



FEBRUARY 2021



Dynamics Billing, Payments + CRM

Modern cloud architecture

15 years providing Billing + Payments solutions

In-production account volume: 100 million / month

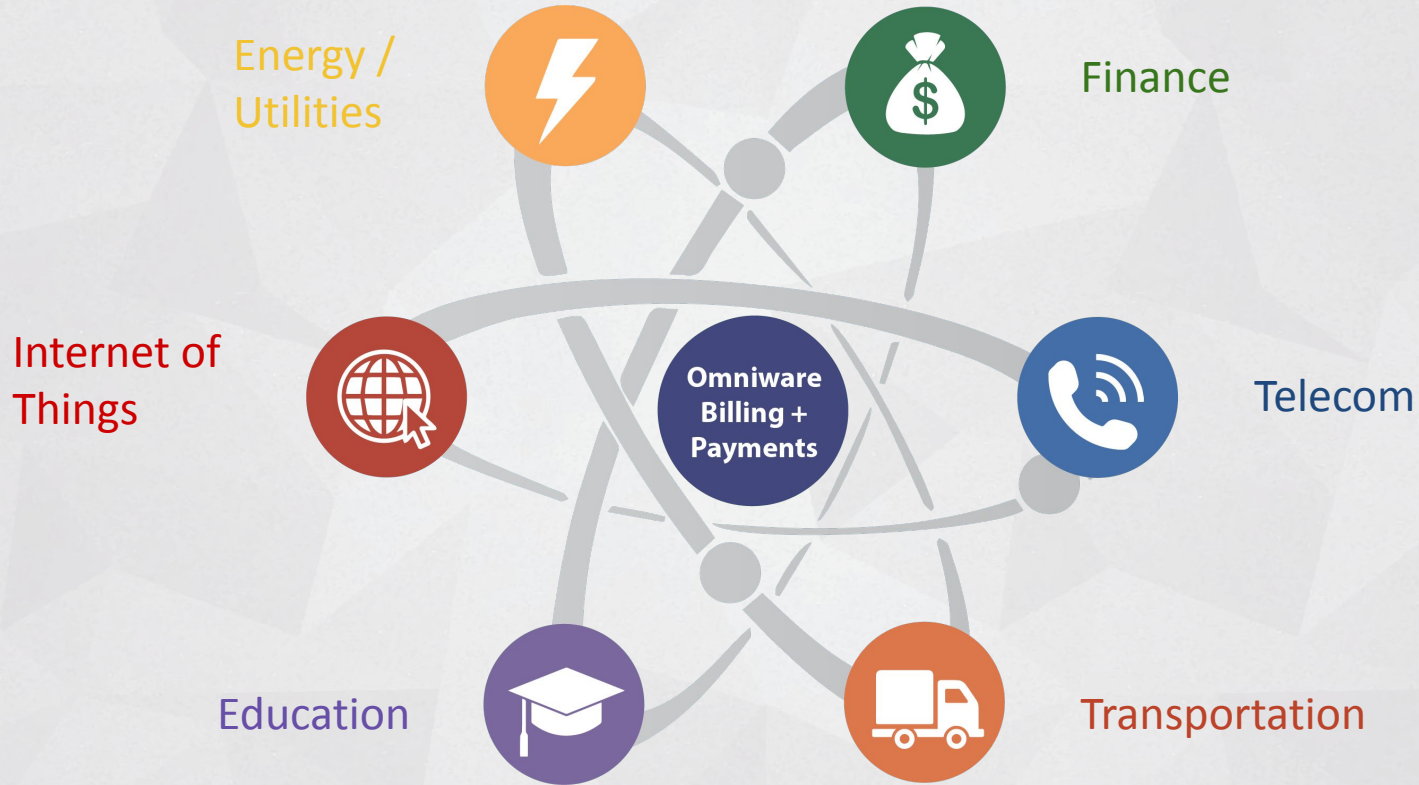
Microsoft[®]
CERTIFIED
Partner

Gartner
COOL VENDOR

Client success across multiple industries

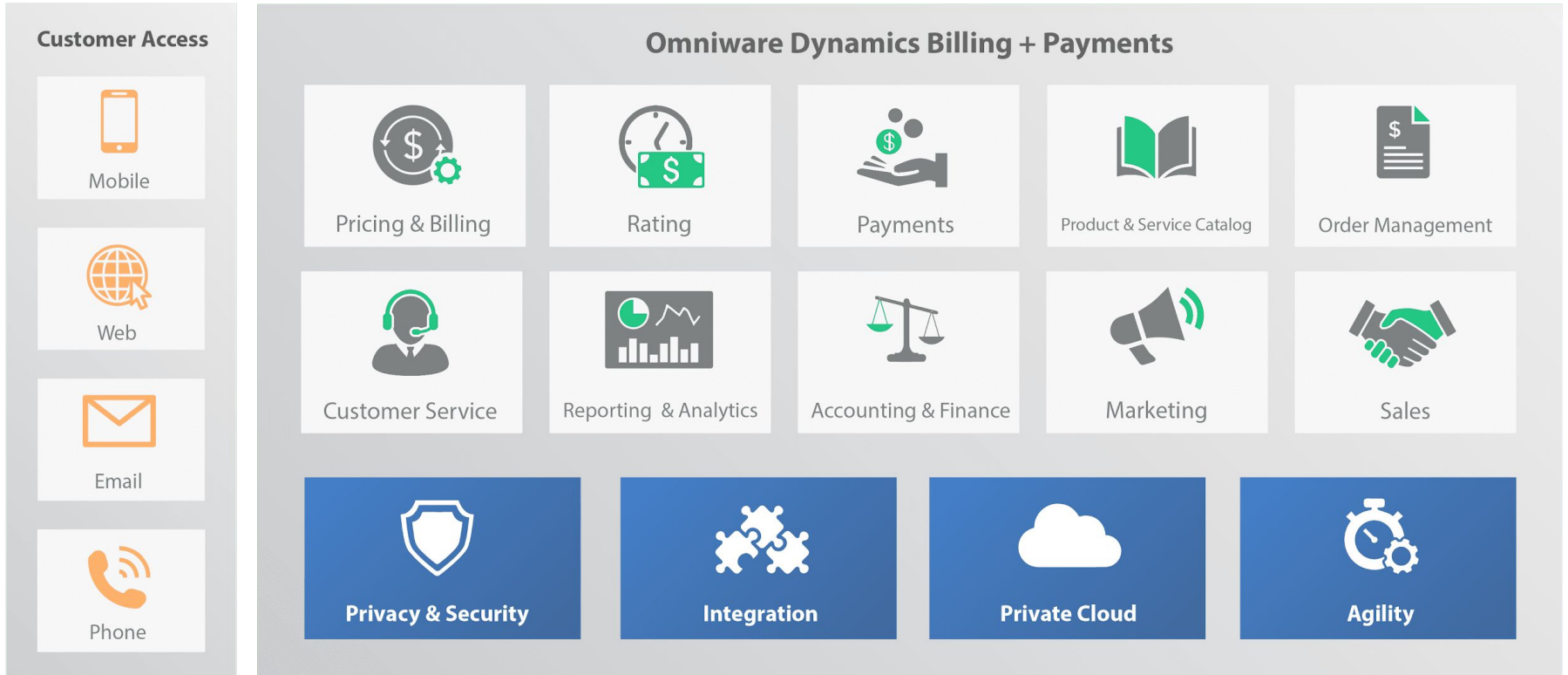


Modern Solution for Multiple Industries



Robust Architecture for Energy / Utilities

A modern architecture that enables agility and native integration with the ecosystem of solutions for Utilities.





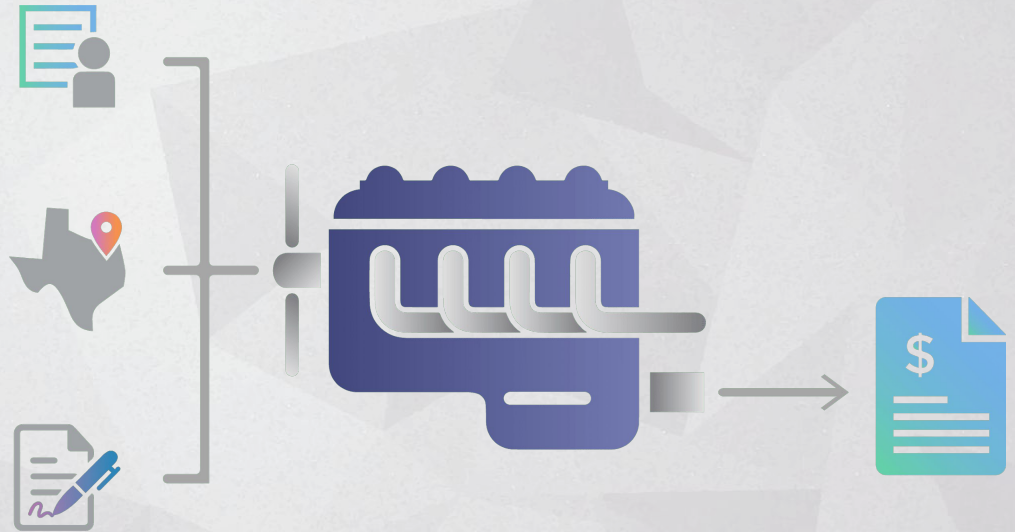
Billing & Pricing

- Pricing rules for consumption, usage, rate, formula, volume min, max or commitment applied immediately or scheduled in future - enables trial periods, future rate changes
- Customer- specific or region-wide credits, government mandates, COVID relief
- Period consumption, estimation or Time of Use and seasonality; embedded VEE or via metering / MDM system
- Separate bill cycles for different products, different times, specific accounts or across the entire system
- Embedded tax calculation or via 3rd party tax service
- Invoice customization across service territory, by classification or specific to customers
- e-Billing presentment and online payments



Rating

- Sophisticated Rating Engine
- Rating by multiple attributes, eg:
 - *Customer Type*
 - *Location*
 - *Contract*





Payments

- Online invoice presentment
- Online payments via multiple payment processors (credit card, bank, ACH one-time or recurring)
- Batch payments, settlement and reconciliations
- Multi-site enabled - group invoices and receive payments by client categorization





Service and Product Catalog

- **Enable billing for multiple service or product types**
 - Electricity, Gas, Water & Sewer
- **Energy Services**
 - Renewables, Internet, Cable
 - Product Bundles
- **Any Product**
 - Home Devices - thermostats, back-flow valves
- **Any Service**
 - Rooms, Events
 - Sanitation, HVAC





Order Management

- Receive and action orders for any Product or Service item
- Issue work orders to staff or external parties
- Schedule service for activation
- Update billing date







Customer Service

- Manage all customer information and share data with Dynamics CRM or 3rd party CRM
- View summary by customer: attributes, products and services, invoices, payments and receivables
- Multi-site: Manage all customers assigned to an Account Manager
- Manage customer tickets via templates and routing to correct CSR
- Multi channel customer service capability via web, mobile, email, conversations and self-help.



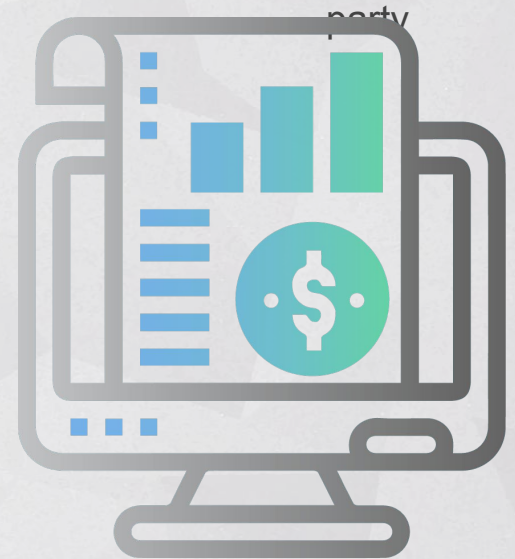
Reporting & Analytics

- All data elements can be queried and reportable
- Convenient out-of-the-box reports
- Use the full power of Microsoft reporting tools including
Power BI reporting engine   Power BI
- Export data to 3rd party reporting tools
- Portable Analytics - Multimedia reporting and analytics solution



Accounting & Finance

- Customize an organization-specific template that captures the data necessary for integration with accounting software of choice
- Leverage MS Dynamics Accounting or integration to a 3rd accounting software
- Dunning and Collections
- Post payment and aging information to accounting system
- Financial drill down into Customer or Accounts





Sales

- Document interactions with prospects
- Record prospect information, including different roles
- Manage sales pipeline
- Manage opportunities with prospect
- Attach documents, such as contracts





Marketing

- Track customer behaviours to inform promotions.
- Pricing offers to incent adoption, referrals or cancellations
- Create reports to identifying target markets, marketing efforts
- Incentives to encourage bundling of services
- Volume incentives
- Energy management incentives





Privacy & Security

Client specific cloud environment fully leveraging Azure privacy and security Microsoft  Microsoft Azure

- Data residency in country of organization - US, Canada or other
- Organization data secured - customers do not share environment
- Multiple access controls - single-sign-on, multiple factor authentication



Integration

Robust architecture designed for integration

- Web 2.0, web services integration to 3rd party systems
- API integration to AMR / AMI / MDM vendors
- API integration to payment processors
- API integration to property management systems
- Native integration to other Microsoft applications and tools
- File transfer data exchange to unique systems / tools



Private Cloud

- Computing, memory and data are managed, secured and scalable for individual clients
- Remove burden from IT department of clients
- Scalable as customers grow
- Leverage privacy and security of Microsoft Azure cloud
- Native integration to other Microsoft applications and tools



Agility

- Architecture designed for modern Energy / Utilities need
- Efficient implementation leveraging migration tools from legacy systems.
- Web 2.0 integration to ecosystem of 3rd party Utilities systems
- Architected for advanced or future needs:
 - *Billing from Internet of Things devices*
 - *Charge accumulation / fleet billing for Electric Vehicles*
 - *Energy as a Service*