

**Accelerite’s**

**Mobile Workforce Management**

<Customer name>

**Proposal submitted by: <>**

**Date: <>**

## Scope of Proposal

Accelerite’s Mobile Workforce Management (MWM) is a cloud-based platform that turns all your mobile phones into tools that enable you to enhance field service productivity, reduce field operation costs and increase customer satisfaction. MWM works on smartphones with installed MWM app and on basic phones (i.e. without GPS or data capability) equipped with our partner operator SIM cards.

This comes with a risk-free and flexible commercial model that allows you to pay as you grow.

MWM is available as a service in two cloud-based, multi-tenant editions, MWM Basic and MWM Standard. Refer [Annexure](#_Annexure) for the detailed list of features.

**MWM Basic** is ideal to get real-time field insights and alerts, locate your field staff in real-time and to get insights into field staff performance.

**MWM Standard** is a comprehensive solution that includes MWM Basic along with smart task management to empower your field staff and optimally schedule and dispatch work.

In the current scope, <customer name> is looking to utilize Accelerite Mobile Workforce Management Basic/Standard edition for <use case & scope>

This document provides a functional overview of Mobile Workforce Management as well as commercial proposal for <customer name>

## Pricing

**MWM Edition: <<Basic/Standard>>**

**One time setup fees:** << to be added >>

**Customization fees:** <<to be added>>

**License fees (per user per month):** <<to be added>>

## Proposal Terms and Conditions

|  |  |  |
| --- | --- | --- |
| **Period** | **Minimum commitment**  **( resources )** | **Remarks** |
|  |  |  |
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|  |  |  |

### Terms and Conditions:

* Accelerite MWM is a cloud based, multi-tenant platform.
* A field resource can be queried for location only once in 10 minutes such that the overall load is evenly distributed across the 10 minutes interval.
* For basic phone support, consent from field resource will be required as per regulatory/telecom operator guidelines
* <customer name> and any users of the end solution will need to comply with the Legal Notices and Acceptable Use Policies as defined by Accelerite, based on what is followed by Mobile Operators in the country, and as communicated by Accelerite.
* <customer name> and any users of the end solution will need to comply with Google Maps Terms, Legal Notices and the Acceptable Usage Policy (AUP) as detailed by Google on its website from time to time.
* Any specific additional requirements will need to be discussed separately.
* Either party may terminate the agreement with a 30 day notice.
* This proposal and budgetary quote may be revised if any of the assumptions and/or terms are invalidated/changed.
* The quoted price is exclusive of all applicable taxes.
* This proposal expires on <>.

### Support terms and SLA

* Service uptime SLA
  + 99% uptime

### Support Coverage

|  |  |  |
| --- | --- | --- |
| Issue | Support Timings | Support Channel |
| Severity 1 | 24x7, On call phone support. | Phone |
| Routine support | 9:00 a.m. – 06:00 p.m. IST.  On standard business working days. | Web Portal/Email |

## Annexure

### MWM Basic: Key Features

#### **Field Staff Tracking**

* Office staff can view real-time location of all checked-in field staff on an intuitive map interface; location polling interval is configurable at enterprise level
* Office staff can access real-time location of a particular checked-in field staff
* Office staff can view accuracy of location point with help of “Accuracy” check-box
* Office staff can view historic location trail of field staff for a given day
* Duration for historic trail can be selected as “Today”, “Yesterday” or “Custom Duration”
* Office staff can view the last known battery status of the field staff mobile device
* Office staff can receive notifications via email if the battery of the field staff falls below certain threshold value

#### **Activity Logs**

* Office staff can view all the activities associated with a field staff on an event dashboard
* These activities include check in / check out, login / logout, location, geo-fence, battery events associated with field staff
* Office staff can select specific activities to be displayed on dashboard
* Office staff can filter the activities based on category of activities
* Office staff can view activities for a specific duration

#### **MWM Mobile App for Smartphones**

* Field staff can check in / check out on-field to record attendance as well as enable / disable tracking
* Field staff can push location / mark point attendance
* Field staff can set reminders to checkout at end of day
* Field staff can send debug report using “Send log” under report issues

#### **MWM for Feature Phones**

* Field staff can check in / check out by sending an SMS to predefined short code

#### **Reports**

* Office staff can view field staff attendance records for the previous days / month using timesheet report
* Office staff can view distance travelled by field staff for previous days / month using mileage report (accuracy depends on location accuracy)
* Office staff can export these reports to Excel
* ‘Confidence’ indicator on distance report to provide indication on level of report accuracy

#### **Geo-Fences**

* Office staff can create / edit a geo-fence using an intuitive interface
* Office staff can associate a field staff with one or more geo-fences
* An alert can be generated if the field staff enters, exits or overstays in a geo-fence based on the association
* Office staff can set entry, exit or overstay alerts based on field staff schedule (i.e. geo-fence alerts to be enabled only for work hours or specific time during the day)
* Office staff can view geo-fence alert notifications on dashboard or receive these notifications through email

#### **Management**

##### Role Management

* Necessary abstraction for office staff users can be defined based on their roles within the enterprise
* Office staff can define “roles” as per business requirements (e.g. a payroll user need not have access to field staff location)
* Office staff can associate a particular role to one or more office staff
* Office staff can edit / update a role definition; the role changes reflect immediately for all associated office staff
* Office staff can delete a role if it is not associated with any office staff

##### Team Management

* Team can be used for group field staff for various purposes including custom reports
* Office staff can define new teams based on existing enterprise structure
* Office staff can associate a field staff with a particular team
* Office staff can delete an existing team if it has no field staff associated

##### Field Staff Management

* Office staff can add a new field staff
* Credentials of field staff can be sent over email and / or SMS
* Office staff can define the skills of field staff
* Field staff can have more than one skills
* Field staff can be associated with a “Team”, this grouping can be used for reporting purposes
* Office staff can update information of an existing field staff
* Office staff can delete a field staff (e.g. field staff is no longer associated with the enterprise); Field staff is notified once the account is deleted

##### Office Staff Management

* Office staff can add a new office staff
* Credentials of office staff are sent over email provided during provisioning
* A role can be assigned to the office staff as per business requirements (e.g. someone from payroll should only have access to reports)
* In case a relevant role does not exist, office staff\* can create a new role with necessary privileges; this role can be assigned to appropriate office staff
* Office staff can update information of an existing office staff
* Office staff can delete an office staff (e.g. office staff is no longer associated with the enterprise)

#### **Platforms Supported - Web UI**

* Browsers: Firefox 36+, Google Chrome 40+, Internet Explorer 11
* Maps: Google Maps

#### **Platforms Supported - Mobile**

* Android Jelly Bean 4.1, 4.2 and 4.3 and Android KitKat 4.4.2 and 4.4.4
* Basic/feature phones through partner operators

### MWM Standard: Key Features

All [MWM Basic](#_MWM_Basic:_Key) features are included in MWM Standard. In addition, following features are also a part of MWM Standard:

#### **Customer Management**

* Office staff can add customer information using “Add Customer” for new customers
* Office staff can look up a customer based on customer name or phone number
* Office staff can update customer information for existing customer
* Office staff can view history of all the tasks associated with a particular customer

#### **Task management - task creation**

* Office staff can create a new task against a customer based on inputs from field or customer; customer location is seen on map while creating a task
* Office staff can record all necessary information related to the task
* Office staff can define the skill required to perform the task
* Office staff can raise the task with an alternate address as against customer’s registered address, as per customer requirements
* The alternate address is only associated with particular task; customer’s registered address remains unchanged
* Office staff can add images as additional task information; this information is available to field staff on MWM mobile application

#### **Task Management - Bulk Task Upload**

* Office staff can bulk upload the tasks if required in certain business use cases
* Office staff can bulk-upload the tasks based on pre-defined input file format
* Excel files are supported as input
* Input files can be validated before upload to ensure it aligns with prescribed format
* A new format can be enabled through backend configuration
* In case of error records, these can be fixed and appended against the same file name
* Mapping of input fields to corresponding task fields can be configured per enterprise

#### **Task Dispatch**

* Office staff dispatcher screen gets updated in real-time when a new task is added (web socket)
* Office staff can dispatch tasks based on proximity and skill-set. i.e. system recommends best suited field staff; manual selection to be done by office staff
* Office staff can also dispatch the task to a checked-out field staff
* Office staff gets the real-time task update notifications from field
* In case a field staff rejects a particular task, office staff can reassign the task to another field staff

#### **Task Management - Bulk assignment**

* Office staff can select multiple tasks and assign it to a particular field staff
* Office staff can select the tasks based on task details, summary or category and use the same for bulk assignment
* Office staff can filter the task list based on any combination of task fields (including custom task fields)
* For bulk assignment, office staff gets a recommendation of field staff against each task based on selected criteria
* Office staff can choose to accept the recommendation or select an alternate field staff before assigning the task
* Office staff can also select tasks of a particular area from map view on dispatch screen
* Office staff can assign the tasks to a field resource from map view

#### **Task Management - View Tasks**

* Office staff can view location of unfinished tasks on dashboard
* Task locations being attended real-time are highlighted in a different colour on dashboard
* Office staff can look up the tasks based on task details, summary or category
* Office staff can filter the task list based on any combination of task fields (including custom task fields)
* Office staff can view the tasks on a map view based on the filter criteria
* For a given task, office staff can view task activity logs such as task status changes, task information updates, attachments, comments or notes

#### **MWM Mobile App for Smartphones**

* Field staff gets task assignment notifications
* Filed staff can sort the tasks based on date or distance from his / her current location
* Field staff can view task details and can accept / reject task or update task status on the field
* Field staff can capture additional task information through notes for future reference
* Field staff can view customer task history along with details of resources who attended the previous tasks
* Field staff can click customer address for map view and enable navigation
* Field staff gets proximity alerts when in vicinity of an assigned task location
* Field staff can view location of all the tasks assigned to him / her on a map interface
* Field staff can upload image attachments from gallery / camera as an update / acknowledgment of task; support to control the source of image (camera / gallery / both)
* Field staff can capture the information in custom task fields enabled for the enterprise

#### **MWM Mobile App Configuration**

* Field staff can configure the task storage limit
* Field staff can enable / disable task notification
* Field staff can define the notification tone
* Field staff can enable / disable proximity notifications

#### **MWM for Feature Phones**

* Field staff gets task assignment notifications on SMS
* Field staff can send task status updates by sending an SMS to the short code

#### **Reports (available for additional fee)**

* Tailored reports can be created based on data available in MWM

#### **Ready-to-use customizations (available for additional fee)**

* Additional custom fields can be defined for an enterprise as per business requirements (on task forms) on per enterprise basis
* Tailored reports can be created for enterprise around data available in MWM - location, timesheet, tasks etc.
* Labels can be renamed to align with business / domain (for e.g. task -> incident, field staff -> technician etc.) on per enterprise basis
* Custom task states and workflows can be defined for an enterprises as per business needs
* For bulk task upload, input file formats can be configured as per industry / business requirements

#### **Management**

##### Skill Management

* Skills can be used to define the expertise of a field staff
* Office staff can define “Skills” to enable an efficient task dispatch by recommending the field staff with appropriate skills
* Office staff can add new skills or update an existing skill definition
* Office staff can define the time duration required for completing a particular job with relevant skills; this information can be used for scheduling features in future
* Office staff can assign more than one skill to a given field staff
* Office staff can delete a skill if it is not assigned to any field staff

##### Category Management

* Categories can be used to group tasks (for e.g. installation, maintenance, repair etc.)
* Office staff can add new categories as per business needs
* Office staff can define the category of each task during the task creation
* Office staff can update the category of an existing task
* Office staff can filter the tasks based on category during dispatch for effective task management
* Office staff can update category definitions; same is reflected immediately on the associated tasks