DIGIFLOW

MODULE 3 – JOB PROCESSING
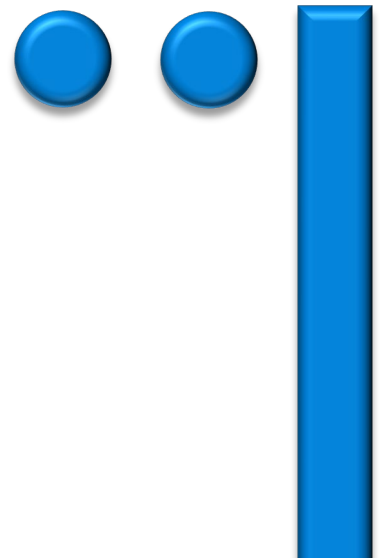
Table of Contents

1. OVERVIEW

Module 1 details the registration and onboarding process for Digiflow. Module 2 introduces the key features of the Provider Portal.

In this Module 3 we focus more specifically on Jobs on the Provider Portal. Follow these steps to learn about relevant views, accessing information available, and how to process a job.

Module 4 expands on processing jobs but deals more specifically with the Provider Mobile Application.

2. JOBS HOME PAGE

2.1. Select a Job View

The default landing or home page when you access the Provider Portal is the "Jobs In-progress" Kanban view, which lists the jobs in status grouped columns. To view "Jobs In-progress", you can select either a Kanban (card) or List view. New jobs will automatically be added to the lists as soon as a job offer is accepted by the Provider via email, SMS or the Mobile Application.
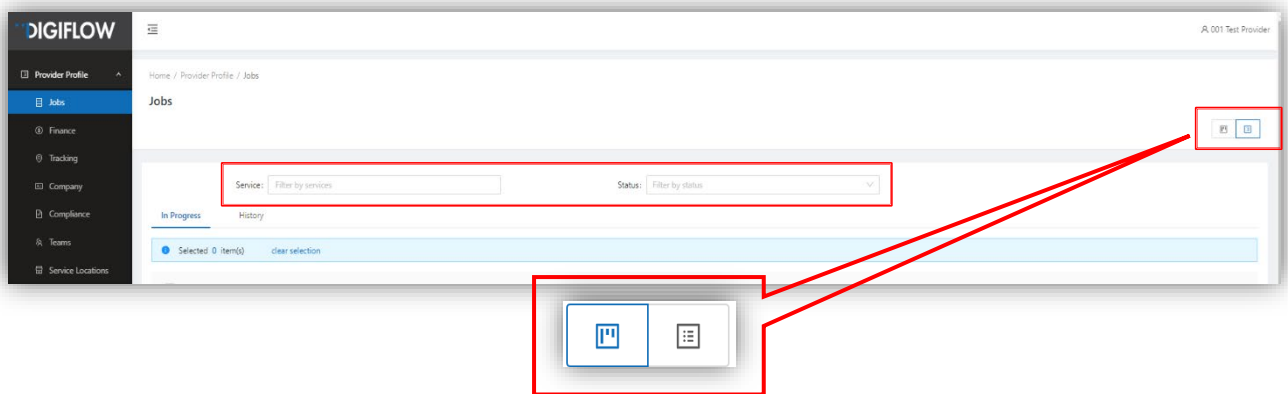
The different views provide alternative options to view the data.

2.2. List View

The Kanban (card) view is the default view when accessing the Jobs page. To switch to the List view, use options in top right corner of Jobs page view as per above image.

Note the following:

- The List view does not have a "Quick Action Shortcuts" to process tasks on in-progress jobs. To process tasks and actions in this view, you need to first select and access the job from the list and then proceed by completing the tasks and actions on the actions menu.

- The List view however presents you with two tabs: the "In Progress" and the "History" tabs. The History tab lists all the completed jobs (History jobs are not accessible via the Kanban view)

- **IMPORTANT NOTE:** THIS LIST VIEW IS THE ONLY WAY YOU CAN ACCESS COMPLETED JOBS

List View Example:
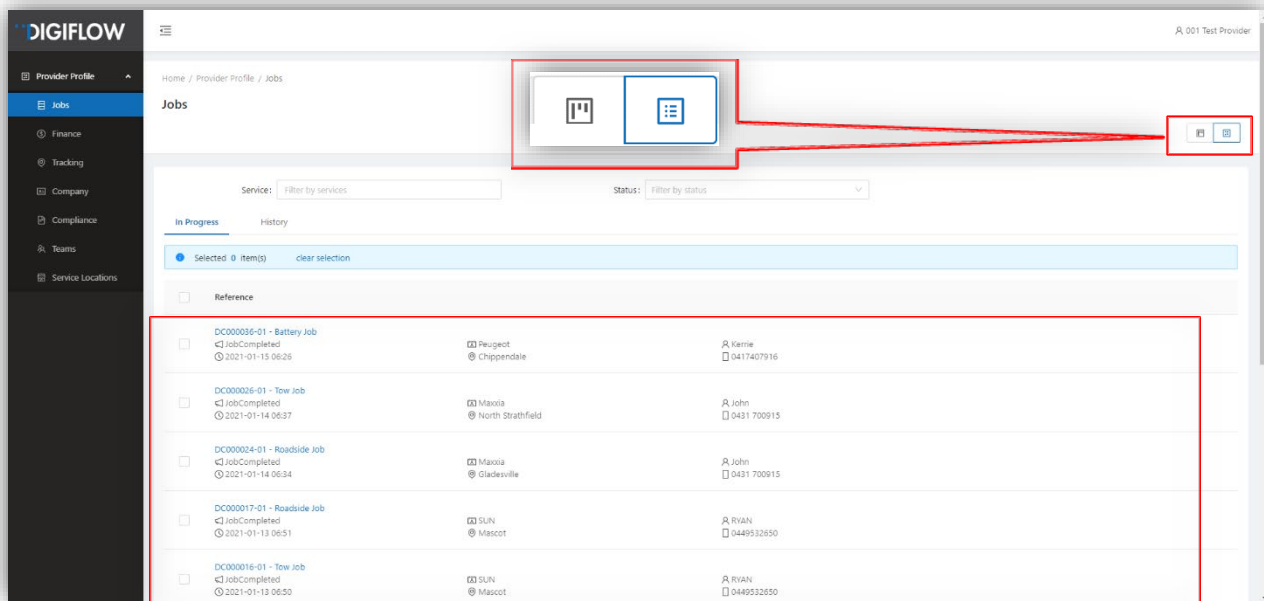
2.3. Kanban View

The Kanban view is a quick job view grouped by the relevant status. Statuses include Unassigned, Assigned, En Route To Location, On Location, En Route to Destination, Arrived At Destination and Job Completed. For the purpose of this module and further illustration of the Jobs features, the Kanban view will be the default use case.
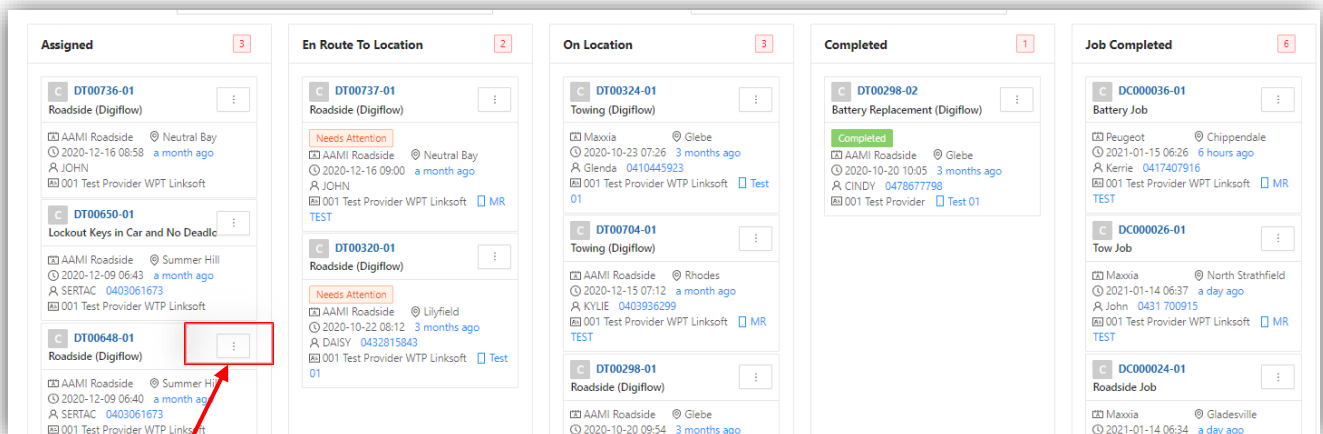
IMPORTANT NOTE: THIS VIEW PROVIDES THE USER ACTIONING A JOB A SHORTCUT TO ACTIONS AND TASKS, WITHOUT NEEDING TO ACCESS THE SPECIFIC JOB, BY SELECTING THE 3 DOT MENU

2.4. Job Filters

The **Job** page providers a filter function for you to select specific job types and or status.
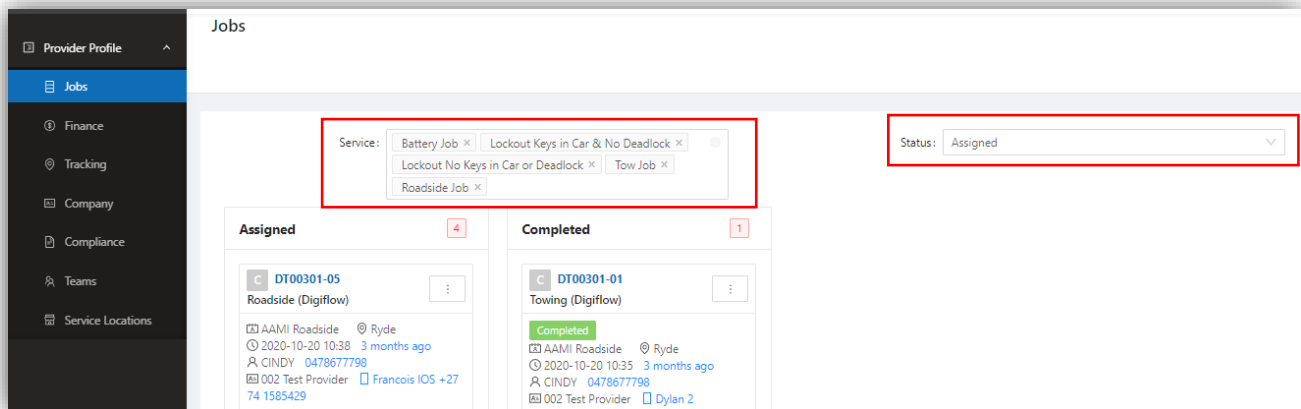
3. HOW TO VIEW JOBS, ACTIONS AND TASKS

To access an assigned job, you can choose to view the job on the Provider Portal or on the Digiflow Partner application, which is currently supported for Android and IOS mobile phones.

The mobile access is limited however with regards to information. It is more action and task orientated.

When entering a job on the desktop Provider Portal, you will have full access to all case and job information, as well as additional features such as finance, tracking, documents, timeline.

3.1. Jobs Quick Action Shortcuts

This feature facilitates a speedier update of job statuses and tasks without accessing the case and job to view all details. The tasks and actions are the same as when accessing the case in full or attending to the job on the Digiflow Partner application and will be explained in the "How To Process A Job" section.

A few examples of the Kanban "Quick Action Shortcut" accessed via the three dots menu:

Assigned Job Shortcut Actions
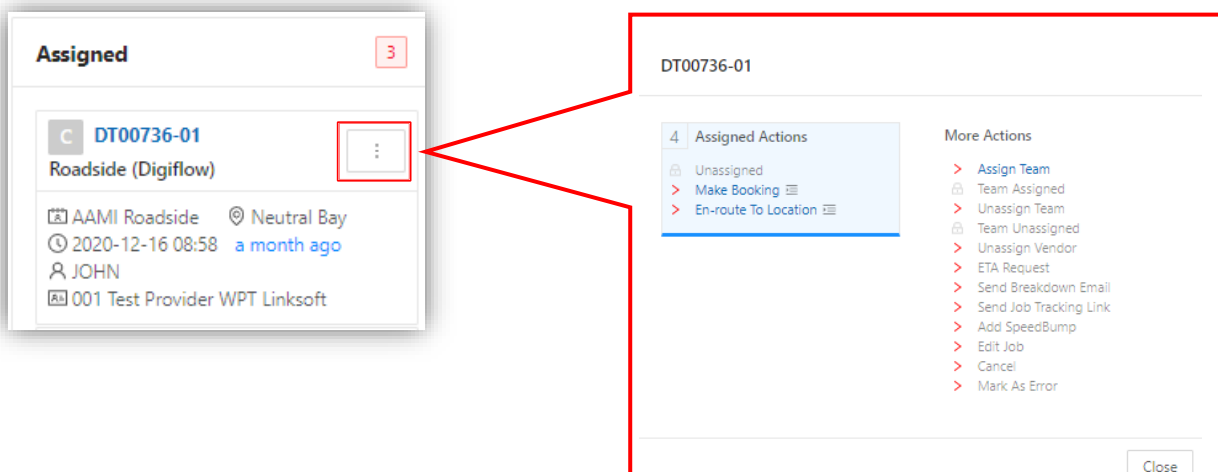
3.2. Case and Job Preview

Accessing a job on the Provider Portal not only allows you to action tasks and complete jobs but also provides much more information and functionality. To access the case and job, select the blue case reference hyperlink on the job card or list view.
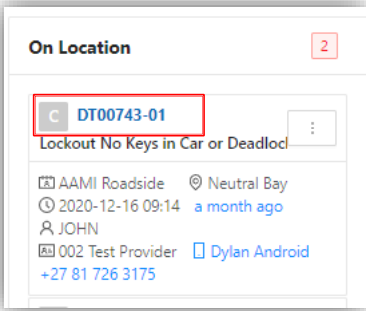
The default view when accessing a case and assigned job as per below illustration:
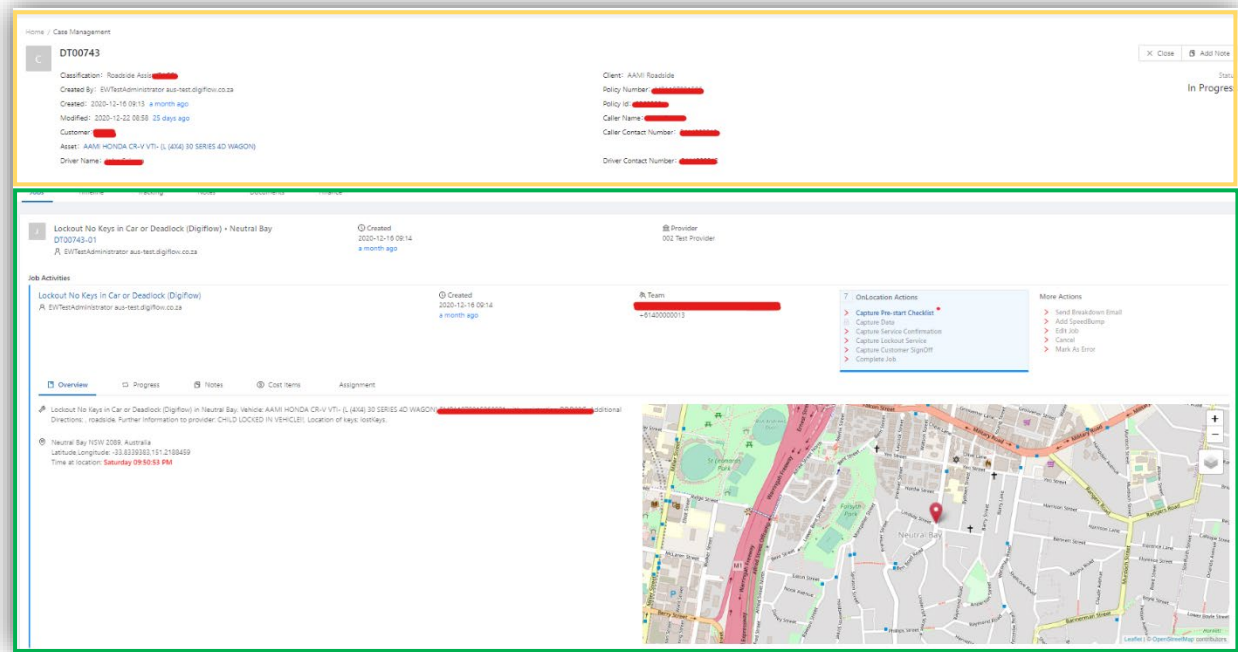
The case view can be split into two sections as per coloured blocks above:

- Case information with the relevant case tabs and case status
- Job information with the relevant job tabs, activities and job status. Multiple jobs can be viewed on a single case.

3.3. Case Information

Case information provided includes policy, client and customer detail, asset detail, relevant dates, relevant contact numbers and driver details. You can also add notes on a case level.

Below we step through the Jobs, Timeline, Tracking, Notes, Documents and Finance tabs.

3.3.1. Job Tabs

The Job tab has the following features:

- Relevant job information

- All linked jobs on a case

- Task action menus that can be completed by the Provider. This includes assigning and unassigning teams, cancelling jobs, completing tasks etc. Some of these actions are greyed out or inactive – if so these are a Digicall Assist feature and not yet relevant depending on the progress of the job. See example image below:
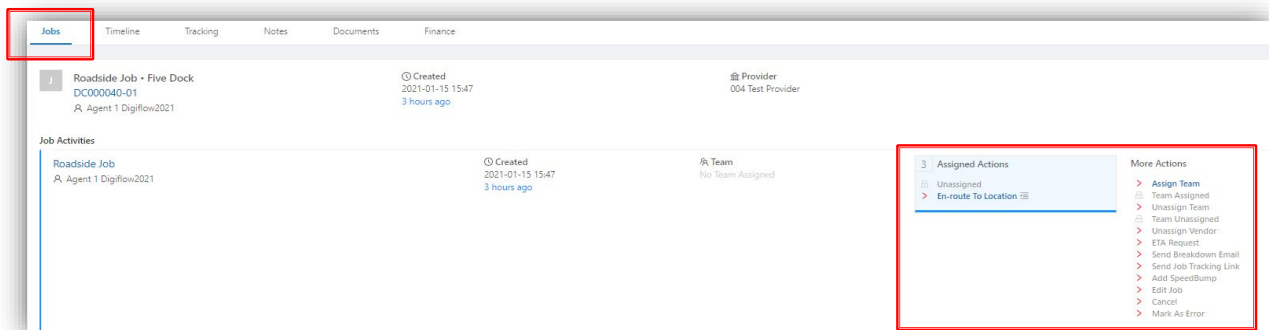
The **Job** tab also has secondary tabs to provide you with further information:
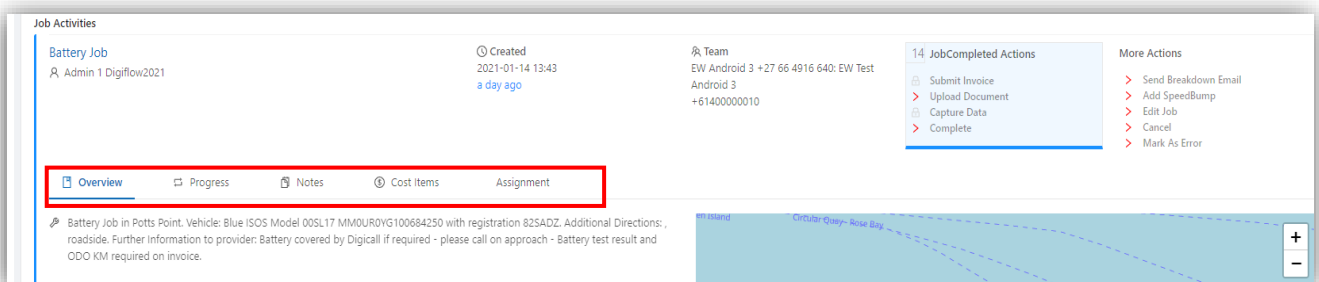
- Overview Tab – a summary of the incident details and a mapped location view.

- **IMPORTANT NOTE** – ADDITONAL INFORMATION CAPTURED BY THE AGENT FOR YOUR ATTENTION WILL BE REFLECTED HERE.
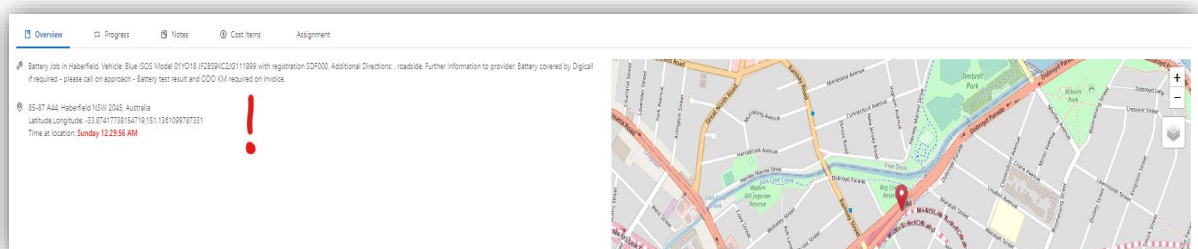
- Progress Tab - details the workflow progress in real-time if the tasks are completed on the Provider Portal and/or the Digiflow Partner application:

- Notes – same as case notes. Can view and add notes to jobs.

- Cost Items – Digicall Assist Office Use Only

- Assignment Strategy – Displays the Provider Assignment status. All the Providers who were offered the job will only be visible to Digicall Assist.

3.3.2. Timeline

The **Timeline** presents a chronological event-based view of the incident, including actions taken, responses received, data captured together with images and telemetry. The data is compiled from all the Digicall and Provider Portals, as well as all integrated applications such as the Digiflow and Client Consumer Apps, as well as the Digiflow Partner App.

3.3.3. Tracking Tab

You will be able to track all your technicians who are registered on the Digiflow Partner App whilst they are On Duty or processing a job, via the mobile application workflow. A future feature will allow you to replay the tracking of any completed jobs as long as the mobile app was used.
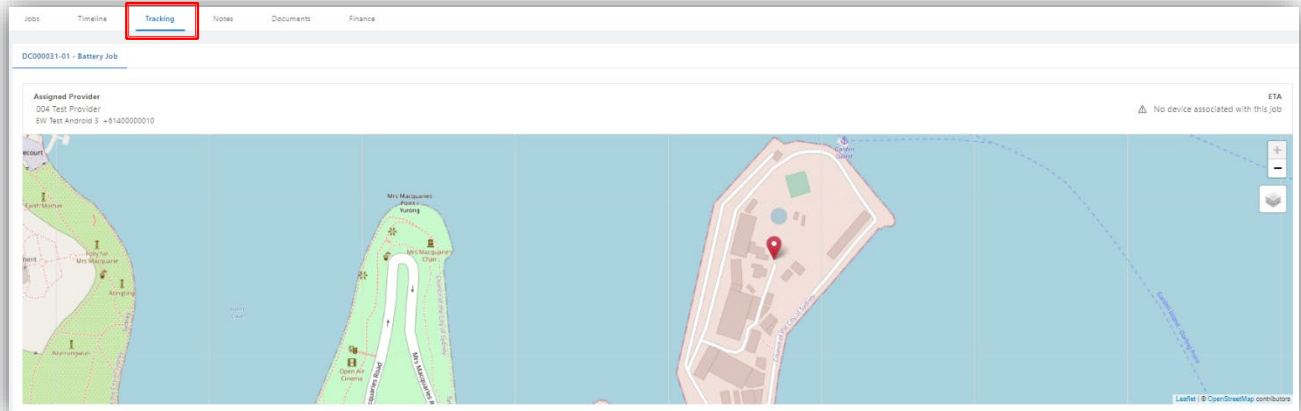
3.3.4. Finance Tab

You can access the financial documents of each job via the **Finance tab**. This is similar to the Finance Label in the Provider Portal detailed in Module 2. You edit and submit your invoices in exactly the same way as per the Finance Label process. You will also be able to view the transactions on completed jobs.
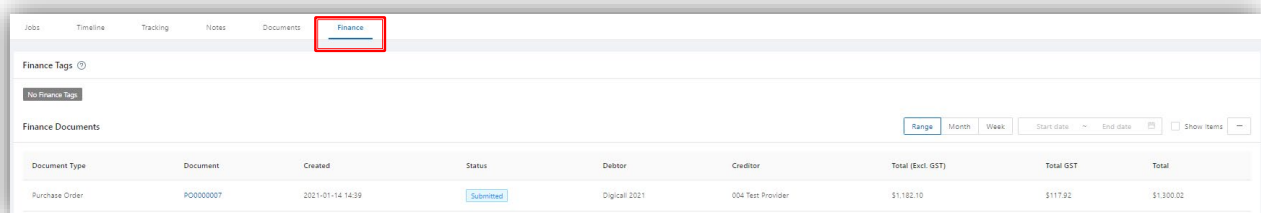
3.3.5. Other Tabs

- Notes – Providers are able to view public notes created by Digicall Assist users and also add own notes for public reference.

- Documents – Providers are able to upload additional documents to the case library if applicable. This might be a warranty, invoice, additional images etc. Public documents uploaded by Digicall Assist users will also be visible.

4. JOB START TO FINISH

4.1. Accept the Offer
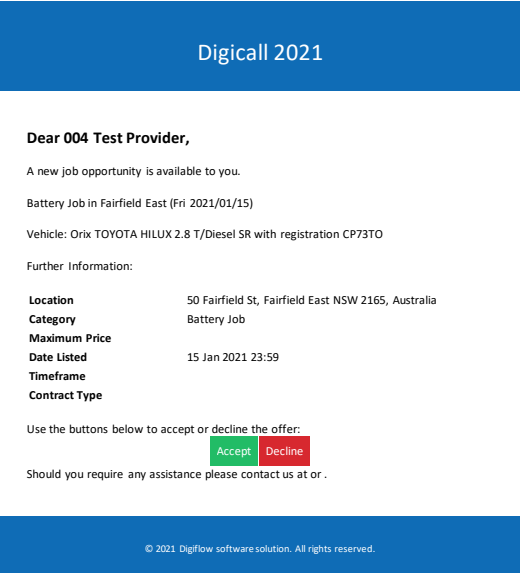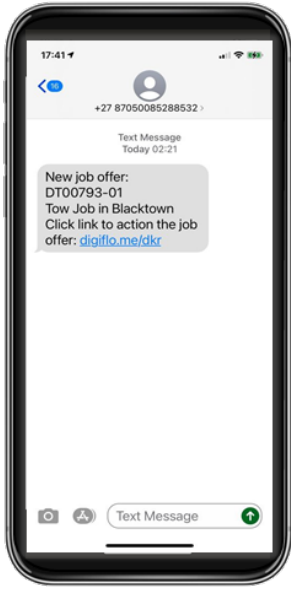
4.1.1. Job Assign Strategy

As soon as a Digicall agent has captured the case and job details or a customer effected the same on the consumer application, the job will automatically assign. Job offers follow the Digicall Assist Assign Strategy that automatically considers panel hierarchies, service areas, services, compliance fulfilment and, in future, customer scoring (CSI) of the Provider. All jobs will auto-assign for a maximum of 10 minutes, attempting 3 providers as selected by the assign strategy. If a job is not assigned successfully in this timeframe it will revert to manual assignment and escalate to Digicall Assist management.

When the assignment cycle starts, the first Provider selected will have 3 minutes to accept the offer before a second Provider is offered the job. After another 3 minutes, if not accepted, a third Provider is added. The first and second Providers will however still be able to accept the offer until the full ten minutes have elapsed.

IMPORTANT NOTE: THIS ASSIGN STRATEGY IS THE CURRENT PROCESS AND IS SUBJECT TO CHANGE

4.1.2. Receive Job Offer Notifications

- Job offers to Providers preferences are configured in Contacts, as detailed in Module 2. To update your contacts, access the Provider Portal and select: Provider Profile > Company > Edit > **Contacts**

- The following options are available. You can elect a single or multiple notification methods.

- Accept the job offer to start the process

Email	Digiflow Partner App	SMS
When you accept the offer on an email link, it updates the offer status automatically and redirects you to the Provider Portal.	When you accept a job via the App, a window will open allowing the App handler to assign the job to themselves or another team.	When you select the offer on a SMS link, it redirects you to an 'offer accept' or 'decline' portal. On acceptance, the user is redirected to the Provider Portal.

4.1.3. Receive Job Offer Status Confirmation

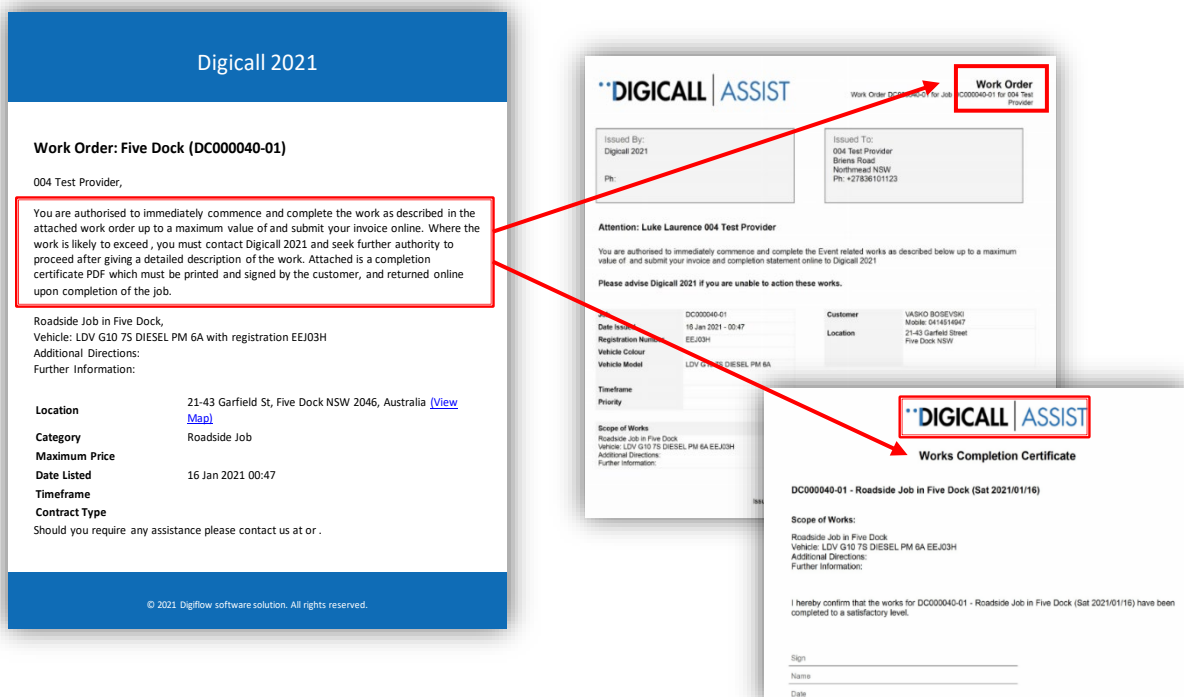- Email confirmation – Success
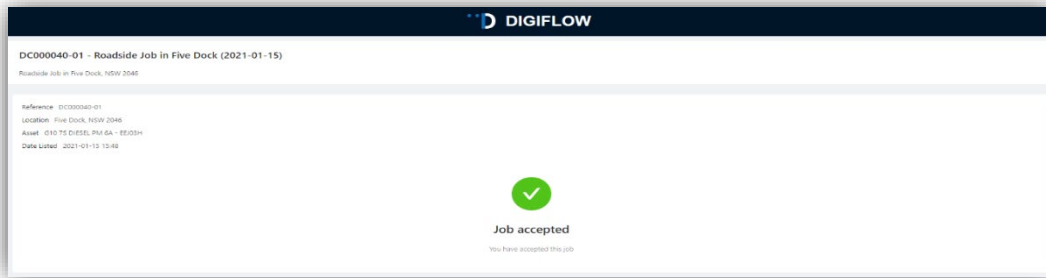
- Email confirmation - Fail
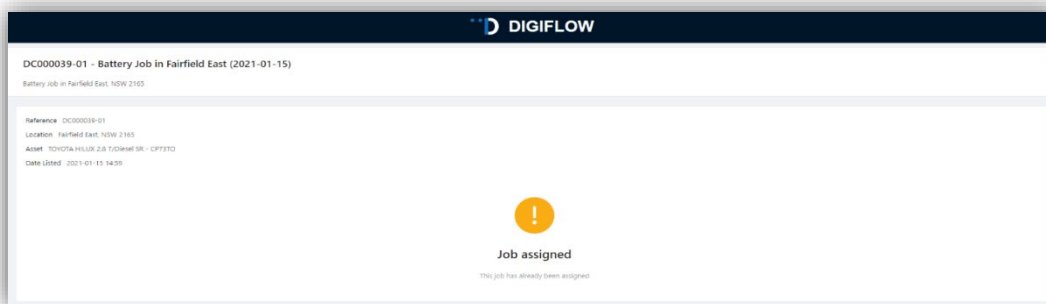
4.1.4. Receive Offer Accepted Supporting Documents

- You will receive a Work Order confirmation email on a successful job offer acceptance and a Client Certificate, which needs to be printed and taken by the technician to the incident location for client signature.

4.2. Assign a Team or Technician

4.2.1. Assign Team on the Provider Portal

- Assign the relevant technician via the **Action Shortcut** or **Job Actions**
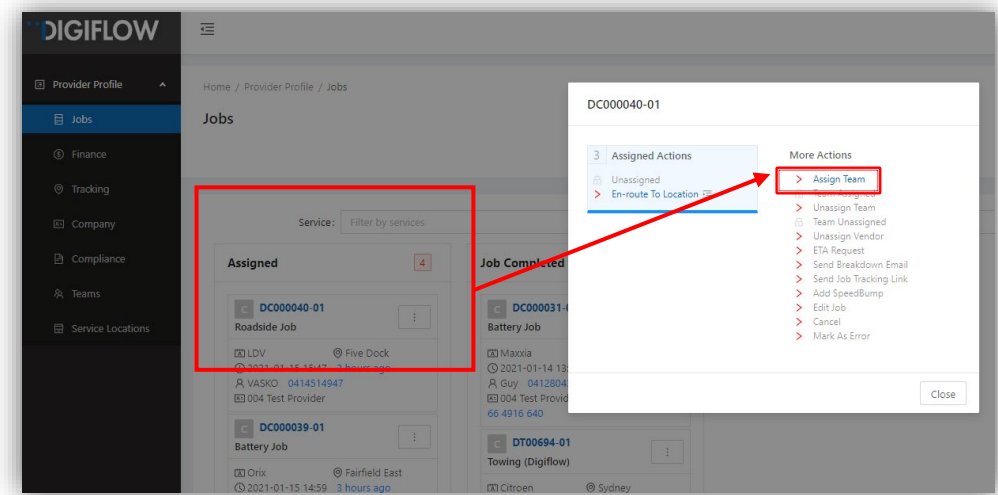
- Once assigned you need to note the selected technician or team on the job information. You're also able to **un**assign a team/technician and reassign the job on the Provider Portal with the More Action Menu functions.

- If a technician or team has installed the Digiflow Partner app and a job is assigned through the Portal to that technician, the job will display on the Partner app, and actions can be completed on either the mobile app or the Provider Portal.
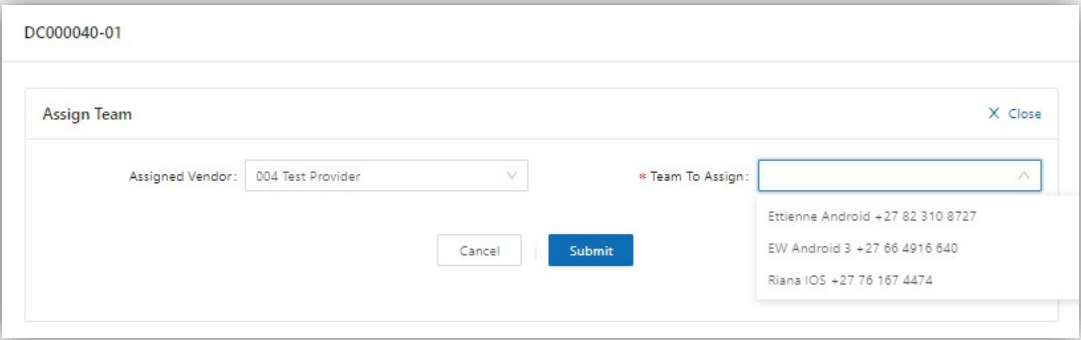
4.2.2. Assign Team on the Digiflow Partner Application

Accepting and allocating a job on the Digiflow Partner Application:

- Step 1 – Accept Job on the app – you'll then see a confirmation message

- Step 2 – Open Unassigned Jobs Tab on the app and select the relevant Job

- Step 3 – Assign Team. Managers are able to select any of your Team members who are included on the Provider Portal for the relevant service and area. If you assign the job to another team member, your manager app will display a 'successful' message.
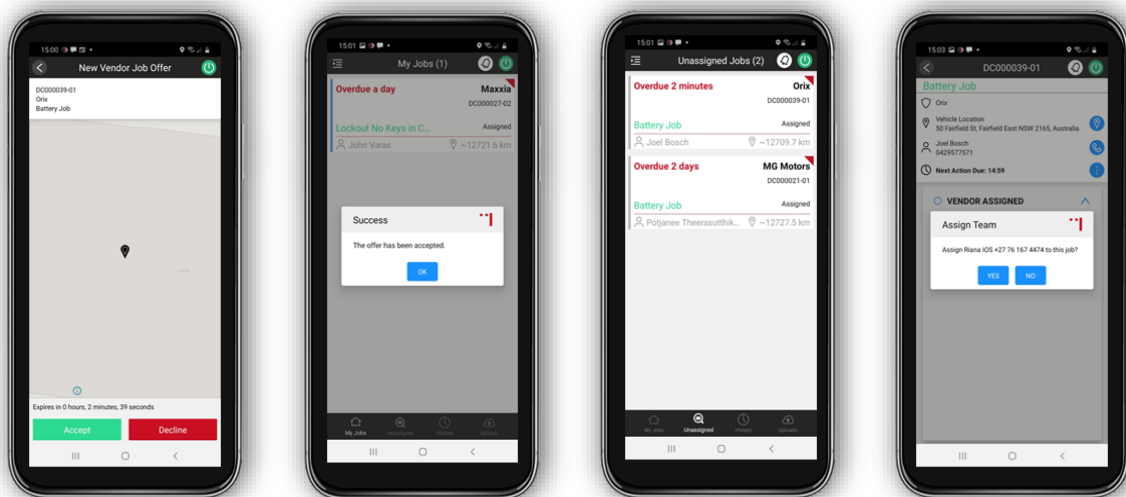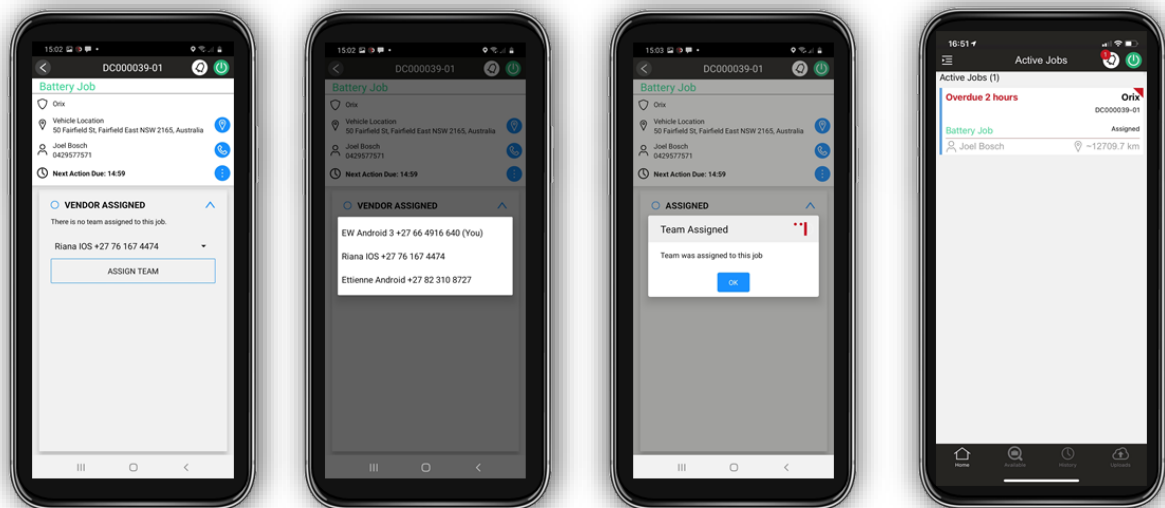

| 1. Accept Offer | Receive Confirmation Offer | 2. Open Job | Claim Job? |

| 3. Assign Team | Select Team | Confirm | Team Active Job |

4.3. Complete the Job Tasks

Your teams are now able to complete the required tasks through the app, or by submitting or capturing the information received from the scene directly onto the system via the Provider Portal. Tasks are service specific.

4.3.1. Mobile Application

The tasks to be completed on the Digiflow Partner app are job specific and exactly the same as on the Provider Portal. Module 4 details the app registration process and the app job tasks in more detail.

### 4.3.2. Provider Portal Job Workflow Tasks

Once a team or technician has been assigned, the tasks will automatically be presented (Assigned Actions as per image). As they are actioned and updated the job progresses and triggers new actions in the workflow.

The following steps are part of the job workflow for a Battery job once a technician has been assigned:

- Step 1 – Select En-route To Location and submit ETA when starting journey.
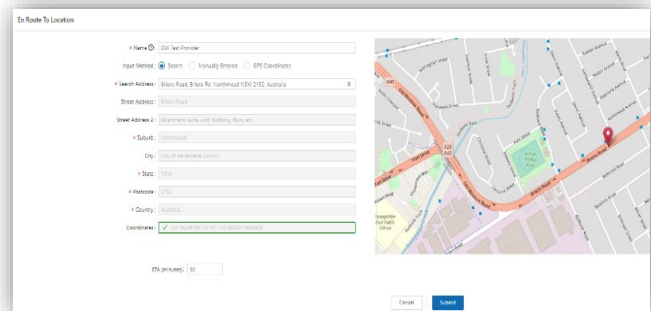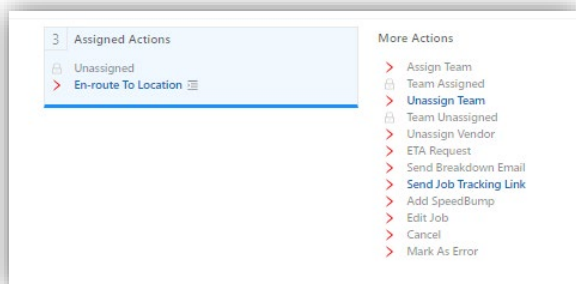
- Step 2 – *Select Arrive At Location* on arrival and submit if address is displayed correctly:
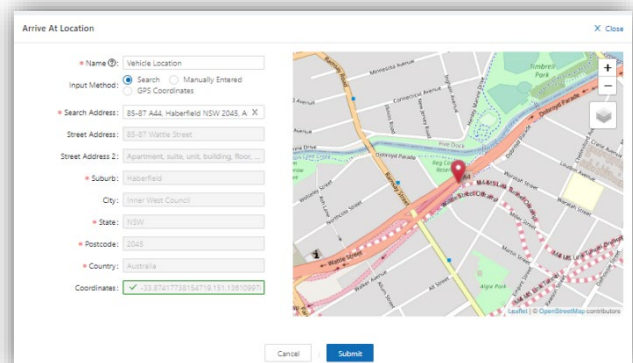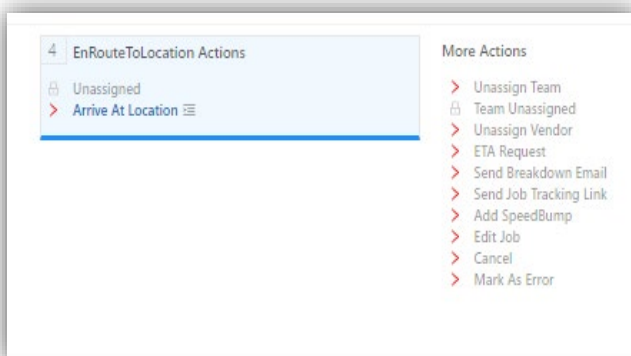
- Step 3 – *Capture On Location tasks*. This is specific per service type and prescribed by Digicall Assist. The customer, asset and incident needs to be recorded correctly with relevant images. As can be seen from the image below, the tasks include:

  - Capture Pre-start Checklist – generic for all jobs

  - Capture Service Confirmation – generic for all jobs

  - Capture Battery Service – service specific tasks

  - Capture Customer Sign-off – generic for all jobs

  - Complete Job – generic for all jobs and requires only Provider additional comments if applicable.
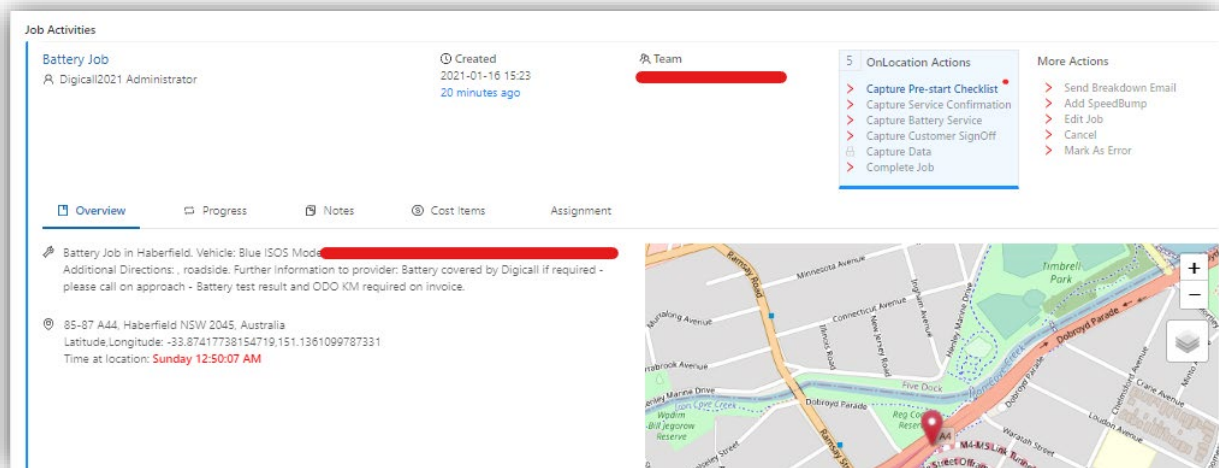
IMPORTANT NOTE: THE PROVIDER NEEDS TO COMPLETE ALL THE TASKS BEFORE AN INVOICE CAN BE GENERATED. ONCE THE 'COMPLETE' JOB STATUS IS ACTIVATED, THE PURCHASE ORDER WILL BE AVAILABLE FOR CONFIRMATION AND IS READY TO BE SUBMITTED
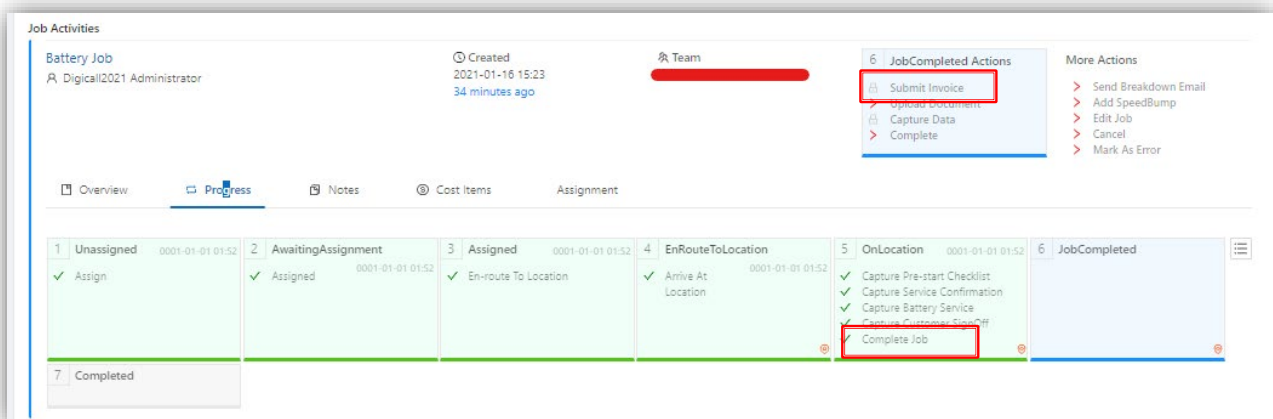
---------- END OF MODULE 3 ----------

In **Module 4 – Mobile Application** you are guided through
the different aspects of the Digiflow Partners Mobile Application.

DIGIFLOW

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