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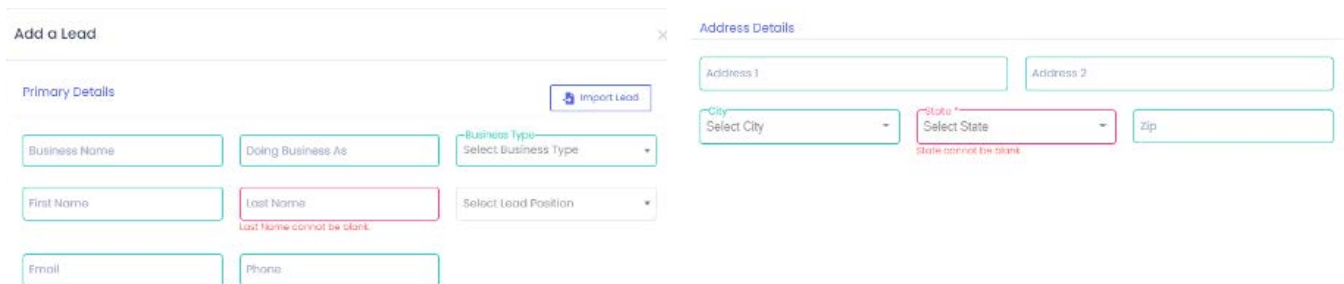
To access the new dashboard, you will go to the Dashboards drop down tab in the top left-hand corner of your screen of the homepage of MSC, and select the "Leads" option under Pipelines.

The plus sign allows you to add new
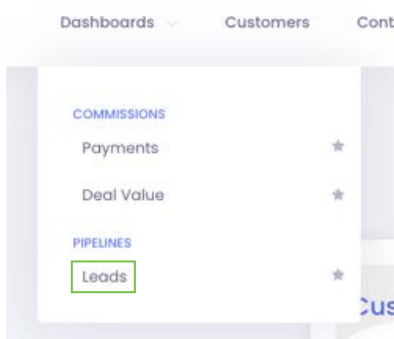
The four steps the client will undergo:
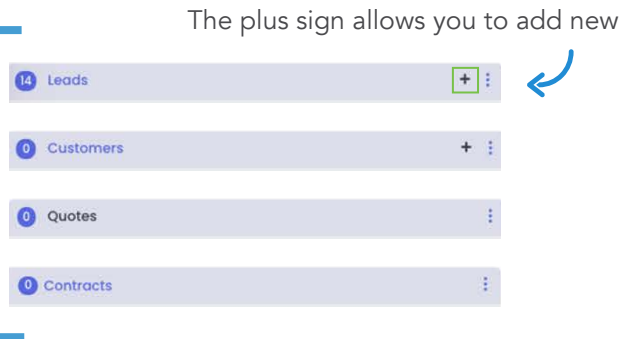
Here is an example of the data that will be collected for each Lead. The red fields are required, while the green fields are optional.
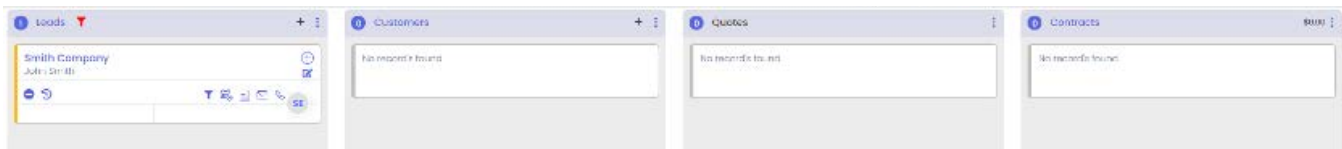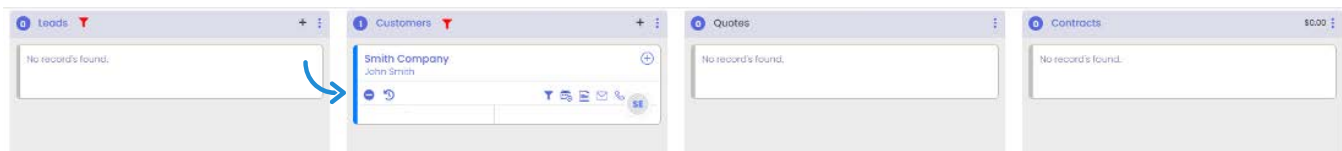
MSC Dashboard: Pipelines

New Lead

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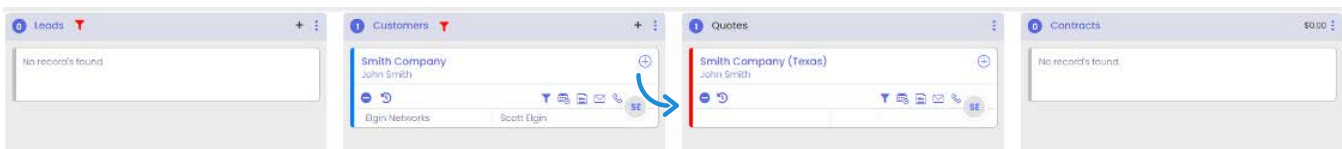

New Customer

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.
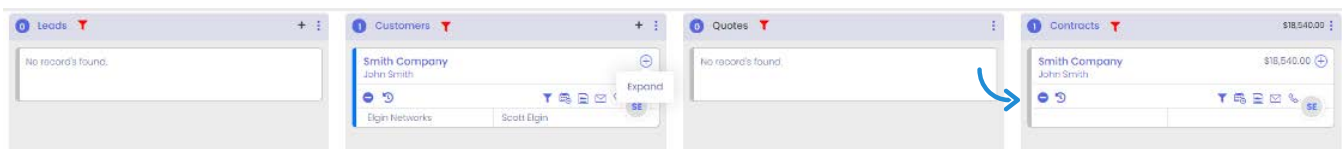

New Quote

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

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.
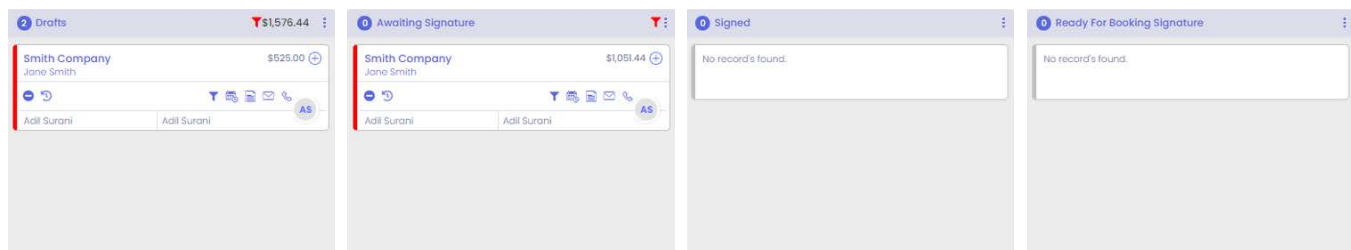
Contracts Pipeline

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.

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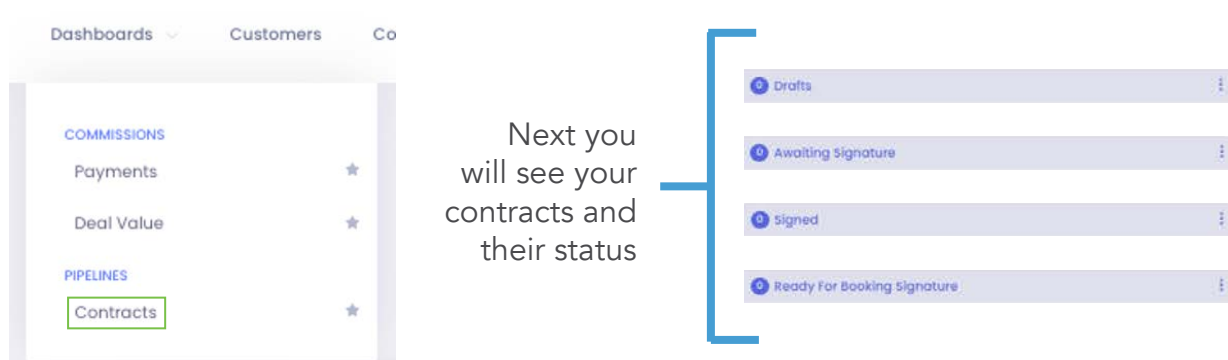
The different status' will be in separate columns and can be dragged into the appropriate column to move the contract along or place the contract into the correct status. The only progression you cannot make is from awaiting signature to signed. This will be up to the customer to complete

MSC Dashboard: Pipelines

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.
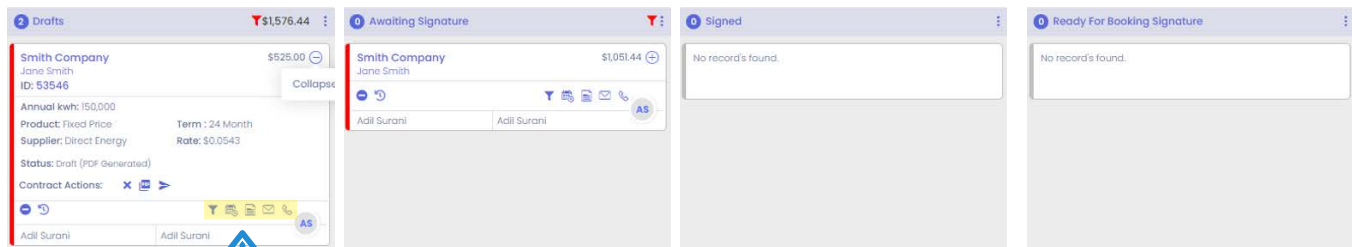

On contract actions you can delete, send, and generate a pdf

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.
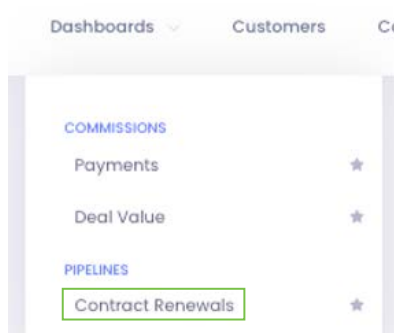
Next you will see the stages in the renewal process

To filter by certain timeframes, click on the three-dots at the top right on each given column

MSC Dashboard: Pipelines

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.
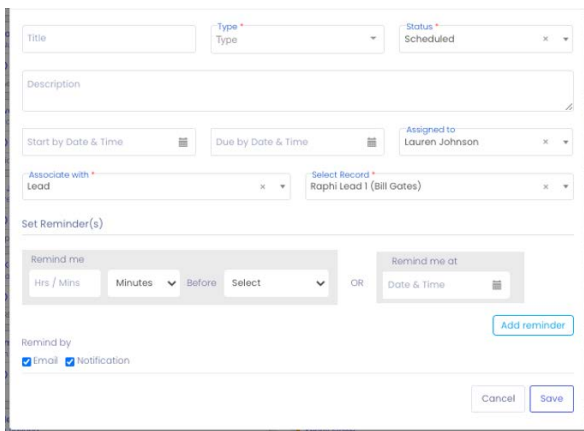
CRM Integration

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.
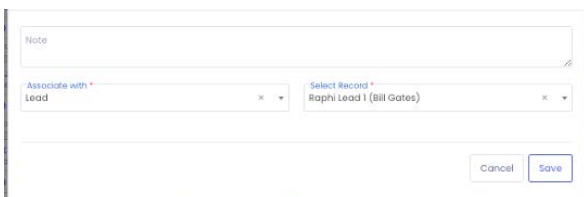

Below is how each CRM action looks:

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)
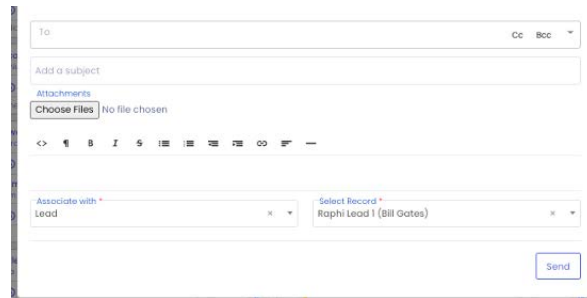

Take a Note

This allows users to make a note about the client

Send an Email

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

Make a Call

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