



MSC User Interface: Customer's Page

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.

My Service Cloud Features

The screenshot displays a user interface for a customer's page. On the left, there is a sidebar with customer information for Tom Brady at New England Patriots, including contact details and business type. The main area is divided into sections: Account (4), Quote (2), Contract (3), and Proposals (2). Each section contains summary cards for individual items, showing details like volume, price, and status.

Section	Item ID	Entity	Annual Volume	Rate Class	Sub Type	Zone	Address
Account (4)	58679-54843	National Grid (Long Island/Queens)	7,200	-	-	-	32434, Hampton NY 12523
	12345-67812	National Grid (Long Island/Queens)	35,000	-	Flat Load	-	32434, Hampton NY 12523
	12-3456-7812-3456-7	Consolidated Edison Company of N...	875,000	E19	J	J	32434, Hampton NY 12523
	19-4594-8594-8594-8	Consolidated Edison Company of N...	200,000	-	-	-	32434, New York City NY 12523
Quote (2)	46773	-	42,200	Fixed Price, Fixed Green	-	-	Created: 02/19/2021 02:44pm Start: 03/2021
	46656	-	200,000	Fixed Price, Fixed Green	-	-	Created: 02/19/2021 03:43pm Start: 03/2021
Contract (3)	49698	Hudson	200,000	0.57880	36 Month	0.00800	PDF Generated Created: 02/19/2021 02:44pm Start: 03/2021
	49697	SFE	42,200	0.57000	48 Month	0.05000	Signed Created: 02/19/2021 02:45pm Start: 03/2021
	49514	Constellation	200,000	0.57720	3 Month	0.00800	PDF Generated Created: 02/08/2021 05:43pm Start: 03/2021
Proposals (2)	New England Patriots_02192021.pdf	Lauren Johnson	Fixed Price	03/2021	0.05000	-	Date Created: 02/19/2021 02:48pm
	New England Patriots_02192021.pdf	Lauren Johnson	Fixed Price	03/2021	0.00800	-	Date Created: 02/19/2021 02:47pm





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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.

The screenshot shows a customer profile for Tom Brady at New England Patriots. At the top, there is a 'CU' icon and a back arrow. Below this, the name 'Tom Brady' is displayed, followed by 'at New England Patriots'. There are four icons: a task icon, a note icon, an email icon, and a phone icon. Below these icons are links for 'Customer Details | Add New Account | Create Quote'. The profile includes 'Agency: Broker Online Exchange' and 'Agent Name: John Smith'. A section titled 'Customer Info 36202' shows the address '32434, Acalanes Ridge, California, 12523'. A list of details follows: Title (Owner), Email (qb@patriots.com), Phone ((569)-852-6456), Business Type (Corporation), Tax Exempt (No), and Industry (Real Estate).

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.

The screenshot shows the 'Account (4)' section with a 'Create New' button. It displays three account cards. Each card has a search icon in the top right corner. The first card is for National Grid (Long Island/Que...) with account number 58679-54843, an annual volume of 7,200, and address 32434, Hampton NY 12523. The second card is also for National Grid (Long Island/Que...) with account number 12345-67812, an annual volume of 35,000, and address 32434, Hampton NY 12523. The third card is for Consolidated Edison Company... with account number 12-3456-7812-3456-7, an annual volume of 875,000, and address 32434, Hampton NY 12523.











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Quotes


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










Quote (2)

 46773  	 46656  
Total Volume: 42,200	Total Volume: 200,000
Product(s): Fixed Price, Fixed Green	Product(s): Fixed Price, Fixed Green
Broker Fee: 0.05000	Broker Fee: 0.00800
Created: 02/19/2021 02:44pm Start: 03/2021	Created: 02/05/2021 03:41pm Start: 03/2021

Contracts

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

Contract (3) Show Expired 

 49698  Hudson 	 49697  SFE 	 49514  Constellation 
Volume: 200,000	Volume: 42,200	Volume: 200,000
Product(s): Fixed Price	Product(s): Fixed Price	Product(s): Fixed Price
Sales Price: 0.07880	Sales Price: 0.57000	Sales Price: 0.07720
Term: 36 Month	Term: 48 Month	Term: 3 Month
Broker Fee: 0.00800	Broker Fee: 0.05000	Broker Fee: 0.00800
Status: PDF Generated	Status: Signed	Status: PDF Generated
Created: 02/19/2021 02:46pm Start: 03/2021	Created: 02/19/2021 02:45pm Start: 03/2021	Created: 02/08/2021 05:43pm Start: 03/2021





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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.


Proposals (2) ⊖



 New England Patriots_02192021.pdf Lauren Johnson 	 New England Patriots_02192021.pdf Lauren Johnson 
Products: Fixed Price	Products: Fixed Price
Start Date: 03/2021	Start Date: 03/2021
Broker Fee: 0.05000	Broker Fee: 0.00800
Date Created: 02/19/2021 02:48pm	Date Created: 02/19/2021 02:47pm


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.

Tasks Notes Emails Calls

Create a Task 

 Call Tom 

 Due by: 02/23/2021 03:00pm

 New England Patriots...    

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