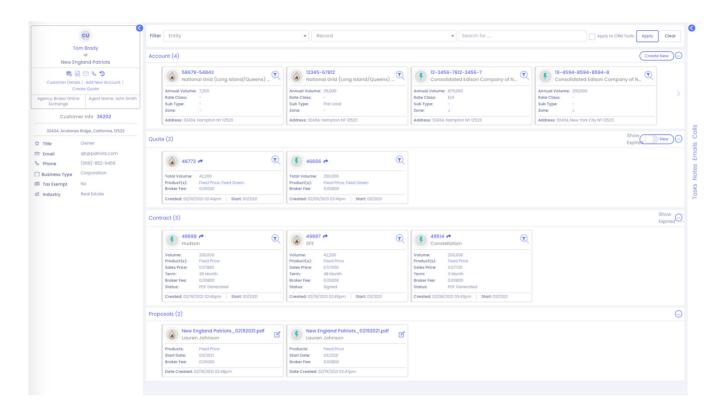


Customer Page User Interface

We have a NEW Design for our Customer's Page. We fit all activities on one page for easy Customer Management. The intent is to trend into a more satisfying aesthetic for you, while also providing a higher level of usability! We know this will lead to a happier you and ensure more success! The summary view allows you to capture all results associated within this customer and explain in higher detail at a glance.

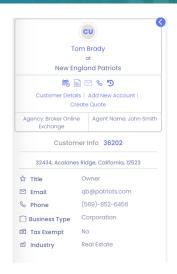






Customer

The Customer's Profile can be found on the left-hand side of the screen. You will notice the Task, Note, Email, and Phone icon there for you to log communication or set up reminders.



Accounts

The Accounts section is at the top. You can add both Electric and Natural Gas accounts into this section. There is no limit on how many you can add, just simply click "Create New" to add another account.

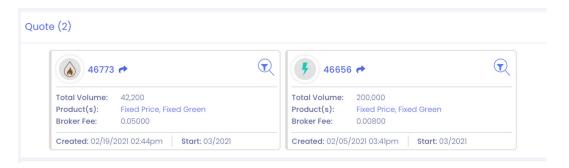






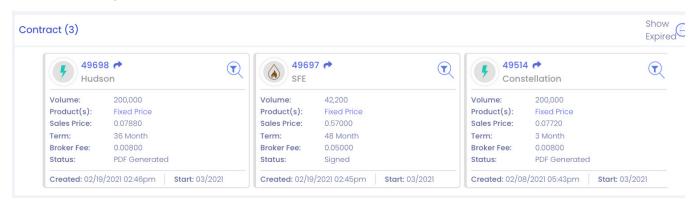
Quotes

After you have added your accounts, you can create a quote, or view previously created quotes here



Contracts

This section stores all contracts that have been generated for this Customer, regardless of the status that they are in.







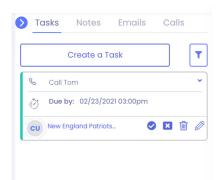
Proposals

After you have added your accounts, created a Quote and generated a Pricing Proposal, you can view the Proposals here. This section is easy to quickly reference to remind yourselves what price you presented to your client.



CRM Integration

The Customer's Profile can be found on the left-hand side of the screen. You will notice the Task, Note, Email, and Phone icon there for you to log communication or set up reminders.



Our goal for this new design is to provide better productivity, simple to use page designs, and higher conversion rates! Happy Selling!

