



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**

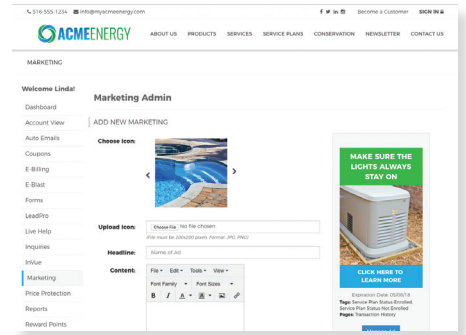


NEW: ON-PORTAL TARGETED MARKETING

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.