



Named Integration Guidebook

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Named Integration Guidebook

Introduction

This guide explains the process of rolling out a Named Integration to the Pruvan Network.

It's important to set expectations properly with your stakeholders as well as the user community to ensure that the workflow with your Named Integration is smooth and provides the same high-quality experience that users expect from Pruvan.

Timeline

The timeline below is the process you can expect when rolling out a Named Integration.



Design Workflow

This is the first step of your Pruvan integration project. This is where you map out a “day in the life” of your user. What steps will the user be responsible for? What steps will your organization be responsible for? How will the current process change? It's best to use a tool like Visio to design out the process and put in as much detail as possible. The Pruvan integration team can assist you with this process if you need help.

Test Workflow

Once you've designed your workflow, manually test the process using Pruvan Online and Pruvan Mobile. This is also a perfect time to get familiar with the technical and functional capabilities of Pruvan. We highly recommend logging into Pruvan Online and creating projects and surveys that you will use to test your workflow. Completing these projects and forms on Pruvan Mobile will also give you a sense of what your vendors will experience.

Develop Surveys

A Pruvan survey is a form. Design and publish a survey in Pruvan's survey designer and it can be instantly deployed on Pruvan Mobile and Pruvan Online. Use Pruvan surveys as a key part of your process to control how data is collected in the field. Pruvan surveys can be configured as a traditional question and answer form with photo and video requirements or as an optimized photo-mode survey. Use our Pruvan support center for best practices on how to create surveys or engage our integration team for assistance.

Develop Endpoint

Once your workflow is defined, you can start building your Pruvan endpoint using our integration API. The endpoint is the link to Pruvan so that orders flow down from your system to Pruvan and photos, videos and surveys flow back. This is a technical task and can be done in parallel with your survey development. Check

out our API v2 documentation online by googling “Pruvan API.” We provide complete documentation and a test harness to validate your endpoint.

Demo Endpoint

When you are ready to register your endpoint as a named integration in Pruvan Online, schedule a demo with our integration team. We will review the functionality with you to understand the scope of your project. We will give you feedback and best practices advice to make sure your endpoint functions properly. We may have some recommendations that will require rework, so please plan accordingly. We will also ask for credentials and test orders in your system so we can test and document the integration ourselves. Once we’ve completed the demo test we will register your endpoint in the Pruvan Network as a named integration.

Launch Integration

Once the named integration is registered, we can begin the launch process. We recommend you launch with a small pilot group before rolling it out to your entire user base. Some things to consider for the launch are announcing the rollout, account setup, user training, user onboarding and user support. Pruvan has expertise, staff and tools to assist with your launch. Please contact our integration team early to find out what we offer.

Integration Tips

Start small, but think big.

Think of your project as Phase 1 of an awesome mobile experience for your users. Start with a simple process that you know you can nail. Think in terms of a “pilot” and not a “big bang.”

Also, make sure Pruvan will work for you by manually testing the workflow by creating projects and surveys using Pruvan Online. This way you can be sure your process will work before you write one line of code.

The manual approach will also allow you to demonstrate how the future process will work to your upstream stakeholders.

Integration Checklist

- Pruvan has developed an automated endpoint tester. **Make sure you test your integration using our endpoint tester** as one of your first steps. (<https://www.direct.pruvan.com/admin/api-validate>)
- **Create a test account and an optional production account.** Accounts are free, so feel free to create a test account you can use to test and develop your integration. And a production account (if needed) that can eventually be used for production. If you are developing an External Integration and don’t have a Pruvan Survey, then a production account might not even be needed.

- **Make sure you have a project plan and have your project manager engage with Pruvan as early as possible.** We've done this before, and we are experts that can help you with all aspects of the project.
- Test your process manually first! Before your developers start cracking their knuckles, run through the process manually using Pruvan Online first.

Vendor Rollout Best Practices

Once again, start small but think big.

A successful Vendor Rollout is completed in stages. This way, as Vendors are onboarded, resources for training and technical support are readily available, and any surprises can be addressed immediately with solutions designed to scale.

Pruvan recommends two or three smaller pre-release groups of approximately 25-40 vendors each. After a successful rollout to those pre-release groups, rollouts to larger groups of vendors may commence.

Pruvan also recommends the creation of training materials and following a specific sequence of training best practices to successfully scale a rollout from pre-release groups to the entire vendor network.

Pre-Launch Checklist

- **Identify two to three pre-release groups made up of 25-40 vendors.** These vendors should be your most reliable and responsive vendors since their feedback will be critical for identifying any issues and moving forward with the rollout.
- Contact pre-release vendors via email to outline the rollout and set expectations. These expectations will include information on **minimum vendor requirements, workflow updates, mandatory training sessions, and any other information essential for the vendor.**
- Engage Pruvan Marketing to launch a landing page on the Pruvan website. **All vendors will be directed to this landing page to start the onboarding process.** The landing page serves to communicate the steps needed to successfully download Pruvan and set up the integration.
***Note:** A landing page is preferable to emailed instructions because a landing page is a single point of reference for all vendors, guaranteeing identical onboarding and training instructions.*
- **Schedule training sessions for not only pre-release vendors, but also vendor managers.** Pruvan offers training and scorecard services for pre-release groups and the full-scale vendor rollout as well as Pruvan expert training for internal staff.

- Once pre-release groups have completed their rollouts and no major issues have been identified, rollouts may continue to the remainder of the vendor network. Groups should be less than 100 vendors and be able to be managed and tracked by the vendor management team.

Pruvan Onboarding Services

Pruvan's Onboarding Services include expertise from several different departments within the organization.

Pruvan Marketing

The Pruvan Marketing team is available to assist with the creation of any joint marketing and communications materials and launching the landing page on the Pruvan website with specific instructions for your vendors.

Additionally, the Marketing team is responsible for publishing the monthly Pruvan Newsletter which is sent to thousands of customers. If you are looking to recruit Pruvan users for your vendor network, the Marketing team can publish this announcement in the Newsletter.

Pruvan Customer Service

The Pruvan Customer Service team works closely with your head of Vendor Management to create a custom training on the work flow desired by your organization. Custom training materials are created by using application and vendor portal screen shots with detailed descriptions of processes. These are then merged into not just a training webinar for vendors, but also a living training document on the Pruvan Support Center accessible at any time.

Our Customer Service team then works with you to determine an appropriate webinar training schedule often with multiple trainings per day. These webinars train vendors not just on your desired workflow, but Pruvan FAQs like how to open a Support Ticket, sub-assign work to crews, and basic account functionality.

Finally, to ensure long-term scalability and success, Customer Service will train your vendor managers on how to use Pruvan with your workflow. Having internal team members who are Pruvan experts reduces confusion and promotes consistency for the vendors regardless of whom they may contact for assistance while in the field. Having Pruvan experts on your vendor management team also provides our Customer Service team with points of contact to resolve issues with increased efficiency.