



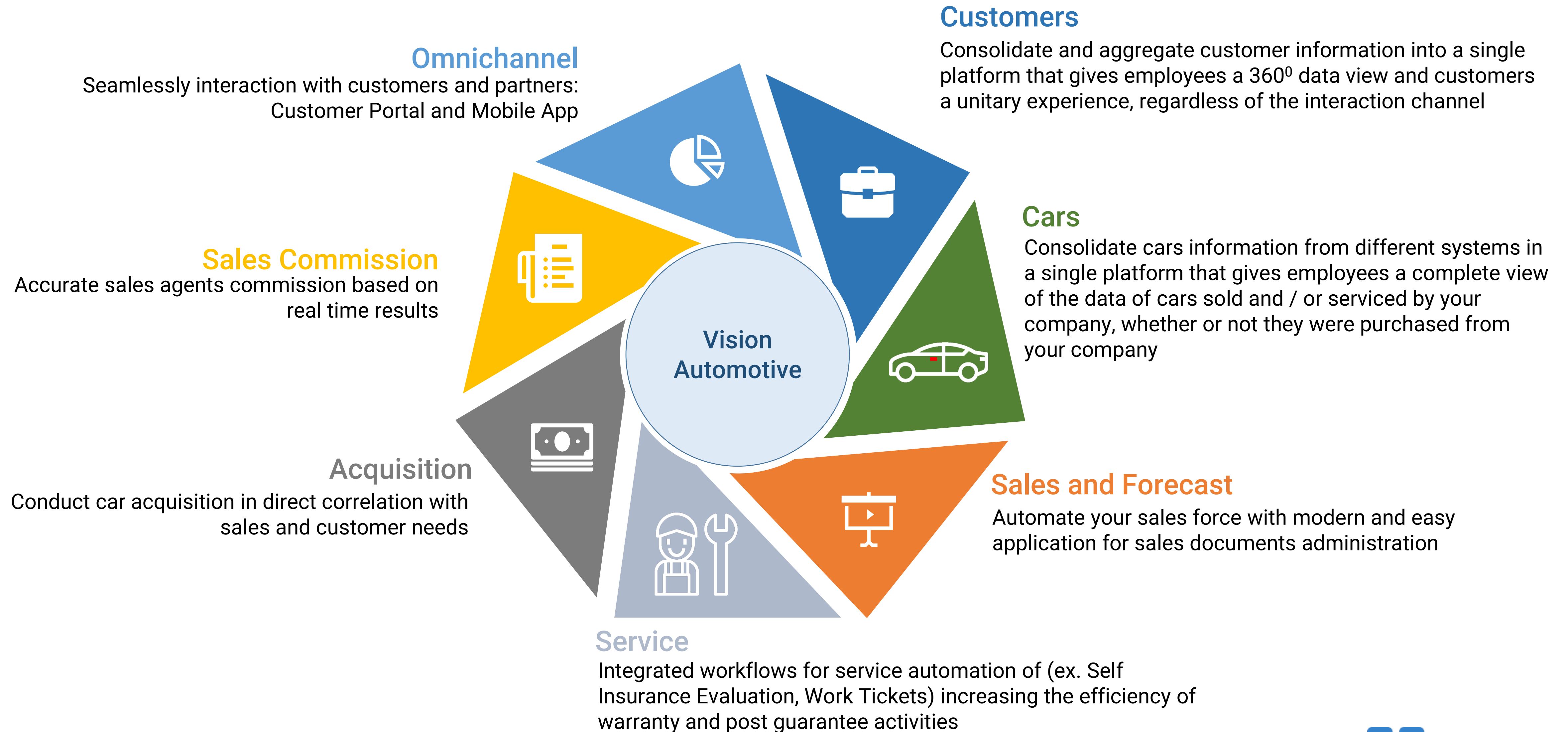
VISION AUTOMOTIVE

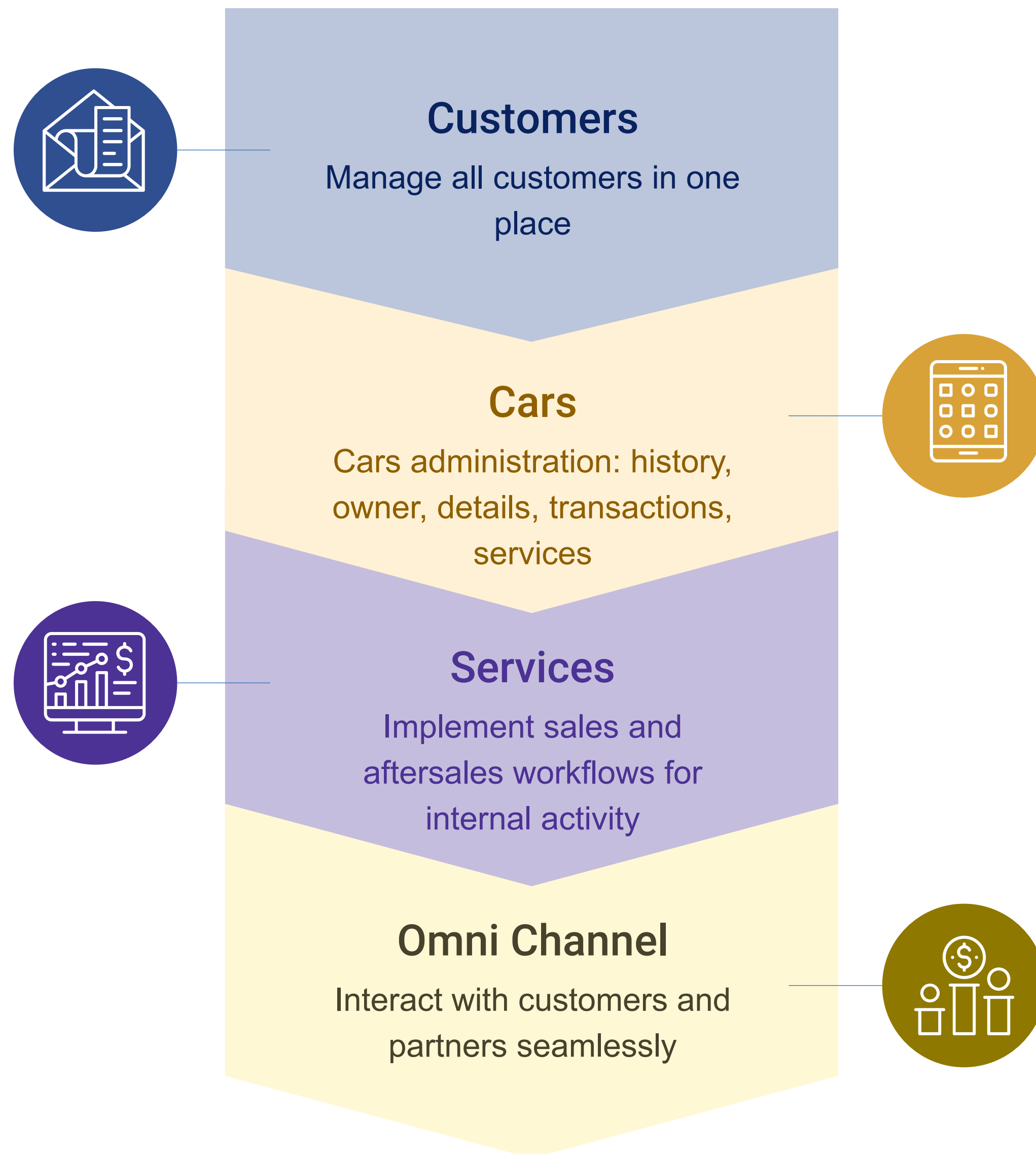
Integrated platform for auto dealers



Vision Automotive

Integrated platform for Automotive





Vision Automotive Standard Features

- Customers Management
- Cars and Parts management
- Sales
- Customer Services workflows
- Acquisitions
- Sales Commissions
- Omni Channel access: unitary experience across channels
- Customer Self Service Portal and Mobile application

Completely integrated solution for managing the customers relationship and cars inventory, bringing together sales functionalities, after sales, service (warranty and post guarantee) and customer portal.

Vision Automotive Overview

Enable your
decisions on real
time data

Accurate analysis
based on
operational data

Enable your decisions on
real time data

vision
automotive

Clienti

Masini

Vanzari

Servicii

Achizitii

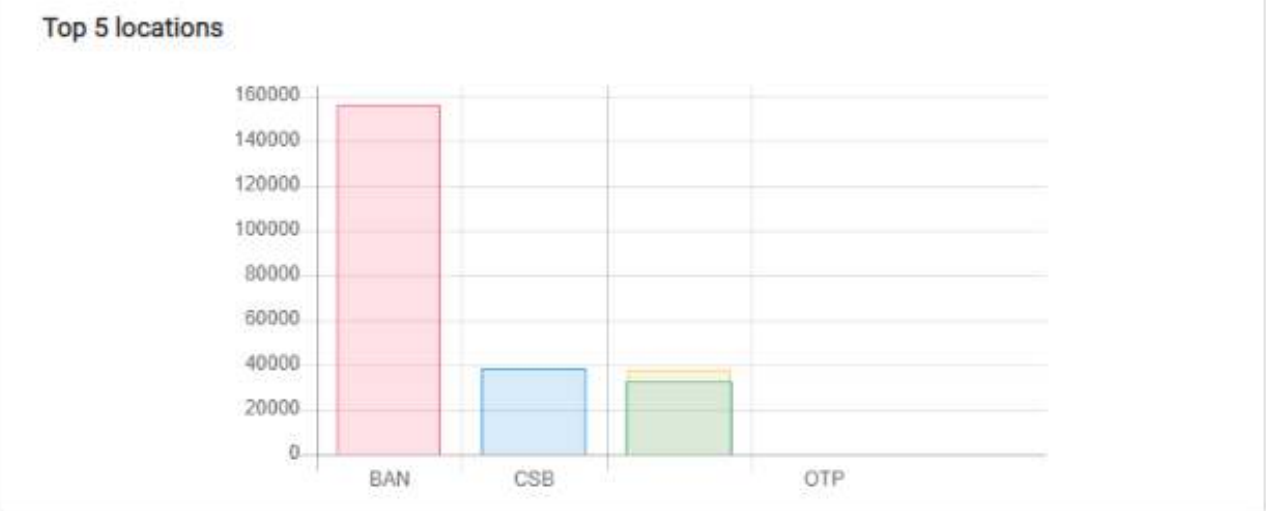
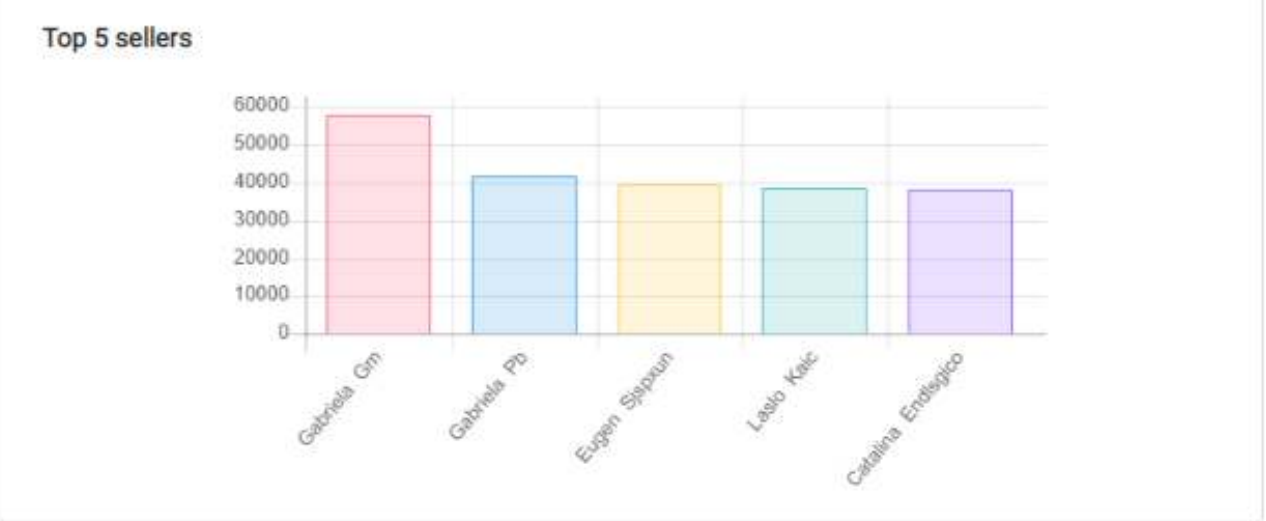
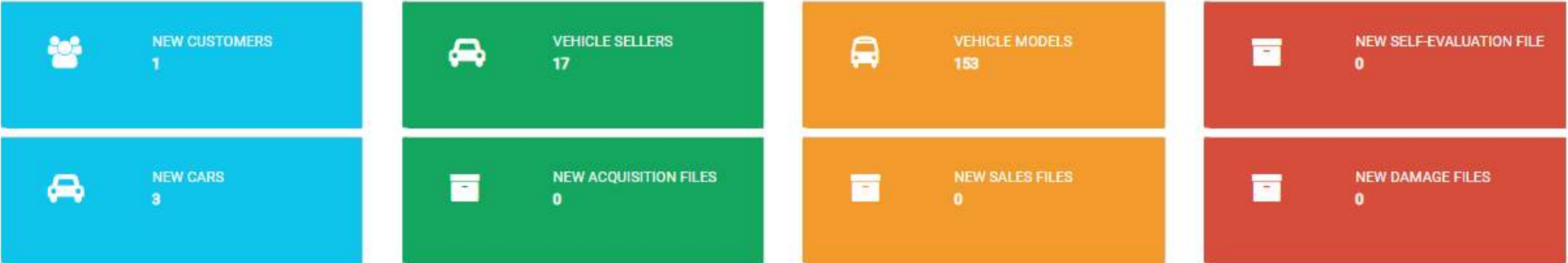
Angajati

Forecast

Operational

Administrare

Administrator



Upcoming delivery date

Client	Phone	Chassis series	Offer number	Estimated delivery date	Seller

<

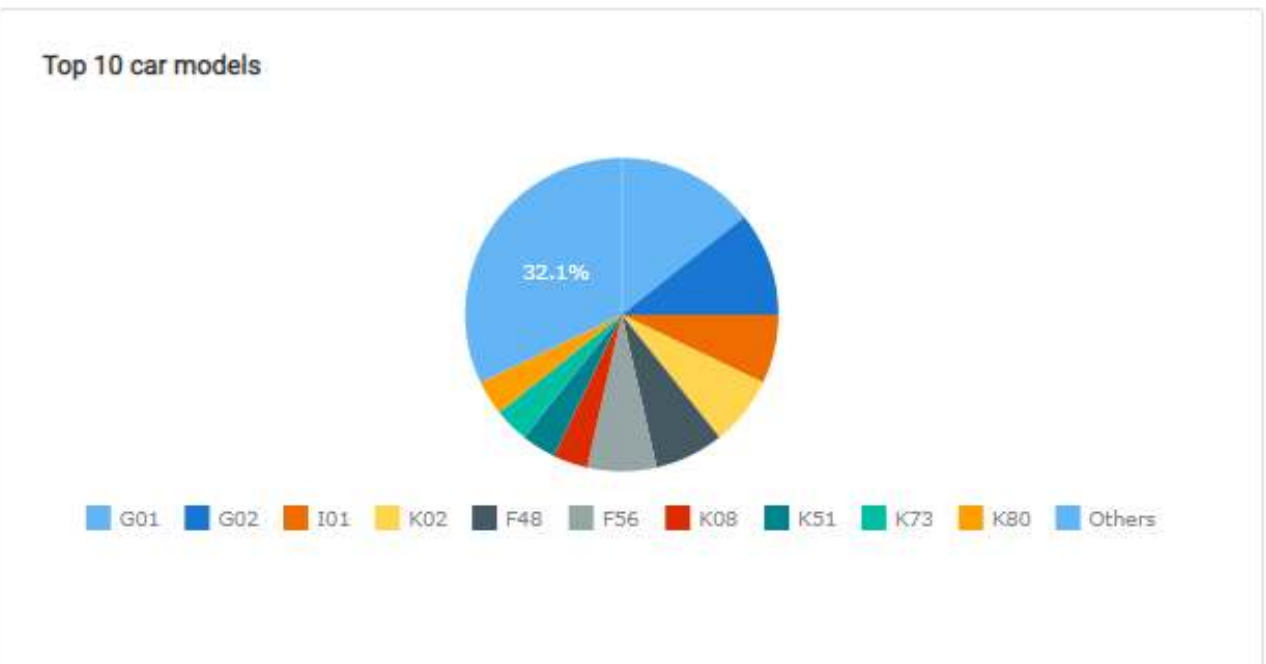
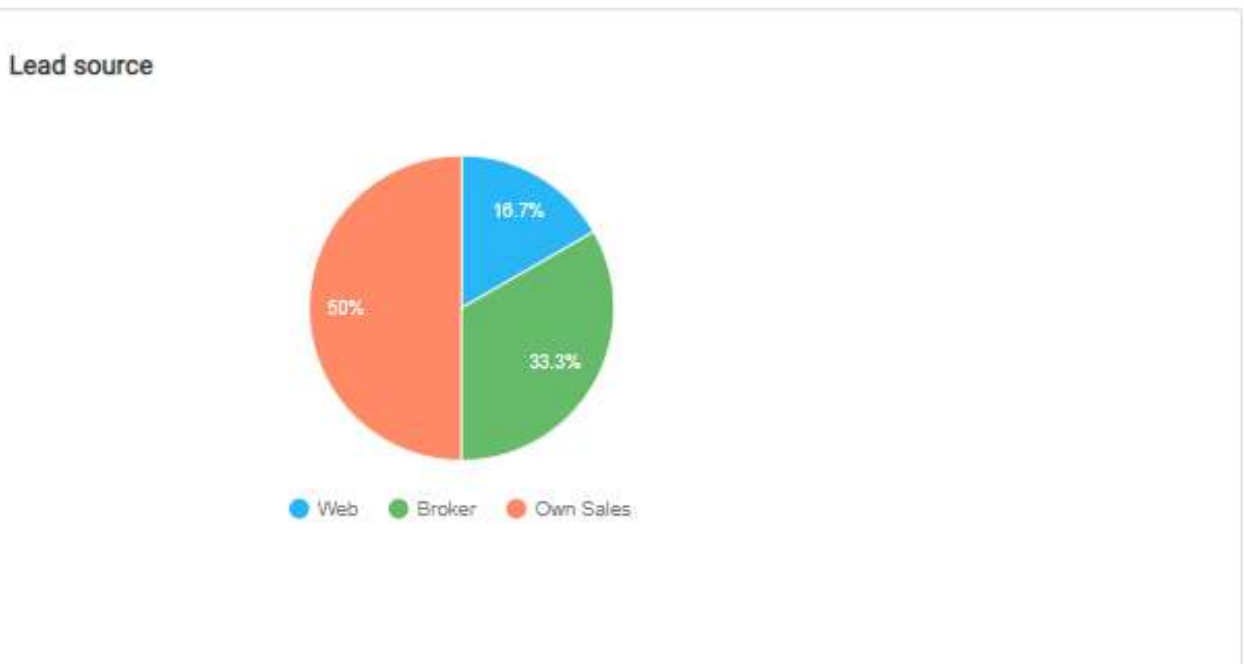
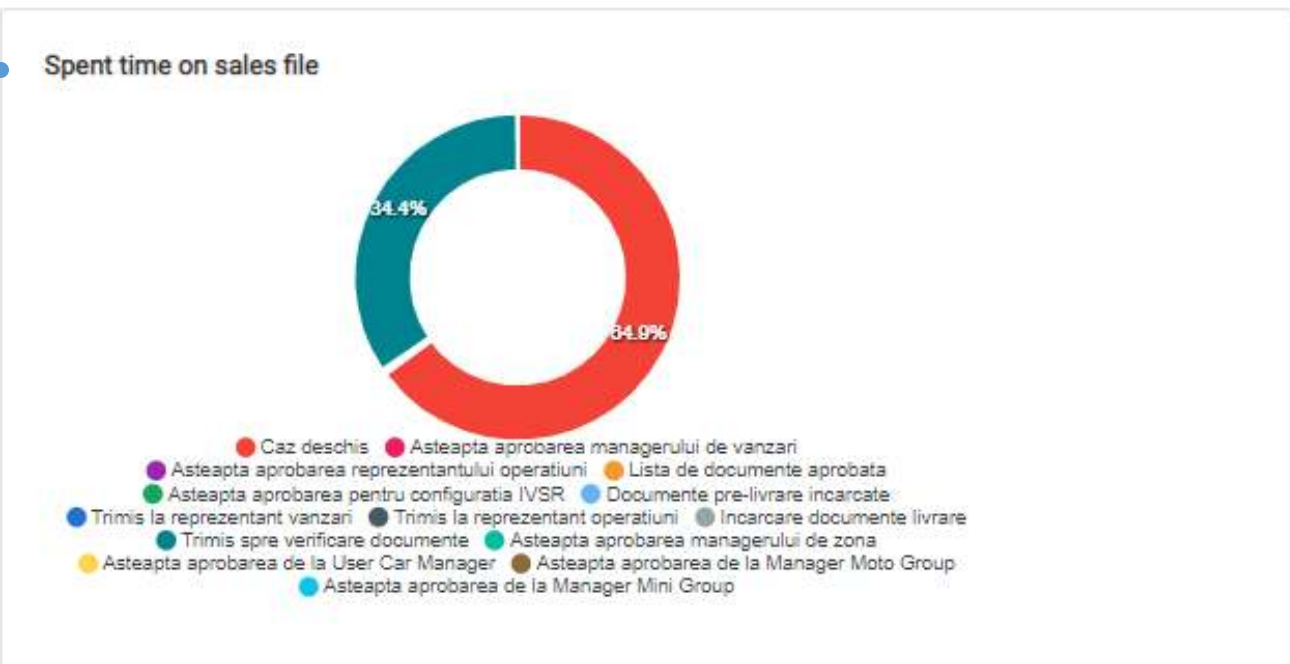
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Choose Page

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Focus on real value added
activities and customers



Vision Automotive

Functional Architecture Implementation Scenarios

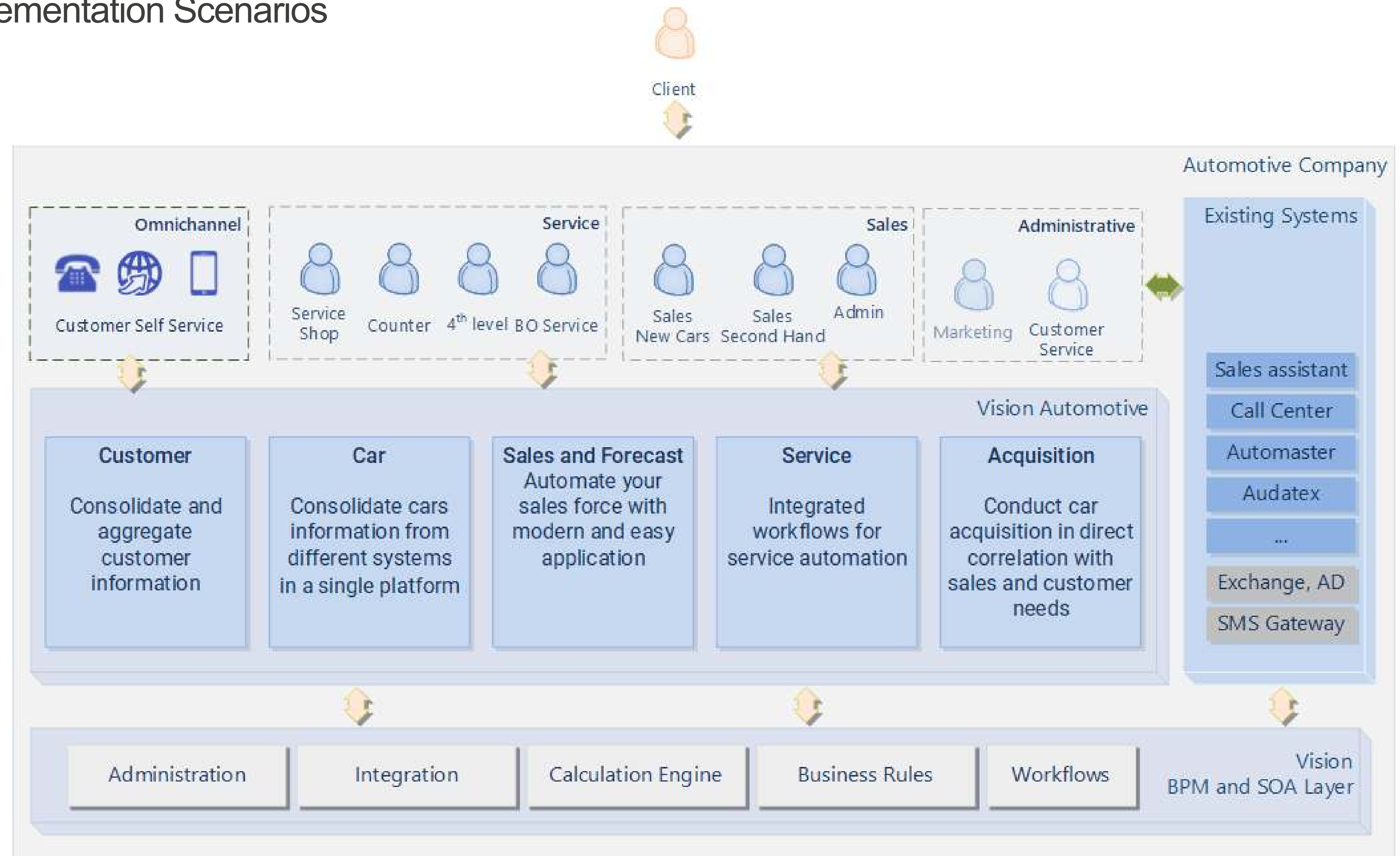
Master System

The platform could be used for entire activity, acting as a master system for your company

OR

Integration System

The platform could be integrated within customer's infrastructure acting as an integration umbrella for existing systems (ex. Automaster, Audatex, etc.).





Omnichannel

Customer Portal

Customer Self Service Portal is available in order to offer a rich and digital experience and to improve the interactions

Mobile App

Mobile app can be used either to easy allow customer access to company services or for improving internal staff efficiency

vision

automotive

My Profile

Vision Technology Development

Client details

Name:

Vision Technology Development

Email:

sales@vision.ro

Phone:

0728006678

Client type:

Persoana Juridica

CUI/CNP:

2634934

Edit

Cars

Brand	Model	Submodel
MINI	F60	COOPER D ALL4
BMW	G01	X3 xDrive25d

Sales files

Acquisition files

Damage file

Self-evaluation

File number	File state	Client name	Opened by	Opening date	Opening hour
30027467	OpenedCase	Vision Technology Development		10/9/2019	11:26

Utilizatori secundari

First name	Last name	Email	Phone	Is approved	Is disabled
office	Vision	office@vision.ro	0720887723	☐	☐
finance	Vision	finance@vision.ro	0720887723	☐	☐

Send to approval

Cases

Activities

Posts

#	Name
1	Damaged Car
2	Replacement Car Delivery Date
3	Winter tire inquiry
4	CNew Car documents

vision

automotive

ro en

Vision Technology Development

Detalii client

Nume:

Vision Technology Development

Adresa de email:

sales@vision.ro

Telefon:

0728006678

Tip client:

Persoana Juridica

CUI/CNP:

2634934

Editeaza

Automobile asociate

Marca	Model	Submodel	Serie sasiu
MINI	F60	COOPER D ALL4	3D17596
BMW	G01	X3 xDrive25d	LP69650

Dosare de vanzari

Dosare de achizitie

Dosar dauna

Autoconstatare

Numar Dosar	Stare Dosar	Nume Client	Deschis de
30027...	Caz deschis	Vision Technology Dev...	

Sustain advanced customer relationship management across multiple touchpoints throughout the purchase journey. From the first interaction to online research, test-driving, financing and after-sales service, you need to engage the customer and reinforce trust building attributes at every step.

Customer Self Service Portal

Key Features

Details

Enable your customers to manage specific details and automatically interact with automotive company staff through self service portal and mobile application.

Offers

Push specific offers to your customers and gather feedback regarding their preferences and requests. Streamline the sales process management workflow.

Services

Automate services providing increasing the transparency and interaction with your customers, allowing each customer to initiate or modify requested services requirements.

visionautomotive

My Profile

Vision Technology Development

Client details

Name:

Vision Technology Development

Email:

sales@vision.ro

Phone:

0728006678

Client type:

Persoana Juridica

CUI/CNP:

2634934

Edit

Cars

Brand	Model	Submodel	Chassis series	License plate	
MINI	F60	COOPER D ALL4	3D17596	9250203	✕ ➔
BMW	G01	X3 xDrive25d	LP69650	9233569	✕ ➔

Sales files

Acquisition files

Damage file

Self-evaluation

File number	File state	Client name	Opened by	Opening date	Opening hour	
30027467	OpenedCase	Vision Technology Development		10/9/2019	11:26	➔

Utilizatori secundari

First name	Last name	Email	Phone	Is approved	Is disabled	
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finance	Vision	finance@vision.ro	0720887723	☐	☐	✕ ➔

Send to approval

Cases

Activities

Posts

#	Name	Status	Creation date	
1	Damaged Car	In progres	11/6/2019	⋮
2	Replacement Car Delivery Date	In progres	11/6/2019	⋮
3	Winter tire inquiry	Inchis	11/6/2019	⋮
4	CNew Car documents	In progres	11/6/2019	⋮

Vision Automotive Self Service Portal is an opportunity to give customers choice and provide an enhanced customer experience by allowing them the freedom to conduct business at their leisure in a way that may better suite the way they would prefer to interact with you.

This technology enable your company to develop customer oriented features enabling great and specific customer experience.



Vision Automotive Customers Management offers the tools needed to approach each client or prospect in an intelligent manner, allowing the company to build customer relationships based on trust and loyalty while increasing the teams' productivity.

Customers Management

vision

automotive

Customers

Cars

Sales

Customer Service

Acquisition

People

Forecast

Operations

Administration

ro en

Administrator

Vision Technology Development

Client details

Edit

Name:

Vision Technology Development

Email:

sales@vision.ro

Phone:

0728006678

Client type:

Persoana Juridica

CUI/CNP:

2634934

Cars

Brand	Model	Submodel	Chassis series	License plate	
MINI	F60	COOPER D ALL4	3D17596	9250203	
BMW	G01	X3 xDrive25d	LP69650	9233569	

Sales files

Acquisition files

Damage file

Self-evaluation

File number	File state	Client name	Opened by	Opening date	Opening hour	
30027467	OpenedCase	Vision Technology Development		10/9/2019	11:26	

Utilizatori secundari

First name	Last name	Email	Phone	Is approved	Is disabled
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finance	Vision	finance@vision.ro	0720887723		

Cases

Activities

Posts

#	Name	Status	Creation date	
1	Replacement Car	Draft	11/6/2019	
2	Damage Car File	In progres	11/6/2019	
3	New Model Presentation	Draft	11/6/2019	
4	Leasing Contract	Inchis	11/6/2019	



Customer View

Key Features

Customer details

Aggregate customer details in one place. Keep accurate and updated data of customers, vehicles, interactions and services.
Customer details could be created either through platform interface or imported from external systems (ex. Automaster)

Customers' Cars

Customer associates vehicles: Cars sold by your company to a specific client or those for which at least one service was performed, even if they were not purchased from your company.

Cases, Activities and Posts Panel

The Case, Activity and Post Panel manages information regarding the interaction with the respective customer. Different types of activities are available: task, email, appointment and call. A case in grouping one or many activities leading to a specific purpose.

vision
automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro enAdministrator

Vision Technology Development

Client details

Name:

Vision Technology Development

Email:

sales@vision.ro

Phone:

0728006678

Client type:

Persoana Juridica

CUI/CNP:

2634934

Edit

Cars

Brand	Model	Submodel	Chassis series	License plate	
MINI	F60	COOPER D ALL4	3D17596	9250203	✕ ➔
BMW	G01	X3 xDrive25d	LP69650	9233569	✕ ➔

Sales filesAcquisition filesDamage fileSelf-evaluation

File number	File state	Client name	Opened by	Opening date	Opening hour	
30027467	OpenedCase	Vision Technology Development		10/9/2019	11:26	➔

Utilizatori secundari

First name	Last name	Email	Phone	Is approved	Is disabled
office	Vision	office@vision.ro	0720887723	☐	☐
finance	Vision	finance@vision.ro	0720887723	☐	☐

CasesActivitiesPosts

#	Name	Status	Creation date	
1	Replacement Car	Draft	11/6/2019	⋮
2	Damage Car File	In progres	11/6/2019	⋮
3	New Model Presentation	Draft	11/6/2019	⋮
4	Leasing Contract	Inchis	11/6/2019	⋮

vision
automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro enAdministrator

Clients list

Client name

Email

Phone

Client type

CUI / CNP

#

Order by

Ascendent

Descendent

76

Zoho Dynamics

trade@mail.com

+40744429236

Persoana Juridica

05065736

➔

77

Star Company

dan@live.io

Other

6215058411081

➔

78

Division Comercial

dc@com.ie

Persoana Juridica

08554447

➔

79

AXEL HHRH WU XNEUP DEE

Persoana Juridica

53518740

➔

80

ATLAS FJLWMNX HJXXTVQVR AIW

Persoana Juridica

88380064

➔

81

TECHNOLOGY INDUSTRY

Persoana Fizica

7664778065344

➔

82

PONY QSI PCRLUK FJ

Persoana Juridica

64846856

➔

83

NX HLBR MGG

Persoana Juridica

57503768

➔

84

ALTFEL ITVF VRB

Persoana Juridica

71701187

➔

85

Trade Move

trd@gmail.com

02124212

Persoana Juridica

333234535

➔

86

Andrex Lex

0212342

Persoana Fizica

➔

87

Citadella

0213818121

Persoana Fizica

0002134324

➔

88

Zig Zag Comm

02142477321

Persoana Juridica

➔

89

Andr

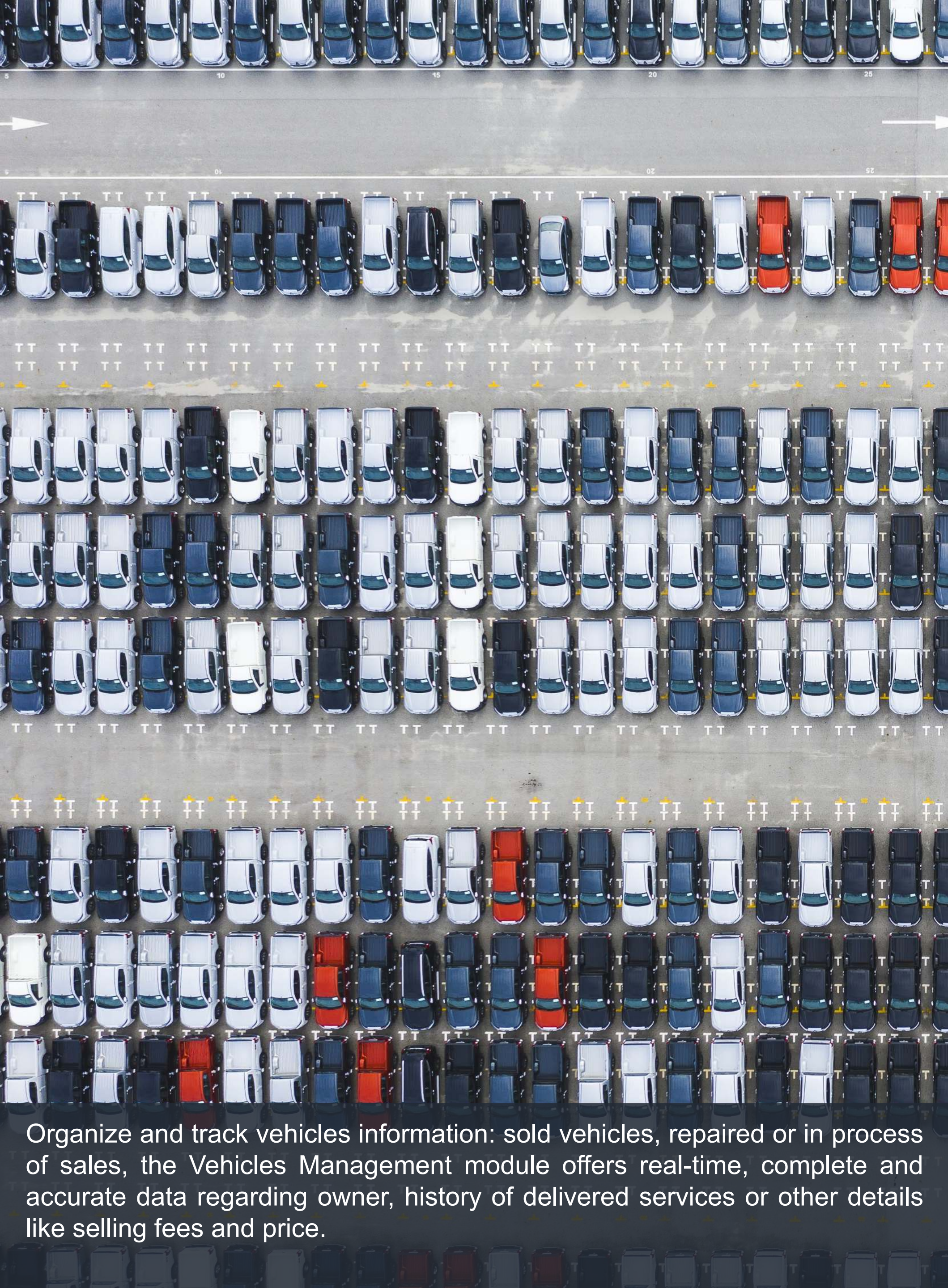
021123456

➔

Vision Automotive \ Client

 VISION

Vehicles Management



vision
automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

Administrator

BMW G02 (B02CAR-LG49492)

Brand: BMWModel: G02

Submodel: X4 20i XDriveChassis series: LG49492

License plate: B02CARClient:

Engine power: 2000Body type: SUV

Fuel type: Dieselintegrat traction: Da

Automatic transmission: DaNumber of doors: 4

Sales filesAcquisition filesDamage fileSelf-evaluation

File number	File state	Client name	Opened by	Opening date	Opening hour
30027248	Waiting approval for IV...	ARSENE		9/2/2019	15:39

CasesActivitiesPosts

#	Name
1	Discuss car update offer

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automotive

ro en

Vision Technology Development

Detalii client

Nume: Vision Technology Development

Adresa de email: sales@vision.ro

Telefon: 0728006678

Tip client: Persoana Juridica

CUI/CNP: 2634934

Automobile asociate

Marca	Model	Submodel	Serie sasiu
MINI	F60	COOPER D ALL4	3D17596
BMW	G01	X3 xDrive25d	LP69650

Dosare de vanzari

Dosare de achizitie

Dosar dauna

Autoconstatare

Numar Dosar	Stare Dosar	Nume Client	Deschis de
30027...	Caz deschis	Vision Technology Dev...	

Organize and track vehicles information: sold vehicles, repaired or in process of sales, the Vehicles Management module offers real-time, complete and accurate data regarding owner, history of delivered services or other details like selling fees and price.

Vehicle view

Key Features

Vehicles Details

Aggregate vehicle details in one place. Keep accurate and updated data of vehicle, owner, user, interactions and services.

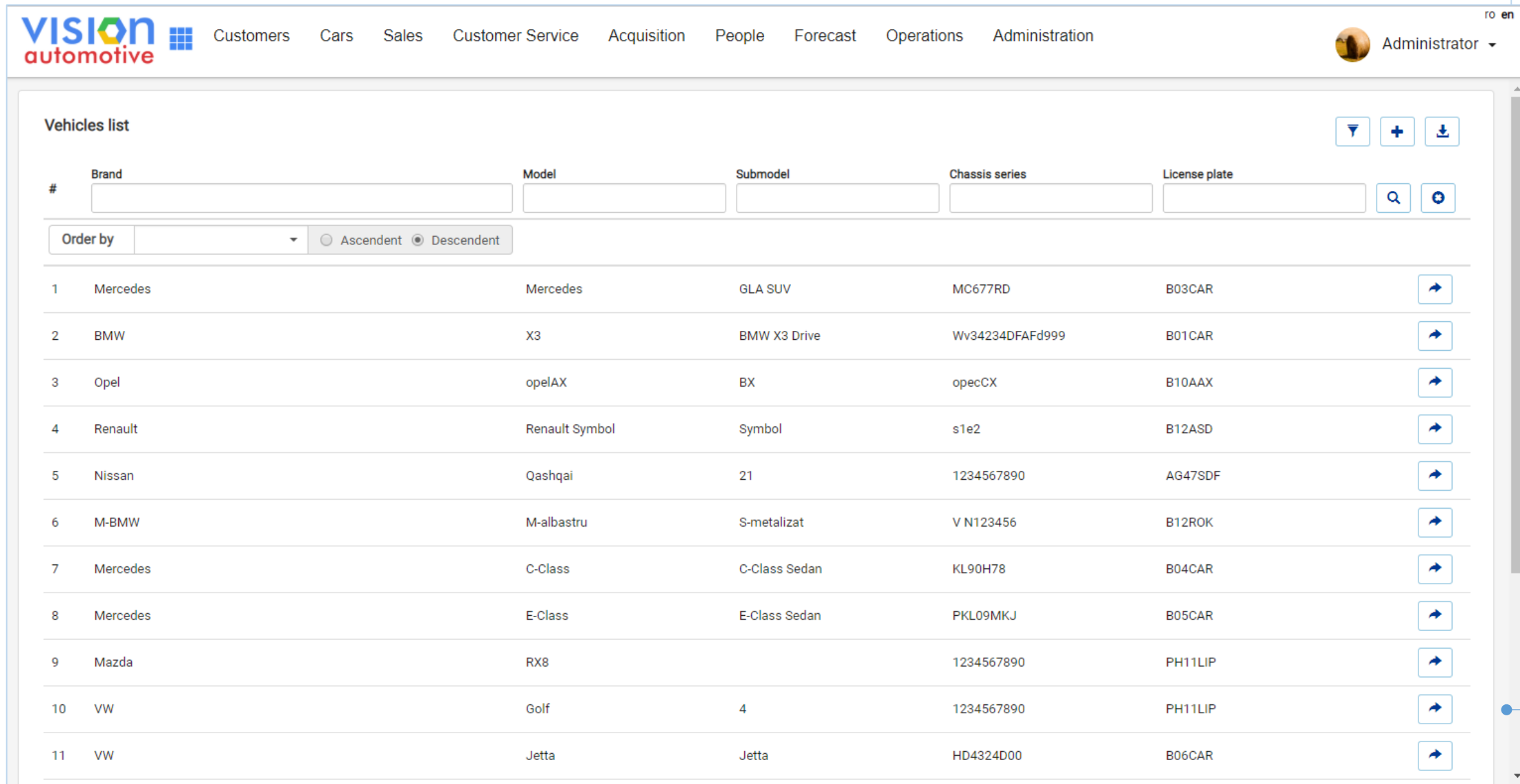
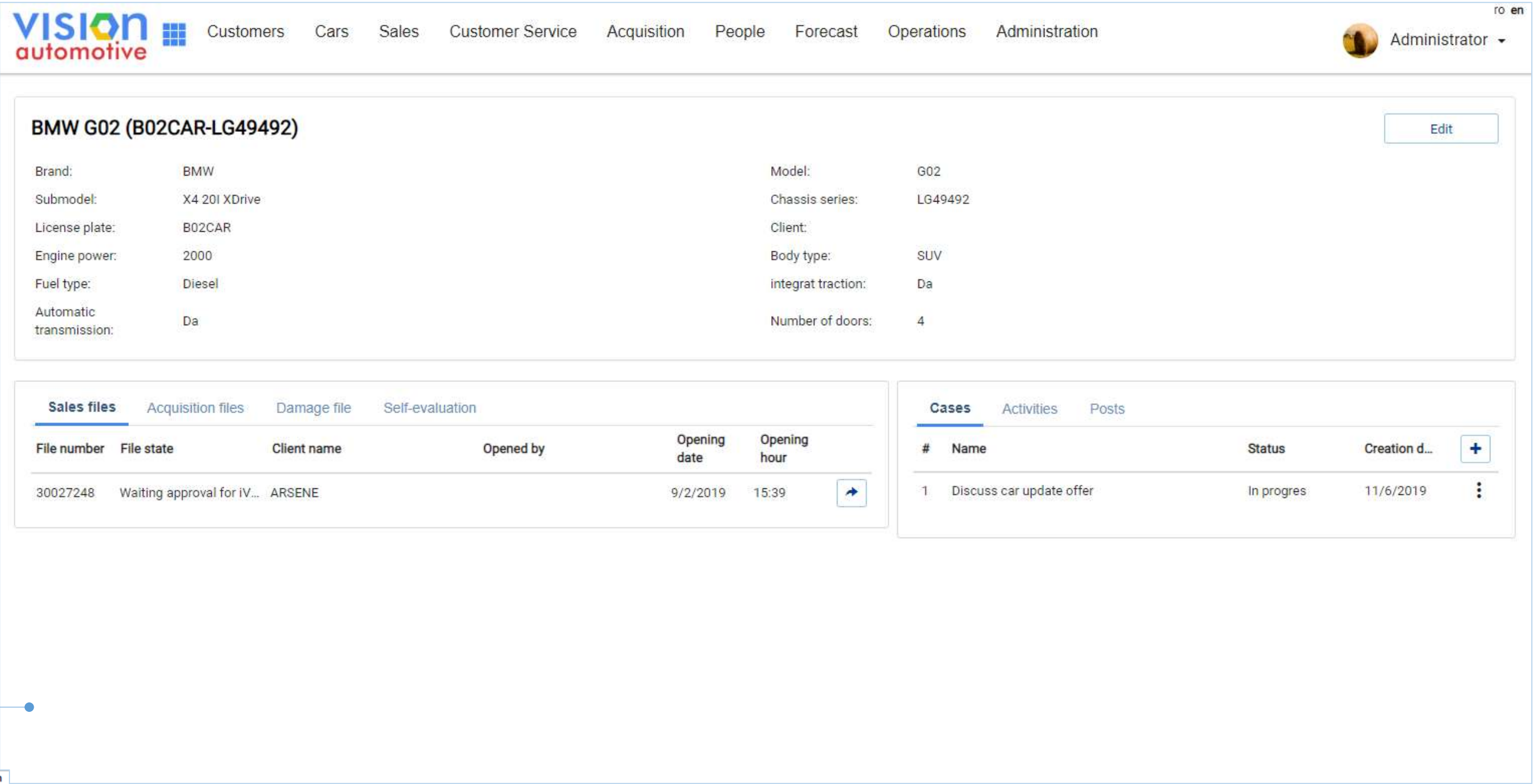
Vehicle details could be created either through platform interface or imported from external systems (ex. Automaster)

Vehicles' Owners and users

Vehicles associates owner or user: Cars sold by your company to a specific client or those for which at least one service was performed, even if they were not purchased from your company.

Cases, Activities and Posts Panel

The Case, Activity and Post Panel manages information regarding the interaction with the respective customer. Different types of activities are available: task, email, appointment and call. A case in grouping one or many activities leading to a specific purpose.



Sales Cases

Aggregate all sales information related to the vehicle. Either a car was already purchased or the customer is in the purchasing process, the information is available in real time.

Acquisitions Cases

Keep track between sales and acquisition in order to synchronize the final delivery. The application allow to organize the internal activities in direct relation with the final deliverable.

Internal processes

Reparations, insurance claim, after sales activities or other specific services are implemented based on general market practices. Standard workflows are available for use either out of the box or customized for your company needs.

Sales

vision
automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro enAdministrator

Sales case file - number30027467

Client:
XIN BGO OXG SSVEH HPM
Leasing company: CASH
CNP/CUI: 5005315
Contact person: MIMCJ
Email: bxj113@126.com
Phone: 0722227038

Vehicul:
Chassis series: LP69650
Brand: BMW
Model: G01
Submodel: X3 xDrive25d
Type key: TX51
Type:
Offer ID: 30027467
License plate: 9233569
Status :

Seller: Mocanu mpuvvs
Location: BAN
Sales manager:
Area manager:
Operations representant:

Agreement: 118138
Agreement date:
IVSR order number: 9233569
Order date: 10/9/2019
Status file: [OpenedCase](#)

Send to sales manager

OPENEDIN WORKINGCLOSED

Offer

File ProcessingDocumentsEventsAlertsMessagesAgreement

Offer informations

Product group*	Demo	Basic price EUR	70000
Corporate classification *	Retail	NSTO	75000
Campaign	ATE	Basic price %	107.14
FS	None FS	List price EUR	61921.87
Order type*	Stock	Discount	10526.05
Pipeline	193-Schwertberg	Discount %	16.999
Negotiated CoR	No	Negotiated CoR%	
Pre-approved discount		Accessories	5543.000
CoR	25.1	Net sale price EUR	51395.82

10:30

ABAdrian Bratu
Adrian.Bratu@vision.ro

RECENT

Recruitment

Candidates

VISION 365 - CLIENTS

Product Catalogue

Leads

Opportunities

Sales Quote

Contacts

Accounts

Contract

Sales Order

Delivery Notes

City

București

București

București

București

București

București

Pitești

Pitești

Pitești

Pitești

București

Pitești

Pitești

Pitești

București

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Automate the vehicles sales process based on predefined offering algorithm and calculation engine, according with company rules and approval workflows. Administrate the sales process in terms of necessary documents, steps and human interactions



SFA

Key Features

Leads

The sales process begins with a lead - someone who is interested in the products or services provided by the Company. The leads might be automatically generated by various tools, or they might come from other sources.

Opportunity

Qualify a lead and convert it to an Sales Case.
At a certain point, once the timeframe, budget, purchase process and decision makers for the sale are identified through various sales activities (calls, face to face meetings, emails, etc.), the lead can be qualified into opportunity.

vision365

Clients

Product Catalogue

Leads

Opportunities

Sales Quote

Contacts

Accounts

Contract

Sales Order

Delivery Notes

Invoices

ro en

Administrator

Lead

New Car Fleet

Qualify

Disqualify

+ Add New

Edit

Initiated

Draft

Qualify

Closed

Topic*

Lead Source*

Quality

Priority*

New Car Fleet

Own Sales

high

High

General Info

Lead Details

Create Opportunity

Salutation*

Last Name

Contact Method

Company Name*

Email*

Assigned on

Already exist

Create Contact

First Name

Job Title*

Phone*

No of Employees*

Revenue

Assigned to

Create Company

Documents

#

Name

Document type

Created by

Created on

The list is empty.

Cases

Activities

Posts

#...

Type

Assigned To

Creation Date

Due Date

1...

Task

Administrator

11/8/2019

11/8/20...

2...

Call

Administrator

11/8/2019

11/8/20...

3...

Appointment

Administrator

11/8/2019

11/9/20...

Workflow Audit

Changes Audit

#

Role

Name

Date

No. Of Days

Status

The list is empty.

Generate Leads

Qualify Leads into Sales Case

Win Sale

Generate Aftersales

Sales Flow

Key Features

General information

Store in one place data regarding potential customer, sales agent, vehicle and agreement.

Offer

Price calculation complex engine based on pre-approved parameters, sales context, vehicles and customer attributes. The price calculation parameters are administrable by the platform administrator either in the platform or through excel upload.

Sales Flow

Store, process and capture information according with each flow step: need approvals, specific requirements, managers, acquisitions, etc.

Documents

The documents check list for the sales. The check list is dynamic according with each sales type (car\customer\price type) and can be automatically emailed.

Offer	File Processing	Documents	Events	Alerts	Messages	Agreement
Date Agreement						
Product group:		List price EUR:	61921.87			
Corporate:	CSA	Discount:	10526.05			
Pipeline:	193-Schwertberg	Discount %:	16.999			
Acquisition bill date:	7/25/2019	AGR Accesories:	0			
		Net sale price EUR:	51395.82			
		Net sale price EUR cu TVA:	61161.026			

Offer	File Processing	Documents	Events	Alerts	Messages	Agreement
1. Trade In						
		Trade In Standard				
2. Approval of corporate classification?						
		☐ Yes ☒ No				
3.Launch / modify the new order in production?						
		☐ Yes ☒ No				
4. Approval of additional discount?						
		☒ Yes ☐ No				
Sales Representative *		Ana Dumitru				
Sales manager *						
Area Manager*						
Opperations Representative *						
Associated acquisition case :		Dosar 2160 SJ6RM3H38DL003142			Redirect	

vision
automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro enAdministrator

Sales case file - number30027467

Client:

XIN BGO OXG SSVEH HPM

Leasing company: CASH

CNP/CUI: 5005315

Contact person: MIMCJ

Email: bxj113@126.com

Phone: 0722227038

Vehicul:

Chassis series: LP69650

Brand: BMW

Model: G01

Submodel: X3 xDrive25d

Type key: TX51

Type:

Offert ID: 30027467

License plate: 9233569

Status :

Seller: Mocanu mpuvvs

Location: BAN

Sales manager:

Area manager:

Operations representant:

Agreement: 118138

Agreement date:

IVSR order number: 9233569

Order date: 10/9/2019

Status file: [OpenedCase](#)

Send to sales manager

OPENED

IN WORKING

CLOSED

LOST

OfferFile ProcessingDocumentsEventsAlertsMessagesAgreement

Offer informations

Product group*	Demo	Basic price EUR	70000
Corporate classification *	Retail	NSTO	75000
Campaign	ATE	Basic price %	107.14
FS	None FS	List price EUR	61921.87
Order type*	Stock	Discount	10526.05
Pipeline	193-Schwertberg	Discount %	16.999
Negotiated CoR	No	Negotiated CoR%	
Pre-approved discount		Accesories	5543.000
CoR	25.1	Net sale price EUR	51395.82

Events

Track sales case flow main events regarding: vehicle, client, case and invoices. The section is used to aggregate data from different sources like Automaster or other specific automotive system.

Alerts and Notifications

Alerts the platform users for predefined scenarios like due deadline, flow states duration, etc. ...

Messages

Email integration: allow to send email messages with specific case data automatically selected from case and track all email conversation on this topic

Agreement

View of sales financial parameters (Product, discount, price, list prices, etc.)

Price Calculation Engine

Key Features

General information

Flexible pricing engine based on complex, pre-approved, pre-processed coefficients configuration for each model, type and unit.

Administration

Calculation parameters are easy to administered through excel upload. Decide discounts matrix for each combination of parameters, fill-in data in excel and then upload the excel in platform.

Configurable parameters

Various configurable parameters combinations for prices and discounts calculation: Make, Model, Campaign, List Price, Discount, Financial Service, Cylinders, Displacement, transportation Cost, Retail Price, Wholesale Price, Stock Age, Options, etc.

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automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro enAdministrator

Sales case file - number30027467

Client:
XIN BGO OXG SSVEH HPM

Leasing company: CASH
CNP/CUI: 5005315
Contact person: MIMCJ
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Vehicul:
Chassis series: LP69650
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Type:
Offer ID: 30027467
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Send to sales manager

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CLOSED

LOST

OfferFile ProcessingDocumentsEventsAlertsMessagesAgreement

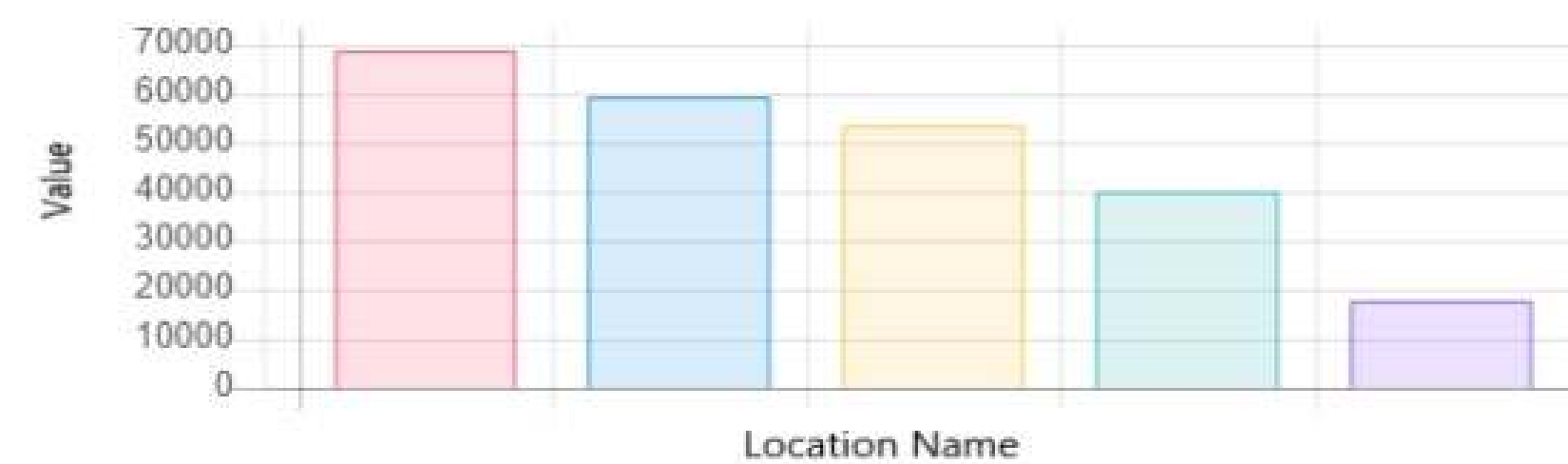
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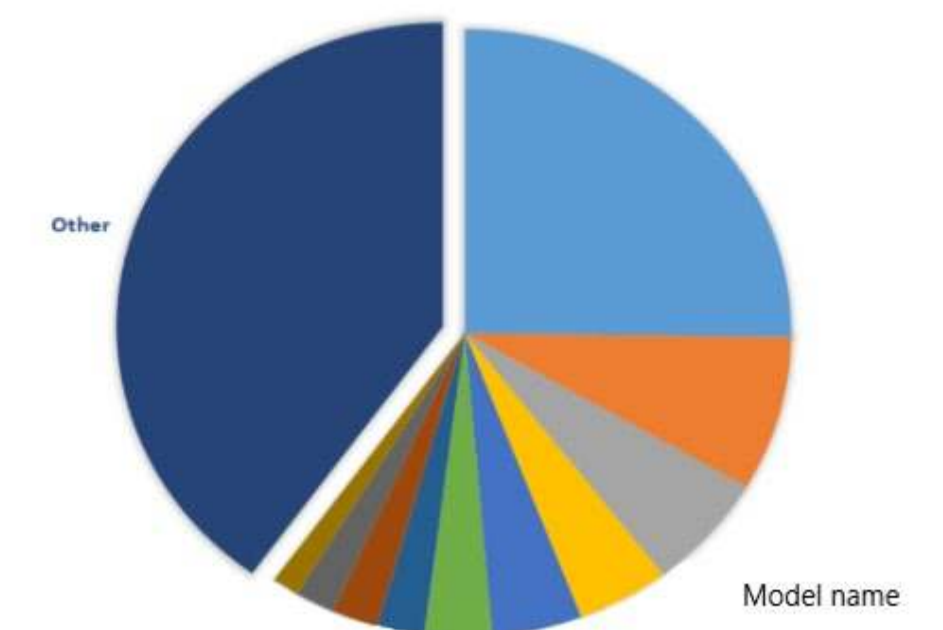
Top 5 Sellers



Top 5 Locations



Top 10 Car Models





Vision Automotive Services implements standards workflow for after sales services, insurance claim file evaluation, etc. enabling your company to successfully control, deliver and keep control of services, resources and financial results.

Service

VISION

automotive

Customers

Cars

Sales

Customer Service

Acquisition

People

Forecast

Operations

Administration

ro en

Administrator

Damage file - order 111998

Client: John Diaconu

Plate license: B023DMC

Insurer: testt

Order number: 111998

Order date:

File status: Received IPR

Cancel case

Save Draft

Assign to pieces operator

Update data

OPENED

IN WORKING

CLOSED

SUBMITTED

PAID

Client/Vehicle/Case

File processing

Revaluations

Documents

Insurer requests

Events

Alerts

Messages

Deviz

File submission

Activities

Logs

Work order number

111998

Site

BAN

Copy file

Imported data from DMS

License plate

B023DMC

VIN short

IRNX208

Lastname Firstname Client

John Diaconu

Lastname Firstname user

testand3

Client/Vehicle/Case

File processing

Revaluations

Documents

Insurer requests

Events

Alerts

Messages

Deviz

File submission

Activities

Logs

AIR necessary?

Yes

No

Necssary accept for payment?

Yes

No

Necesar IPR?

Yes

No

AIR

Status: Refuzat

Submission date: 11/7/2018

Receiving date: 11/7/2018

Observations:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Deny reason:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Accept plata

Status: Primit

Submission date: 11/7/2018

Receiving date: 11/7/2018

Total amount accepted payment:

12.000 Eur

Observations:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

ActivitiesReportTemplate (16) (1).pdf

Compensation order

IPR

Status: Refuzat

Submission date: 11/7/2018

Reveiving date: 11/7/2018

Observations:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

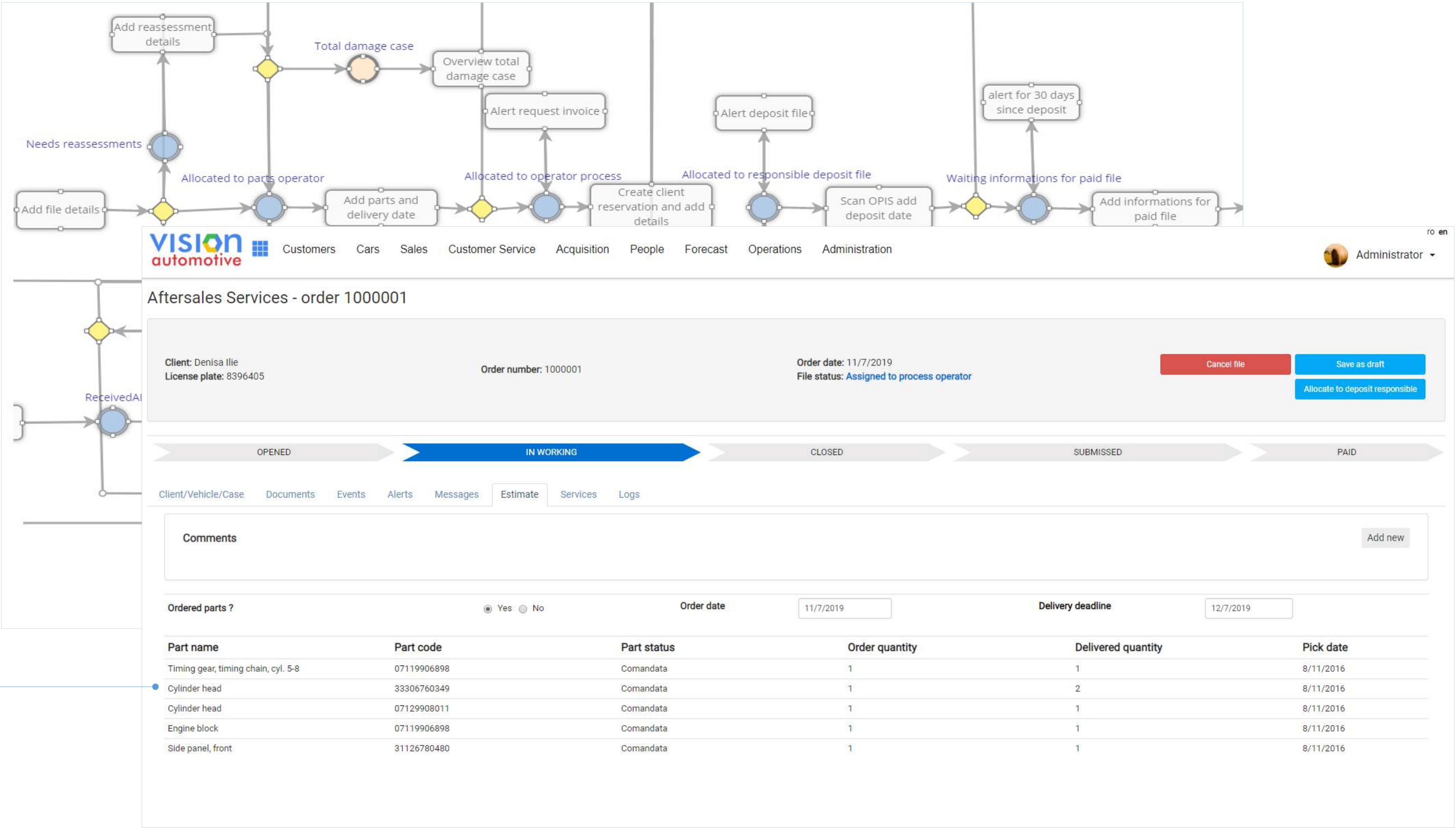
Deny reason:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Services

Key Features

The platform implements standards **workflows** for after sales services, insurance claim file evaluation, etc. This workflows can be easily customized in a business process management visual user interface.



Main after sales services

- Vehicle Maintenance
- Mechanical/electrical repairing
- Vehicle body repairing
- Vehicle check

Secondary after sales services

- Detailing
- Fast Lane
- Door 2 door
- Voucher taxi
- Replacement car
- Warranty
- Insurance Claim File Evaluation
- Insurance Evaluation

After Sales Services

Key Features

Manage in real time the service flow, tracking the vehicle since first owner interaction with the service, going further with all service details (schedule, items, cost, parts, etc.), until the car delivery.

Flow Steps

Aftersales services features automate service activities across all lifecycle: starting with customer first interactions, going further across all activities (schedule, services activities, parts, receptions, documents, payments, etc.)

Details

All service activities details are available in real time: vehicle/owner, steps, status, pats, etc.

VISION

automotive

Customers

Cars

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Customer Service

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ro en

Administrator

Aftersales - comanda 1000000

Client: Dumitru Ana

Numar Auto: B193ABG

Numar Comanda: 1000000

Data Comanda: 11/6/2019

Status dosar: Created aftersales

Anulare caz

Salveaza Draft

Actualizare date

OPENED

IN WORKING

CLOSED

SUBMITTED

PAID

Client/Vehicul/CAZ

Nr. comanda lucru

1000000

Site

Copiere dosar

Date importate din DMS

Nr. Inmatriculare

B193ABG

Nume prenume client

Dumitru Ana

Telefon mobil client

0745896321

Date completate de operator

Urmariti dosarul?

Yes

No

Fransiza

Yes

No

Tip dauna

CASCO

RCA

Client Payment

Others

Valoare deviz estimativ

Incarca calculatie

Posibil dauna totala?

Yes

No

VIN short

G460779

Nume prenume utilizator

Telefon mobil utilizator

Nr.dosar de dauna

Vision Automotive \ Services

VISION

Damage File Report #1

Key Features

Flow Steps

The standard flow steps are: Open, Processing, Closed, Subscribed and Payed. At each step specific information are requested or multiple iteration are supported according with each insurance provider. The application interface is adjusting in real time for each implemented scenario.

General Information

General information regarding the case is captured or automatically loaded from other systems: requestor name, vehicles details, order and insurance data.

Vehicle / Client / Insurance data

Manage vehicle details needed in order to process the claim file request. If the car is already registered in platform, the information is automatically presented. Additionally, this section store the details regarding the requester and insurance policy.

Case processing

Store, process and capture information according with each flow step: need approvals, specific requirements, managers and responsible, necessary parts, etc.

Insurance re-report

Allow successive input of report data according with insurer requirements

Documents

The documents check list for the claim file. The check list is dynamic according with each claim type (car\customer\damage type) and can be automatically emailed.

Insurer specific requirements

Dynamically support the necessary procedures for each insurer enrolled in platform. Type of requested documents, models, minimal information can be stored and filled in this section according insurer specifically.

Manage in real time the flow of claim file evaluation, tracking a claim file in all phases of its development. The functionality enabling the **automotive services** companies acting both as claim center on behalf of different insurance company and repairing shop to offer its customers a **one stop shop** experience.

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Administrator

Damage file - order 111998

Client: John Diaconu

Plate license: B023DMC

Insurer: testt

Order number: 111998

Order date:

File status: Received IPR

Cancel case

Save Draft

Assign to pieces operator

Update data

OPENED

IN WORKING

CLOSED

SUBMITTED

PAID

Client/Vehicle/Case

File processing

Revaluations

Documents

Insurer requests

Events

Alerts

Messages

Deviz

File submission

Activities

Logs

File CASCO:

Generate OPIS

	File	OPIS	Requested	Upload date	Pas cand dev obligatoriu	Document	
O	Nota constatare	OK	OK		Salvare caz		
O	Cererea de despagubire	OK	OK		La inchidere		
O	Copie permis/ CI/ talon	OK	OK		Salvare caz		
A	Declaratie accident	OK	OK		La inchidere		
A	RCA vinovat + constatat amiabil semnat	OK	OK		La inchidere		
A	Dovada Politie	OK	OK		La inchidere		
A	Acord cesiune	OK	OK		La inchidere		
A	Imputernicire	OK	OK		La inchidere		
O	Deviz final	OK	OK		La inchidere		
O	Factura finala	OK	OK		La inchidere		
A	Altele	OK	OK	9/18/2019		1920-wallpaper-hd-11.jpg	
A	Foto cu auto reparat	OK	OK		La inchidere		
A	Foto cu auto in lucru	OK	OK		La inchidere		
A	Foto cu fuller aplicat	OK	OK		La inchidere		
A	Foto cu auto demontat	OK	OK		La inchidere		
A	Foto cu piese distruse*	OK	OK		La inchidere		

Damage File Report #2

Key Features

Client/Vehicle/Case

File processing

Revaluations

Documents

Insurer requests

Events

Alerts

Messages

Deviz

File submission

Activities

Logs

AIR necessary?

YesNo

Necssary accept for payment?

YesNo

Necesar IPR?

YesNo

AIR

Status: Refuzat

Submission date: 11/7/2018

Receiving date: 11/7/2018

Observations:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Deny reason:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Accept plata

Status: Primit

Submission date: 11/7/2018

Receiving date: 11/7/2018

Total amount accepted payment:

Observations:

ActivitiesReportTemplate (16) (1).pdf

Compensation order

IPR

Status: Refuzat

Submission date: 11/7/2018

Reveiving date: 11/7/2018

Observations:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Deny reason:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Client/Vehicle/Case

File processing

Revaluations

Documents

Insurer requests

Events

Alerts

Messages

Deviz

File submission

Activities

Logs

Client/Vehicle

Nume Prenume Client: John Diaconu

Matriculation nr.: B023DMC

Insurer: testt

Pieces

Launched pieces order:

Arrived pieces:

Case

Open date for case: 11/7/2018

Service order date:

File closing date:

Requests

AIR request date: 11/7/2018

Accept request date: 11/7/2018

IPR request date: 11/7/2018

Fixing

Send email

To:

insurance1@i.ro

Cc:

andrei.rasvanta@vision.ro

Subject:

[Dosar Dauna-Comanda:#00111998]

Attachments:

There are many variations of passages of Lorem Ipsum available, but the majority have suffered alteration in some form, by injected humour, or randomised words which don't look even slightly believable.

Body:

Send

Events

Track sales case flow main events regarding: vehicle, client, case and invoices. The section is used to aggregate data from different sources like Automaster or other specific automotive system.

Alerts and Notifications

Alerts the platform users for predefined scenarios like due deadline, flow states duration, etc. ...

Messages

Email integration: allow to send email messages with specific case data automatically selected from case and track all email conversation on this topic

Part and services estimate

Administrate and track at item level the parts list necessary for reparation.

File submission

Prepare the submission file: package all necessary data according with each insurer and prepare for submission. Store the submission metadata like: date, responsible, contact person, etc.

Activities

Email integration: allow to send email messages with specific case data automatically selected from case and track all email

Logs

Email integration: allow to send email messages with specific case data automatically selected from case and track all email

Vision Automotive \ Services



Auto Insurance Claim Evaluation File

Key Features

Manage in real time the flow of insurance claim file evaluation, tracking a claim file in all phases of its development. The functionality enabling the **automotive services** companies acting as claim center on behalf of different insurance companies.

VISION
automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro en

Self-evaluation - appointment 100572

Client: Top Drive Company
License plate: AG78MMM

Insurer: ASTRA ASIGURARI
Programation number: 100572

Programation date: 2/20/2017
File state: Allocated service adviser

Save Draft

Update data

Completion

Case cancellation

OPENED

REQUESTED WARNING

IN WORKING

ON GOIND EVALUATION

SENT TO INSURER

DONE EVALUATION

CLOSED

CANCELED

Client/Vehicle/Case

Insurance

File Processing

Checks

File preparing

Alerte

License plate

AG78MMM

Chassis number

VJ54336

Client lastname firstname

Top Drive Company

User lastname firstname

CHIRIAC VLKRNDVB

Client phone

0754234565

User phone

0754392224

Appointment location

BAN

Vehicle / Client / Insurance data

Manage vehicle details needed in order to process the claim file request. If the car is already registered in platform, the information is automatically presented. Additionally, this section store the details regarding the requester and insurance policy.

Insurance report

Allow successive input of report data according with insurer requirements

Documents

The documents check list for the claim file. The check list is dynamic according with each claim type (car\customer\damage type) and can be automatically emailed.

Insurer specific requirements

Dynamically support the necessary procedures for each insurer enrolled in platform. Type of requested documents, models, minimal information can be stored and filled in this section according insurer specifically.



Acquisition

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[Clienti](#)[Masini](#)[Vanzari](#)[Servicii](#)[Achizitii](#)[Angajati](#)[Forecast](#)

ro enAdministrator

Dosar caz de achizitii - numarul 2166

Nume Client
Toij Vqngtx Pip

Data Comanda
19/3/2018

Status dosar
Negociere

Inchide Proces Evaluare

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automotive

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ro enAdministrator

Acquisitions case file - number2166

Client name
Daniel Doe

Order name
3/19/2018

Status file
Negociere

Close evaluation process

CASE INITIATION

ESTIMATION

IN WORKING

CLOSED

CANCELED

Formular

Licitatie

Istoric

Documente caz achizitie

Documente caz vanzare

Observatii

Proposal purchase price

Responsible role	Responsible name	Proposal date	Proposal purchase price
Junior acquisition resp.	Mr. Administrator	3/19/2018	11000
Buyer	Mr. Administrator	3/19/2018	12000
Senior acquisition resp.			
Acquisition coordinator	Mr. Administrator	3/19/2018	12000
		Estimare castigatoare	12000

*TVA inclus si nedeductibil.

Administrate the acquisition flow across entire phases and details. Control the evaluation, approvals and actions in direct correlations with the sales case.

Acquisition

Key Features

Case informations

Reason Request Appraisal

TRADE-IN CU AUTO DIN STOC

Tires "summer" when delivered

Car delivery date

3/19/2018

Wheels "according to configuration" when delivered

Rolling car when delivered

250000

Casco policy

Initiator Price Proposal

11000

Car mark-(exterior&interior)

Owner financial expectations

12000

Proposal site exposure price

13000

*TVA inclus si nedeductibil.

Associated sales case:

Redirect

Historic informations

Historic estimates

Owner name	Chassis series	Offered price	Rolling KM	Date
Daniel Doe	123456	15500	250000	2/28/2018 12:00:00 AM
Daniel Doe	123456	14500	250000	
Daniel Doe	123456	12500	250000	
Daniel Doe	123456			
Daniel Doe	123456			
Daniel Doe	123456			
Daniel Doe	123456			

Formular Licitatie Istoric Documente caz achizitie Documente caz vanzare Observatii

Istoric achizitie

Istoric revizii motor

OK

Istoric daune caroserie

OK

Lorem ipsum is a name for a common type of placeholder text. Also known as filler or dummy text, this is simply copy that serves to fill a space without actually saying anything meaningful. It's essentially nonsense text, but gives an idea of what real text will look like in the final product.

Lorem ipsum is a name for a common type of placeholder text. Also known as filler or dummy text, this is simply copy that serves to fill a space without actually saying anything meaningful. It's essentially nonsense text, but gives an idea of what real text will look like in the final product.

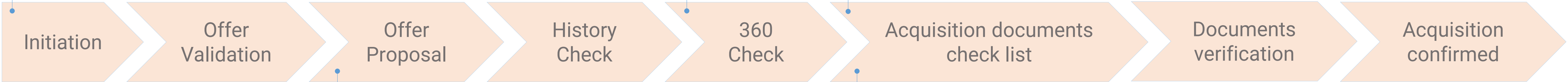
Istoric provenienta(furnizor)

Not OK

Numar Proprietari

2

Not OK



Formular Licitatie Istoric Documente caz achizitie Documente caz vanzare Observatii

Propunere pret achizitie

Rol responsabil	Nume responsabil	Data propunere	Propunere pret achizitie
Resp. achizitii Junior	Mr. Administrator	19/3/2018	11000
Achizitor	Mr. Administrator	19/3/2018	12000
Resp. achizitii Senior	Mr. Administrator	19/3/2018	13000
Coordonator achizitie	Mr. Administrator	19/3/2018	12500
		Estimare castigatoare	12500

Formular Licitatie Istoric Documente caz achizitie Documente caz vanzare Observatii

Documente Achizitie

Nume Document	Denumire fisier	Data incarcarii
CARTE DE IDENTITATE AUTO	Identity Card.pdf	18/9/2019
CERTIFICAT INMATRICULARE (TALON)	demo.pdf	18/9/2019
	Passport.pdf	18/9/2019

CERTIFICAT INMATRICULARE (TALON)
CONFIGURATIE AUTO(ASAP - ISPA)
ISPA/AM/WEBRATIO/ASAP
FACTURA PROVENIENTA
CARTE DE IDENTITATE AUTO
VERIFICARE 360
DEVIZ REPARATII LA VALOARE INTERNA

Aquisitions types:

- TRADE-IN from stock
- TRADE-IN with order
- Free aquisition
- Consignment



Sales Commission

VISION
automotive

ClientiMasiniVanzariServiciiAchizitiiAngajatiForecast

ro enAdministrator

Reprezentant vanzariDumitru AnaDealerAutomobile BavariaManager VanzariUser Manager vanzariAnul2018

Target

Marca	Tip	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	YTD Q2	Jul	Aug	Sep	Q3	YTD Q3	Oct	Nov	Dec	Q4	YTD Q4		
BMW	New	0	0	3	3	0	0	2	2	5	0	0	1	1	6	0	0	4	4	10		
MINI	New	0	2	0	2	0	1	0	1	3	0	4	0	4	7	0	3	0	3	10		
Used	All	1	0	0	1	4	0	0	4	5	3	0	0	3	8	2	0	0	2	10		
Bmw Moto	Demo	0	0	4	4	0	0	3	3	7	0	0	2	2	9	0	0	3	3	12		

Achievement

Tip	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	YTD Q2	Jul	Aug	Sep	Q3	YTD Q3	Oct	Nov	Dec	Q4	YTD Q4
BMW New	0	0	0	0	0	0	9	9	9	0	0	0	0	9	0	0	0	0	9
MINI New	0	0	0	0	0	0	1	1	1	0	0	0	0	1	0	0	0	0	1
Used All	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bmw Moto Demo	0	0	0	0	0	0	0	0	0	1	0	0	1	1	0	0	0	0	1
All All	0	0	0	0	0	0	10	10	10	4	0	0	4	14	0	0	0	0	14
Total	0	0	0	0	0	0	20	20	20	5	0	0	5	25	0	0	0	0	25

Overall volume Target Achivement

Quarter	Overall Target	Overall Achieve...	Achievement %	Total value	Bonus %	Bonus BRUT	Bonus NET
Q1	13	0	0	0	0	0	0
Q2 YTD	25	20	80	438447,88	0	0	0
Q3 YTD	36	25	69,44	438447,88	0	0	0
Q4 YTD	50	25	50	438447,88	0	0	0

Demo Target Achievement

Quarter	Demo Target	Demo Achieve...	Achievement %	Total value	Bonus %	Bonus BRUT	Bonus NET
Q1	4	0	0	0	0	0	0
Q2 YTD	7	0	0	103828,57	0	0	0
Q3 YTD	9	1	11,11	154771,44	0	0	0
Q4 YTD	12	1	8,33	154771,44	0	0	0

Stock New/Demo Target Achievement

Quarter	Stock New/De...	Stock New/De...	Achievement %	Total value	Bonus %	Bonus BRUT	Bonus NET
Q1	0	0	0	0	0	0	0
Q2 YTD	0	0	0	103828,57	0	0	0
Q3 YTD	0	0	0	154771,44	0	0	0
Q4 YTD	0	0	0	154771,44	0	0	0

Used volume Target Achievement

Quarter	Used Target	Used Achievement	Achievement %	Bonus BRUT	Bonus NET
Q1	1	0	0	0	0
Q2 YTD	5	0	0	0	0
Q3 YTD	8	0	0	0	0
Q4 YTD	10	0	0	0	0

Total V3

0

Total V4 (Bonus Malus)

200

Total brut variable part to be paid

200

Total net variabile part to be paid

116

Improve internal communications and team collaboration, provide critical information in one place and in correlation with your entire organization.



Sales Commission

Key Features

Monthly calculation process

The sales results are monthly validated according with each sales agent hierarchy. The sales are structured on New\Used Car Sales, Accessories and services sales.

Summary

For each month a summary is aggregated based on:

- Information provided by sales agent: sales activity, description and observations
- Data automatically loaded from invoicing system: total sales, total delivered sales, commissions, revenue, etc.
- Information provided over the flow: figure adjustments, additional explanations, etc.

Sales data

The sold items (vehicles, parts, accessories and services) are imported from internal systems and monthly aggregated for each sales agent. This figures are the base calculation and approval for commissions. Additional items can be added directly in the platform.

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Editare plan comisioaneValidare ManagerValidare HQ QualityValidare intermediara ManagerValidare AgentValidare finala ManagerValidare finala HQ QualityValidare director de vanzariInregistrare comisioane.

Fisa comision lunarBMW NewMini NewUsed CarsAccesorii si alte servicii

Valoare Totala bruta :204 €204Valoare Totala neta :118.32 €118.32

AccesoriiPachete serviceBavaria BrokerBavaria MobilityTrade-InConsignatieAlteleBonus/Malus/Regularizare

Nr. crt.	Valoare RON	Valoare EUR	Valoare comision brut €	Valoare comision net €	Document
1	1234	274	7	4.06	
2	12455	2768	66	38.28	
3	24509	5446	131	75.98	

Achievement																				
Tip	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	YTD Q2	Jul	Aug	Sep	Q3	YTD Q3	Oct	Nov	Dec	Q4	YTD Q4	
BMW New	0	0	0	0	0	0	9	9	9	0	0	0	0	9	0	0	0	0	9	
MINI New	0	0	0	0	0	0	1	1	1	0	0	0	0	1	0	0	0	0	1	
Used All	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Bmw Moto Demo	0	0	0	0	0	0	0	0	0	1	0	0	1	1	0	0	0	0	1	
All All	0	0	0	0	0	0	10	10	10	4	0	0	4	14	0	0	0	0	14	
Total	0	0	0	0	0	0	20	20	20	5	0	0	5	25	0	0	0	0	25	

Overall volume Target Achievement								Demo Target Achievement							
Quarter	Overall Target	Overall Achieve...	Achievement %	Total value	Bonus %	Bonus BRUT	Bonus NET	Quarter	Demo Target	Demo Achieve...	Achievement %	Total value	Bonus %	Bonus BRUT	Bonus NET
Q1	13	0	0	0	0	0	0	Q1	4	0	0	0	0	0	0
Q2 YTD	25	20	80	438447,88	0	0	0	Q2 YTD	7	0	0	103828,57	0	0	0
Q3 YTD	36	25	69,44	438447,88	0	0	0	Q3 YTD	9	1	11,11	154771,44	0	0	0
Q4 YTD	50	25	50	438447,88	0	0	0	Q4 YTD	12	1	8,33	154771,44	0	0	0

Stock New/Demo Target Achievement								Used volume Target Achievement							
Quarter	Stock New/De...	Stock New/De...	Achievement %	Total value	Bonus %	Bonus BRUT	Bonus NET	Quarter	Used Target	Used Achievement	Achievement %	Bonus BRUT	Bonus NET		
Q1	0	0	0	0	0	0	0	Q1	1	0	0	0	0		
Q2 YTD	0	0	0	103828,57	0	0	0	Q2 YTD	5	0	0	0	0		
Q3 YTD	0	0	0	154771,44	0	0	0	Q3 YTD	8	0	0	0	0		
Q4 YTD	0	0	0	154771,44	0	0	0	Q4 YTD	10	0	0	0	0		

Total V3	0	Total V4 (Bonus Malus)	200	Total brut variabile part to be paid	200	Total net variabile part to be paid	116
----------	---	------------------------	-----	--------------------------------------	-----	-------------------------------------	-----

Approval Workflow

The approval flow can be customized according with each company internal procedures.

Quarterly dashboard

Aggregate the quarterly result per agent and type of sales, covering: Targets, Achievement, Overall volume Target Achievement, Stock New/Demo Target Achievement, totals.

Collaboration

Alerts, Notification, request for approvals or quality verifications are implemented in order to allow a quick, transparent and smoothly approval of the sales agents commissions.

Performance improvement tools

Key Features

Calendars

Vehicles, activities, deadlines, etc. – in one-place, structured visual in a dynamic calendar, enabling the operations staff to quickly visualize, plan and execute daily tasks

Home dashboard

Aggregates all activities, task and alerts from the entire platform offering in a single view real time dashboard. You can start a new case or check the status of exiting ones with one click.

Email Integration

The platform is integrated with the email function allowing to automatically track email in platform, compose message with attachment generated automatically from platform or to respond to any message, the entire conversation being tracked here.

Deschide Dosar

Dosarele Mele

Site

In Asteptare

In Asteptare Asigurator

Nedepuse

Nefacturate

Neplatite

Sumar Dosare

Data creare	Site	Nr comanda	Numar inmatriculare	Asigurator	Stare
14/11/2018	OTP	121000	B18MMD	esfd21231	AIR primit
12/11/2018	OTP	121101	B05MDM	esfd21231	Accept de plata ...
9/11/2018	OTP	222222	AG78MMM	esfd21231	Dosar dauna creat
9/11/2018	OTP	222223	B365DDD	esfd21231	AIR primit
8/11/2018	BAN	12312315	IS09OPR	testt	Alocat operatoru...
8/11/2018	BAN	111200	IF88EED	testt	Alocat operatoru...
8/11/2018	BAN	100200	B98ABC	TEST	Alocat operatoru...
8/11/2018	BAN	100201	B18MMD	TEST	AIR solicitat
8/11/2018	BAN	100255	CT74000	TEST	Alocat operatoru...
8/11/2018	BAN	10025621	GL00324	TEST	Alocat operatoru...

Autoconstatare:

Deschide Dosar

Dosarele Mele

Site

In Asteptare

Trimise Asigurator

Dosare cu alerte

Site	Responsabil	Nr comanda	Data deschidere caz	Stare
CBV	Mr. Administrator	116196	15/5/2018	Accept de plata primit

Calendar vehicle

<

>

Iulie 2018

Luna 7 (Iulie) An 2018

Luni

Marti

Miercuri

Joi

Vineri

Sambata

Duminica

						1
2	3	4	5	6	7	8
9	10	11	12 GL00324	13	14	15
16	17 B18MMD	18	19	20 B18MMD	21	22
23	24 B05MDM B01JKU	25	26	27	28	29

Visual messages

The platform offer a consistent user experience: either you forget to attach a document or to fill in some data, the platform highlight the missing section visually, allowing easy identification within the complex data sheets.

Complex views

Complex views are available in the standard format: last customers, solved cased, due cases, etc.

Integration

Automotive platform is integrated with: Automaster, CRM, ERP, etc.

Activity and Case Management

Key Features

Activity Management

Different types of activities are available: task, email, appointment and call. The Case and activity panel is can be associated with any entity or interface.

Case Management

A case in grouping one or many activities leading to a specific purpose. Any activity or case can be associated to a specific entity (customer, provider, contract, invoice, etc.)

Analytic

Dashboards regarding the duration of an activity or workflow phase are available in real time.

Post

Post feature is available on each entity allowing users to post comments or to respond to some specific comments.

Case

Name*

Project Case

Created on

8/29/2019

End date

Comments

Status

Start date

Priority

Task

Email

Call

Appointment

#	Subject	Status Code
1	ccccc	1

Appointment

Subject*

Appointment PR

Status*

Closed

Description

Assigned to*

Irina-Ruxandra Plăcianu

Start date*

8/23/2019

End date*

8/23/2019

Required contact list

Priority*

High

Created date

8/23/2019

Start hour*

05:35

End hour*

12:48

Mark as complete

Save

Cases

Audit

#	User name	Date	Details
1	Administrator	8/23/2019	The appointment was marked as complete by Administrator on 23/08/20...
2	Administrator	8/23/2019	Assigned to was changed from Administrator to Irina-Ruxandra Plăcianu
3	Administrator	8/23/2019	The appointment has been added

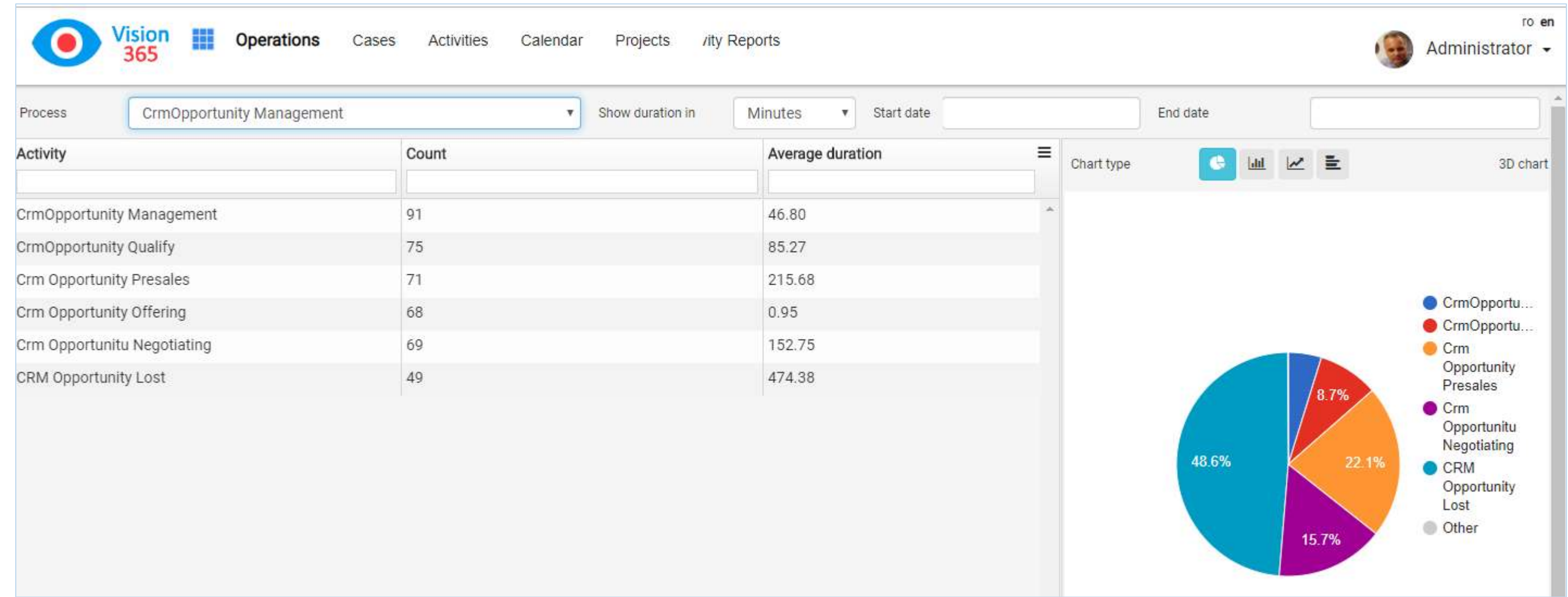
Activity

Add Task

Add Email

Add Call

Add Appointment



Intranet

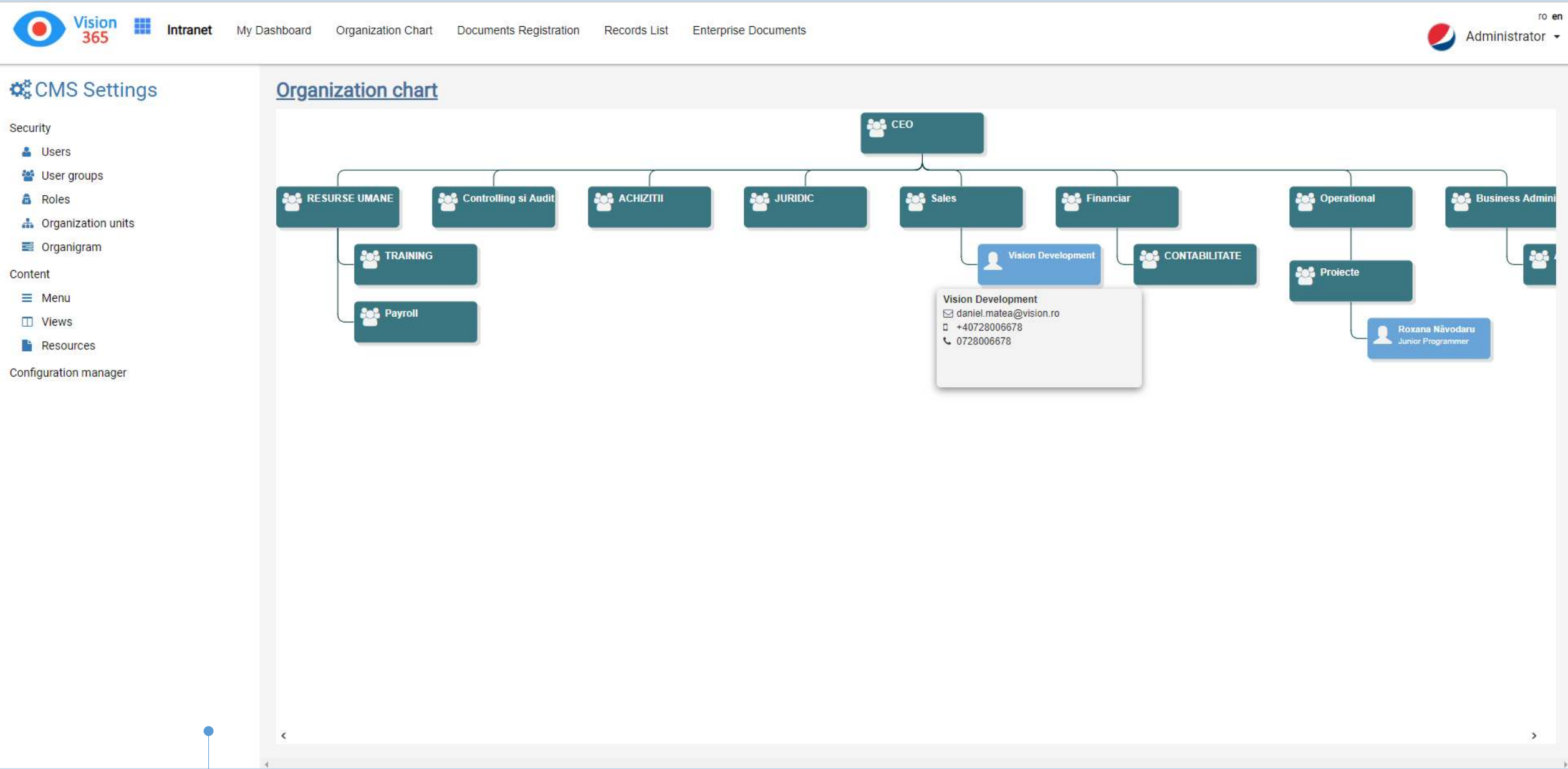
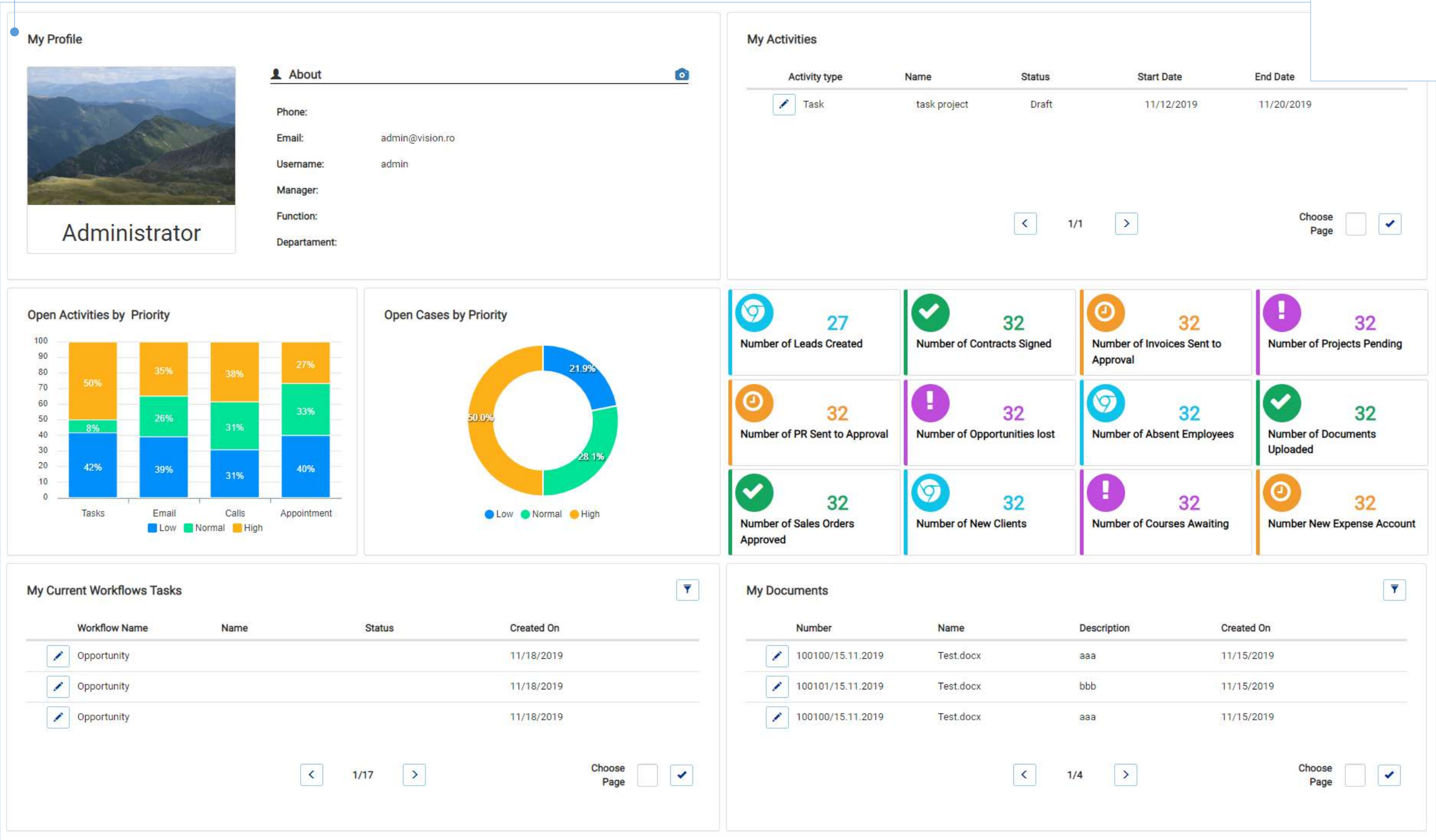
Key Features

User Operational Dashboard

Manage in one place the user interaction with the entire platform.

The dashboard is a preview of crucial information important for the user at the moment he is looking at it, and an easy way to navigate directly to various areas of the application that require users attention or present critical information quickly to users as they are engaged in time-sensitive tasks.

Either you have to approve a contract, solve a task or upload a document, you can use the dashboard as a starting point.



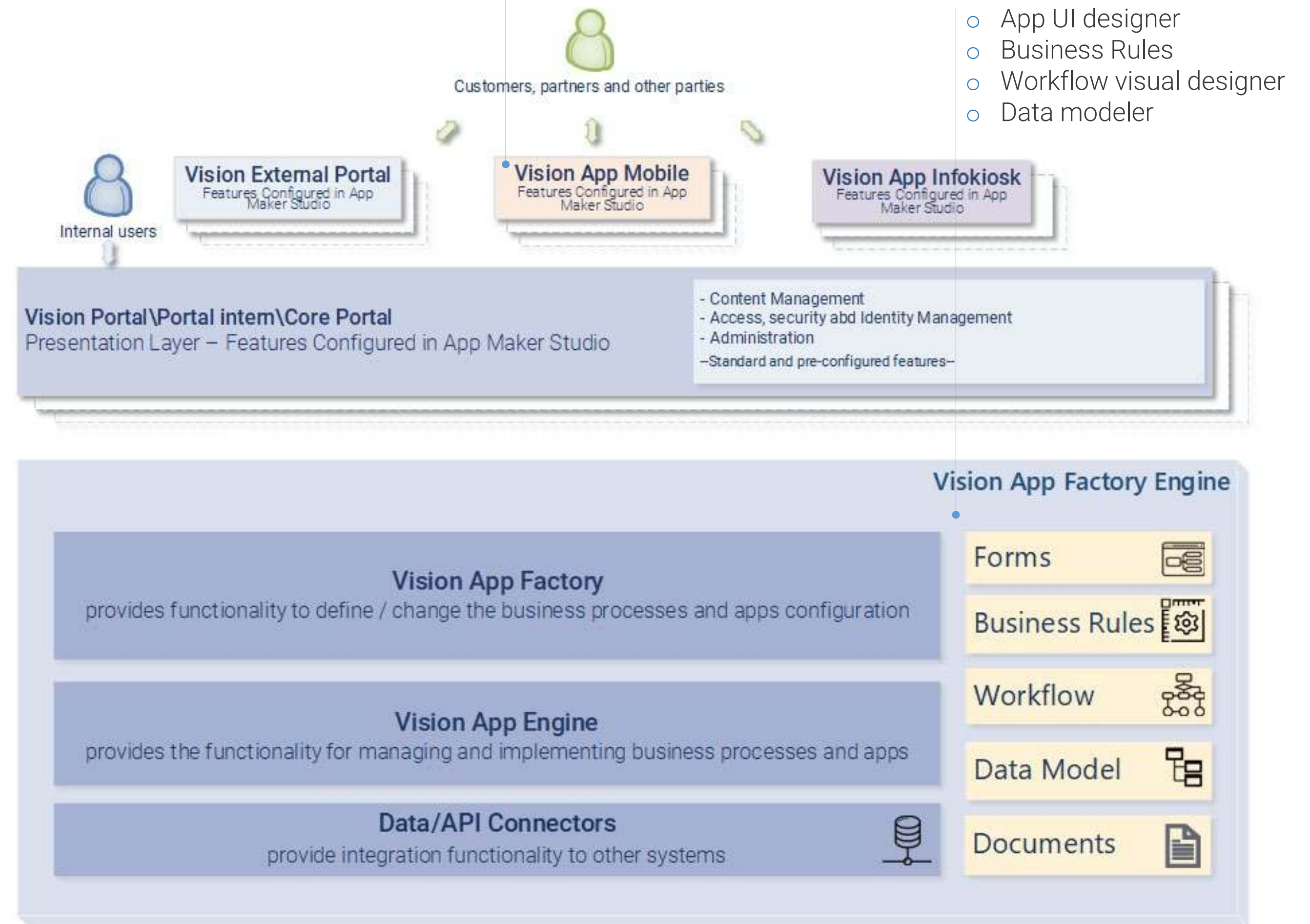
Company Organigram

Is the best way to represent the company structure in a clear and easy to understand way. The main purpose is to show the structure of the company visualizing its hierarchy along with specifying concrete positions and the reporting line between them.

Vision App Maker

Architecture

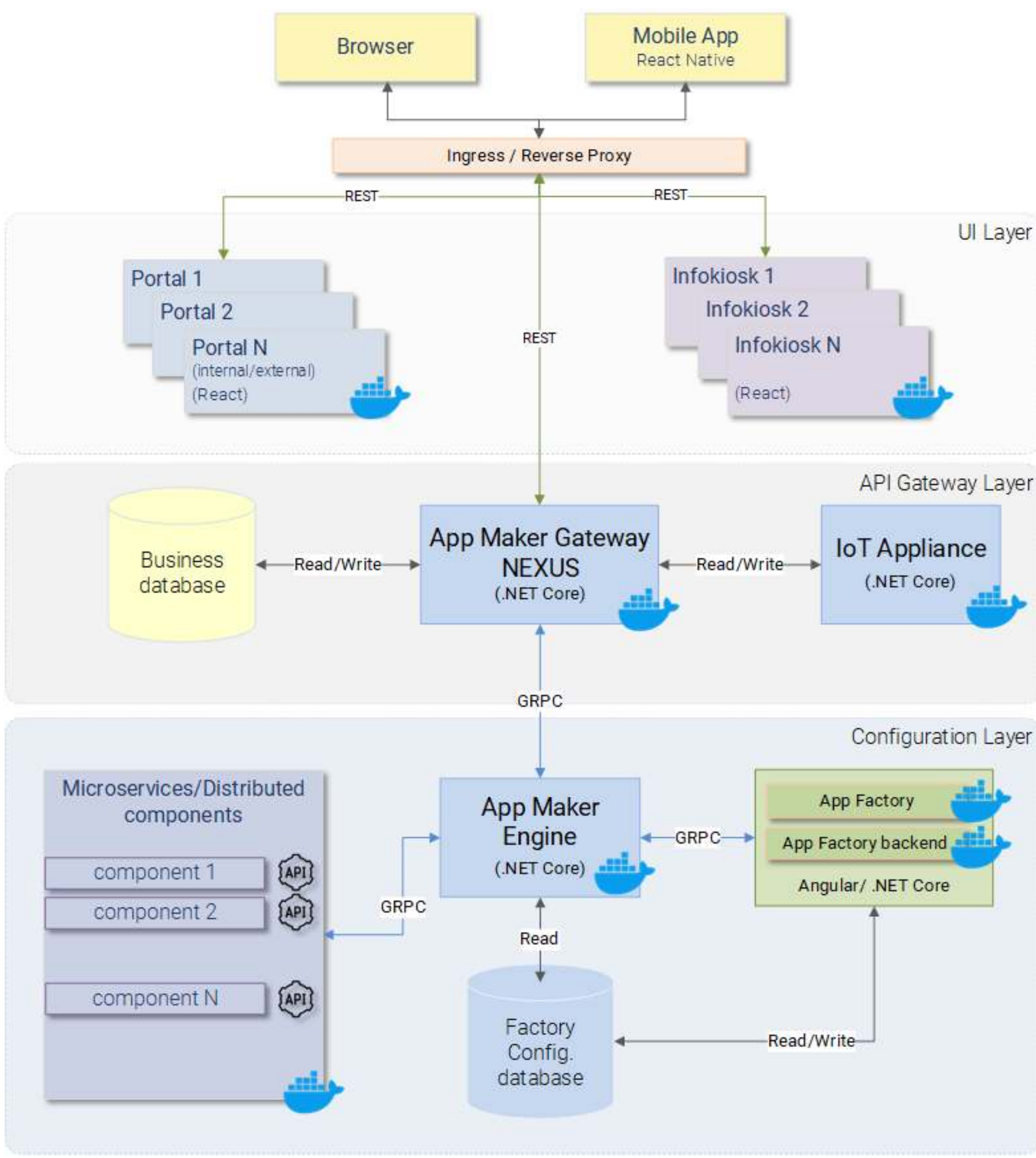
- Omnichannel (external/internal portal, mobile, infokiosk)
- Public API access
- Internal and external purposes configurable topology



Vision App Maker is a turn-key, integrated framework designed on a modular, cloud and decoupled architecture, compliant with the highest security and availability requirements.

Vision App Maker Suite

Technology Stack



Vision App Maker components were developed with modern and appropriate technologies for each layer purpose: reliable back-end developed in .NET Core and flexible, responsive and rich front-end based on Java Script, React and Angular.



Enjoy the digital journey



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