tmforum

Frameworx 18.0

Product Conformance Certification

Company Name: Diksha Technologies

Product Name: Smart Invoice Pro v.3.3

Report Version: 1.0
Report Date: 26 October 2018

Table of Contents

List of Figures

1 Introduction

1.1 Executive Summary

This document provides details of Diksha Technologies (Dikshatech) self-assessment and TM Forum's Conformance Assessment of **Dikshatech's Smart Invoice Pro version 3.3** product, against the following Frameworx 18.0 components:

- Business Process Framework (eTOM) version 18.0

The assessment included a review of the methodology approach to process modeling against the TM Forum's Business Process Framework Release 18.0 according to the specific processes submitted in scope for the Assessment.

Note that Conformance to the Information Framework (SID) Aggregate Business Entities (ABEs) was not covered in this Assessment.

For more information on Dikshatech's Smart Invoice Pro please contact:
Sonal Jain: sonal.jain@dikshatech.com
Vinod Pulluru: Pulluru.vinod@dikshatech.com
Rajesh: rajesh@dikshatech.com

For any additional information on this Frameworx Conformance Certification Report, please contact TM Forum Conformance Certification team at:
conformance@tmforum.org.

2 Product Functionality/Capability Overview

2.1 Dikshatech's Smart Invoice Pro – Product Overview

Smart Invoice Pro is a well-integrated, highly effective solution that can suffice the Invoicing Requirements of any Service Provider across the globe. This is a centric solution that helps the Service Providers to generate invoices for any kind of service. It is a high-speed rendering solution that can generate complex invoices quicker.

The Solution provides a Web Console to configure the invoicing templates and parametric conditions. It is designed in a way to read the input from any formats and from any source. The Solution offers the capability to generate the Customers Invoices in various output formats like PDF, iPDF, AFP, CSV, XML, etc.

The Solution also offers the facility to the end customers to analyze and audit their service utilization based on configurable metrics from the Invoice output formats chosen. It is also designed to provide a capability to a Service Provider to e-deliver / Print / Store (into a local storage) the invoices. The hence stored invoices can be retrieved from any CRM / Self-care at wish.

Figure 1 – Smart Invoice Pro
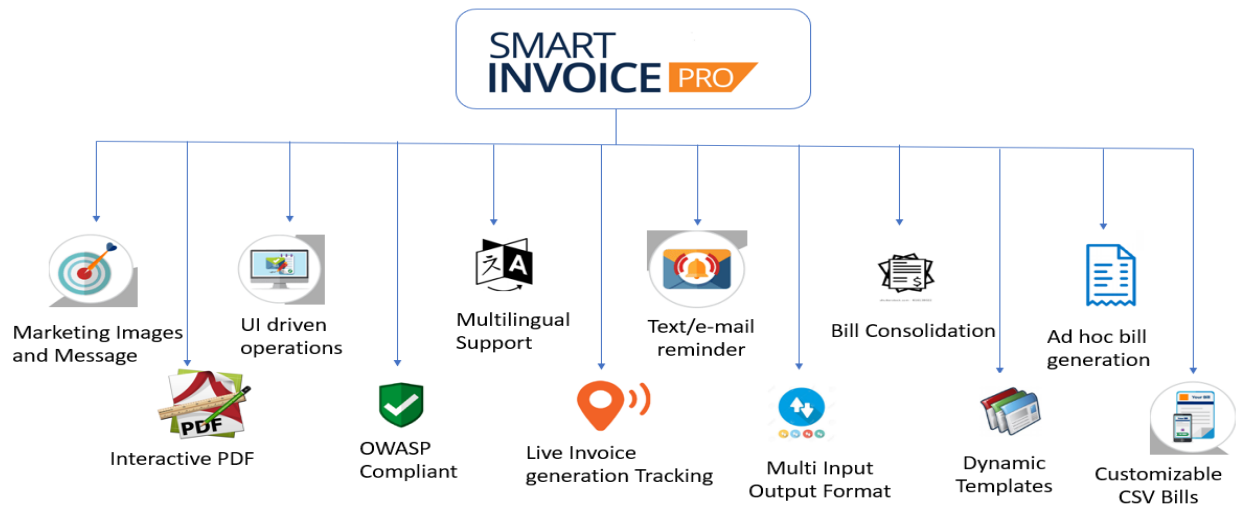
2.2 Features of Smart Invoice Pro:

Figure 2 – Smart Invoice Pro Core Features

Figure 3 – Smart Invoice Pro Advanced features

2.2.1 Summary of Features of Smart Invoice Pro:

- Enhanced customer experience
- Omni channel experience
- Increases Customer Interaction with Business
- Campaigns – Social Media, Email, SMS, Surveys
- Mobile App – Easy accessibility and tracking
- Suggest Best fit plans to avoid Bill shocks
- Payment Transparency and Flexible Payment Distribution
- Helpdesk enablement through chat bots

2.3 Dikshatech's Smart Invoice Pro Benefits

- **Ease of Operations** - Configuration Enablement, making system highly configurable helps to reduce the deployment effort and code change effort
- **Live Invoice Generation Tracking**: Batch can be initiated and tracked from the UI which helps operations to understand the current status with ease
- **User Management**: Role based access control, which helps to define the roles and responsibilities and mange the users
- **Automated Processing**: Reduce operations cost and human errors. Leads to high quality output
- **Marketing Videos & Images**: Marketing videos makes Promotions more Interactive
- **Payment Reminders**: Reminds customer to pay bill and leads to early collection of revenue, also avoid late payment fee.
- **Integration with Social Media**: Customer can receive bill info on their social media accounts as well

- **Multi Source Data Handler**
  Application has the capability to extract data from various sources, like Database, Flat files, CSV, XML, etc for processing and output generation.

- **Multi Output Format**
  Application has the capability to generate output in standardized format to support various internal and external systems. Some of the output formats produced by application are PDF, iPDF, AFP, PS, CSV, XML.

- **Dynamic Templates & Multi Language Support**
  Application has the capability to maintain a repository for custom marketing messages, images, and templates. Application has the provision to customize messages, resources, and supports multiple languages for effective personalization.

- **Multi-Channel Invoice Dispatch & Tracking**

Application has the capability to dispatch output through various distribution channels, like print, Email, SMS, and other integration systems. Application also has the capability to track dispatch status and generate reports.

- **Operational Reports**
  Application generates multiple audit reports about the application usage statistics, user activities and provides an interface to generate custom reports.

- **Integration**
  The Solution can be integrated easily to any Self-Service Portals, CRM, Payment Gateway and other applications via Web-services. Application provides provision to view the bill, download or print the bill. Application also have the ability to take request from the CSR for duplicate bills & deliver it to the customer through their preferred channel.

- **Security & Access Control**

  The Invoice Rendering Solution provides the high security features like:
  o Single Sign-On (SSO) is a property of access control of multiple related, but independent software systems. The Solution provides and manages the single login credentials for both administrative tasks as well as end user tasks.
  o RBAC (Role Based Access Control) is an approach to restricting the system access to authorized users, where in the larger enterprises can implement Mandatory Access Control (MAC) or Discretionary Access Control (DAC) based on their business requirements. The Solution provides the organization to better manage the teams and the actions to be performed by these teams in an organized and decentralized manner.

- **Communication**
  Dispatcher application provides the functionality to dispatch invoices over Email and SMS, this application consists of the following two principle components:
  o Email & SMS Dispatcher
  o Report Generator

- **Analytics Engine**
  Analytics engine is a standalone web-based portal which picks data from Smart Invoice Pro database, applies pre-defined analytical rules, and produce reports both in UI and downloadable formats.

2.4 Dikshatech's Smart Invoice Pro - Technical Facts

- Microservices enabled architecture
- Cloud ready
- Omnichannel Experience
- Unified Communication
- Intuitive Template Designer
- Rule based configuration
- Mobile application for Business KPI monitoring
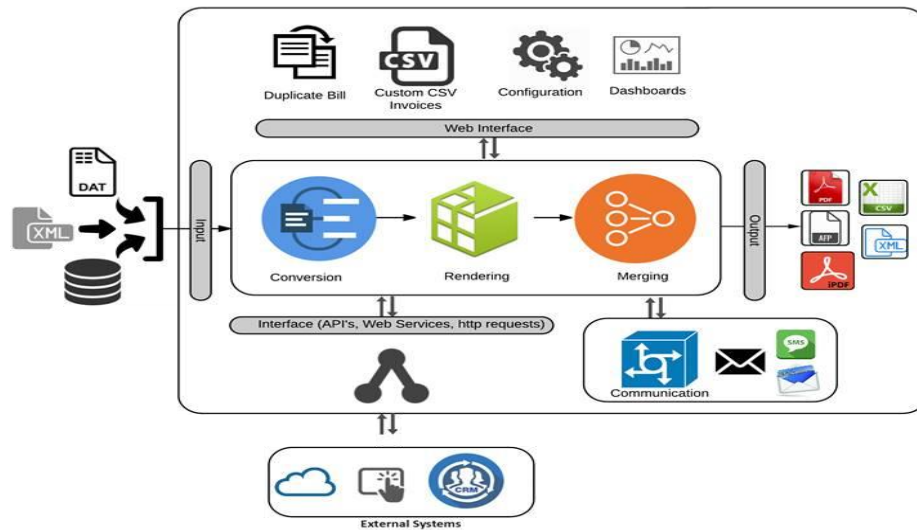
Figure 4 – Smart Invoice Pro Component layout

2.5 Dikshatech's Smart Invoice Pro - Supported Installation Models

The following installation models are applicable for Dikshatech's Smart Invoice Pro:

➢ Smart Invoice pro supports on premise and cloud installations

3 Business Process Framework Level 2 Process Scope and Footprint

The following figure represents the scope of the assessment based on the Business Process Framework (eTOM) v.18.0. The Level-2 processes highlighted in red, and all their Level-3 constituents were submitted for conformance certification.

Figure 5- Level 2 process scope coverage for Dikshatech Smart Invoice Pro Assessment

4   Business Process Framework Assessment Overview

4.1   Mapping Technique Employed

Business Process Framework Level 3 process descriptions are analyzed by looking for implied tasks. (This is similar to how process decomposition can use Semantic Analysis). Each Business Process Framework process is support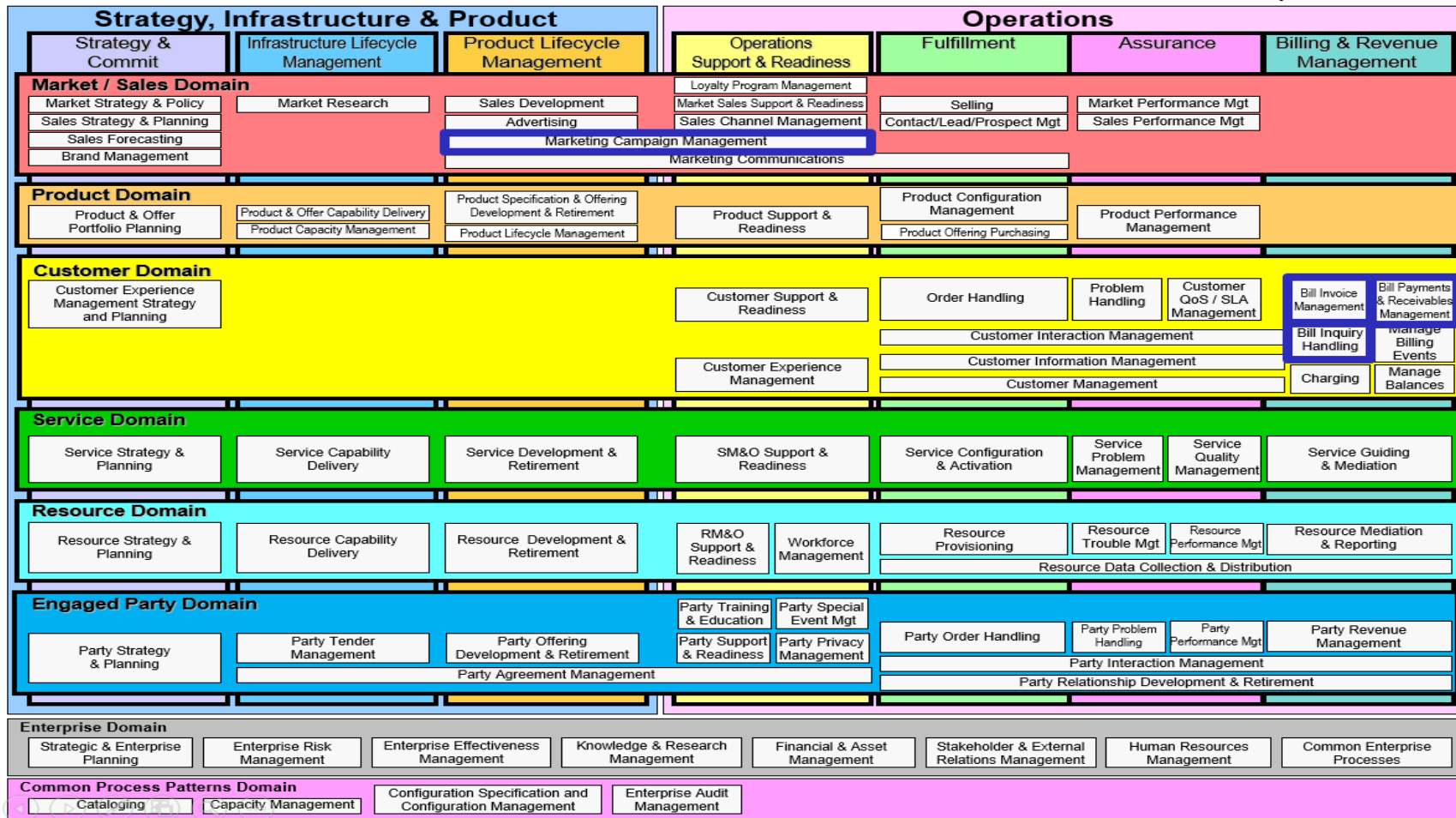ed by descriptive text. In many cases, each process is aligned and mapped to appropriate company documentation references solution, methodology or modeling material.

The Business Process Framework Level 3 descriptions are analyzed by looking for implied tasks. Color coded text as highlighted below is used as part of the process mapping whereby highlighted text indicates the level of support for a Level 3 process implied task:

- GREEN is used to highlight key words or key statements that are fully supported
- YELLOW is used to highlight key words/key statements that are partially supported
- GREY is used to highlight key words/key statements that are not supported
- No highlighting is used for words/statements that are irrelevant, just for reference or needed to complete the sentence.

Manual and Automated Support
It is important to determine whether the implied task is supported by manual steps, automated steps, or a combination of both. In this document, "A", "M", or "AM" is used for each task to indicate that the step or steps is/are automated (A), manual (M), or both (AM).

TM Forum Note 1: The mappings are provided against the text in the "Brief and Extended Description" fields for the process.

TM Forum Note 2: As of February 2018, TM Forum allows mappings to be provided against Level-3 process elements when:
- *L3s have relevant, consistent full detailed descriptions reflecting all L4 process elements in their decomposition (usually implied tasks identified and separated by bullet points)*
- *No decomposition to Level 4 processes was available for a particular L3 process, but the Level-3 mappings fulfil the condition described above, therefore the score awarded hereafter is for the Level 3 process in its entirety*

The following diagram identifies the number of Level 3 processes that were submitted for assessment, for each Level 2 process that was submitted in scope for the Assessment.

Diksh Technologies - Smart Invoice Pro v.3.3
Business Process Framework v18.0 - Level 3 Process Coverage

- ■ Total # Level 3 Processes Defined in the eTOM = 20
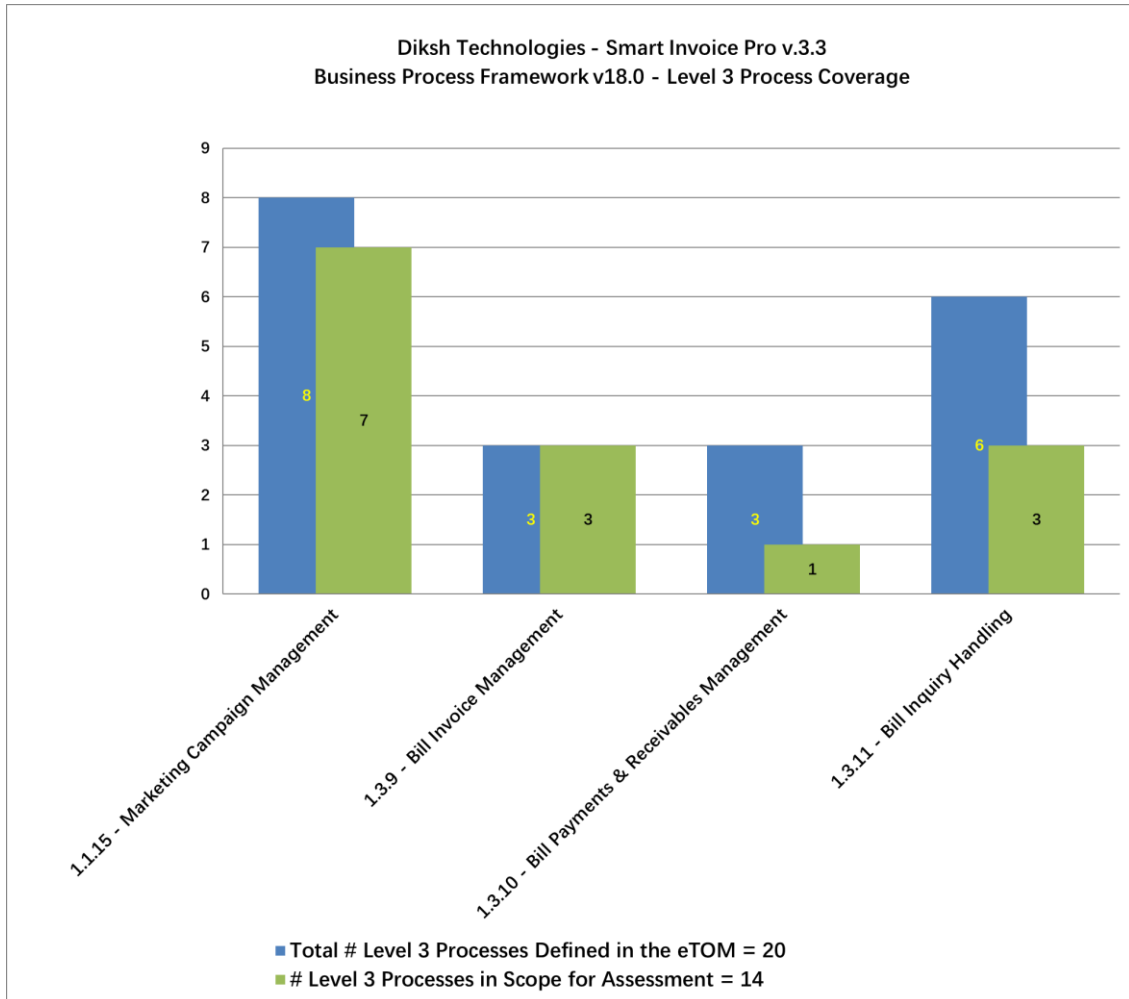- ■ # Level 3 Processes in Scope for Assessment = 14

Figure 6 - Level 3 process coverage for Dikshatech Smart Invoice Pro Assessment

5   Business Process Framework – Process Mapping Descriptions

This Section provides a summary of the product mappings that Diksha Technologies provided in the form of self-assessment.

The self-assessment was reviewed by TM Forum Subject Matter Experts alongside supporting documentation provided by Diksha Technologies.

5.1   Level 2: 1.1.15 – Marketing Campaign Management

5.1.1   Mapping Details & Supporting Evidence

The documented mapping information for all Level 3 processes in scope for the "1.1.15 – Marketing Campaign Management" business processes are available from the following link:

https://www.tmforum.org/wp-content/uploads/2014/10/Diksha-Smart-Invoice-Pro-eTOM_Certification_Mappings_R18.0-MCM-1.1.15-V2RF.pdf

Mappings and supporting evidence were presented for the following **L3** processes:

1.1.15 – Marketing Campaign Management
    1.1.15.1 - Plan Marketing Campaign
    1.1.15.2 - Ensure Marketing Campaign Capability (Out of scope)
    1.1.15.3 - Develop Marketing Campaign
    1.1.15.4 - Launch Marketing Campaign
    1.1.15.5 - Monitor Marketing Campaign Effectiveness
    1.1.15.6 - Modify Marketing Campaign
    1.1.15.7 - End Marketing Campaign
    1.1.15.8 - Undertake Marketing Campaigns Trend Analysis

5.2   Level 2: 1.3.9 - Bill Invoice Management

5.2.1   Mapping Details & Supporting Evidence

The documented mapping information for all Level 3 processes in scope for the
"1.3.9 - Bill Invoice Management" business processes are available from the
following link:

https://www.tmforum.org/wp-content/uploads/2014/10/Diksha-Smart-Invoice-Pro-
eTOM_Certification_Mappings_R18.0-BIM-1.3.9-V2RF.pdf

Mappings and supporting evidence were presented for the following **L3** processes:

1.3.9 - Bill Invoice Management
    1.3.9.1 - Apply Pricing, Discounting, Adjustments & Rebates
    1.3.9.2 - Create Customer Bill Invoice
    1.3.9.3 - Produce & Distribute Bill

5.3   Level 2: 1.3.10 - Bill Payments & Receivables Management

5.3.1   Mapping Details & Supporting Evidence

The documented mapping information for all Level 3 processes in scope for the
"1.3.10 - Bill Payments & Receivables Management" business processes are
available from the following link:

https://www.tmforum.org/wp-content/uploads/2014/10/Diksha-Smart-Invoice-Pro-
eTOM_Certification_Mappings_R18.0-BPRM-1.3.10-V3RF.pdf

Mappings and supporting evidence were presented for the following **L3** processes:

1.3.10 - Bill Payments & Receivables Management
    1.3.10.1 - Manage Customer Billing (Out of scope)
    1.3.10.2 - Manage Customer Payments
    1.3.10.3 - Manage Customer Debt Collection (Out of scope)

5.4 Level 2: 1.3.11 - Bill Inquiry Handling

5.4.1 Mapping Details & Supporting Evidence

The documented mapping information for all Level 3 processes in scope for the "1.3.11 - Bill Inquiry Handling" business processes are available from the following link:

https://www.tmforum.org/wp-content/uploads/2014/10/Diksha-Smart-Invoice-Pro-eTOM_Certification_Mappings_R18.0-BIH-1.3.11-V2RF.pdf

Mappings and supporting evidence were presented for the following **L3** processes:

1.3.11 - Bill Inquiry Handling
  1.3.11.1 - Create Customer Bill Inquiry Report
  1.3.11.2 - Assess Customer Bill Inquiry Report (Out of scope)
  1.3.11.3 - Authorize Customer Bill Invoice Adjustment (Out of scope)
  1.3.11.4 - Track & Manage Customer Bill Inquiry Resolution (Out of scope)
  1.3.11.5 - Report Customer Bill Inquiry
  1.3.11.6 - Close Customer Bill Inquiry Report

6 Frameworx Conformance Result

This Section details the Scores awarded to reflect Conformance for Diksha Technologies Smart Invoice Pro to the Business Process Framework components of Frameworx 18.0.

6.1 Business Process Framework – Overall Conformance Scores

TM Forum Frameworx 18.0 Assessment Scoring Document - Business Process Framework (eTOM)			
Member:		*Diksha Technologies*	*Overall Scores Achieved in the certification*
Product:		*Smart Invoice Pro v.3.3*	
Assessment Type:		Product	
Number of L3 Processes:		14	
Level 2	*Level 3*		
1.1 - Market / Sales Domain			
1.1.15 - Marketing Campaign Management			
	1.1.15.1 - Plan Marketing Campaign		5.0
	1.1.15.3 - Develop Marketing Campaign		5.0
	1.1.15.4 - Launch Marketing Campaign		5.0
	1.1.15.5 - Monitor Marketing Campaign Effectiveness		5.0
	1.1.15.6 - Modify Marketing Campaign		5.0
	1.1.15.7 - End Marketing Campaign		5.0
	1.1.15.8 - Undertake Marketing Campaigns Trend Analysis		5.0
1.3 - Customer Domain			
1.3.9 - Bill Invoice Management			
	1.3.9.1 - Apply Pricing, Discounting, Adjustments & Rebates		5.0
	1.3.9.2 - Create Customer Bill Invoice		5.0
	1.3.9.3 - Produce & Distribute Bill		5.0
1.3.10 - Bill Payments & Receivables Management			
	1.3.10.2 - Manage Customer Payments		5.0
1.3.11 - Bill Inquiry Handling			
	1.3.11.1 - Create Customer Bill Inquiry Report		5.0
	1.3.11.5 - Report Customer Bill Inquiry		5.0
	1.3.11.6 - Close Customer Bill Inquiry Report		5.0

Figure 7 - TM Forum Business Process Framework: Overall Conformance Scores

6.2 Business Process Framework – Conformance Result Summary

The graph in this Section provides an overview of the conformance levels granted to the Level 3 Processes presented in scope for Diksha Technologies Smart Invoice Pro conformance assessment.

Each Level 3 process was measured using a Business Process Framework (eTOM) conformance score according to the level of Conformance – Full Conformance or Partial Conformance as described in Section 6.1 Business Process Framework – Overall Conformance Scores

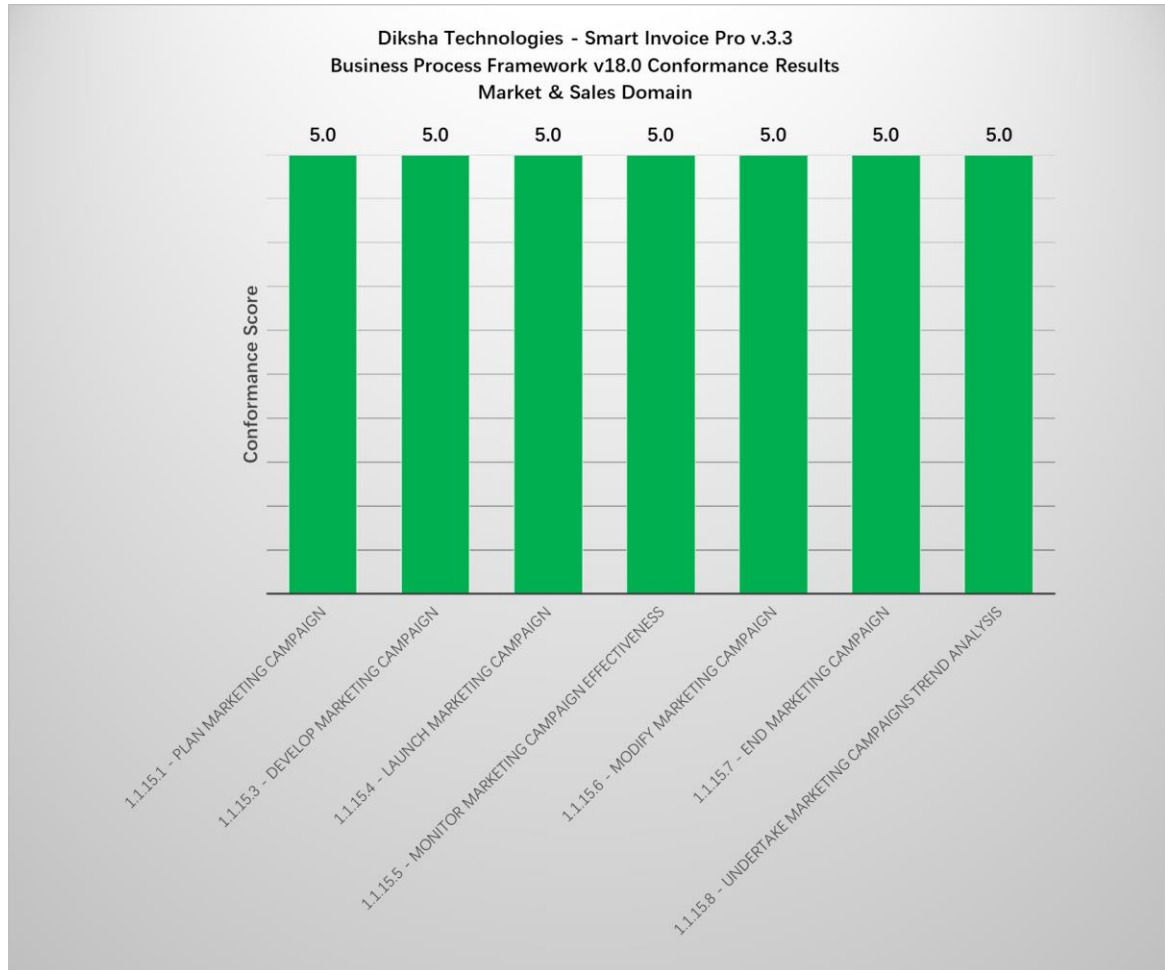## 6.3 Business Process Framework – Detailed Conformance Results – Market & Sales Domain

Figure 8 - Conformance Results (eTOM) Market & Sales Domain

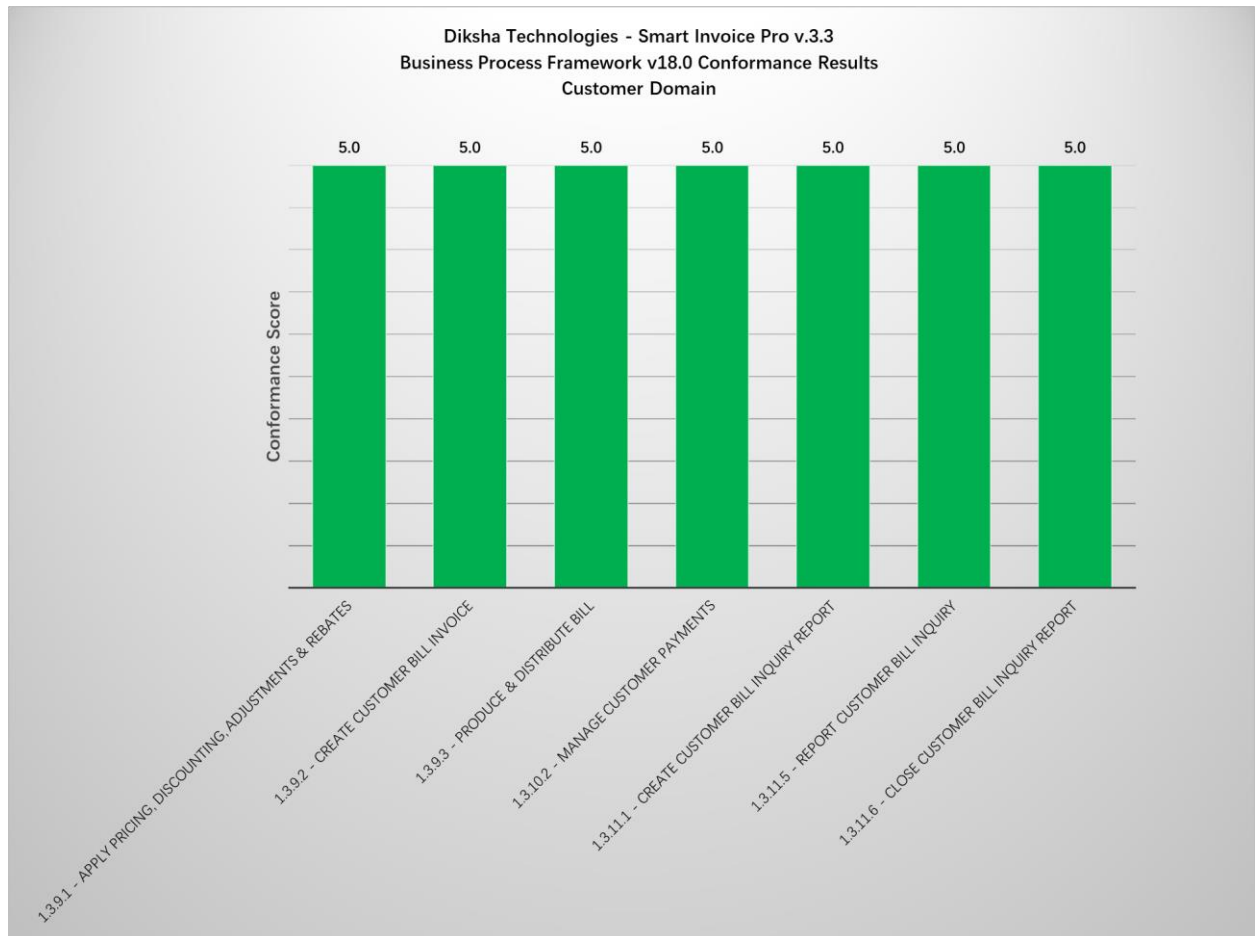## 6.4 Business Process Framework – Detailed Conformance Results - Customer Domain

Figure 9 - Conformance Results (eTOM) Customer Domain