

Automate workflows and
improve your data
collection with our latest
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Introduction

When simPRO was originally started, many business owners were facing challenges whilst working incredible hours. simPRO's goal was simple, to give people back the reason why they went into business. Of the hundred thousand or so people simPRO has worked with over the years, the feedback is never that customers love data entry or that it's what they want to do with their lives.

People who start businesses have a vision for how they can change things, for them and their families lives along with the community in which they live. They don't want to spend nights entering supplier invoices, entering or checking job or quote information to make sure it's all accurate. But that's the reality for many. It's incredible how much paperwork we drown in. How many invoices need entering and checking (if you are on the ball). How many jobs coming in from customers need to be entered into whatever system you have, paper-based, spreadsheet based or system based. It's all the same. The data still needs to get in there. And if it doesn't, something doesn't happen.

They say data is the new oil, so that data is valuable. Given how much it costs to acquire it through data entry and how prone it is to make a mistake through that very process, it makes sense that we could exchange data with your customers and suppliers in a streamlined manner. That's where our latest innovation comes from. As part of our vision of wanting to give people back the reason why they are there in the first place, we have built an add-on to simPRO that takes all of that repetitive and time consuming, dare I say tedious, work and automate it.

Data Feed automates the collection of data and automates workflows within simPRO by scanning an email being sent to it, extracting information from the email and from various attachments on those emails. Then based on some simple rules, predictably and rapidly puts it into simPRO and triggers off those workflows without anyone needing to be involved.

Just think, not needing to enter that stack of invoices that come in from your wholesalers, or the jobs that are sent to you from your customers, security monitoring systems, websites, real estate agents, prime contractors, insurance companies. The list goes on. As long as the information coming to you is in a predictable format, Data Feed can work with it 24 hours a day, 7 days a week.

What does it do?

Data Feed scans through dedicated email inboxes dedicated to the task. Simply setup a forwarding rule on your email server or client to push the relevant emails through. On Data Feed, a set of rules are setup to mirror those that forward through the email to watch for matching emails. From there we can extract data from the original email and from the attachments on the email to automatically trigger various workflows.

Attachment types that Data Feed can read are:

- XLSX files
- CSV files

- TXT files
- System generated PDF files

From there a set of extraction rules are configured based on the selected workflow to take the data and map it into simPRO fields.

The workflows that the system can automate are:

- Task creation
- Lead creation
- Quote creation
- Job creation
- Receipting Purchase orders with invoices

Along the way specific business rules are created that are relevant to the workflow. For example when creating jobs you may want to let the system know whether to create the site if it can't find it, schedule the technician or apply specific status codes for example. Can't find the part in the catalogue or the appropriate purchase order when receipting an invoice? Tell Data Feed whether or not it should stop or go ahead and automatically create those records for you.

The system is so effective, that an email that comes in the middle of the night, with no one to action it can create the site, log the job to a customer, schedule the tech, then without anyone touching it, and then that job appears in the technician's simPRO mobile app. The after-hours call out is already in there ready to go with all the files related to the job attached and available to the tech within seconds of the message arriving.

Pairing Data Feed with other simPRO functionality like automatic SMS notifications to various stakeholders when jobs come in, is simple. Love using eForms? Why not send the eForm automatically straight through to Data Feed to take the information captured and action it live.

Tables of data can be extracted from CSVs, XLSX files, and using various machine learning algorithms, PDFs. This powerful feature allows us to extract many records from a single file to add multiple line items and tasks to a job (or for that matter create multiple jobs), invoices and quotes.

Summary

Data Feed is the latest in a long line of innovations from simPRO. By freeing up your time from doing data entry, you are then able to spend more of it on things that are actually valuable to the business like talking with your customers, improving your simPRO processes and pushing the business into new directions and markets. Or you can simply get your nights back with the peace of mind that your data is being looked after and actioned for you.

For more information about Data Feed and how it can help to automate your business workflows, email admin.nz@simpro.co or phone 0800 100 854.