

The table below is a quick view of the different sections of the Provider Portal, what each section entails and a module reference for a detailed guide to the relevant section:

Label	Registration Status	Content	Comments
Jobs	✅	Job Lists	See Section 2.3
Finance	✅	Job Financial Transactions	See Section 2.4
Tracking	✅	Mobile Telemetry	See Section 2.5
Company	✅	Company Overview	See Section 2.6
	✅	Provider Detail	
	✅	Areas & Services	
	✅	Banking Detail	
	✅	Contacts	Important to confirm job assignment notifiers and operating hours are correct
	✅	Documents	Company and compliance document library
	✅	Parameters	Digicall Assist Configured
	✅	Networks & Panels	Digicall Assist Configured
	✅	Rates	Digicall Assist Configured
Compliance	❌	Compliance documents	See Section 2.7- To be completed by provider once registered
Teams	❌	Mobile Technicians	See Section 2.8- To be completed by the Provider once registered
Service Locations	❌	Add New	See Section 2.9- To be completed by the Provider once registered

2.3. Jobs

This module provides an introduction to the Job Section.

The detailed guide on how to process and complete jobs on the Provider Portal is in Module 3.

The Jobs page is the landing/home page when accessing the Provider Portal. You have two display options when viewing assigned jobs:

1. Kanban (Card view)
2. List View (row View).

To access a specific job, you must select the blue hyperlink on the job.

- **Kanban View**

  With a Kanban view, you can visualize all your records as stacks of cards on a board. The different stacks are defined by a designated single select field or single collaborator field; you can click and drag a record card from one stack to another to alter the value in its single select field or reassign it to a different collaborator.
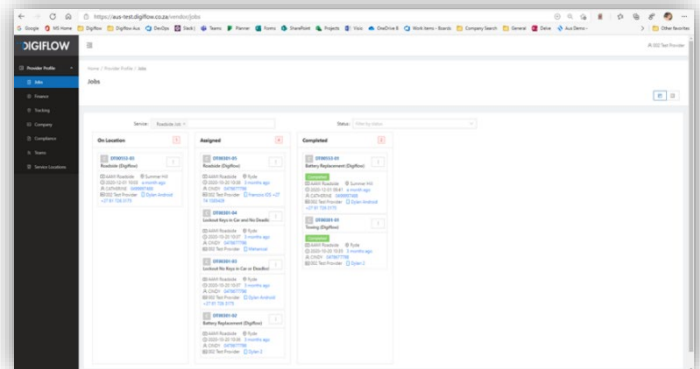
- **List View**

  A List view groups several items and displays them in a vertical scrollable list and content is automatically pulled into the list from the source.

  The List view also list historical cases under a separate tab for a quick access to completed cases.
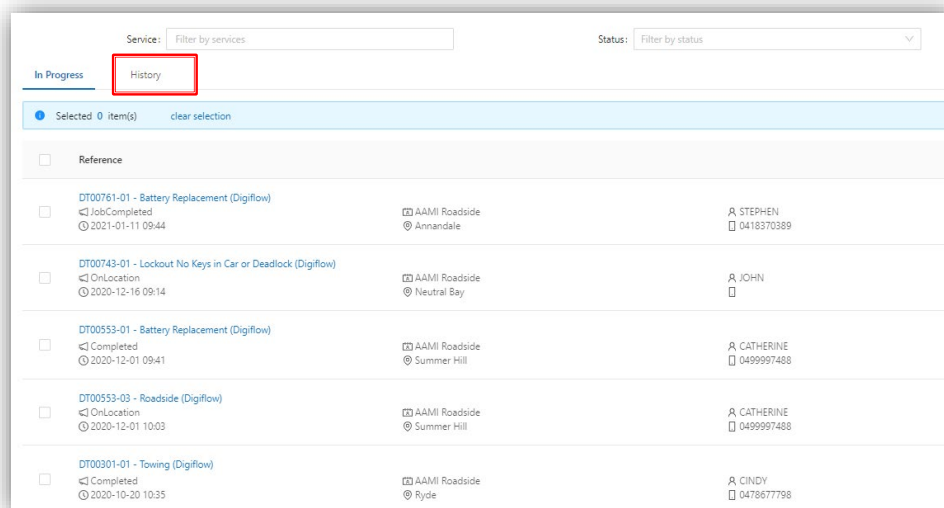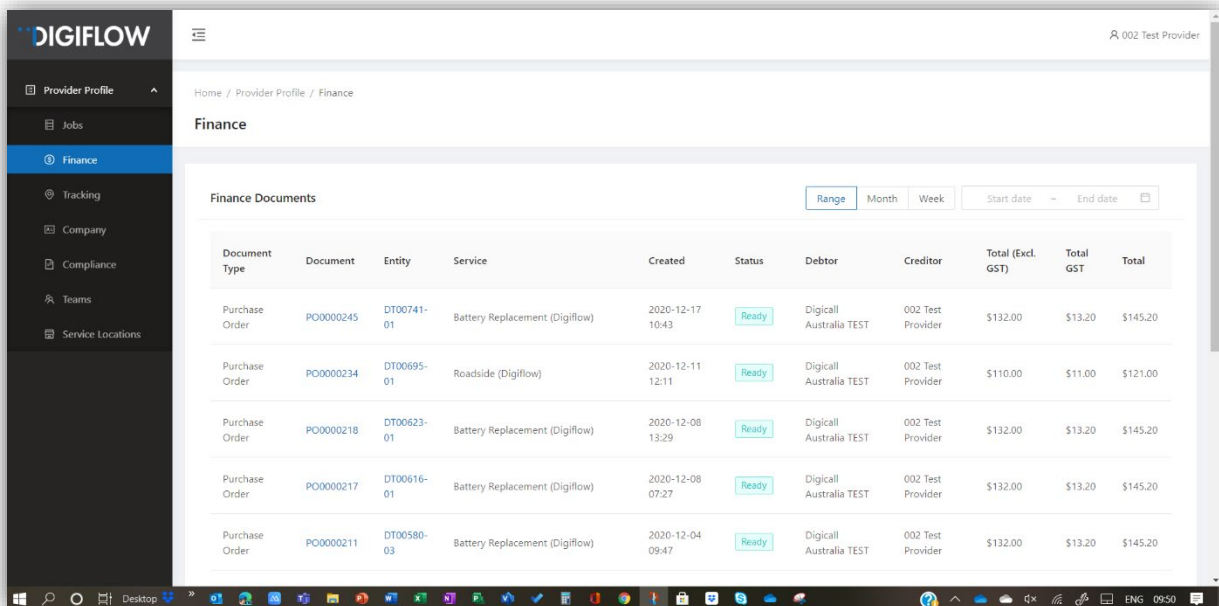
2.4. Finance

The finance section provides you with a list of purchase orders that are either in *draft* or *ready* status.

- Purchase orders are automatically generated once a provider is assigned. The purchase order becomes ready to submit once the job is completed or cancelled.

- Purchase orders amounts will be automatically inserted where cost item rates have been pre-configured.

- Once a purchase order has a "Ready" status on the Provider Portal, you can manually submit the order and create an invoice, alternatively the order will automatically be submitted to Digicall Assist for payment after 7 days from job completion, as per the Service Level Agreement.

- Purchase orders that have been edited, where invoice amounts have been increased or additional cost items have been added, will require Digicall Assist approval. These invoices will automatically be referred on submission.

Purchase orders and invoices can be viewed by selecting the **Finance Label** on the Portal and then selecting the blue hyperlink of the relevant item, Alternatively, you can access a job and select the Finance tab on the job.

- Once an order or invoice is selected, it can either be edited or submitted as per top right functions on the view below:

- The following two options are available when editing a purchase order, as highlighted in red:
  - Edit the pre-configured item rate or amount
  - Add additional items not configured
- Once edited, you need to save the edited item before saving the changed order
- Once saved, you can submit it as an invoice for payment.

- The finance tab also provides a 'search by period' option. This allows you to view purchase orders for a specific period, such as the past 7 days:
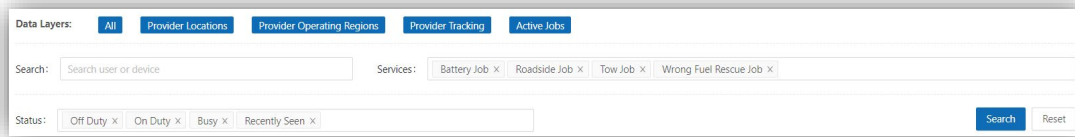 - ➢ Range
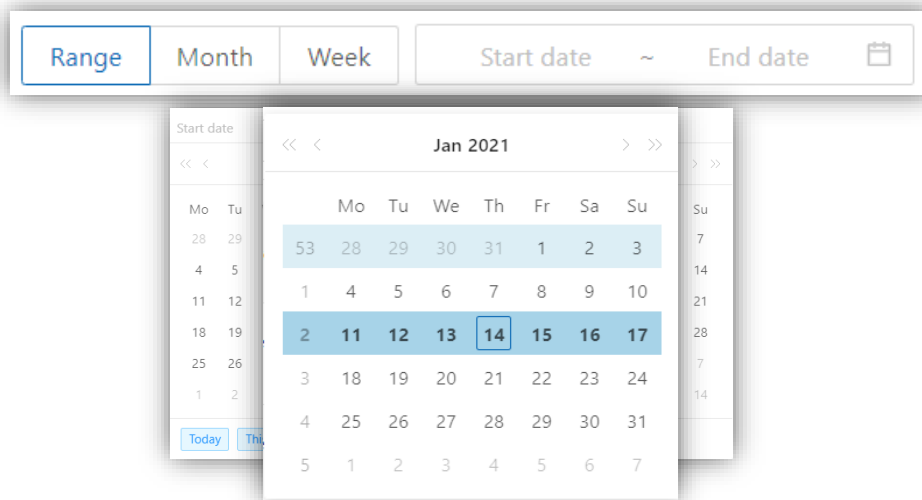
2.5. Tracking

The Tracking tab is a useful tool where you manage locations, regions and mobile teams. There are various filters available to refine your search, but the following is of importance:

- To view any telemetry devices or Provider locations, you need to first select the relevant service and/or services and then activate the All, Provider Location or Provider Tracking options - see Data Layer options

- Active Jobs and Provider Operating Regions are not yet active (coming soon)

- The Provider Location tab refers to service locations

- The Provider Tracking tab refers to the technicians using the Digiflow mobile application (Digiflow Partner) available in the relevant App Stores. (Refer Module 5)
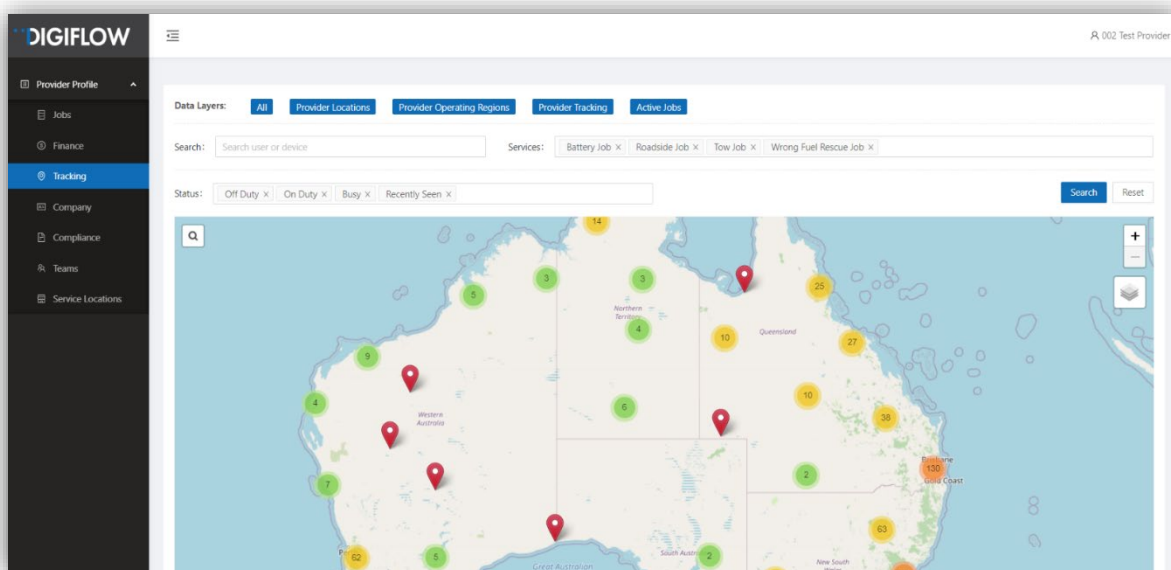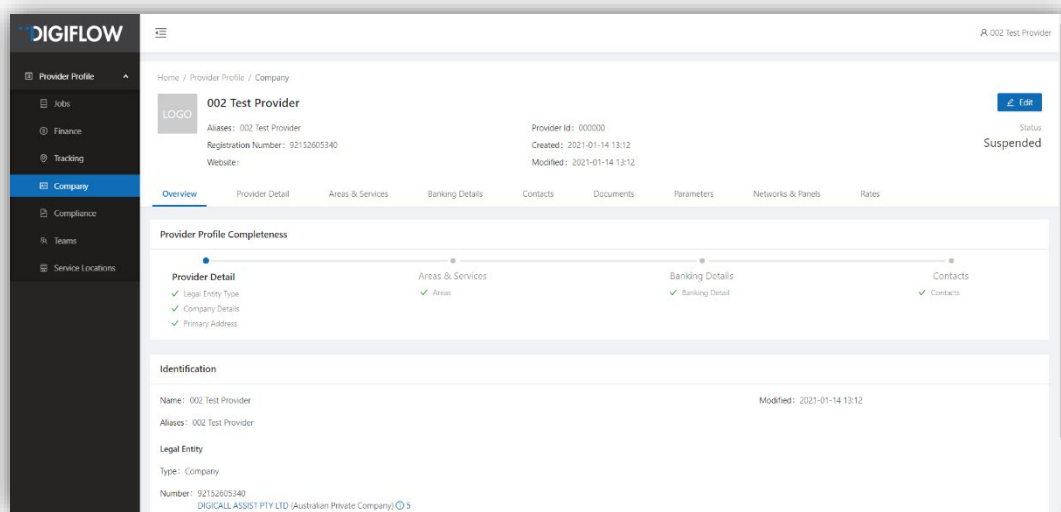
- You can also refine your search further with regards to username or device numbers, specific services or job status.
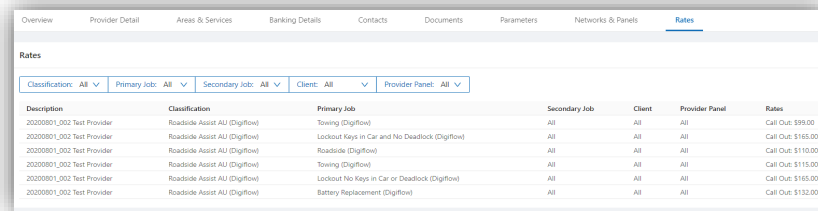

2.6. Company Portfolio

The Company tab enables you to view company related information such as addresses, contacts, services registered for, operational areas, rates etc. You are also able to edit this information when anything changes. This will activate a digital approval and notification process between Digicall Assist and your business.

Overview

- Most of the Provider information is obtained and validated during the registration or onboarding process. This includes:

  ➢ **Provider Detail**

  ➢ **Areas & Services**

  ➢ **Banking Details**

  ➢ **Contacts**

- Other information in the Company portfolio include:

  ➢ **Documents**: - a Library that contains some documentation requested and uploaded during the onboarding process, compliance and business-related documents that are uploaded and/or updated during the agreement period.

  ➢ **Parameters**: - Parameters are configured by Digicall Assist to allow additional functionality with external systems such as third-party software links.

  ➢ **Networks & Panels**: - Associated Provider Networks and Panels will be reflected here. Configured by Digicall Assist.

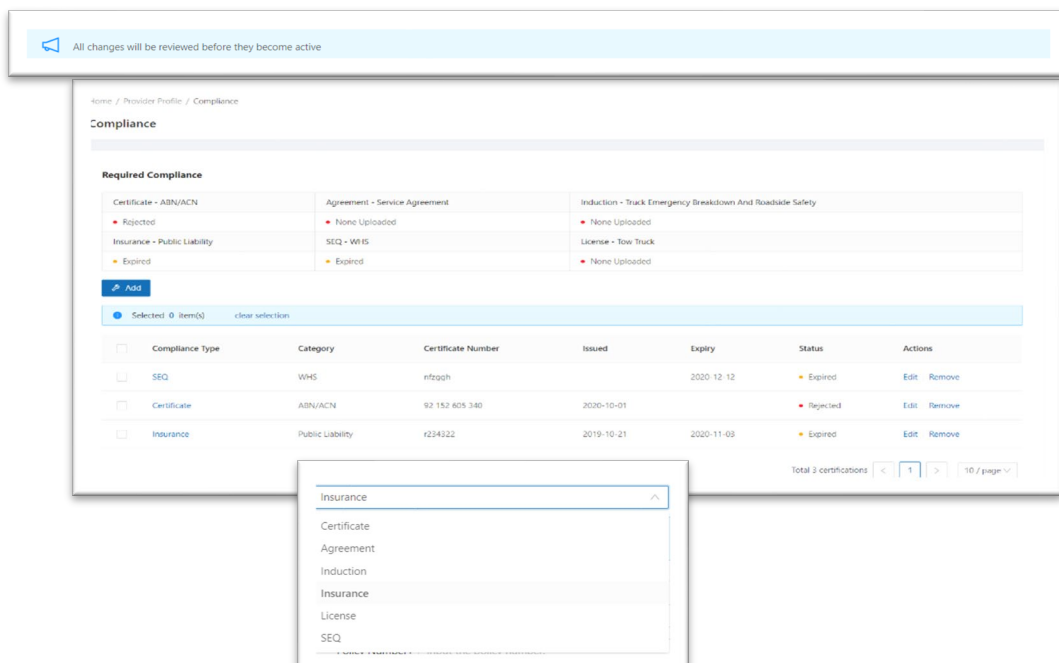> **Rates**: - Rates configurable per service by Digicall Assist.

Editing

- You are able to edit your company details by selecting the Edit function. The process is managed through a built-in workflow that will assist you to follow the process in a specific order, starting with company registration details, head office location, mapped areas and services, bank details and contacts. There are however two additional features that you need to manage and update:
  - ➤ Compliance - refer Section 2.7
  - ➤ Teams - refer Section 2.8

2.7. Compliance

- Digiflow Compliance functionality allows you to manage compliance documents, expiry and renewal digitally. Compliance categories and templates have been pre-configured, and you can therefore just upload the relevant documents and capture the requested information. Once submitted, the compliance will automatically be directed for approval by a built workflow. There's no need to email it to Digicall Assist.

- Once all compliance requirements have been met, built-in workflows will manage expiry, renewals and related notifications. This means you'll be notified automatically.

- As per the image below, the required/mandatory compliance is visible on top of the screen as well as the current status.

- To add compliance documents, simply select **New** and select the relevant category and sub-category, complete the required fields and upload the document.

- Submit

2.8. Teams

Teams facilitates the capturing of technicians / drivers/ device users that need to be assigned to execute a service. It also facilitates the use of the mobile application by these users. Users, whose number has been noted in Teams, will automatically be approved to download the **Digiflow Partner** app from the relevant Store.
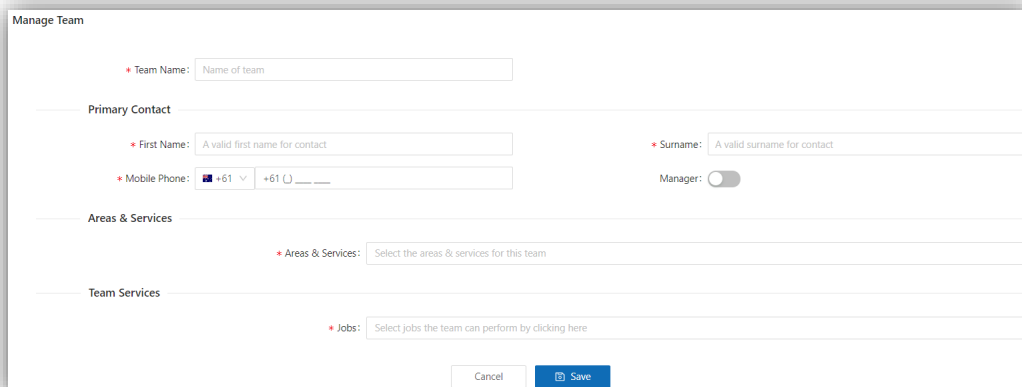
The processing of jobs and tasks on the mobile application is detailed in Module 4.
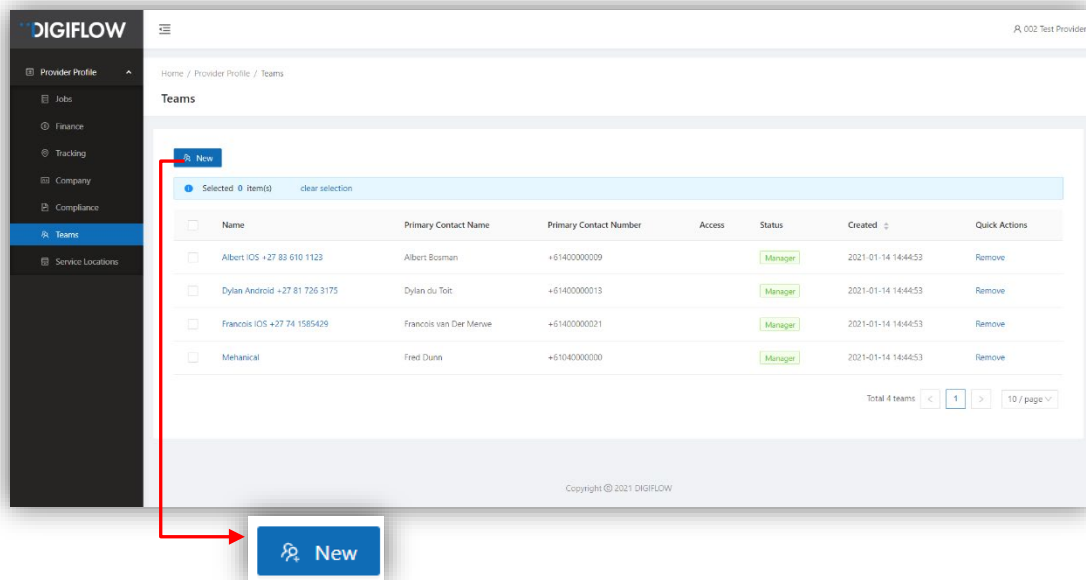
- Adding Service Provider Teams (Mobile Operators) to Provider Portfolio
  - ➢ Select the New button
  - ➢ Select Team Name
  - ➢ Complete Primary Name and Contact Details
  - ➢ Select Areas & Services – A drop-down list of areas and services capture during Provider Registration will be available for selection per team
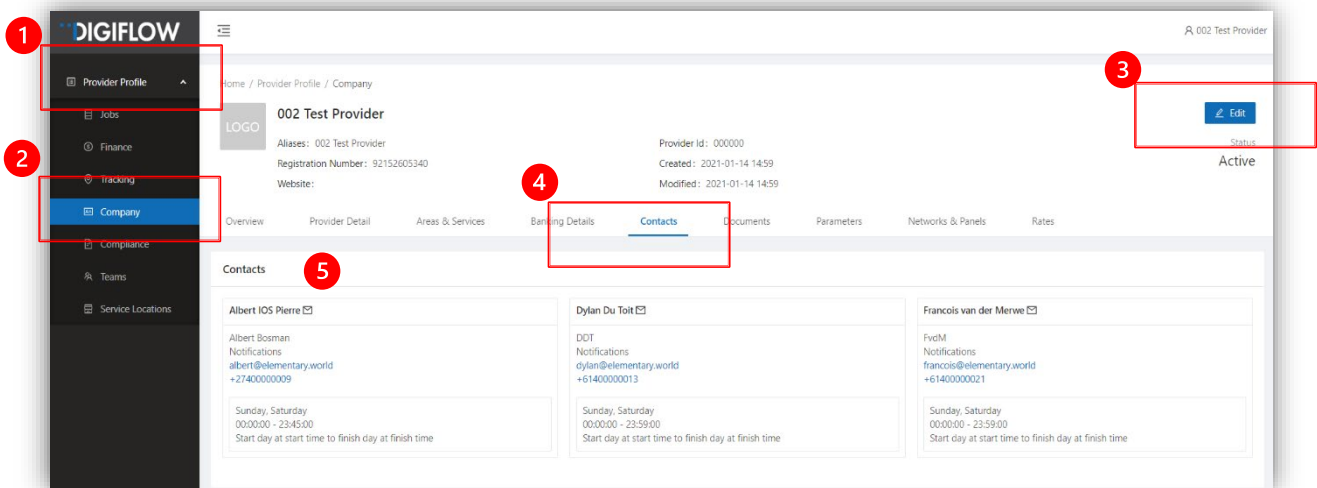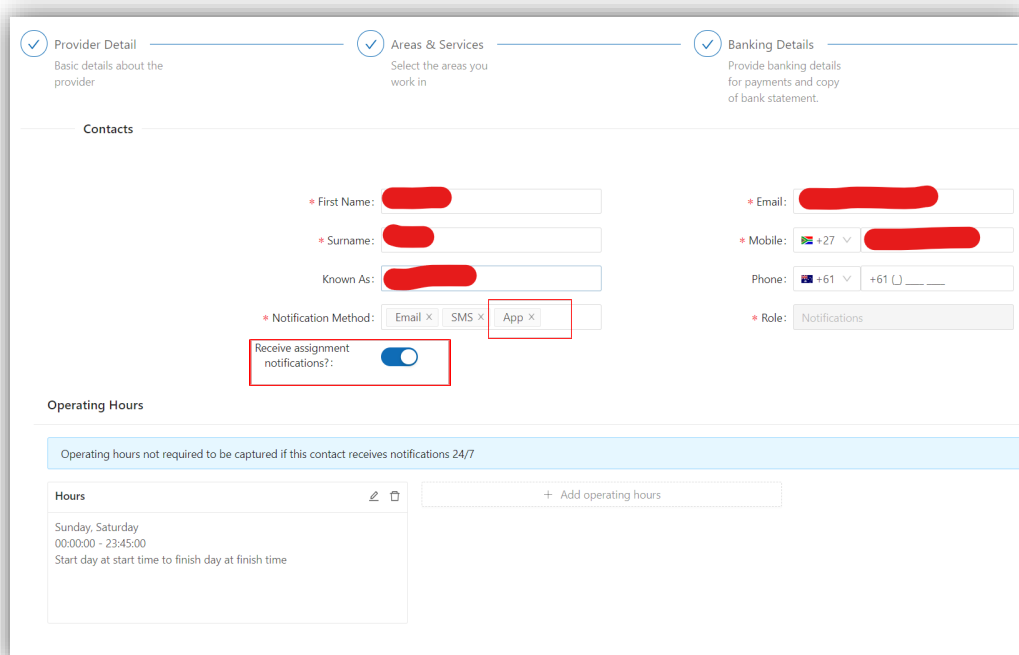 - ➢ Services – Select applicable services
- Adding Team Managers

  The Manager toggle allows Manager Technicians to be notified of new job offers on the mobile application and once accepted, allows the manager then to allocate the job to him/herself, or assign it to another team member.

- **Please Note: Manager Role**

Setting a Team as a Manager will not automatically send job offers to the manager. To enable this, the manager must be added to "Contacts" in the Company Profile as well and set toggle "Receive Assignment Notifications" to on and "Notification Method" must include "App". The same mobile number must also reflect in the Team and the Contact. Therefore:

➢ Set Team "Manager" Toggle to On

➢ Capture Manager details in Contacts

➢ Select App as "Notification Method"

➢ Select "Receive Assignment Notifications" toggle to On

➢ Set "Operating Hours"

➢ Go to the relevant App Store (Apple for IOS or Google for Android)

➢ Download Digiflow Partner App and install

➢ Register on App

2.9. Service Locations

Service locations are relevant to Providers who operate from different facilities or with Towing companies, who have several facilities. Capturing the relevant locations enables Digiflow to direct and assign jobs most appropriately. Therefore, it's important that you add your relevant service locations:

- Select "New" location

- Select suitable Name

- Select Categories – configured by Digicall Assist:

  - Select relevant category such as tow yard, area office; Service centre

  - Select relevant sub-category if applicable. Example for a Service centre might be relevant OEM badges

- Add web link if applicable

- Submit.

---------- END OF MODULE 2 ----------

Module 3 – Job Processing focuses more specifically on Jobs on the Provider Portal. Follow the steps in that module to learn about relevant views, accessing information available, and how to process a job.

Contact:
Luke Laurence
Digicall Assist Provider Network Manager
Luke.laurence.@digicall.com.au