

Elements - Operate Workflow

CDG's Workflow element allows you to manage all of your business's tasks and workflow associated with prospects, implementations, tickets, and anything else needed to manage your subscribers' accounts and services from the office or in the field.

OVERVIEW

The Workflow element provides tools for creating, assigning, managing, and completing tasks associated with your business's workflow processes. From scheduling ticket repairs and network upgrades to service installations, changes, and disconnects, Workflow can help you manage it all. The interactive calendar can help show you the bigger picture of what is assigned to whom and when, while also helping prevent scheduling conflicts. Employees can use Workflow in the office using the desktop version or in the field using the Field Tech mobile app.

WORKFLOW FEATURES

- Create, assign, track, and complete tasks associated with all aspects of your business.
- Assign, schedule, and manage tasks directly through the Workflow interactive calendar.
- Manage tasks and your personal calendar in the field through Field Tech app.
- Generate documents and obtain e-signatures from the field through Field Tech app.
- Manage customer premise equipment from the field, including sending provisioning requests directly to the Service Automation element.
- Search for tasks using a variety of task, department, or other information.
- Text messaging capabilities (powered by Twilio).
- Help maximize workforce efficiency with enhanced mapping tools and drive time calculations.
- Access metrics and analytics through the Business Intelligence element.