



*Automate your service business*

## **Business Process Management Overview**

WorkflowPoint incorporates a fully integrated Business Process Management (BPM) module.

This module can create a generic workflow for a job, that exactly matches an organisation's existing workflow. When the *Automatic Job Creation* option is used, a custom job workflow can be attached to a specific Insurance/Trade customer.

A job is actioned by roles or groups. For example; if you want the CEO of the company to review a job and take action, then the job would be allocated to the **CEO role**. If, on the other hand, you want someone to make a booking, then you would allocate the job to the **Branch Operations group**, so any user that has the **Branch Operator** role allocated to them, can take action. An unlimited number of roles or groups can be created.

The BPM module provides the following capabilities:

### **Automatic Job Creation**

Jobs can be automatically created by simply formatting the job as an XML or DOCX file, that is automatically read by WorkflowPoint.

### **Automatic Branch Allocation (Territories)**

After a job has been created, it can be automatically allocated to a branch, based on the postcode/zipcode territory groups that are allocated to each branch.

### **BPM Forking**

A fork within a workflow occurs when a test is carried out on the data that is linked to a job, and depending on what data is tested, and what result is obtained, the workflow for the job may go down any number of workflow paths.

For example, a built-in fork that can be utilised quite easily is the *Branch Automation Level*. If a branch is first learning WorkflowPoint, their automation level may be set at *HQ Controlled*, so all their jobs are processed by HQ. When HQ sees the jobs have the correct data attached to them, HQ may then promote that branch to *HQ Vetted*, where HQ just quickly previews each job. Once HQ is sure that the branch knows how to use WorkflowPoint, then HQ would set them to *Branch Controlled*.

Another example is checking the job type; if it's a warranty then another custom workflow can execute.

### **SMS Notifications**

At any stage of a workflow, the customer can receive a custom SMS.

### **Patent Pending Functionality**

A methodology that cannot yet be released due to the patent process, will put WorkflowPoint far ahead of the competition.

### **Add-On Services**

These services allow an unlimited number of features to be added. Currently, there are incoming and outgoing email services, accounts integration services, and branch notifications, just to name a few.

For further information, please contact:

PrimeKey Pty. Ltd. (ACN 40 089 251 810)

PO Box 515

Wanneroo WA 6946, Australia

Tel +61 8 6118 2388

Email: sales@primekey.biz