



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

Customer Details: Tom Brady at New England Patriots. Agency: Broker Online Exchange. Agent Name: John Smith. Customer Info: 36202. Address: 32434, Acalanes Ridge, California, 12523. Title: Owner. Email: qb@patriots.com. Phone: (569)-852-6456. Business Type: Corporation. Tax Exempt: No. Industry: Real Estate.

Account (4):

- 58679-54843 National Grid (Long Island/Queens) ... Annual Volume: 7,200. Rate Class: -. Sub Type: -. Zone: -. Address: 32434, Hampton NY 12523.
- 12345-67812 National Grid (Long Island/Queens) ... Annual Volume: 35,000. Rate Class: -. Sub Type: Flat Load. Zone: -. Address: 32434, Hampton NY 12523.
- 12-3456-7812-3456-7 Consolidated Edison Company of N... Annual Volume: 875,000. Rate Class: E19. Sub Type: -. Zone: J. Address: 32434, Hampton NY 12523.
- 19-4594-8594-8594-8 Consolidated Edison Company of N... Annual Volume: 200,000. Rate Class: -. Sub Type: -. Zone: J. Address: 32434, New York City NY 12523.

Quote (2):

- 46773 ... Total Volume: 42,200. Product(s): Fixed Price, Fixed Green. Broker Fee: 0.05000. Created: 02/16/2021 02:44pm. Start: 03/2021.
- 46556 ... Total Volume: 200,000. Product(s): Fixed Price, Fixed Green. Broker Fee: 0.05000. Created: 02/16/2021 03:49pm. Start: 03/2021.

Contract (3):

- 49598 Hudson ... Volume: 200,000. Product(s): Fixed Price. Sales Price: 0.07880. Term: 36 Month. Broker Fee: 0.00800. Status: PDF Generated. Created: 02/16/2021 02:44pm. Start: 03/2021.
- 49697 SFE ... Volume: 42,200. Product(s): Fixed Price. Sales Price: 0.07000. Term: 48 Month. Broker Fee: 0.05000. Status: Signed. Created: 02/16/2021 02:45pm. Start: 03/2021.
- 49514 Constellation ... Volume: 200,000. Product(s): Fixed Price. Sales Price: 0.07720. Term: 3 Month. Broker Fee: 0.00800. Status: PDF Generated. Created: 02/16/2021 05:43pm. Start: 03/2021.

Proposals (2):

- New England Patriots_02192021.pdf Lauren Johnson ... Products: Fixed Price. Start Date: 03/2021. Broker Fee: 0.05000. Date Created: 02/16/2021 02:48pm.
- New England Patriots_02192021.pdf Lauren Johnson ... Products: Fixed Price. Start Date: 03/2021. Broker Fee: 0.00800. Date Created: 02/16/2021 02:47pm.



BROKER ONLINE EXCHANGE
BrokerOnlineExchange.com | 817.350.4880



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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.

CU

Tom Brady
at
New England Patriots

Customer Details | Add New Account | Create Quote

Agency: Broker Online Exchange Agent Name: John Smith

Customer Info: 36202

32434, Acalanes Ridge, California, 12523

☆ Title	Owner
✉ Email	qb@patriots.com
☎ Phone	(569)-852-6456
🏢 Business Type	Corporation
📄 Tax Exempt	No
🏠 Industry	Real Estate

My Service Cloud Features

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.

Account (4) Create New

<p>🔥 58679-54843 National Grid (Long Island/Que... 🔍</p> <p>Annual Volume: 7,200 Rate Class: - Sub Type: - Zone: -</p> <p>Address: 32434, Hampton NY 12523</p>	<p>🔥 12345-67812 National Grid (Long Island/Que... 🔍</p> <p>Annual Volume: 35,000 Rate Class: - Sub Type: Flat Load Zone: -</p> <p>Address: 32434, Hampton NY 12523</p>	<p>⚡ 12-3456-7812-3456-7 🔍 Consolidated Edison Company...</p> <p>Annual Volume: 875,000 Rate Class: EL9 Sub Type: - Zone: J</p> <p>Address: 32434, Hampton NY 12523</p>
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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

My Service Cloud Features

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 	 49697 	 49514 
Hudson	SFE	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

Products: Fixed Price
Start Date: 03/2021
Broker Fee: 0.05000
Date Created: 02/19/2021 02:48pm

**New England Patriots_02192021.pdf**
Lauren Johnson

Products: Fixed Price
Start Date: 03/2021
Broker Fee: 0.00800
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

cu 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!