



## Automated Customer Account Services and Enrollment For SmartConnect®



### inVue for SmartConnect Goes Beyond Account Management

Fully secure, **inVue** for SmartConnect gives you and your customers 24/7/365 access to real-time account information with automated write-backs. More convenience for the customer translates to streamlined operations for your company.

#### Customer Look-up with inVue for SmartConnect

When you integrate the Customer Look-up module with your public facing website, customers can access the basic information for which they might otherwise call the office.

- ▶ General account information
- ▶ Account balance / Payment history
- ▶ Budget program status
- ▶ Delivery locations / history
- ▶ Service locations / history
- ▶ Service plan status

PriMedia develops a customized portal for your company, which shows your clients only the information you want them to see. It enables account linking to manage multiple accounts and can:

- ▶ Estimate budget payments
- ▶ Trigger email and text reminders
  - Tune-ups
  - Service plan enrollments
  - Price protection enrollments
- ▶ Simplify online payments via an embedded document viewer
- ▶ Display account-targeted marketing messages
- ▶ Send account data to other applications

#### inVue for SmartConnect uses standard SmartConnect Modules:

- ▶ Customer Look-up
- ▶ Delivery Ticket
- ▶ Service Order
- ▶ Plan Price SLPP
- ▶ Payment & Credit Card Entry
- ▶ Customer Add & Modify
- ▶ Create Log Entries
- ▶ Delivery Maintenance/Tank Monitor

#### Integrated New Customer Enrollment

- ▶ **Two-way real-time integration with ADD Systems and other account management software** pulls current information and updates with new accounts
- ▶ **Replicates your printed credit application and contracts**
- ▶ Automatically takes new customers through **the enrollment process in minutes**
- ▶ **Collects all required account information**
  - Contact information
  - Delivery location
  - Tank and fill locations
  - Billing information
  - Employer and credit information
- ▶ Confirms applicant is not already a customer
- ▶ Confirms service area
- ▶ **Checks credit rating** and approves or disallows (based on company-set parameters)
- ▶ Allows for **custom messaging** at all steps
- ▶ **Auto-saves continuously** for follow-up on incomplete applications
- ▶ **Enables one-time orders or full enrollment**
- ▶ Can include **customer enrollment in price protection, budget, service and loyalty programs**
- ▶ **Integrates with online payment gateway** for immediate completion of contracts
- ▶ All accounts are **subject to company approval**
- ▶ **Automatic write-back to ADD Systems with Customer Add & Modify module**



**1**  
Choose a feature that you'd like to offer.

**2**  
Identify the SmartConnect module required for that feature. Each feature requires a SmartConnect module, designated by the icon in the grey columns at left.

- View account number/address
- View & manage contact information
- Create & modify contact & billing information
- Charge credit card for payment
- Add/edit/deactivate stored payment methods
- Set up auto recurring billing
- Write-back payment to account
- View balance/budget information
- View transaction & payment history
- View & search invoice and statement PDFs
- View & search invoice and statement PDF archive
- Display detailed pricing & price protection information
- Write-back price protection plan information to account
- View delivery locations & details
- Create & modify delivery locations
- View & search delivery history
- Write-back delivery request to account as phone order
- View/Reschedule/Cancel previously created phone order
- View service locations & details
- Create & modify service locations
- View & search service history
- Write-back service request to account as work order
- View/Reschedule/Cancel previously created work order
- Add tank monitoring information to account
- View all master fields & template data
- Check for customer record
- Validate customer information
- Create & manage online web user account
- Link accounts to web user
- Create new master account with account number
- Create log entries for any account change or event
- Create binding online contracts
- Display customer-specific marketing messages

	Customer Look-up	Delivery Ticket	Service Order	Payment & Credit Card	Customer Add & Modify	Plan Price SLPP	Create Log Entries	Tank Monitor
View account number/address	READY							
View & manage contact information	READY							
Create & modify contact & billing information				READY				
Charge credit card for payment				READY				
Add/edit/deactivate stored payment methods				READY				
Set up auto recurring billing	READY							
Write-back payment to account				READY				
View balance/budget information	READY							
View transaction & payment history	READY							
View & search invoice and statement PDFs	READY							
View & search invoice and statement PDF archive	READY							
Display detailed pricing & price protection information					READY			
Write-back price protection plan information to account					READY			
View delivery locations & details	READY							
Create & modify delivery locations				READY				
View & search delivery history	READY							
Write-back delivery request to account as phone order		READY						
View/Reschedule/Cancel previously created phone order		READY						
View service locations & details	READY							
Create & modify service locations				READY				
View & search service history	READY							
Write-back service request to account as work order			READY					
View/Reschedule/Cancel previously created work order			READY					
Add tank monitoring information to account								READY
View all master fields & template data	READY							
Check for customer record	READY							
Validate customer information	READY							
Create & manage online web user account	READY							
Link accounts to web user	READY							
Create new master account with account number				READY				
Create log entries for any account change or event							READY	
Create binding online contracts	READY							
Display customer-specific marketing messages	READY							



**3**  
Colored boxes in each feature row indicate the PriMedia product(s) that enable that feature.



[smartconnect.getinvue.com](http://smartconnect.getinvue.com)  
800-796-3342

# NEW: ON-PORTAL TARGETED MARKETING

*Dynamically display advertising messages to customers based on account data and history.*

## Automatically promote:

*Automatic Delivery to will-call customers*

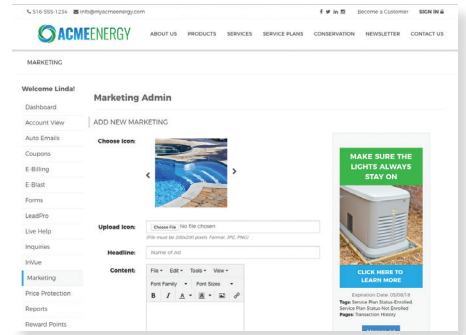
*Budget Plans to billed accounts*

*Service Plans to delivery-only customers*

*Tune-up Reminders when it's been a year*

*New Equipment/Efficiency if their equipment is 10+ years old*

*And more!*



## Expanded Customer Look-up Applications

**inVue** for SmartConnect is customized for each client, offering virtually unlimited applications utilizing the information available via several common SmartConnect modules.

### Delivery Requests and Service Orders

Simplify **delivery ticket and service order applications**.

- Requests managed by custom logic
  - By type of customer
  - Minimums/Maximums
  - Service Request Type (non-emergency)
- Writes back as **Phone Order** or **Service Order**

### Plan Price SLPP

Create and manage **binding online price protection contracts**.

- Custom logic
  - Type of customer
  - Minimum/Maximum protected gallons
  - Lock-outs for new customers
- Offer Pre-paid, Capped and/or Fixed plan options
- Lock in contract online
- Collect digital signature
- Store and archive completed agreements
- Writes back as **Price Plan**

### Payment and Credit Card Entry

Streamline the **invoicing and payment cycle**.

- Driven by Customer Look-up module
- Integrate with Tiger, Avatas and other payment gateways
- Implement a **paper-to-paperless invoicing conversion** strategy
- Enable customers to store and edit payment methods with **credit card vaulting**
  - Automated secure token exchange
  - Set up recurring billing
  - One-time and automated payments
- Writes back as **Payment**

### Customer Add & Modify

Automate the customer enrollment process, then give your customers access to manage that data.

- Online Customer Enrollment**
  - Step-by-step customer activation process
  - Collect all required contact, payment and location information
  - Instant credit reporting and analysis
  - Enroll in automatic delivery, service, budget, price protection and loyalty plans
  - Writes back to generate account number and store data

### Lead Tracking Integration

- Convert new business leads to active accounts
- Utilize data from lead tracking software to write back and generate account

### Customer Management of Account Information

- Edit account information, delivery and service locations, and other data available through Customer Look-up and other modules

### Text Messaging and Social Media Marketing

#### Text Messaging

- Utilize Customer Look-up and Payment & Credit Card Entry
- Fully compliant opt-in service
- Text promotions, coupons, billing and renewal reminders, and service call updates
- Send "in your neighborhood" order reminders to will-call accounts
- Incoming text messages for payments, service and delivery requests
- Keep in touch during weather emergencies/blackouts

#### Social Media

- Utilize Customer Look-up data to reach customers via social media directly on news feeds
- Advertise to clients or individuals with similar demographics and likes
- Increase awareness of products, services and special offers

### Create Log Entries

- Keep track of all customer transactions
- Write notes into customer accounts
- Record any action taken or notification sent, such as
  - Customer updated account information
  - Customer enrolled in price plan
  - System sent payment reminder

### Delivery Maintenance / Tank Monitor

- Integrate with WESROC® or other remote monitoring systems
- Pull live tank readings
- Display current reading on customer portal
- Import data into customer account

**Learn More! Find out how to integrate your ADD Systems data with online account management services. Call PriMedia at 800-796-3342 for your FREE inVue Customer Account Management consultation.**