

# Solution Overview

## Vision Automotive

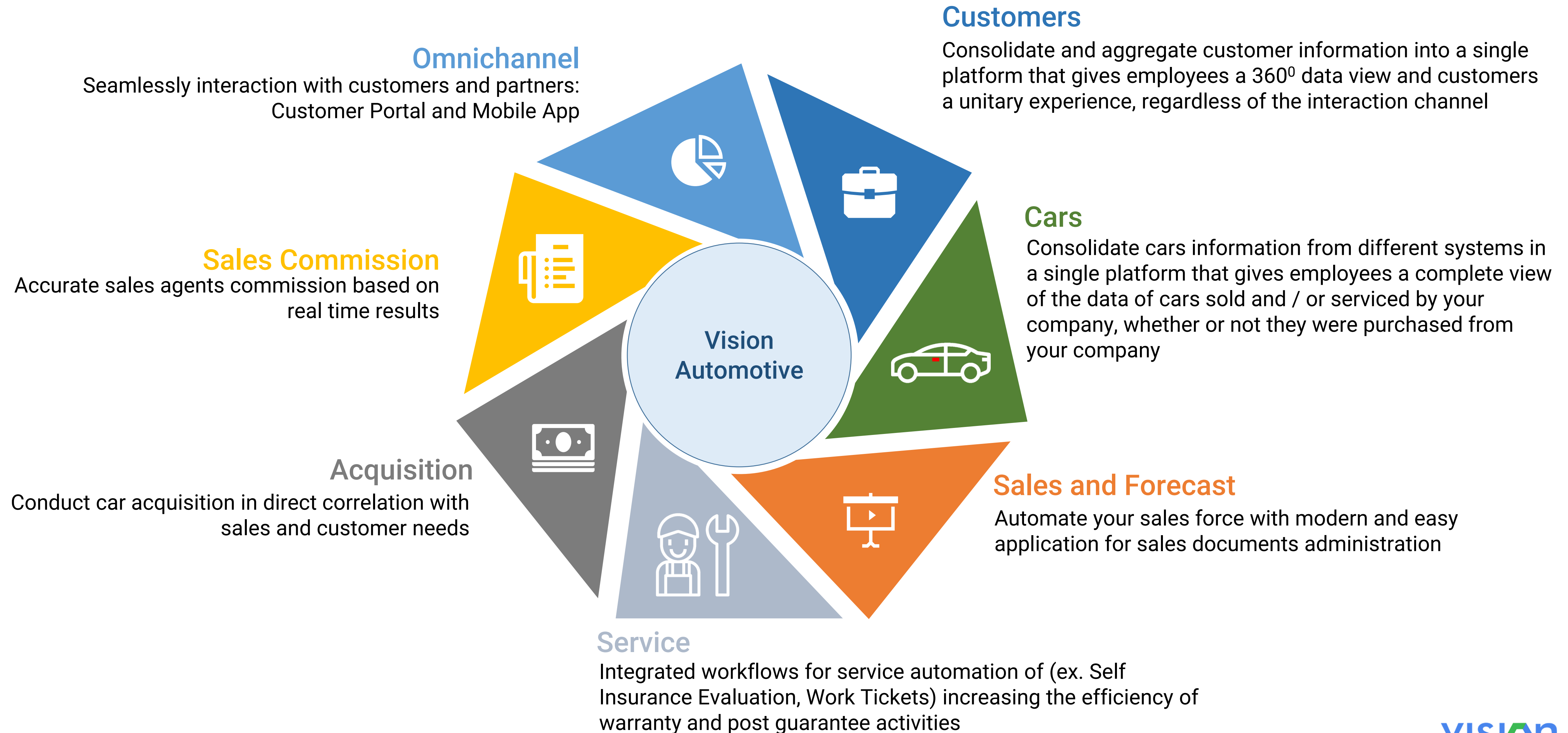
#Customer Self Service Portal  
#Sales Automation  
#Vehicles Management  
#Service Automation

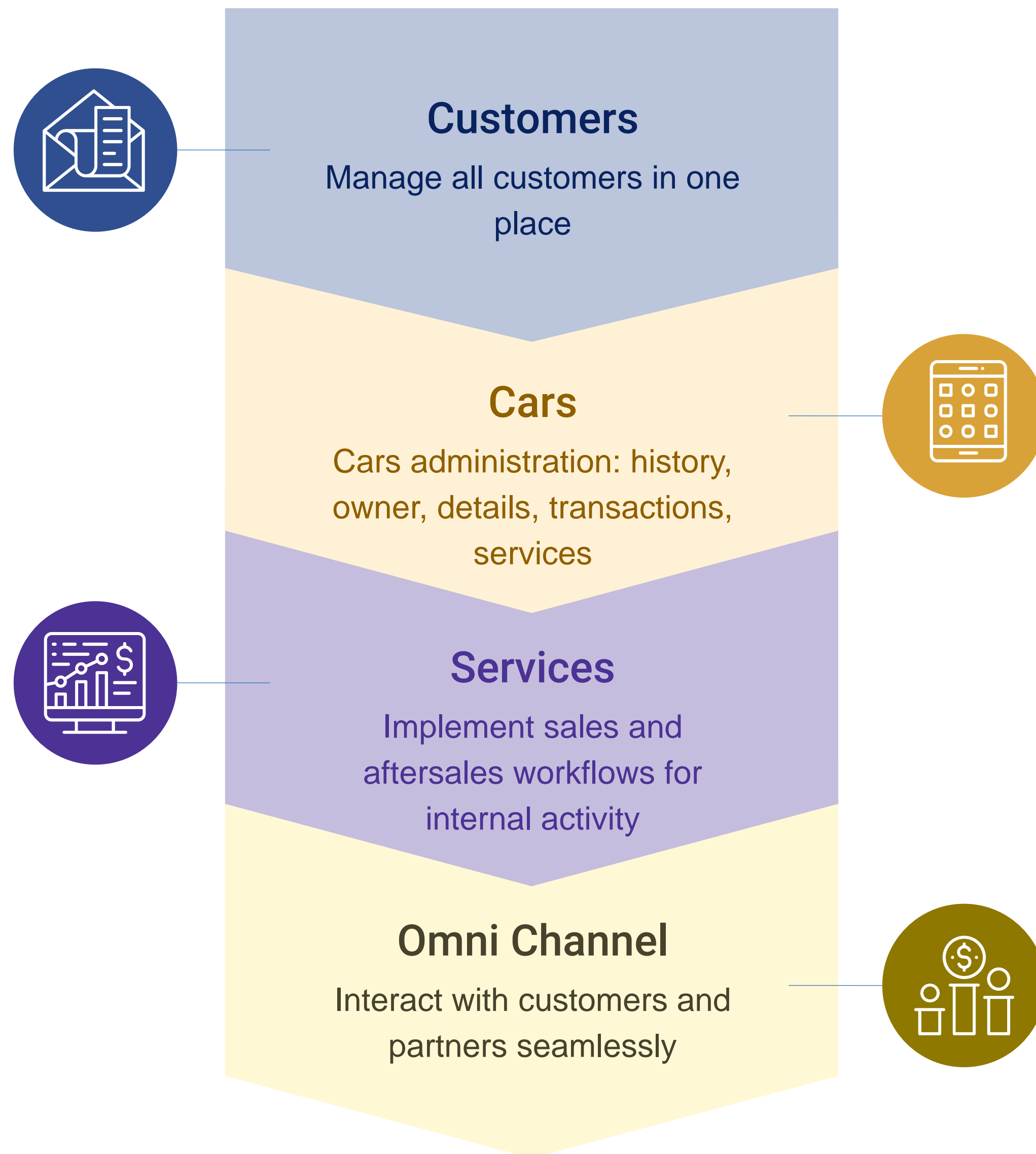




# Vision Automotive

## 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

Automatize and control  
internal processes and  
services

NEW CUSTOMERS

1

NEW CARS

3

VEHICLE SELLERS

17

NEW ACQUISITION FILES

0

VEHICLE MODELS

153

NEW SALES FILES

0

NEW SELF-EVALUATION FILE

0

NEW DAMAGE FILES

0

Top 5 sellers

Seller	Value
Gabriela Cm	55000
Gabriela Po	40000
Eugen Sidoran	38000
Laslo Kalic	37000
Catalina Endesigro	36000

Upcoming delivery date

Client	Phone	Chassis series	Offer number	Estimated delivery date	Seller

<

1/0

>

Choose Page

☒

Top 5 locations

Location	Value
BAN	150000
CSB	35000
OTP	30000

Focus on real value added  
activities and customers

Spent time on sales file

● Caz deschis ● Asteapta aprobarea managerului de vanzari  
● Asteapta aprobarea reprezentantului operatiuni ● Lista de documente aprobata  
● Asteapta aprobarea pentru configuratia IVSR ● Documente pre-livrare incarcate  
● Trimis la reprezentant vanzari ● Trimis la reprezentant operatiuni ● Incarcare documente livrare  
● Trimis spre verificare documente ● Asteapta aprobarea managerului de zona  
● Asteapta aprobarea de la User Car Manager ● Asteapta aprobarea de la Manager Moto Group  
● Asteapta aprobarea de la Manager Mini Group

Lead source

● Web ● Broker ● Own Sales

Top 10 car models

● G01 ● G02 ● I01 ● K02 ● F48 ● F56 ● K08 ● K51 ● K73 ● K80 ● Others

Vision Automotive \ Overview

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## Vision Automotive

### Functional Architecture Implementation Scenarios

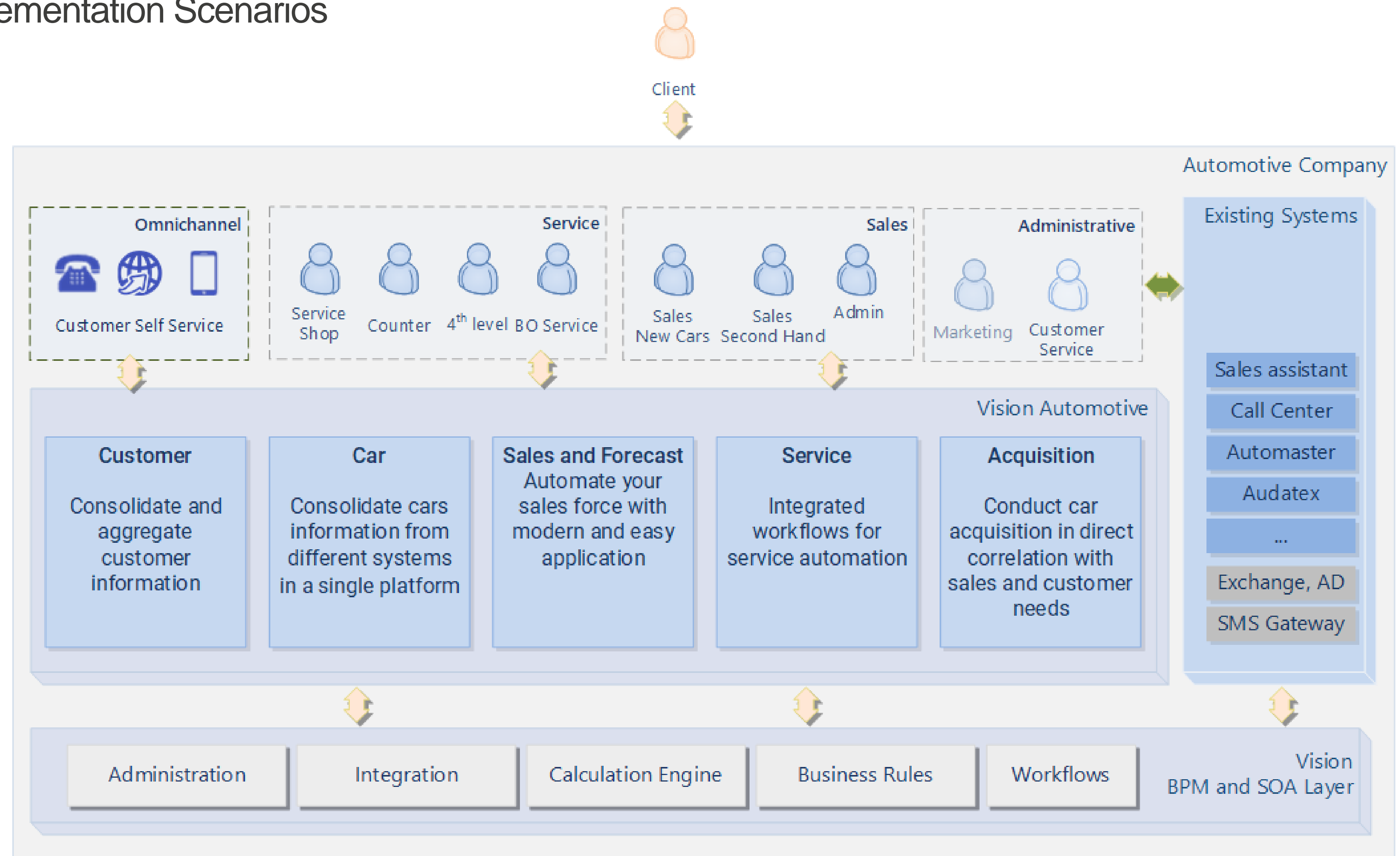
#### Master System

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.).





## A hand is shown interacting with a tablet. The tablet's screen displays a futuristic digital interface with various icons and glowing lines. The icons include a Wi-Fi symbol, a globe, a target, a lightbulb, a person, a shopping cart, a headset, a thumbs up, a document, a gear, and a location pin. The glowing lines connect these icons, suggesting a network or data flow. The background is dark and blurred, with some light sources visible.

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

Vision  
automotive

ro en

Vision Technology Development

Detalii client

Editteaza

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...	

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technology



# 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.

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My Profile

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Vision Technology Development

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	<div><div>x</div><div>→</div></div>
BMW	G01	X3 xDrive25d	LP69650	9233569	<div><div>x</div><div>→</div></div>

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	<div><div>→</div></div>

Utilizatori secundari

First name	Last name	Email	Phone	Is approved	Is disabled	
office	Vision	office@vision.ro	0720887723	<input type="checkbox"/>	<input type="checkbox"/>	<div><div>+</div><div>✉</div></div>
finance	Vision	finance@vision.ro	0720887723	<input type="checkbox"/>	<input type="checkbox"/>	<div><div>✉</div></div>

Send to approval

Cases

Activities

Posts

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

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.

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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

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Customers

Cars

Sales

Customer Service

Acquisition

People

Forecast

Operations

Administration

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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	<div><div></div><div></div></div>
BMW	G01	X3 xDrive25d	LP69650	9233569	<div><div></div><div></div></div>

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finance	Vision	finance@vision.ro	0720887723	<div><div></div></div>	<div><div></div></div>

Cases

Activities

Posts

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



# 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.

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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	<div><div>✖</div><div>➡</div></div>
BMW	G01	X3 xDrive25d	LP69650	9233569	<div><div>✖</div><div>➡</div></div>

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	<div><div>➡</div></div>

Utilizatori secundari

First name	Last name	Email	Phone	Is approved	Is disabled
office	Vision	office@vision.ro	0720887723	<input type="checkbox"/>	<input type="checkbox"/>
finance	Vision	finance@vision.ro	0720887723	<input type="checkbox"/>	<input type="checkbox"/>

CasesActivitiesPosts

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

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ro enAdministrator

Clients list

#

Client name

Email

Phone

Client type

CUI / CNP

Order by

AscendentDescendent

76

Zoho Dynamics

trade@mail.com

+40744429236

Persoana Juridica

05065736

➡

77

Star Company

dan@live.io

Other

6215058411081

➡

78

Division Comercial

dc@com.le

Persoana Juridica

08554447

➡

79

AXEL HHRH WU XNEUP DEE

Persoana Juridica

53518740

➡

80

ATLAS FJLWMNX HJXXTVOVR AIW

Persoana Juridica

88380064

➡

81

TECHNOLOGY INDUSTRY

Persoana Fizica

7664778065344

➡

82

PONY QSI POLRLUK 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

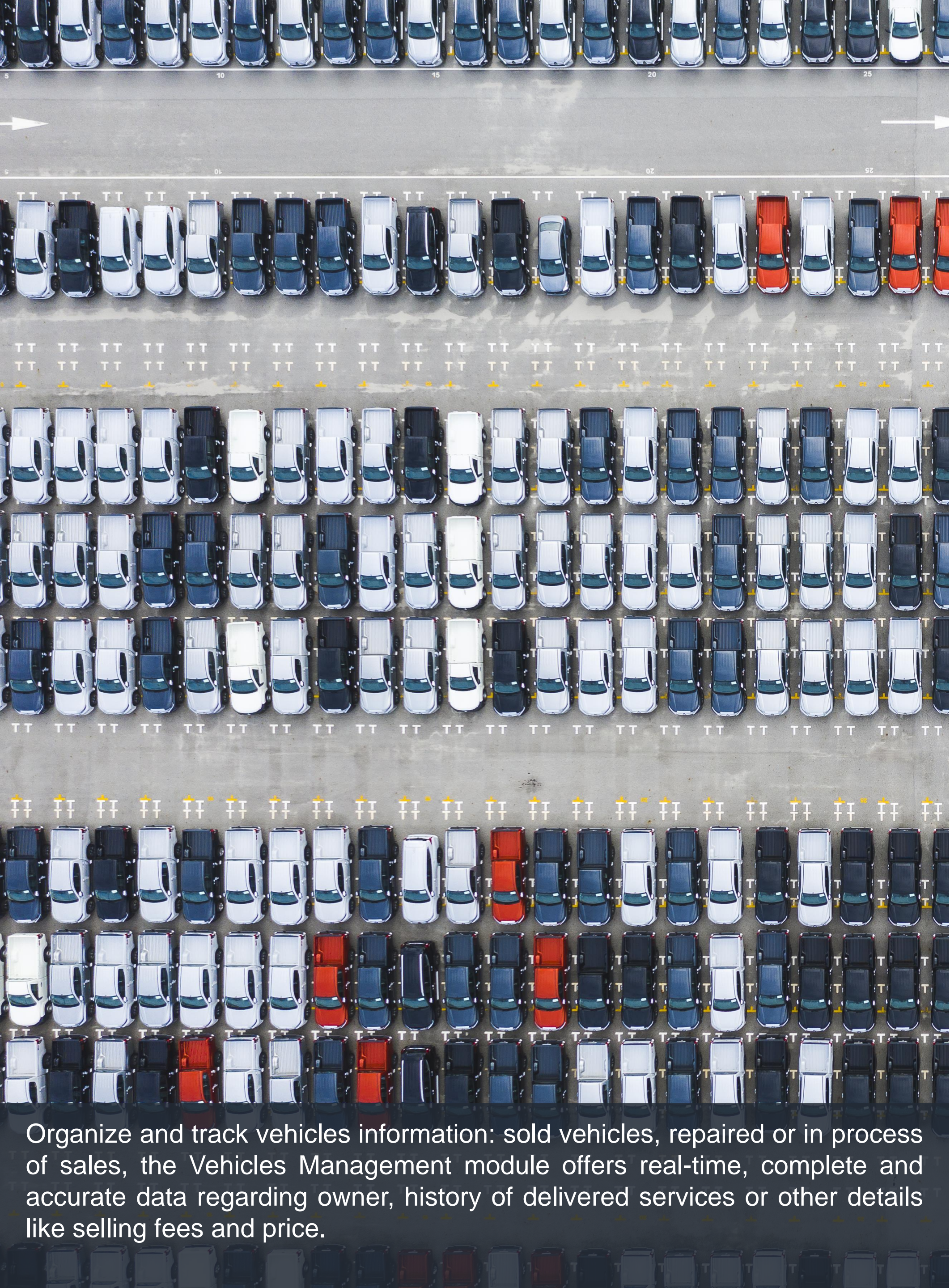
➡

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# Vehicles Management



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Administrator

BMW G02 (B02CAR-LG49492)

Brand: BMWModel: G02Submodel: X4 20i XDriveChassis series: LG49492License plate: B02CARClient: SUVEngine power: 2000Body type: SUVFuel type: DieselIntegrat traction: DaAutomatic 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

Vision Technology Development

Detalii client

Num: Vision Technology DevelopmentAdresa de email: sales@vision.roTelefon: 0728006678Tip client: Persoana JuridicaCUI/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 daunaAutoconstatare

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.

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BMW G02 (B02CAR-LG49492)

Edit

Brand:BMW

Submodel:X4 20i XDrive

License plate:B02CAR

Engine power:2000

Fuel type:Diesel

Automatic transmission:Da

Model:G02

Chassis series:LG49492

Client:

Body type:SUV

Integrat traction:Da

Number 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	Status	Creation d...	
1	Discuss car update offer	In progres	11/6/2019	

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Vehicles list

▼+↓

#BrandModelSubmodelChassis seriesLicense plate

Order by▼

Ascendent

Descendent

1MercedesMercedesGLA SUVMC677RDB03CAR

2BMWBMW X3 DriveWV34234DFAFd999B01CAR

3OpelopelAXBXopecXB10AAX

4RenaultRenault SymbolSymbols1e2B12ASD

5NissanQashqai211234567890AG47SDF

6M-BWMM-albastruS-metalizatVN123456B12ROK

7MercedesC-ClassC-Class SedanKL90H78B04CAR

8MercedesE-ClassE-Class SedanPKL09MKJB05CAR

9MazdaRX81234567890PH11LIP

10VWGolf41234567890PH11LIP

11VWJettaJettaHD4324D00B06CAR

### 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.

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# Sales

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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

București

Pitești

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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.

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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

Mr.

John

EURO COR TECHNO EDP

ecte@mail.com

Doe

Procurement Manager

0729008876

120

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
<b>Date Agreement</b>						
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?						
		<input type="radio"/> Yes <input checked="" type="radio"/> No				
3.Launch / modify the new order in production?						
		<input type="radio"/> Yes <input checked="" type="radio"/> No				
4. Approval of additional discount?						
		<input checked="" type="radio"/> Yes <input type="radio"/> No				
Sales Representative *		Ana Dumitru				
Sales manager *						
Area Manager*						
Opperations Representative *						
Associated acquisition case :		Dosar 2160 SJ6RM3H38DL003142			Redirect	

ro en

Administrator

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

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
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Campaign	ATE	Basic price %	107.14
FS	None FS	List price EUR	61921.87
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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

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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

OPENED

IN WORKING

CLOSED

LOST

OfferFile ProcessingDocumentsEventsAlertsMessagesAgreement

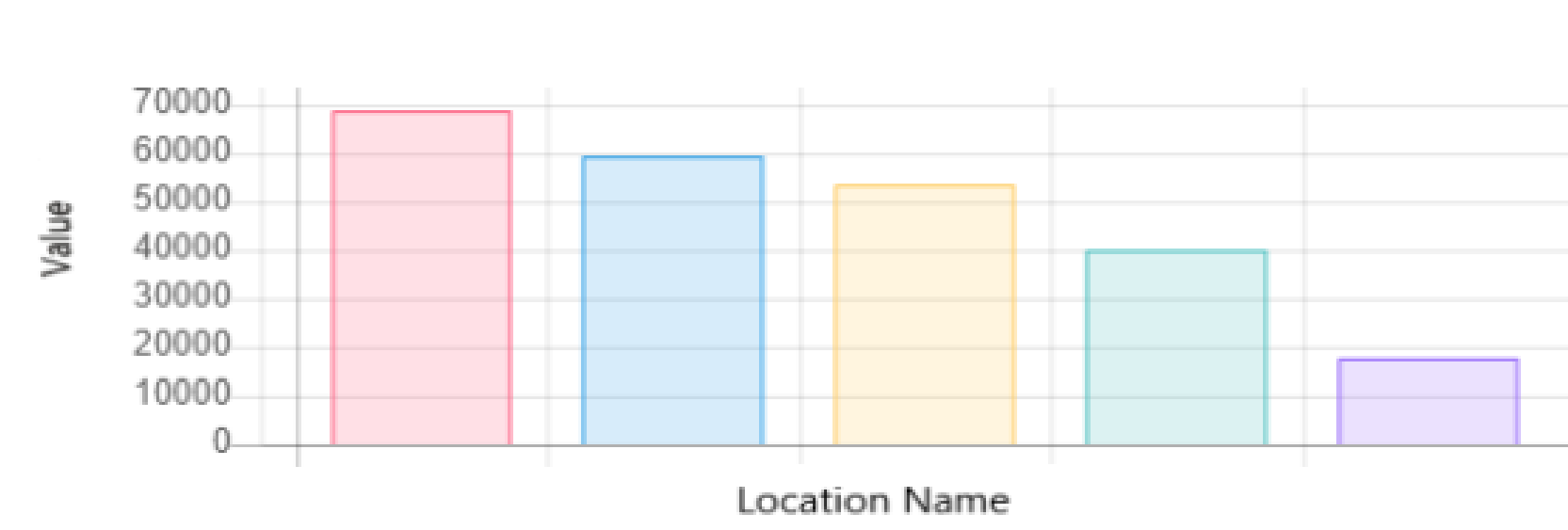
Offer informations

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

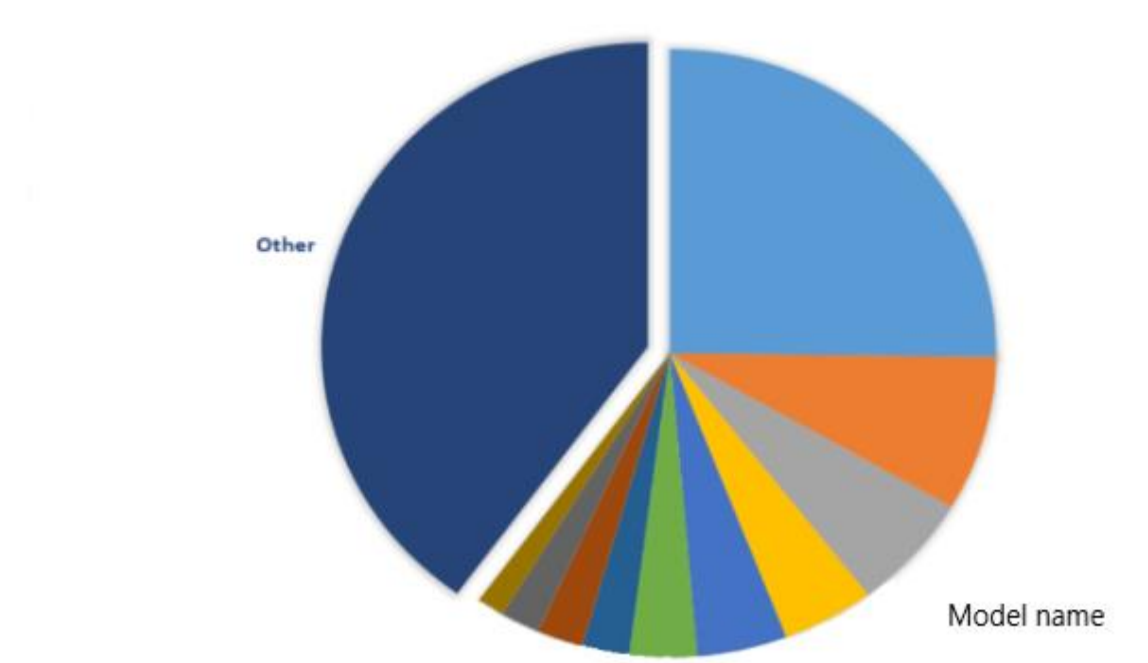
Top 5 Sellers



Top 5 Locations



Top 10 Car Models







# Service

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

Administrator

Damage file - order 111998

Client: John Diaconu  
Plate license: B023DMC

Insurer: testt  
Order number: 111998

Order date:  
File status: Received IPR

Cancel caseSave DraftAssign to pieces operatorUpdate data

OPENEDIN WORKINGCLOSEDSUBMITTEDPAID

Client/Vehicle/CaseFile processingRevaluationsDocumentsInsurer requestsEventsAlertsMessagesDevizFile submissionActivitiesLogs

Work order number111998SiteBANCopy file

Imported data from DMS

License plateB023DMCVIN shortIRNX208

Lastname Firstname ClientJohn DiaconuLastname Firstname usertestand3

Client/Vehicle/CaseFile processingRevaluationsDocumentsInsurer requestsEventsAlertsMessagesDevizFile submissionActivitiesLogs

AIR necessary?☒ Yes☐ NoNecessary accept for payment?☒ Yes☐ NoNecesar IPR?☒ Yes☐ No

AIRStatus: RefuzatSubmission date: 11/7/2018Receiving date: 11/7/2018Observations: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 plataStatus: PrimitSubmission date: 11/7/2018Receiving date: 11/7/2018Total amount accepted payment:12.000 EurObservations: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).pdfCompensation order

IPRStatus: RefuzatSubmission date: 11/7/2018Receiving date: 11/7/2018Observations: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.

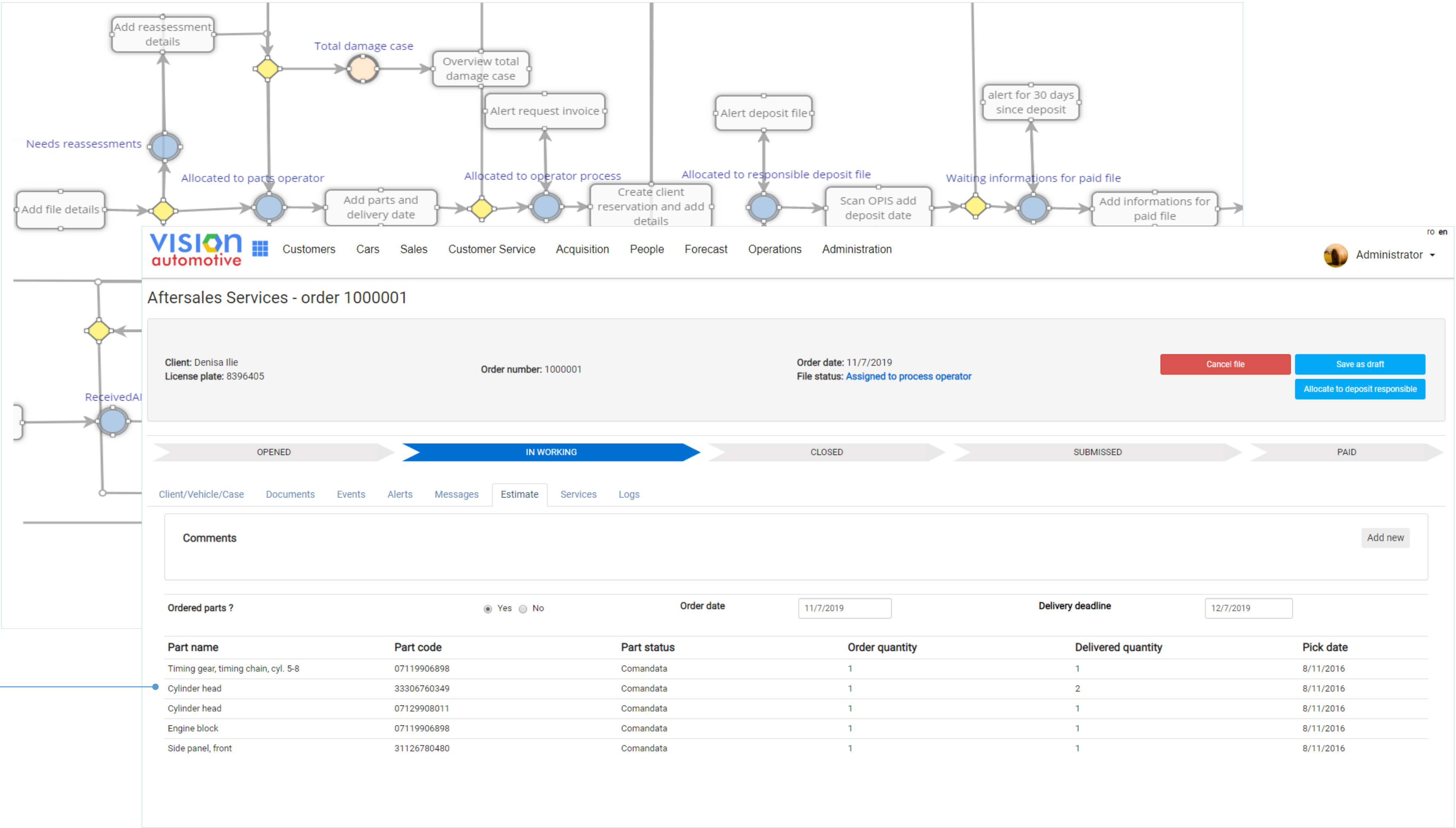
Vision Automotive Services implements standards workflow for after sales services, insurance claim file evaluation, etc. enabling your company to successfully control, deliver and keep control of services, resources and financial results.



# 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.

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automotive

CustomersCarsSalesCustomer ServiceAcquisitionPeopleForecastOperationsAdministration

ro enAdministrator

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

VIN short

G460779

Nume prenume client

Dumitru Ana

Nume prenume utilizator

Telefon mobil client

0745896321

Telefon mobil utilizator

Date completate de operator

Urmariti dosarul?

Yes

No

Fransiza

Yes

No

Tip dauna

CASCO

RCA

Client Payment

Others

Valoare deviz estimativ

Nr.dosar de dauna

Incarca calculatie

Posibil dauna totala?

Yes

No



# 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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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 + constat 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

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technology



# 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.

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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

Client lastname firstname

Top Drive Company

Client phone

0754234565

Appointment location

BAN

Chassis number

VJ54336

User lastname firstname

CHIRIAC VLKRNDVB

User phone

0754392224

### 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.





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

# 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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[Customers](#)[Cars](#)[Sales](#)[Customer Service](#)[Acquisition](#)[People](#)[Forecast](#)[Operations](#)[Administration](#)

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Acquisitions case file - number2166

Client name  
Daniel Doe

Order name  
3/19/2018

Status file  
Negociere

Close evaluation process

CASE INITIATIONESTIMATIONIN WORKINGCLOSEDCANCELED

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.



# 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			
Daniel Doe	123456			

Formular

Istoric

Documente caz achizitie

Documente caz vanzare

Observatii

Istoric achizitie

Istoric revizii motor

OK

Istoric daune c

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.

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Formular

Licitatie

Istoric

Documente caz achizitie

Documente caz vanzare

Observatii

Istoric achizitie

Istoric revizii motor

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.

Istoric provenienta(furnizor)

Not 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.

Istoric daune caroserie

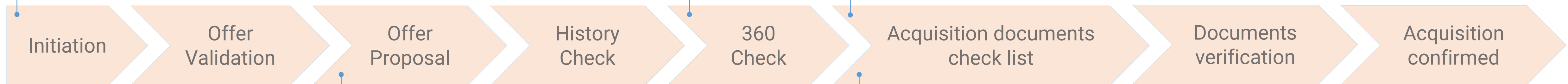
OK

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.

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. achizitiei Junior	Mr. Administrator	19/3/2018	<input type="text" value="11000"/>
Achizitor	Mr. Administrator	19/3/2018	<input type="text" value="12000"/>
Resp. achizitiei Senior	Mr. Administrator	19/3/2018	<input type="text" value="13000"/>
Coordonator achizitie	Mr. Administrator	19/3/2018	<input type="text" value="12500"/>
		Estimare castigatoare	<input type="text" value="12500"/>

Formular

Licitatie

Istoric

Documente caz achizitie

Documente caz vanzare

Observatii

Documente Achizitie

NUME DOCUMENT

CARTE DE IDENTITATE AUTO

CERTIFICAT INMATRICULARE ( TALON )

DENUMIRE FISIER

Identity Card.pdf

demo.pdf

Passport.pdf

DATA INCARCARI

18/9/2019

18/9/2019

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

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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 variabile 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 MobillityTrade-InConsignatieAlteleBonus/Malus/Regularizare

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

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 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

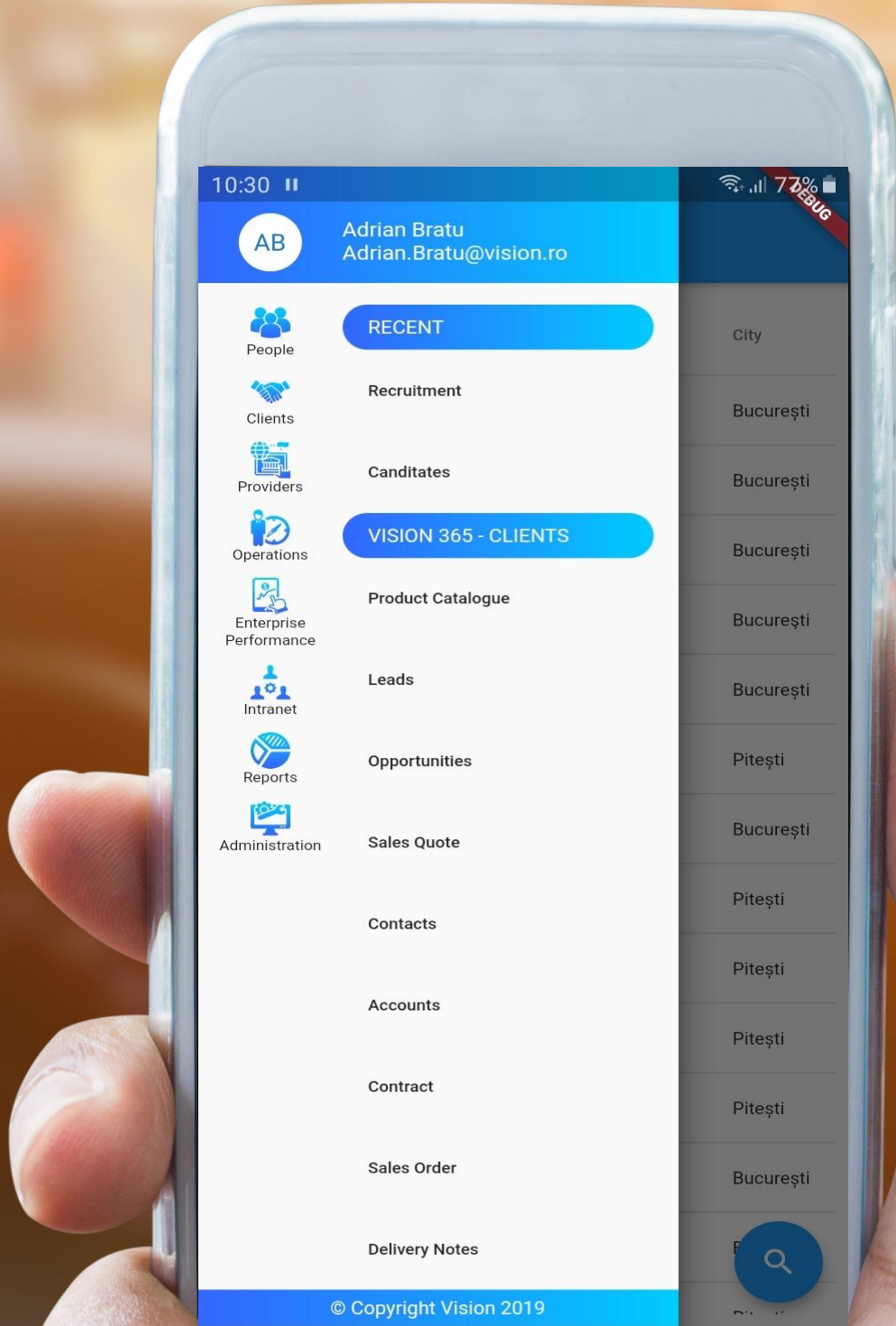
Aggregate the quarterly result per agent and type of sales, covering: Targets, Achievement, Overall volume Target Achievement, Stock New/Demo Target Achievement, totals.

### 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.



# Tools and Dashboards



Dosar electronic de dauna:

Deschide Dosar

Dosarele Mele

Site

In Asteptare

In Asteptare

Asigurator

Nedepuse

Nefacturate

Neplatite

Autoconstatare:

Deschide Dosar

Dosarele Mele

Site

In Asteptare

Trimise Asigurator

Sumar Dosare

De la

Pana la

Site

Nr comanda

Numar inmatriculare

Asigurator

Stare

Dosare cu alerte

Site

Responsabil

Nr comanda

Data deschidere caz

De la

Pana la

Stare

Calendar vehicule

Luna

7 (Iulie)

An

2018

Luni	Marti	Miercuri	Joi	Vineri	Sambata	Duminica
						1
2	3	4	5	6	7	8
9	10	11	12 IS09OPR	13	14	15
16	17 IF88EED	18	19	20 B98ABC	21	22
23	24 B18MMD GL00324	25	26	27	28	29

The platform provide tools like Calendar, Activity Dashboard implemented specific to optimize and automate the automotive company employee efficiency.



# 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.

Dosar electronic de dauna:

Deschide Dosar

Dosarele Mele

Site

In Asteptare

In Asteptare Asigurator

Nedepuse

Nefacturate

Neplatite

Sumar Dosare

Data creare	Site	Nr comanda	Numar inmatriculare	Asigurator	Stare	
De la	Pana la					
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	CT74OOO	TEST	Alocat operatoru...	
8/11/2018	BAN	10025621	GL00324	TEST	Alocat operatoru...	

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Alege pagina

Autoconstatare:

Deschide Dosar

Dosarele Mele

Site

In Asteptare

Trimise Asigurator

Dosare cu alerte

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

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Alege pagina

Calendar vehicle

<

>

lulie 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

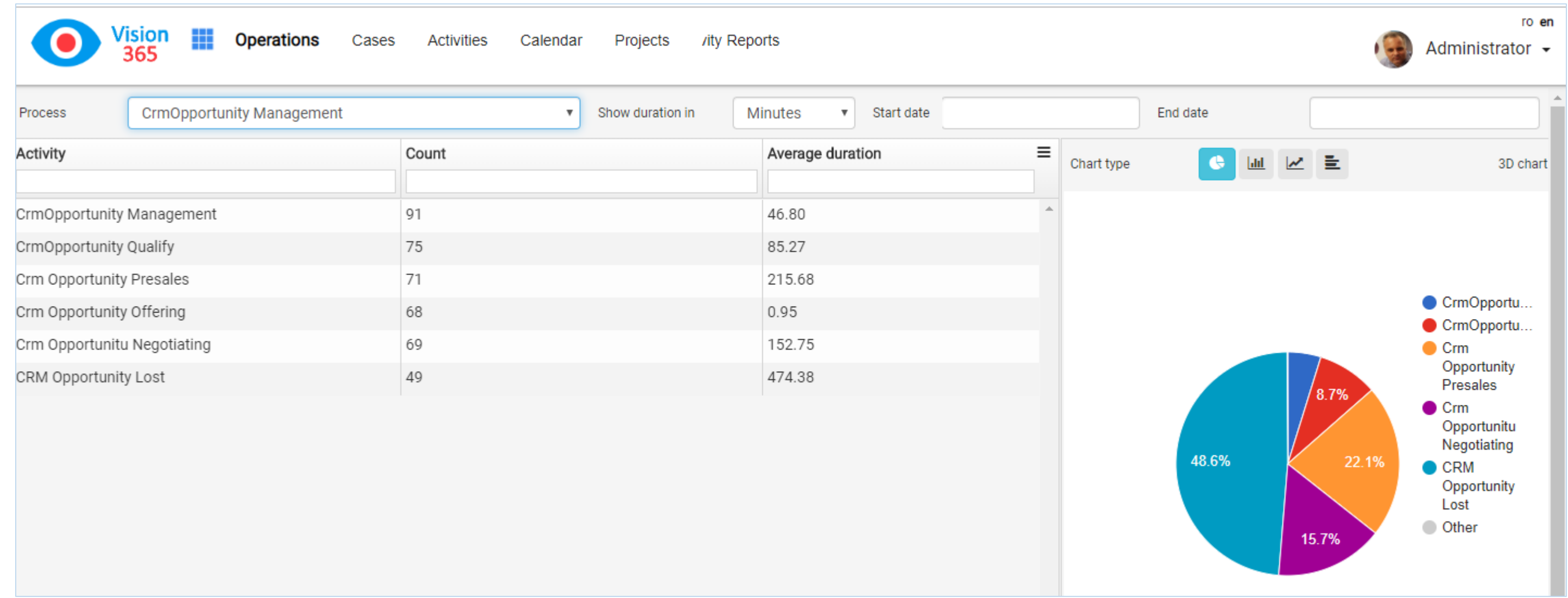
Activity

Add Task

Add Email

Add Call

Add Appointment





# Intranet

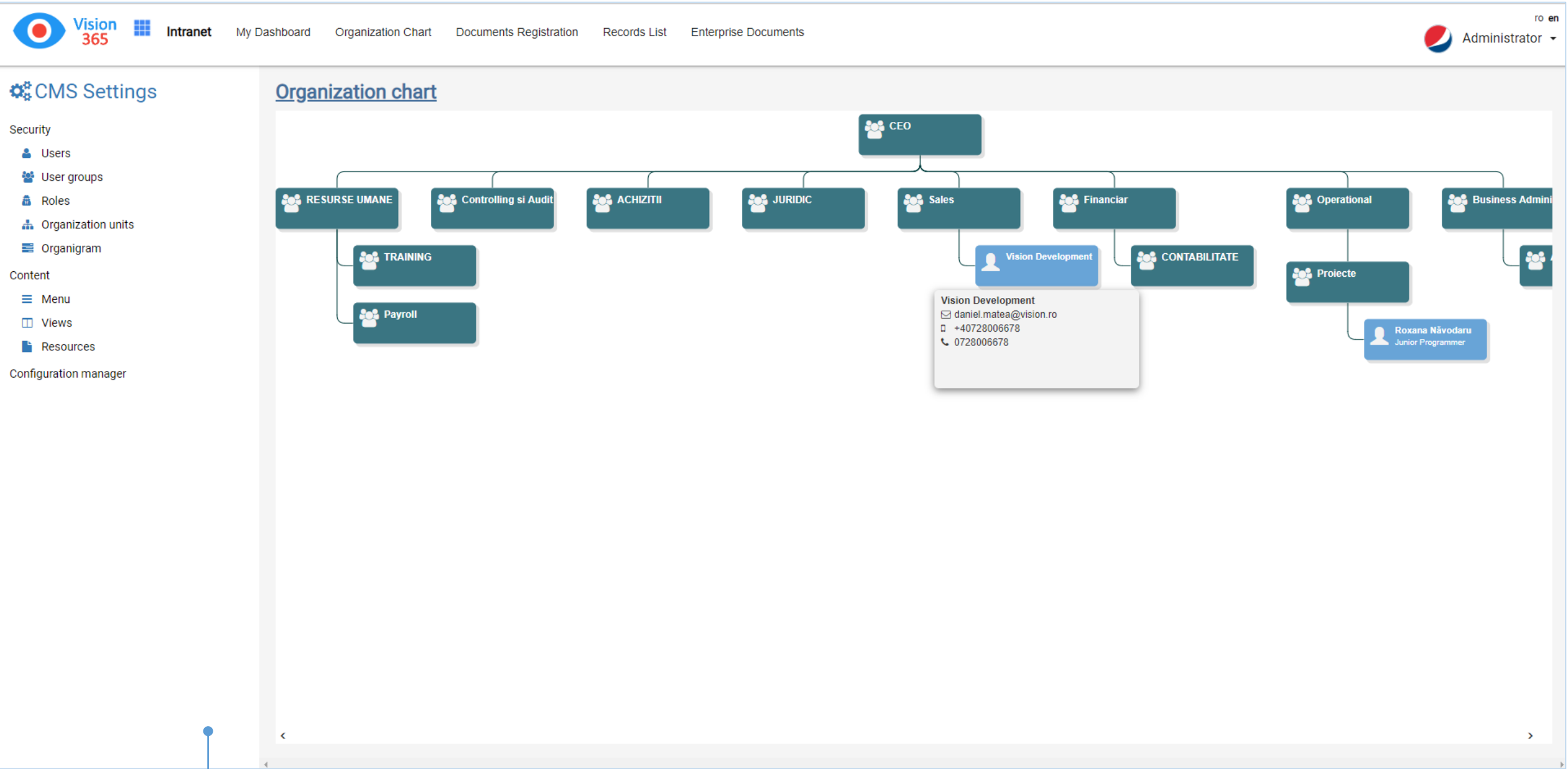
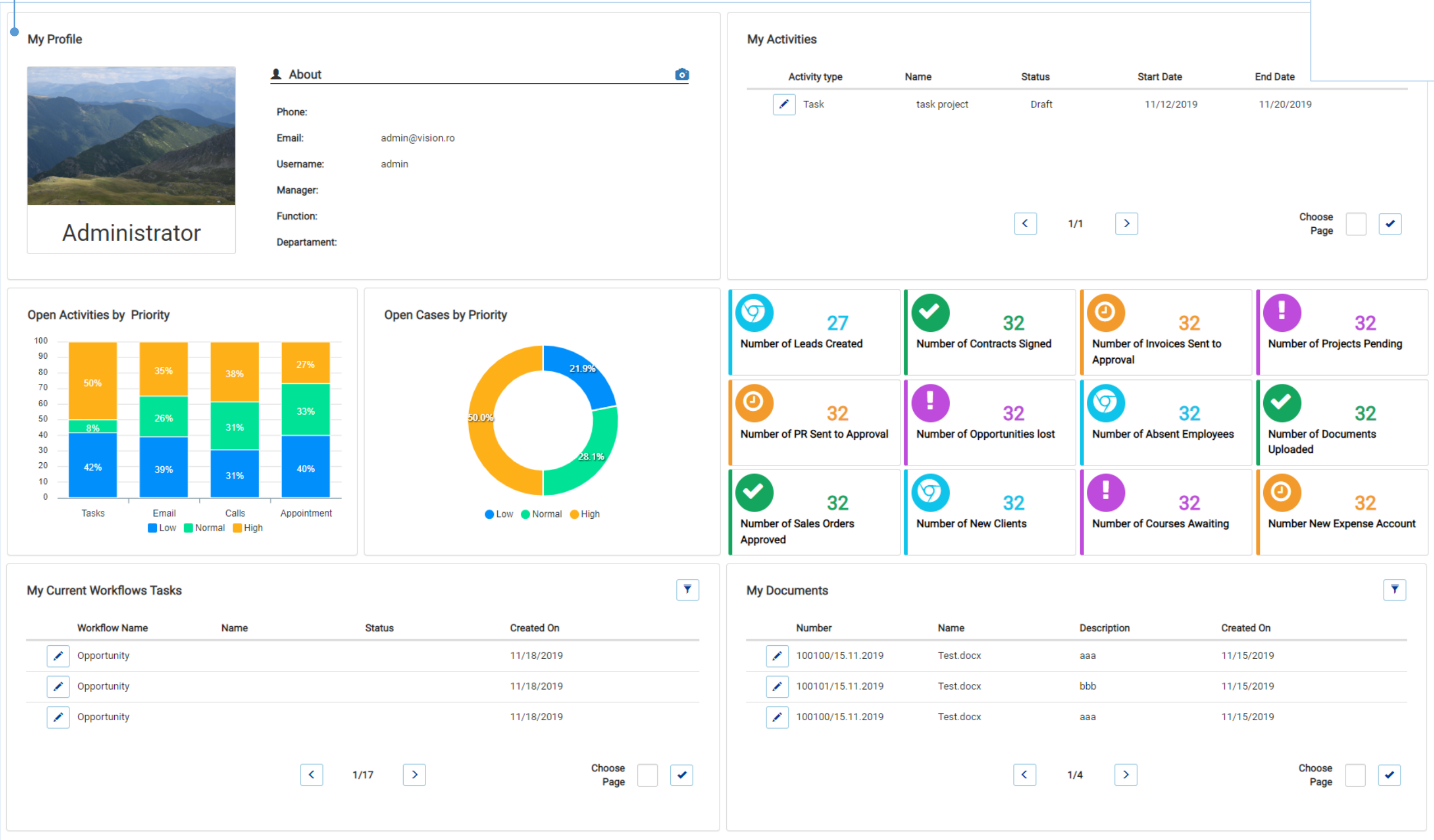
## Key Features

### 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.



# Technology and Integration



Create complex applications in visual designer, with no code and high flexibility for further changes and customizations with Vision App Maker Platform.





## Vision App Maker Suite

Build complex applications in visual designer, without code.

- Easy build new application from scratch
- Integrate existing platforms and legacy systems into unified application
- Digitalize your business workflows through business processes re-engineering
- Enhance Business-Integration Speed & Agility
- Optimize operations with processes prepared for rapid evolution
- Drive innovation by quickly creating innovative digital products and services
- Accelerates Transformation
- Simulate working software much earlier in the cycle enabling project team to iterative prototyping and agile development

Our customers are successfully rollout their daily operation on applications powered by Vision App Maker:



Vision App Maker is a mature platform with 100+ implementations for various industries: Banking, Insurance, Automotive, Pharma, Services, Government, Distribution, Travel, Field Services.



# Vision App Maker Suite

## Features

### Powerful Integration Capabilities

Allows integration with any system through a plugin mechanism. Data can be imported from ERP, CRM, DMS or legacy systems and can be further used in workflows, rules, interfaces and document templates.

### Workflow Visual Editor

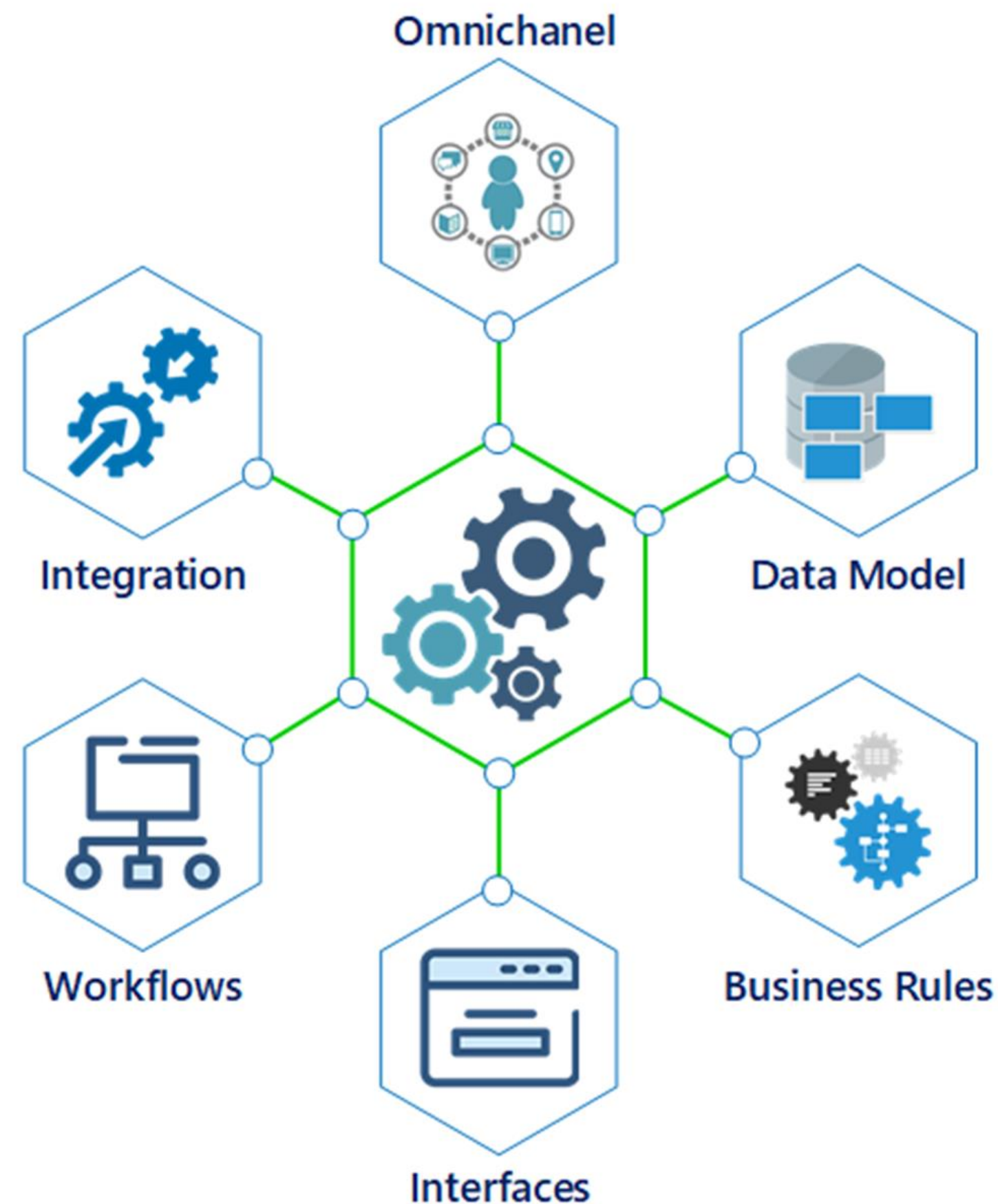
Flows can be simple or complex, from procurement approval to credit management or back-office solutions.

### Document Generation

Design and generate document templates that can then be used in workflows to print any type of forms, like Quotes, Contracts or Invoices.

### Omnichannel

Same user experience across all channels:  
Internal Portal – External Portal – Mobile – Public API



### Interface Visual Editor

Generate responsive UI accessible from any web browser or mobile device. Build Single Page Applications providing a fluid, desktop-like user experience.

- Modular, multi layered, decoupled architecture, enabling security segregation and high availability implementation
- Two factor and self registration authentication mechanism
- Identity and Access systems integration (ex. Active Directory)
- Plugins for various commercial systems (Microsoft CRM Dynamics, SharePoint, ERP, DMS, etc.)
- Persistent vs. Non-persistent data mechanism

### Data Model Graphic Designer

Definition of simple and complex data types, cardinalities, lists, parameters and entities for any type of application.

### Business Rules

Can be designed by any user who has the ability to write formulas in Excel. You can easily implement scoring, escalation and notifications or you can manage how information is displayed and processed in the interface, documents and reports.

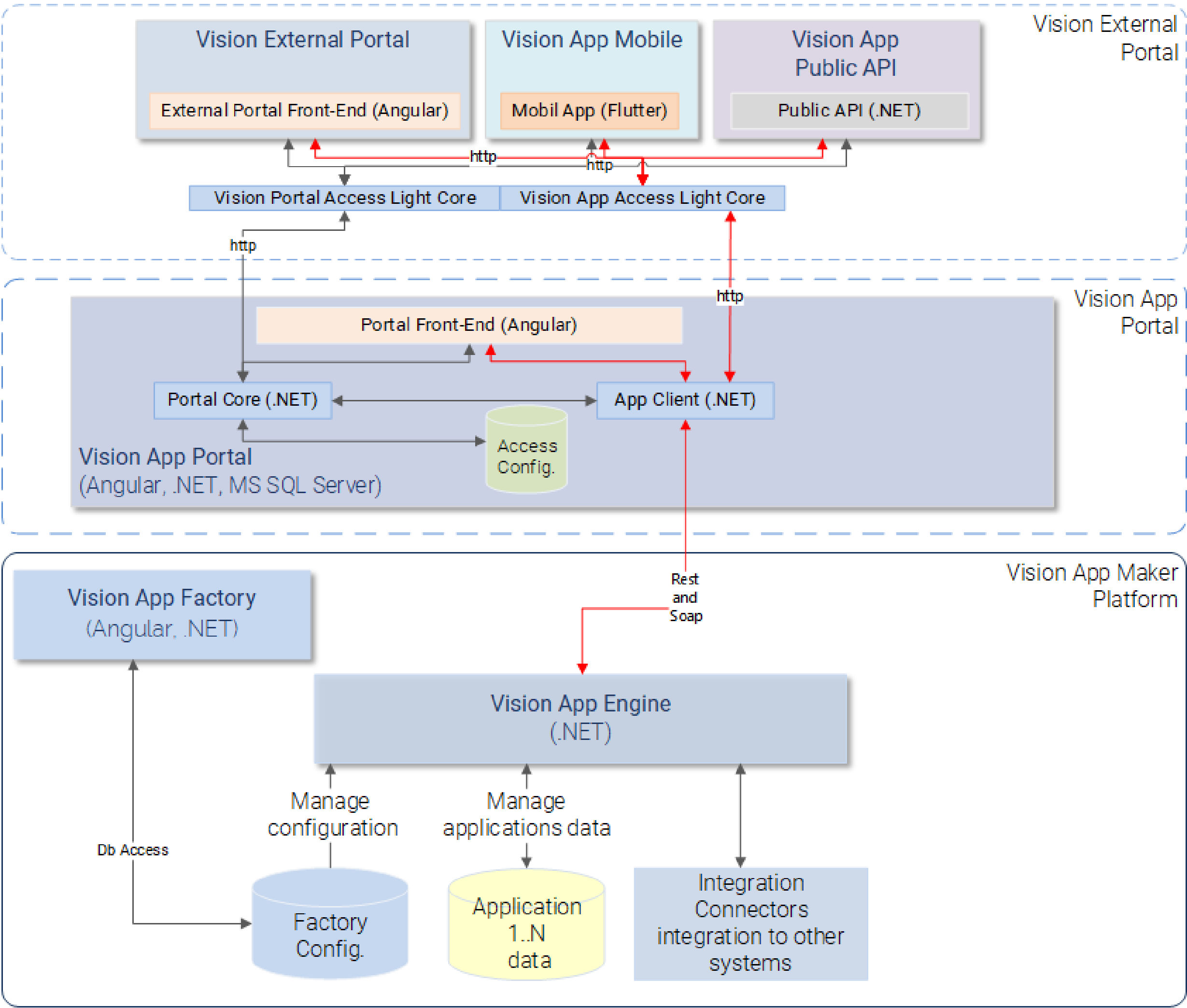
### Reporting and Alerts

Generate various types of alerts within workflows, from information transmitted by e-mail to reports generated by the system and exported in a predefined format.



# 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 Microsoft .NET and flexible, responsive and rich front-end based on Java Script and Angular.





+40 728 006 678  
[sales@vision.ro](mailto:sales@vision.ro)  
[www.vision.ro](http://www.vision.ro)



Dr. Ernest Juvara 16, Sector 6, Bucuresti,  
România  
148, Republicii Bulevard 3rd floor, Pitesti,  
Arges, România

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