Functionality summary – “GeFEE for Web”

1. General

The CRM “GeFEE for Web” can be visualized on PC, laptop, tablets and telephone and enables the user to export and download documents from application (invoices, client sheet, minutes, etc).

The CRM “GeFEE for Web” is natively integrated with the basic application GeFEE – Electricity Supply Management.

A series of actions developed in the GeFEE basic platform reflects are reflected in CRM and reversely. The users of the GeFEE platform and the users of CRM “GeFEE for Web” are responsible for the actions which they develop in the two software platforms mentioned above.

Note: The CRM GeFEE for Web **cannot** operate independently of the basic application GeFEE – Electricity Supply Management.

2. CRM modules GeFEE for Web

The CRM GeFEE for Web contains 3 distinct modules, and namely:
- ✓ Clients module
- ✓ Sales agents module
- ✓ Administrator module

3. Types of user accounts

The CRM includes 3 classes of users:

1. Partners
2. Agents
3. Administrator

Each class has 2 types of users:

1. Master
2. User (or sub-user)

The master users may create sub-users for the company to which they belong.

4. Modules menus

4.1. Clients module

1. Switchboard
2. Users, with:
    - List of users
    - Add user
3. Consumption places, with:
    - List of consumption places
    - List of minutes
    - Hourly consumptions
    - Hourly unbalances

4. Invoices/cash-in
5. Client sheet
6. Hourly consumption
7. Hourly unbalances
8. index self reading
9. notifications/complaints

4.2. Sales agents module

1. Switchboard
2. Users, with:
    - List of users
    - Add user
3. Clients, with cu:
    - List of clients
    - Add client
    - List of contact persons
    - List of consumption points
    - Offer request
    - Sending offer
    - Printing offer
4. Contracts
5. Event calendar
6. Documents of clients
7. Documents of agent

4.3. Administrator module

1. Switchboard
2. Users with:
    - List of users;
    - Add user
3. Schedules
4. Type of consumers
5. Notifications / complaints
6. Unsent email
7. Consumer configuration
8. Agent configuration
9. Administrator configuration
10. Crons configuration
11. General parameters
12. Email templates
13. Event Calendar
14. Logo
15. Favicon

5. User information

User information of the type - Partners

Account information: email address, name, tax code/personal code, registration number, place, county, cable telephone number, fax number, mobile number (for notices on SMS).

After issuing and generating in .pdf format the invoices from GeFEE, the clients that have account in CRM will be automatically notified about it and will be able to download the invoices directly from CRM.

CRM automatically notifies the clients in case of exceeding the due date with a certain period of time depending on the settings made at the level of platform and at client level. Depending on the number of days of exceeding the due date, the platform notifies automatically the disconnection of the client from the electricity system, depending on the setting from the section “Administrator”.

User information of the type - Agents

Account information: email address, name, tax code/personal code, registration number, place, county, cable telephone number, fax number, mobile number (for notices on SMS).

The purpose of the users like Agent is of bringing in new clients to the electricity provider.

1. In order to overtake for administration a certain company, the agent has an interface in which he/she will insert the company’s tax code, or the personal number of the individual which they want to convert into client, having available therein a mechanism for overtaking under administration, mechanism treating various possible situations.
2. The Agent adds to the CRM interface potential clients and on the basis of the collected information, the agent requests a price offer to the provider.
3. On the basis of the quotation received from the provider, the agent will generate from CRM a price offer in the form (sample) agreed by the provider, offer which the agent shall send to the potential client.

User information of the type - Administrator

Account information: email address, name, personal number, cable telephone number, fax number, mobile number (for notices on SMS).

The Administrator may create/deactivate users that belong to any class of users like master type, but also sub-administrators and may carry out the following operations:

- ✓ adding/deactivating client or agent accounts
- ✓ may see what the users of Partners type see
- ✓ may see what users of Agent type see
- ✓ setting of various global parameters of functioning of CRM, like:
  - period of checking the invoices balances
  - Periodicity of notifications to a certain client
  - Period of checking the issued invoices
  - Various settings concerning the type of notifications
  - Setting email body
  - Setting of sms body/text
  - Setting CRM parameterization