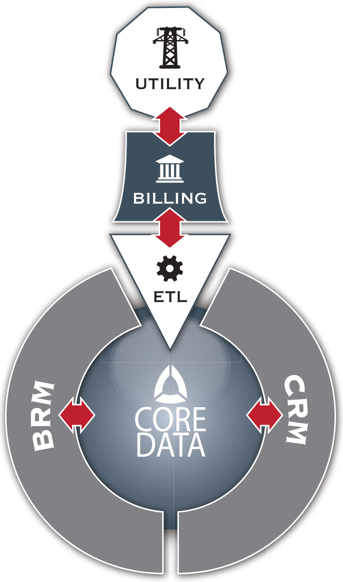
escoware Broker | CHANNEL MANAGEMENT

Save Time | Reduce Errors | Lower overhead

Efficiently handle all of the tasks that your billing system doesn't:

- Bulk/Batch enrollment for all sales channels
- Efficiently process reinstatements and renewals
- Easily Track and Calculate Commissions
- Communicate and inform with our Broker Portal
- Deliver Digital Assets to your Broker Channel
- Create Digital Contracts on the fly
- Manage Matrix Pricing
- Fully Support the ERCOT Market



escoware®
...energy understood

Broker Channel Management

The ESCOWare® CRM provides extensive Channel Management capabilities and is the ideal solution for Retail Suppliers and providers you with all the tools needed to setup and manage virtually any type of sales channel or compensation structure from call centers to door-to-door street teams, from the simplest affiliate broker program to the most sophisticated Network Marketing plans.

Channel Structure and Commissions: The ESCOWare® CRM provides a sophisticated engine for defining each of your marketing channels and their associated compensation structures in an easy to understand, step-by-step manner including:

- Channel name
- Number of payment levels
- Amount of payment for each level
- Type of payment
- One-time, upfront
- Residual
- Claw backs
- Quota based payments (SPIFS)
- Start date and end date for each payment type

Commission Calculation, Management and Reporting: As meter reads occur, commissions are calculated. Each commissionable account then appears in commission management area where each item can be reviewed for accuracy and accepted, denied or put on hold pending further investigation. Finally, once all commissions are approved, they are processed. Once processed, no further changes can be made. If changes are required, such as debits or credits, they must be done in the next month's commission run. Reports for processed commission runs can be viewed at any time. The broker summary report lists each broker and shows their total commissions. Clicking on a specific broker will display that broker's individual detail report and list every commissionable item for that commission run.

Broker Creation: Brokers /Agents are entered into the system and given a signing agent ID. This ID is used to tag enrollments to a specific broker for commission purposes. It defines the channel and compensation plan under which the broker will be paid. Brokers can only be entered in the system once but brokers can have multiple signing agent IDs. This allows them to be paid under different compensation plans.

Broker Portal: Helps keep overhead low by providing your Brokers/Agents with complete visibility to all their directly enrolled customers as well as their down-line agents and their customers. It provides broker with detailed commission statements, available programs and rates and the marketing materials and corporate documents they need to be self-sufficient and run their own business without having to constantly call your organization for support. This allows you to grow you broker channels without having to proportionately grow your support staff.

Dynamic Dashboard: When a broker logs into their portal, they are presented with a series of default graphs and charts providing them with a quick overview of their business. The broker has the ability to create additional graphs and charts as required.

Call ESCO Advisors today for your Free Demonstration:

203-456-1833