

MSC Multi-Level Management Tier & Pricing Setup

Our industry-leading technology provides energy and natural gas professionals with a holistic back office solution to simplify the sales process including:

- ✓ Instant access to up-to-date prices from all of our suppliers
- ✓ Automation to create accurate, professional contracts
- ✓ Integration to DocuSign to send and accept electronic signature
- ✓ Features to assist with renewal management
- ✓ Commission and agent tracking

My Service Cloud Features

Multi-Level Management Tiers



Role Descriptions, Pricing & Fees

Role Descriptions

Super Master is the highest tier in the hierarchy. This role has full access to the system, including Commissions, Pricing Components, all Agency Manager and Agent's customers, contracts, and actions. There can be more than one Super Master.

Agency Manager is the second tier in the hierarchy. This role allows us to assign agents to them. The Agency Manager can see only their customers, contracts and actions as well as all Agents assigned to them. There are no limits on how many management tiers you can have, therefore, this role can be formed as the second, third and fourth tier if you have a five-tier management system. Agency Managers do not have access to commissions.

Agent is the most basic role in MSC. An agent can only see their customers, contracts, and actions. Agents do not have access to commissions.

Pricing Components & Fees

Agency Built In Margin (ABM) is what we like to refer to as "house money." This is a set margin that we can build in for the Agency. Agents and Agency Managers will not be able to see this margin. This margin will be included in all of the rates that the salesperson can see. We can customize ABM by product, supplier, term, agent, matrix vs. custom, state, utility, and volume thresholds.

Broker Fee (BF) is the component of margin that the Agent adds. You can allow your agents to add margin freely, of course depending on splits and caps by suppliers.

Another option for the Broker Fee is by incorporating what we call "**Broker Range.**" This is a dropdown with set margins based on increments. The number of selections and the increments are totally customizable per commodity. The Agent would have the opportunity to select a choice from the dropdown. Each number would be a set margin. The agent would know that as the Range goes higher, their commission increases, and the price is less competitive. They would also understand that as the Range is lowered, their commission decreases, and the price is more competitive.

	Electric	Gas
1	0.002	0.02
2	0.004	0.04
3	0.006	0.06
4	0.009	0.09

In this example, Agents have the choice to select Broker Range of 1, 2, 3, or 4. If they select 3 for Electricity, the price will add \$0.006/kWh. If they select 4 for Gas, the price will add \$0.09/Therms.

