# My Service Cloud Features

# **MSC Dashboard: Pipelines**

## **Leads Pipeline**

We have built and designed a new Leads Dashboard to track, monitor and organize your leads to have knowledge on where each one are at in the sales process. The goal is to help brokers stay organized while a customer progresses from a lead to a signed contract.

To access the new dashboard, you will go to the Dashboards drop down tab in the top lefthand corner of your screen of the homepage of MSC, and select the "Leads" option under Pipelines.

Dashboards 😔	Customers Cont			The plus	s sign allows you to	add new
			🚺 Lea	ids	+ :	R
COMMISSIONS						
Payments	*	The four steps the client will	O Cus	stomers	+ :	
Deal Value	. *	undergo:	0 Que	otes	1	
PIPELINES		5				
Leads	*		O Con	stracts	ł	
	Dus					

Here is an example of the data that will be collected for each Lead. The red fields are required, while the green fields are optional.

Add a Lead			×	Address Details				
Primary Details		b Import Lead		Address 1		Address 2		
Business Nome		elect Business Type	]	Select City ~	State State	-	Zip	
	st Nome Name connot be clanit.	elect Lead Position *						
Emoil	anor							



#### New Lead

Once saved, you will see the completed lead under the Lead's column.

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Smith Company John Smith		his response tours		No mounds to and		No monefa teune.	
• 5	<b>▼</b> ≌, <u>⇒</u> ⊆ % st						
1							

#### **New Customer**

For the customer tab, you will click the same plus sign and manually enter the customer there. You can also drag and drop the lead into the Customers pipeline to move the customer along in the sales cycle.

0 Loads T	+ :	Customers T	+ :	0 Quotes	1	O Contracts	\$0.00 ‡
No record's found:	ι.	Smith Company John Smith	۲	No record's found,		No record's found.	
	~	• •	▼ 5 E ≌ % si				

#### New Quote

Once it's in the Customers pipeline, you have the ability to transform it into a quote.

	Customers T	+ :	0 Quotes	1	O Contracts	\$0.00 E
No record's found	Smith Company John Smith	۲	Smith Company (Texas) John Smith	۲	No record's found.	
	0 3	T - B - E - S - SE	0 0	T B B M S		
	Elgin Networks Sci	att Elgin				

#### New Contract

When the customer selects a rate and term, you can generate the contract from the quote in this dashboard. Once the contract is sent, it will appear in the Contracts pipeline.

			0 Quotes T		0 Contracts T	\$18,540.00
No record's found.	Smith Company John Smith	Θ	No record's found.		Smith Company John Smith	\$18,540.00 🕀
	0 3	T B E C SE		5	0 9	▼ 🛱 🖻 🖂 % 🚮



## **Contracts Pipeline**

We are releasing a new pipeline in MSC titled "Contracts." The goal of the function is to keep contracts organized and easily move them along the contract journey.

To access the new feature, you will go to the Dashboards drop down tab in the top left-hand corner of your screen of the homepage of MSC. You will see several options listed. Select the "Contracts" option under Pipelines.

Dashboards 🗸 C	ustomers Co			1
COMMISSIONS Payments	*	Next you will see your	Awaiting Signature	1
Deal Value	*	contracts and their status	Signed	ŧ
Contracts	*		Ready For Booking Signature	1

The different status' will be in separate columns and can be dragged into the appropriate column to move the contract along or place the contract into the correct status. The only progression you cannot make is from awaiting signature to signed. This will be up to the customer to complete

1			<b>T</b> :	0 Signed	1	Ready For Booking Signature
Smith Company Jane Smith	\$525.00 🕀	Smith Company Jone Smith	\$1,051.44 🕀	No record's found.		No record's found.
• •	Y 🛱 🖹 🖾 🌜	0 3	🝸 🍓 🖻 🖾 🗞 Adil Surani			<u></u>
Adil Surani Adil Suran	as -	Adil Surani	Adil Surani			



By clicking the plus sign, you can expand the contract and see the contract details, such as the annual kWh, product, term, supplier, rate, status, and contract actions.

2 Drafts	<b>T</b> \$1,576.44	Awaiting Signature	<b>T</b> :	O Signed	E Ready For Booking Signature
Smith Company Jane Smith 10: 53546	\$525.00 🕞 Collapse	Smith Company Jane Smith	\$1,051.44 🕀	No record's found.	No record's found.
Annual kwh: 150,000	Concipae	0 3	Y 🖏 🖻 🗠 🗞		
Product: Fixed Price Term : 24 Mor Supplier: Direct Energy Rate: \$0.0543		Adil Surani	Adii Surani		
Status: Draft (PDF Generated)					
Contract Actions: 🗙 🔤 🗲					
• • • •	🖹 🛇 %				
Adil Surani Adil Surani	AS				
····	Or	n contract	actions you ca	an delete, send, a	nd generate a pdf

## **Contract Renewal Pipeline**

We are releasing a new feature in MSC titled "Contract Renewals". The goal of this tool is to monitor and renew all contracts that are expiring within the given timeframe selected.

To access the new feature, you will go to the Dashboards drop down tab in the top left-hand corner of your screen of the homepage of MSC. You will see several options listed. Select the "Contract Renewals" option under Pipelines.

		Next you will	🔘 Up For Renewal	1
COMMISSIONS		see the stages	() Quotes	1
Payments	*	in the renewal		
Deal Value	*	process	O Contracts	
PIPELINES			To filtor by	certain timeframe
Contract Renewals	*			ree-dots at the to
				each given colur



## **Renewal Filters**

The filters feature allows you to filter by business name, supplier, expiration window and further sort those filtered results. By clicking the arrow down you can limit the suppliers shown to those expiring within a specific time frame.

	Filter by Business Name	Expiring within 15 days		
	Business Name	Expiring within 30 days Expiring within 60 days		
Business Name (A to Z) Business Name (Z to A)	Supplier	Expiring within 90 days		
Annual Volume Ascending	Supplier	Expiring within 120 days		
Annual Volume Descending Created Date Ascending	Expiring in 🔹	R		
Created Date Descending	Sort by			
L.	Sort By			
	Apply Reset Filter			
	Unhide Cards Expand all			



## **CRM Integration**

CRM integration will allow you to set reminders, take notes. You can do things like: Create A Task, Add A Note, Send an Email, or Make A Call. At any point in the process in any of the pipelines, you have the option to use our integrated CRM features.

Smith Company John Smith					Ð
• •	۲	<b>B</b>		S	SE
12					-

Below is how each CRM action looks:

#### Create a Task

This allows user to schedule a task with a time, date, how and when they would like to be reminded (ie. 1 day before, 1 hour before)

Title	Type * Type		* Scheduled		×	
Description						
Start by Date & Time 🗮	Due by Date & Tin	ne	Ħ	Assigned to Lauren Johnson	×	
Associate with * Lead	Select Record * Raphi Lead 1 (Bill Gates)			×		
et Reminder(s)						
Remind me				Remind me at		
Hrs / Mins Minutes 🗸	Before Select	~	OR	Date & Time 📓		
emind by				Ad	d remind	er
Email 🛛 Notification						

### Take a Note

This allows users to make a note about the client

lote			
Associate with * ead	×	Select Record * Raphi Lead 1 (Bill Gates)	к э
			Cancel Save



#### Send an Email

Enter email subject, open email, log time and date of sent email – Allows user to enter notes

Add a subject							
Attochments Choose Files	his file she						
Choose Files	No file cho	osen					
<> ¶ B	I 9		-	-	_		
- <u>-</u>			1000 A. 1000 A.				
Associate with					Select Record *		
Lead				 *	Raphi Lead 1 (Bill Gates)		

## Make a Call

Open call tool, log subject, type, time and date – Allows user to enter notes

