

## Online Services & Mobile Capture

Online Services provides complex browser interactions for your customers purely through configuration, while Mobile Capture allows your staff to capture data in the field, on any device, disconnected.

### Smart Online Forms

- A range of templates are included
- Responsive design – adapting to the users device be it PC, tablet or smartphone
- Configurable header, footer and colour palette (style sheet)
- Authenticated or anonymous
- Save for later
- Graphical form builder
- Online payments, configurable options
- Multi-lingual – configure multiple languages
- Visual progress indicators (Green for complete, Orange for incomplete)
- Large file handling (upload and download)
- Dynamic show / hide of a section based on what is selected in a different question
- Basic field types: text, number, decimal, date, time, option buttons, check boxes, drop down
- Complex field types: auto-complete (as you type), google map spatial location, validated postal address
- Validation – cross field checks (if field A is blue field B must be red)
- Validation – min/max character length
- Validation – min/max dates
- Validation – min/max numbers
- Validation – regular expressions
- Cascading drop downs – a selection in one drop down changes the list for the second
- Tooltips for each question
- Option lists based on an external web service or REST interface
- Repeating sections – a group of fields can be repeated by the user for sections where you want to have zero, one or more of the same thing e.g. Children.
- Nested repeating sections
- Data saved as XML for easy integration
- Visible rule, Mandatory rule and Default value able to be set from an expression – which could be a calculation a value or a user profile attribute
- Forced Abort based on business rules

### Customer Portal

- My Account page
- Configurable tiles
- Email and txt alerts configurable for application status changes
- Viewing of submitted applications and access to pending draft applications
- Attach files post submission
- Searching and filtering by keyword, type and date
- Messages consolidated
- Can view data from external systems, e.g. financial history, documents, transactions
- Payment options configurable, registering cards and mobile number

### Application Processing

- When an application is submitted, it can trigger a number of actions:
- Cascading drop downs – a selection in one drop down changes the list for the second
- Data saved as XML for easy integration
- Sending an email to the applicant
- Sending an email to a staff member
- Generating a PDF document and optionally attaching to the above emails
- Calling a web service, passing the captured data as an XML document
- Calling a custom integration interface
- Configurable states for each application type
- Staff actions, including email send and PDF generation
- Internal checklist form
- Can attach files to an application
- Messaging to and from the applicant

### Output templates

- Output templates can be configured to render collected data just as you want
- Email templates
- PDF templates
- Graphical form builder
- Online payments, configurable options
- Visual progress indicators (Green for complete, Orange for incomplete)
- PDFs attached to emails

### Messaging

- Txt alerts
- Email alerts
- Alerts on application status change
- Alerts on new messages
- Alerts on file upload
- Reminder alerts for inspections

### Integration

- Published API
- XML over web services
- JSON over REST
- Token based security
- Secured by client certificate or login password
- Lookup asset / consent / permit data when booking an inspection

### Payments

- Online credit and debit card payments
- PCI/DSS compliant payment gateway
- Can use almost any online payment provider
- Pay using a pre-registered card (tokenised, card details are not stored)
- Pay by txt confirmation (if a card and mobile are pre-registered)
- Receipts sent by email
- Payments viewable by admin staff
- Refunds available to admin staff
- Download of payment file available for reconciliation
- Can call a web service following payment for integrated receipting
- Configurable service fee
- Configurable fee rules
- Tariffs maintained in one place
- Fee line items can depend on what is entered on the form
- Fee line items can be shown to the user in the dialogue, email and PDF
- Business reference can be configured against each payment type

### Cloud Solution

- Hosted in the cloud, no infrastructure required
- New Zealand – private cloud hosted in Datacom Auckland and Hamilton data centres
- Australia – cloud hosted in Amazon AWS in Sydney
- High availability
- Storage, compute, bandwidth scaled as needed
- Test environment available in Azure

### Identity and Security

- User logins are provided either by using an inbuilt DCC service, or an ADFS can also be used to provide single sign on (SSO) with your internal AD
- Federated claims based architecture
- Can use an external identity provider such as Facebook, Twitter, Google, Microsoft, etc.
- Works with RealMe
- Ships with an internal DCC identity provider, which has login, create account, forgot password, change password, email based activation
- You can choose which identity providers you support
- Can be more than one
- Can let users choose which identity provider they want to use when they register
- Configurable user profiles – you choose what data you want to capture about each user
- Integration with your existing contacts repository (allowing you to show data from your systems on the Customer Portal)

### Workflow

- Customisable workflow solution
- Multiple configurable outcomes per task
- Branching and looping
- Modular – can call a workflow from a workflow
- Task assignment
- Prompt emails
- Escalation emails
- Group assignment
- Re-assign tasks
- Start and stop the clock
- Read and write Datacom
- Call web services
- Visual workflow builder

### Bookings

- An online booking module option allows customers to book and pay for the use of facilities e.g. stadiums, parks, swimming pools etc.
- Also used to book Mobile Capture inspection times
- Month view
- Week view
- Day view
- Configurable time slot per bookable item
- Configurable pool size per bookable item
- Recurring bookings
- Exception management within a recurring series
- Cancel and change a booking
- Online self-service bookings
- Online payments
- Configurable fees
- Complex consumption rules – for example to handle a function room that can be booked as a whole or in two parts
- Print-friendly views
- Inspection booking will query an external interface to show consent data, and then will show inspector availability and map route on a given date

### Staff Portal

- Graphical form builder
- Configurable payments options
- Configurable email templates
- Configurable PDF templates
- Configurable HTML templates
- Configurable actions for an online service submit or mobile capture data synchronisation
- Versioning of all forms and templates with date and time based publishing
- User administration (staff and external) including custom groups and group profiles – you can create your own user and group attributes
- Security permission management for staff users and per service via roles
- Device management (for Mobile Capture)
- Payment administration (view, download, refund)
- Bookings administration
- View submitted applications
- Keyword searching within applications, bookings and payments
- Internal checklist (a smart form)
- Ability to add files to an application
- Messaging to and from the applicant

### Mobile Capture

- Allows completion of forms in the field on a mobile device
- iOS
- Android
- Windows 8
- Disconnected – the user chooses when to synch data
- Responsive to the screen size
- Actions can be triggered when a completed form is synched (email, PDF generation, web service call)
- Bookings of inspections to inspectors can be made in the staff website
- Unscheduled inspections can be created in the field
- Uses the same form designer as online services, with the same features – dynamic show / hide, repeating sections
- Paged sections for very large forms
- Photo capture using the device camera
- Annotate photos with freehand drawing
- Audio recording
- GPS location capture
- Signature capture
- Viewing of related attachments (pdfs, jpgs, docx etc.) on the device
- Populate option list from a web service at the time of synch
- Map view, showing spatial location of jobs
- Scheduled booking calendar or job list by priority
- Self-allocate jobs from a queue
- Ticket / notice printing in the field using Bluetooth printers