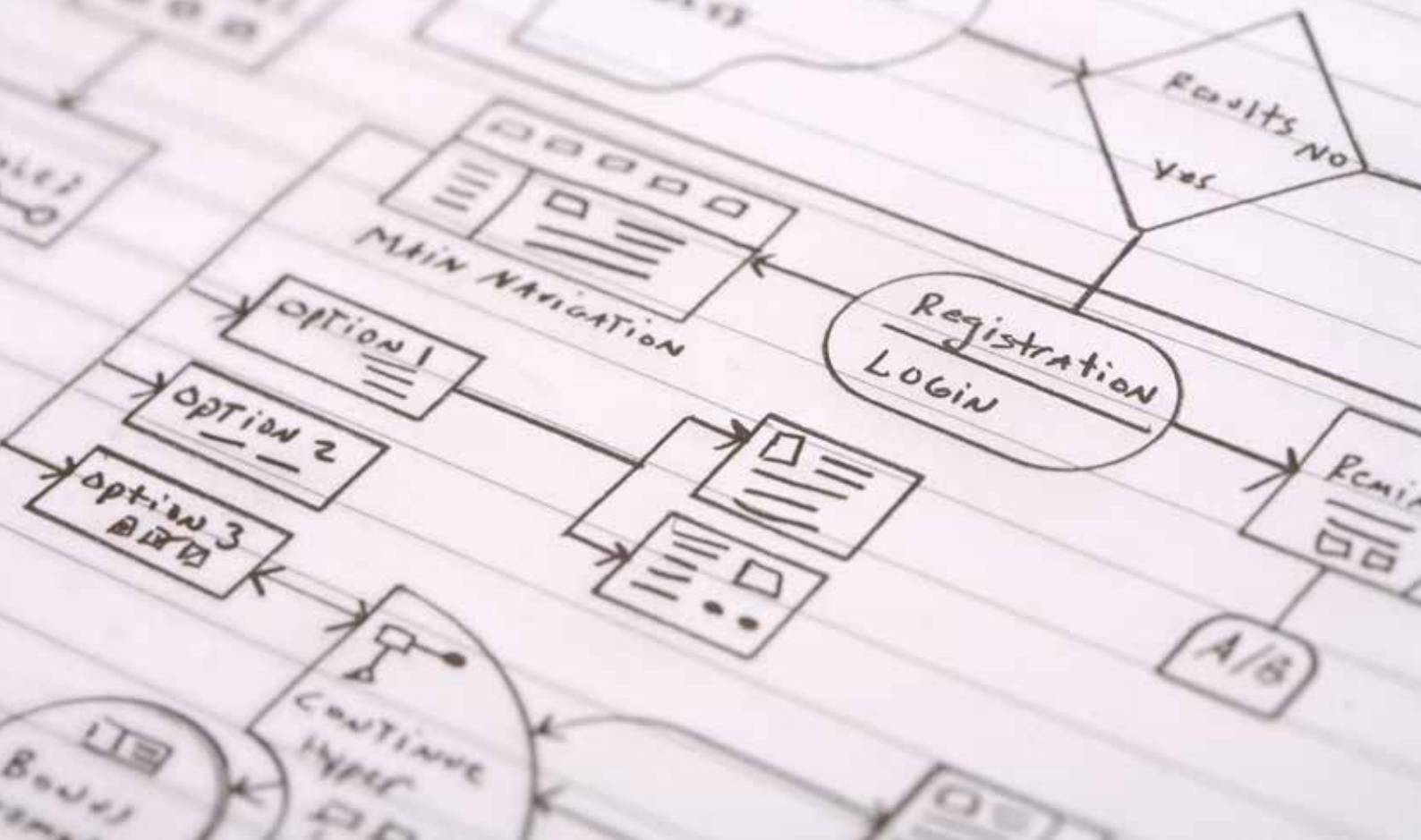


# LEAP FEATURES GUIDE



powered by  
**FLOvate**



# BUILD POWERFUL SOLUTIONS FOR PROCESSES WITH LEAP, THE LOW-CODE PLATFORM

## AUTOMATE AND OPTIMISE YOUR PROCESSES

Our working days are made up of myriad processes. From small tasks to large projects and everything in between, there are multiple steps to everything we do. Automating and digitising some of these processes can free up time, increase productivity and save money. Traditionally if you wanted to digitise and automate your business process you had the option of using an out of the box solution and hoping you can make it fit, or hiring developers to build a unique system from scratch — an often very time-consuming exercise. Now, with LEAP you have a third choice.

## THE POWER OF LOW-CODE

As a low-code platform, LEAP gives you the flexibility and fit of a bespoke solution with the convenience

and speed of an off the shelf solution, at a surprisingly affordable cost. Plus, the nature of a low-code solution means you can adapt and scale your system as your business changes and grows. By utilising a range of powerful pre-coded building blocks, LEAP can build workflow solutions that fit your processes and your business — saving you time, money and stress.

## POWERFUL, FLEXIBLE FEATURES TO BUILD YOUR PROCESS SOLUTIONS

With LEAP, you can take advantage of a range of pre-coded features that can be utilised individually or together to build powerful, flexible and automated process solutions.

# DATA MANAGEMENT



## CAPTURE, STORE AND MANAGE ALL YOUR DATA IN ONE SECURE PLACE

Forms that only capture the information you need ensure your teams enter the correct data by creating custom data captures forms. By utilising validation rules when using the wide range of field types, including check boxes; pick-lists; rich text; and dates, you can improve speed and accuracy of data capture. Minimise inaccuracies further with tools such as spellcheck, Google Maps and postcode search.

B / U | [Rich Text Icons]

For rapid application development, the LEAP low-code platform includes all of the fields you will require; such as pick-lists, dates, and rich-text fields. Spell check functionality is also present, to ensure that all documents and communications created are free of spelling and grammatical errors.

Repair Code

- Bodywork
  - 001 Painting
  - 002 Panel Beating
- + Chassis
- + Engine
- Service
  - 007 Standard**
  - 008 Deluxe

Date

15/06

June						
Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Day

Wednesday

- Monday
- Tuesday
- Wednesday**
- Thursday
- Friday
- Saturday
- Sunday

And

- Reference Begins with FLO
- Master Status Equals Open
- Date Is greater than or equal to 06/09

Type Name	Reference	Status	Priority
Complaint	FLO382	Open	Medum
Complaint	FLO380	Closed	None
Complaint	FLO377	Open	Low
Complaint	FLO376	Open	High
Complaint	FLO373	Closed	None
Complaint	FLO371	Open	High

## DATA AT YOUR FINGERTIPS

Quickly and easily find the data you need with custom filters and smart search. Plus, you can format search result grids so that the information you need is within easy reach.

## FOLLOW THE TRAIL

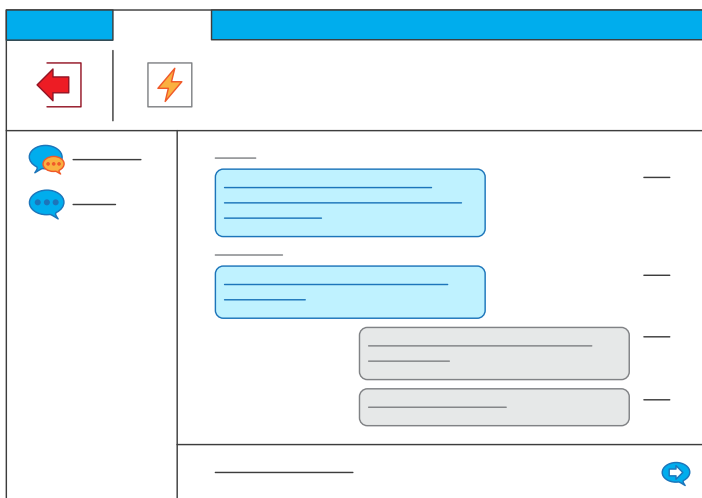
Whenever a change is made to the data or a process, LEAP captures the information into an activity log — time and date stamping the changes and linking it to a user profile. This allows for a full audit trail to be generated for training, compliance or reporting reasons.

# COMMUNICATION TOOLS



## ENSURE CUSTOMERS, CLIENTS AND SUPPLIERS RECEIVE CORRECT AND TIMELY INFORMATION

Communicate directly with your customers and suppliers from within LEAP. Using the email and SMS functions you can send messages to your customers or configure LEAP to send them for you at predefined times or events, ensuring that you are always keeping your customer informed. What's more, each contact record can act as an inbox, so replies are all kept together — meaning there is no more searching through inboxes for messages and replies.

A screenshot of a software interface showing an email record and an SMS message. The email record includes fields for 'Details', 'Attached Documents' (with a PDF icon and 'ComplaintProc.pdf'), 'Document Type', 'Email Addresses' (j.smith@gmail.com), 'Subject' (Complaint Ref CMP007), and 'Body' (Dear Mr Smith, Thank you for your correspondence received on 30/07...). Below the email record is an SMS message interface with fields for 'Name' (SMS Message - 02 March 09:54), 'To' (Claimant Mr J Smith 07788 455421), and 'Message' (Mr Smith, please remember to submit your documentation as soon as possible. If you need help, call us on 01473 778844.).

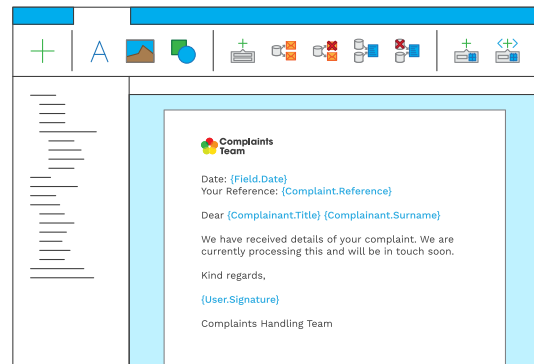
## ALLOWS TEAMS TO COMMUNICATE

Often different teams or team members have responsibilities for the different stages of a process. With the inbuilt instant messenger, teams can chat from within a record, making sure that the correct data is easily accessible for every team to do their job.

# DOCUMENT PRODUCTION AND MANAGEMENT

## CREATE AND MAINTAIN A RANGE OF DOCUMENT TEMPLATES

Ensure that letters, emails and other communications are all on brand with the LEAP document template editor. Either upload Word documents or create new ones with an intuitive rich text editor, and then add merge fields relating to your data within LEAP.



Expected Document	Date Matched
+ Initial Complaint	
- Acknowledgement Letter	
Acknowledgement.pdf	13/03 09:22
+ Resolution Letter	

## INCORPORATE DOCUMENTS INTO YOUR WORKFLOW

Ensure invoices, reminders and other documents are sent at the correct time by integrating them into your workflow. They can then be printed to be sent by post, or emailed by utilising the built-in email system. You can also flag missing documents and send reminders to customers or team members.

## STORE, MANAGE AND INDEX DOCUMENTS

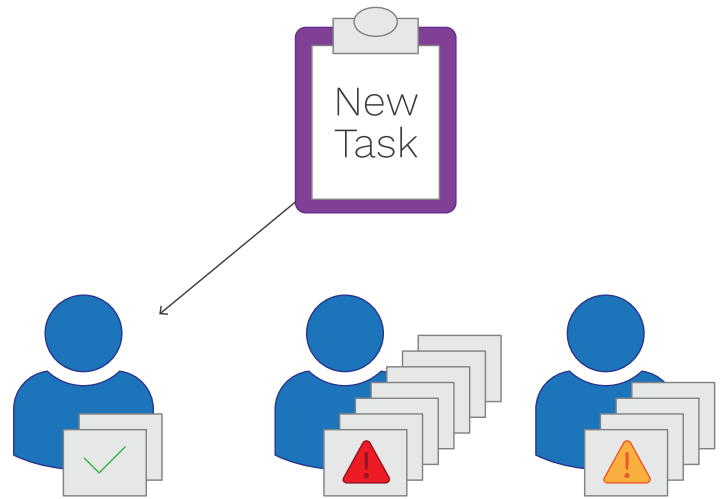
Keep all of the documents related to a record or incidence in one place with the Document Library. Whether they have been created within LEAP or uploaded by a user or customer, they can be indexed, searched and filtered to help improve transparency.

Document Name	Document Type	Date
ClaimConfirmation.pdf	Outgoing Document	12/03 09:34
EvidencePic1.jpg	Digital Image	12/03 10:40
EvidencePic2.jpg	Digital Image	12/03 10:41
Acknowledgement.pdf	Incoming Document	13/03 11:32
CallTranscript.txt	Internal Document	13/03 15:39
SMSLog.txt	Internal Document	15/03 10:50

# DIGITAL WORKFLOWS

## AUTOMATE AND OPTIMISE YOUR PROCESS WITH DIGITAL WORKFLOWS

Create digital workflows based on any process, no matter how simple or complicated. By linking together user tasks and system tasks with a series of triggers based on your rules and conditions, you can automate and optimise your processes, increasing efficiency and driving productivity.



New Task







Edit Task



Send to User

## INTELLIGENT TASK ALLOCATION AND TRACKING

Team members can keep track of all the tasks they have due in their workflow queue. Tasks are routed to the correct user or specialist teams based on your criteria. You can also utilise intelligent task allocation, so tasks are only sent to those who not only have the correct skill set, but have the availability.

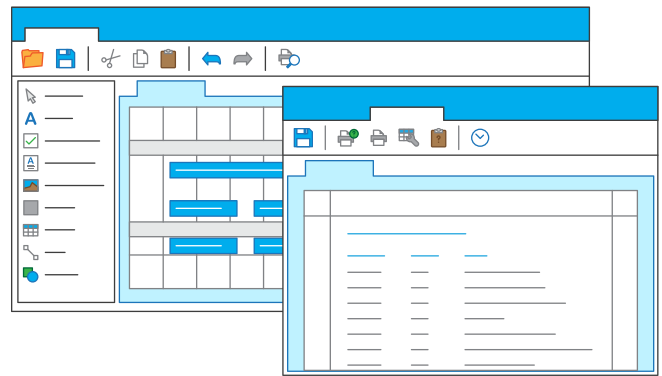
-  Invoices to approve (0/4)
-  Actions to authorise (2/5)
-  New repair (3/3)
-  Client claims

# REPORTS AND DASHBOARDS



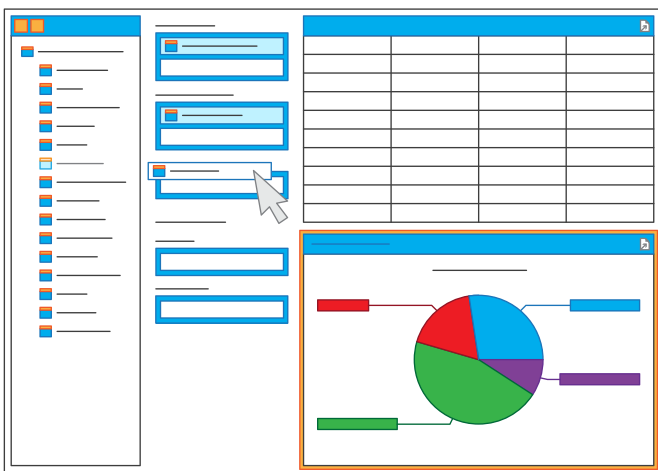
## ANALYSE YOUR DATA TO GAIN VALUABLE INSIGHTS

Measure data and gain insights in real-time with customisable and flexible reports and dashboards. Utilise the drag and drop function in the report design studio to create reports based on any data within LEAP and export them to Excel, Word or as PDFs. You can also schedule reports and distribute them to designated users or email addresses.



## INTERACTIVE DASHBOARDS FOR INSIGHTS IN REAL-TIME

Dashboards are perfect for a more interactive and visual representation of your data. Utilise a range of graphical elements, such as charts; tables; graphs; and maps, to show all your significant data in an easily digestible manner. What is more, the live nature of the dashboard means you can click, filter and drill down further into the data to gain real-time insights.



# ADDITIONAL FEATURES



## SCANNING AND INDEXING

**Edit, annotate and index scanned documents**



Documents can be scanned into LEAP and then edited and annotated before being sent to a colleague/customer or being attached to a record.

## WEB AND DESKTOP CLIENTS

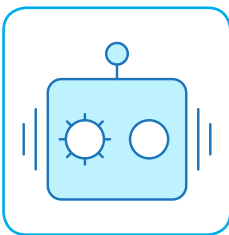
**Access LEAP the way that works for your business**



LEAP can be accessed through a desktop client or via a web browser and can be hosted remotely or on-site — meaning that the system can be accessed wherever you are.

## ROBOTIC PROCESS AUTOMATION

**Automate tasks to maximise efficiency**



LEAP can perform a range of tasks automatically and without user involvement. These tasks can be set to run periodically or as a result of another task or action. They can also trigger

other tasks, based on your conditions and rules. This automation of process elements can free up time for users and improve accuracy.

## AUTHORITY TRACKING

**Ensure tasks are authorised correctly**



Automatically send tasks to senior team members for approval or sign off, ensuring tasks cannot be finalised without the correct permissions. Authority can be required based on field conditions, specific documents or financial information — for instance, approving holiday requests or signing off costs and invoices.



# ADDITIONAL FEATURES



## CUSTOMER PORTALS

**Make your customers part of the process**



With the Customer Portal your customer can track, manage and update information as needed. Specialised web forms and permission settings means they can only see and edit as per your settings.

## THIRD PARTY ACCESS

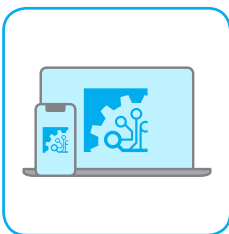
**Allow customers, suppliers and other third parties access to LEAP**



Save time and minimise risk of miscommunication by allowing third parties to enter data directly into the system without compromising security of information using ProcessWeb.

## TASKWEB REMOTE WORKING

**Action tasks on the move**

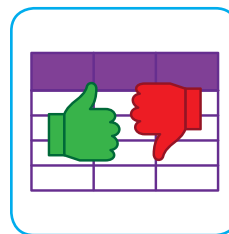


Empower team members to action tasks remotely with LEAP TaskWeb. The web-based user interface strips back any unnecessary content, allowing users to complete

tasks assigned to them. For example, an engineer can enter information directly into the system or app from a site visit.

## DECISION ENGINE

**Automate decision making**



Utilise the LEAP Decision Engine to automate decision making based on your set of rules and conditions. The rule editor can make complicated calculations and rapidly evaluate data sets

to minimise the risk of human error and to improve efficiency. If a condition is not met or an error is accounted, the system will flag this to the relevant users for manual checking.

# ADDITIONAL FEATURES



## USER MANAGEMENT AND PERMISSIONS

**Control and manage who can access LEAP**



You can control how groups or individual users interact with LEAP with the Permissions Module. Allow users to have access to only those elements they need to perform their job, ensuring security and oversight.

## CONTACT DATABASE

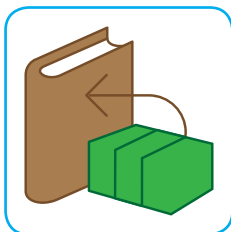
**Manage contact information and track customer interactions**



Keep track of all of your contacts, whether they are customers, suppliers or third parties with the contact database. Define what information is collected, show relationships between types of contact and track interactions.

## FINANCIAL LEDGERS

**Keep track of financial information from within LEAP**

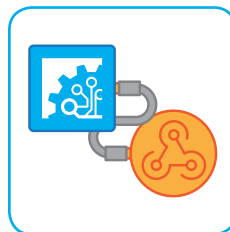


The transactional based accounting module can create sales, purchase and nominal ledgers with a hierarchical model of ledger account codes. Use in conjunction with

the documentation and communication modules to send estimates and invoices.

## MESSAGING SERVER (INTEGRATIONS)

**Integrate existing applications**



Through use of a Messaging Server and APIs, LEAP can integrate with your other systems and applications. The messaging server acts as a distribution centre, receiving

data and information from one system and sending it to the other. This happens automatically in the background, without any need for user input.



## BUILD POWERFUL PROCESS APPLICATIONS WITH LEAP – THE LOW-CODE PLATFORM



### FAST

By joining together functional building blocks your solution is built in weeks, not months — leaving you with a high-quality solution, at a lower risk and cost.



### POWERFUL

An impressive array of functions and features can deliver the outcomes you need, proving you with a solution that is right for your organisation.



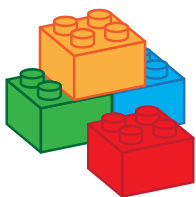
### AFFORDABLE

Pay for usage not users. Activity based, rather than user-based licencing means you only pay for what you use. Plus set up costs are kept to a minimum.



### SECURE

Differing permission levels and enterprise level security measures mean you can be confident your data is protected.



### FLEXIBLE

Just like building blocks, the functional elements can be used to build applications for a wide range of uses.



### SCALABLE

Industry standard MS SQL server and MS IIS support for thousands of users, hosted in the cloud using Microsoft Azure or locally on your own servers.



Get in touch with us today to discuss your process requirements or book a bespoke demonstration.

**Call us:** 0330 111 0570

**Email us:** [solutions.team@flovate.com](mailto:solutions.team@flovate.com)

**Visit our website:** [www.flovate.com](http://www.flovate.com)