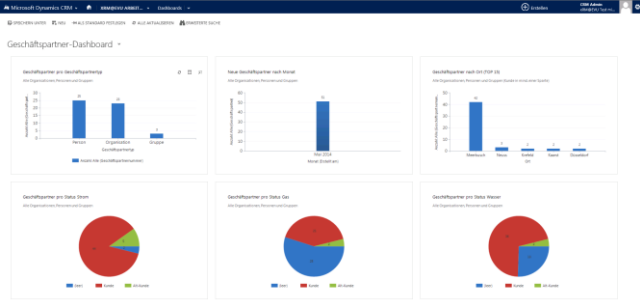




xRM@EVU Sales

The professional IT solution for your customer relationship management in the energy, utility & waste market.



xRM@EVU is based in Microsoft Dynamics 365 and is the industry solution for the energy, utility & waste market. Important features and functions are already configured. Individual settings are easy and fast to set up.

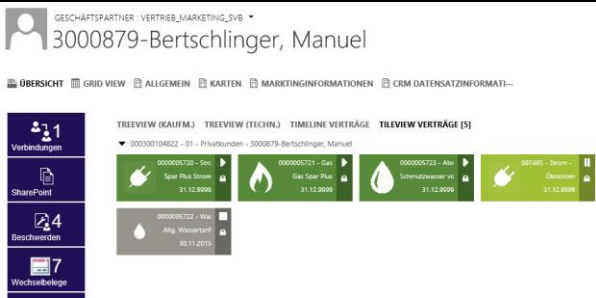
xRM@EVU Sales is your economical "next generation" industry solution for companies in the energy, utility & waste market which is easy to implement and easy to use. It's part of the Dynamics 365 environment, where you can integrate the following components to improve your performance.





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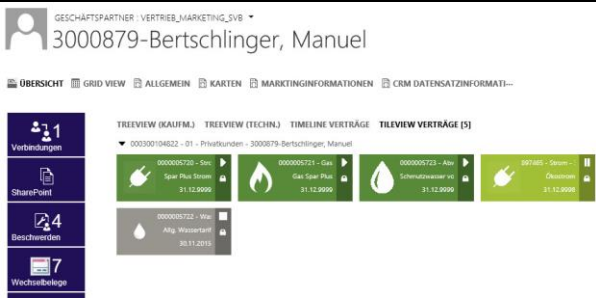
The in the industry template **xRM@EVU Sales** included **standard functions** are listed below:

Standard function	Description
Account	<p>In xRM@EVU, business partners (accounts) form the master data of private, commercial and industrial customers as well as grid operators, suppliers, sales partners, consultants, purchasing groups, arbitration bodies, etc. through various business partner types.</p> <p>Industrial, private and commercial customers come with additional roles, through which a master record for each type of service can be presented in different situations (prospective customer, current customer, old customer). In addition, sales partners and consultants can be assigned so that these data are taken into account in the quotation management.</p> <p>Accounts are assigned the relevant commercial and technical master data. Bing-Maps are integrated in the account form so that the location of the business partner is automatically displayed on the electronic map.</p>
Commercial master data	<p>All commercial master data for contracts, contract accounts, bank details, credit ratings or invoices are stored and/or displayed in xRM@EVU. This information is linked to the corresponding account and the associated technical data by xRM@EVU. The data available in xRM@EVU depends on the used ERP system and billing system.</p>
Credit rating	<p>In real-time, credit reports are created about your prospective customers and customers, for example by Bürgel or CreditReform. The credit rating can be handed over and shown in various ways to xRM@EVU, e.g. as a traffic light or scoring value.</p>
Technical master data	<p>The technical master data, from connection objects via the premises, points of delivery, devices to the register and counter readings are synchronized and stored in xRM@EVU. They are linked to the corresponding business partner and the associated commercial data. The data available in xRM@EVU depends on the billing system used.</p>
Contacts	<p>Contacts in xRM@EVU are people who work for a company. They are synchronized with Microsoft Outlook and can also be used offline.</p>



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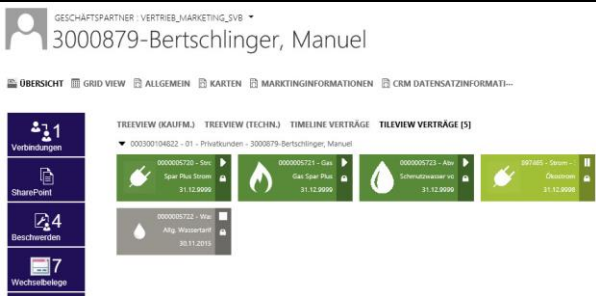
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Standard function	Description
Address check	A CRM-system is just as good as the quality of its data. In xRM@EVU master data, such as company names, address, e-mail or phone number are checked and validated.
Supplier	In xRM@EVU all accounts with the market role supplier can be managed with their master data. This way they can be used in the quote management or it can be documented to which competitor your customers switched. All codes (e.g. DVGW, EIC, ILN) can be documented.
Grid operator	Accounts with the market role grid operator can be stored with the master data, for example DVGW, EIC or ILN codes. This master data can be used in the quote management or for analysis.
Activity management	Using the activity management xRM@EVU provides a companywide platform for task and activity management. On this platform the internal as well as the external communication with costumers or partners can be tracked. A history view of all business processes in sales, marketing and customer service is available. Each seperate department is able to see the actions of other departments.
Product management	Products are recorded in xRM@EVU and used in the quotation management and/or associated with contracts.
Contract management	Contract terms for energy supply contracts are monitored in xRM@EVU and the persons responsible are informed about expiring contracts so that sales activities can be initiated. In addition, the flexible structure allows other contract types, such as contracting agreement, supplier frame contracts, etc., to be included, monitored and managed, if required.
Security and role concept	Pre-configured EVU specific security and role concept for: <ul style="list-style-type: none"> • IT • Customer service • Marketing • Sales • Company management



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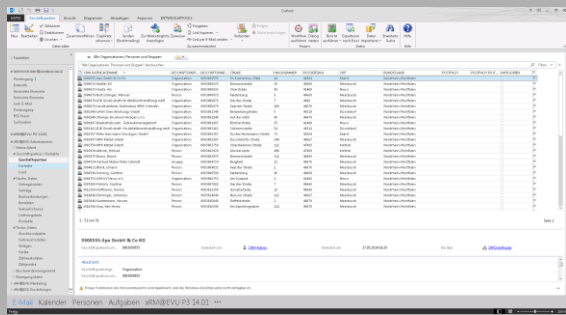


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Standard function	Description
<p>EVU relevant duplicate check</p>	<p>Pre-configured duplicate check for:</p> <ul style="list-style-type: none"> • Account (roles) • Contacts • Connection object • Premise • Point of delivery • Devices • Registers • Market role "Sales" • Grid operators • Contracts • Products
<p>Analytic xRM@EVU</p>	<p>xRM@EVU includes following preconfigured dashboards:</p> <ul style="list-style-type: none"> • Activity Dashboard <ul style="list-style-type: none"> ○ Overview of the tasks to be performed for a user or a team ○ Overview and evaluations of tasks overdue ○ Overview and analysis of completed tasks • Marketing Dashboard <ul style="list-style-type: none"> ○ Overview and analysis of current campaigns, such as number of responses, open tasks related to campaigns, number of open, closed, and in preparation campaigns • Quotation Dashboard <ul style="list-style-type: none"> ○ Overview and evaluations of quotations • Contract Dashboard <ul style="list-style-type: none"> ○ Overview and evaluations of contracts. ○ Dashboards are based on queries, which can be generated by the user after appropriate training.

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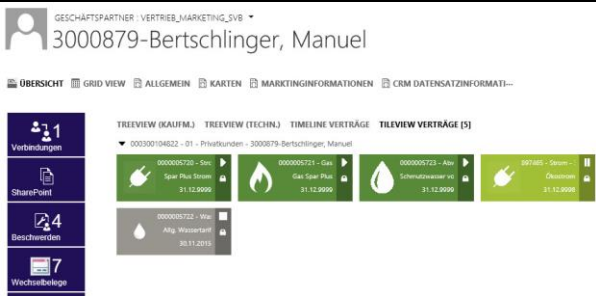
xRM@EVU enables you with the marketing functions to effectively address your customers and leads. You can increase your productivity and get valued insights in your market initiatives.

Standard function	Description
<p>EVU relevant workflows</p>	<p>Pre-configured workflows for:</p> <ul style="list-style-type: none"> • Regular contact with industrial customers • Transfer of a credit rating in a quote to the business partner • Reminder to complete a quote • Quote closing at the end of the binding period • Approval denied • Approval granted • Reminder at the end of an energy supply contract • Automatic renewal of the energy supply contract • Ask for consult customer satisfaction at the beginning of the delivery • Data allocation of contracts, supply offers, contacts to the relevant key account manager (for industrial customers) • Email at the start of the switch process • Activity creation at the start of the switch process • Email at the end of the switch process • Email if there is no status change during the switch process for 2 weeks • Runtime monitoring for contracts and products <p>Workflows can be created by the user after a short instruction. Afterwards they can be operated manually or automatically.</p>
<p>Campaigns <i>Depends on the Dynamics 365 licence</i></p>	<p>Based on the created marketing lists and serial letter / mail templates, campaigns can be created with xRM@EVU. In this context a campaign is an umbrella term for the transmission of information. They can be used, for example, for price adjustment letters, new customer acquisitions, and so on.</p>
<p>Marketing lists <i>Depends on the Dynamics 365 licence</i></p>	<p>xRM@EVU allows you to define marketing lists. They show a group of addresses that should be contacted in a campaign. These lists can be created with queries, e.g. the customers with gas or electricity or a certain tariff. The queries can easily be set up on the interface of xRM@EVU.</p>
<p>Case management <i>Depends on the Dynamics 365 licence</i></p>	<p>xRM@EVU allows you to create a companywide case management. Cases can be structured, tracked and classified. With the help of xRM@EVU cases are handled in the most efficient way.</p>
<p>Social Engagement <i>Depends on the Dynamics 365 licence</i></p>	<p>Microsoft Social Engagement provides a comprehensive view of the sentiment and engagement towards your own company, a product or relevant topics. Individual search settings provide a widespread overview of current trends and developments.</p>





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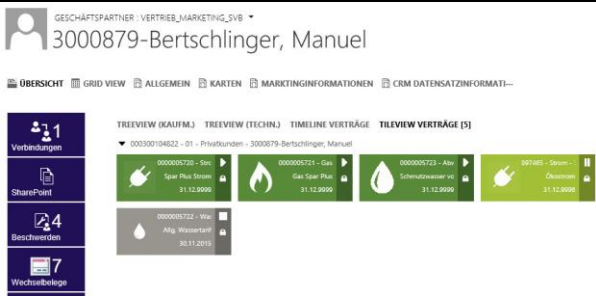
The **optional functions** available for the industry template **xRM@EVU Sales** are listed below:

Optional function	Description
<p>xRM@EVU portal</p> 	<ul style="list-style-type: none"> • Mobile CRM access • Any device • Capture of a complete sales cycle <ul style="list-style-type: none"> ◦ Budget billing ◦ Integration of exact grid charges and additional values • Contact compilation with duplicate check • High workflow-functionality <ul style="list-style-type: none"> ◦ Contract creation ◦ Sign contract on device ◦ Address check ◦ Credit rating ◦ Initiation of switch process
<p>EVE Single View</p> 	<p>With EVE Single View customer views can be designed more intuitively in Dynamics 365. Relevant information as supply type and state are listed in clearly arranged tiles with different symbols and colours depending on the status.</p> <p>Furthermore, commercial and technical master data is displayed in an easily understandable tree structure. The user has all needed information well arranged, no scrolling necessary. In an integrated map addresses and premises are shown. The customer value can be displayed graphically as well.</p>
<p>Customer value</p>	<p>Based on soft and hard facts the customer value is analysed on a daily basis for each customer relationship. Following data can be included in the calculation:</p> <ul style="list-style-type: none"> • Customer history (activities, credit rating, payment behavior) • Contracts (tariff characteristics, contract status, terms or bonuses) • Marginal return (calculated on a daily basis) • Pricing of contact points (e.g. e-mails, calls) <p>The customer value analysis brings following advantages:</p> <ul style="list-style-type: none"> • Analysis of customer specific marginal returns based on the actual energy consumption • Identification of customers with negative or low marginal return • Individual development of established customer relationships and optimization of the whole client base



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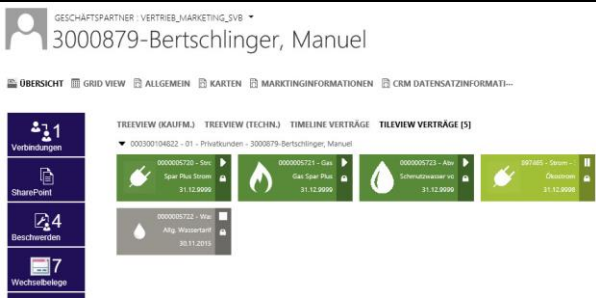
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Optional function	Description
Cancellation risk	<p>With the help of Big Data-analysis attributes that indicate a higher cancellation risk are identified. Additionally, the analysis can be based on extended market data.</p> <p>Customers at risk can be identified at an early stage and can be contacted actively to prevent a possible migration.</p>
Load shape	<p>Load shapes can be imported in xRM@EVU. With this function monthly, quarterly and annualy consumption as well as peaks from imported source files can be determined. These load shapes are available for the quote management.</p>
Load profile	<p>Load profiles can be stored in xRM@EVU. Primarily load profiles are available for the quote management. For customers without a load profile, one can be stored in the quote management.</p>
ene't link-up	<p>The grid charge based on the master data deposited at the point of delivery can be calculated and saved in xRM@EVU. This data can be used in the quote management.</p>
Quote management	<p>Quote management covers both tariff and industrial customers. For tariff customers, the quote management is used in conjunction with campaign management.</p> <p>Individual calculation can be created for industrial customers. The following process steps are included in xRM@EVU:</p> <ul style="list-style-type: none"> • Request reception • Quote calculation based on calculation requirements (taxes, margins, surcharges), factors relevant to the procurement (e.g. stock market price) as well as the weighting of the load and the grid charges • Approval • Send quote • Copy or edit quote (versioning) • Complete the quote (won / lost) • Create delivery contract from quote • Folder integration (reference to the file system or SharePoint for quick access to documents) <p>Business process workflows support every user and provide transparency in each state in the quote management process. In this process, the quote status is automatically updated in order to carry out reports.</p>



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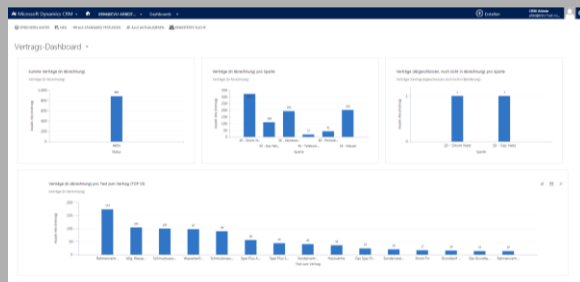
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Optional function	Description
Interface-templates	<ul style="list-style-type: none"> Accounting systems (e.g. SAP IS-U, NTS.suite, Schleupen.CS, Wilken ENER:GY, SIV kVASy, Klafka&Hinz FirstSale, LIMA, SDK.ProviderSuite) Marginal return calculation (e.g. merlin.dbr, Anka-Fix, VIM) Grid charges (e.g. ene't) EDM (e.g. Belvis) Archive, DMS (e.g. nScale, EASY, OSECM, ...)
Mobile speech recognition	<p>Simplification to record visit reports. Recorded language is automatically converted to text and can be stored in xRM@EVU as activities such as e.g. notes or as a document. Visitor reports or other records can be linked directly to data records in CRM.</p>
xRM@EVU ADD-ONS	<ul style="list-style-type: none"> Geographic mapping ADD-ONS based on address data from SAP, CRM, SQL DB, Business Intelligence Management cockpits to report for geomarketing, web portals and location-based and logistics services Microsoft xRM@EVU ActivityTools Microsoft xRM@EVU RecordCounter Microsoft xRM@EVU DocumentsCorePack Microsoft xRM@EVU PowerSearch Microsoft xRM@EVU TelephoneIntegration Microsoft xRM@EVU SmartBar Microsoft xRM@EVU AttachmentExtractor xRM@EVU Lotus Notes Connector xRM@EVU Novell GroupWise Connector Drag 'n' drop function for the service calendar, extension for the standard CRM service calendar



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xRM@EVU allows your employees to proceed customer driven analysis. This analysis could be concentrated on public or/and private Dashboards. Drill Down- and Drill Through allows to specify the analysis

It supports your employees to operate customer driven processes continuously and sustainable.

EVE Consulting und Beteiligungsgesellschaft mbH

EVE Consulting und Beteiligungsgesellschaft mbH provides consultancy and solutions for utility companies using e.g. billing or CRM systems.

EVE was founded in 2008 by Jörg Heitmann und Hanno Zühlke and continues its success story of approx. 200 installations of utility and billing systems in the energy market in time and budget. EVE is bundling the competence and expertise of a core team in the utility business. The team faces up to all challenges in the business since more than 25 years with strategies, implementation, consultancy and service for utility companies. We keep on running a strong and transparent partner network for realizing even larger projects where more experts' skills are needed to serve our customers ideal and flexible.

For further information, see www.eve-consulting.de.



EVE Consulting und Beteiligungsgesellschaft mbH

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