

The logo for 'umax' is displayed in a bold, white, lowercase sans-serif font. A registered trademark symbol (®) is located at the top right of the 'x'. The background of the entire image is a photograph of a renewable energy landscape, featuring several white wind turbines in the distance and a large array of solar panels in the foreground, all set against a bright blue sky with scattered white clouds. The solar panels are tilted and reflect the sunlight, while the wind turbines are spaced out across a field of golden-yellow crops.

umax[®]

maximum performance for utilities

Innovative & agile
customer solution
for integrated utilities

UMAX - The utility solution

Certified by Microsoft, delivering smart flexibility

UMAX is the answer for utilities looking for a powerful and agile business solution. This integrated, standardized, out-of-the-box system was designed, built and certified for Microsoft Dynamics 365 for Finance and Operations (D365FO), using established utility industry frameworks and proven methodologies.

UMAX combines optimum flexibility with proven functionality and standardly integrates level 3 utility processes. From the process of connecting new retail and business customers, through to the process of billing and collecting the amounts due.

Moreover, this business solution helps to stay in control of the consecutive stages in the different value chains.

Smart flexibility. Delivered.

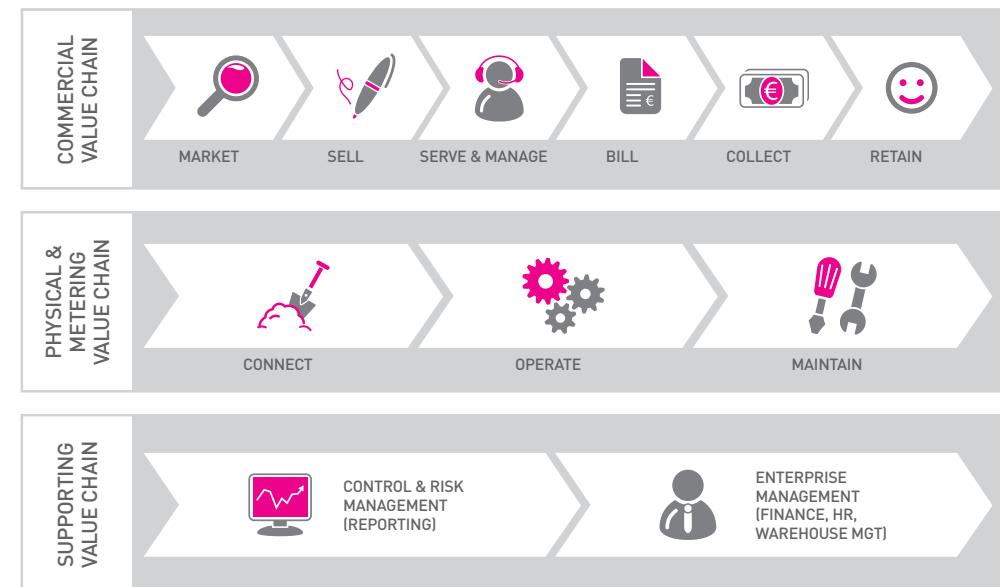
UMAX is the leading customer information system on Microsoft Dynamics 365 for Finance and Operations, integrating crm, billing, collection, asset, service & meter data management in one solution.

Gold
Microsoft Partner



Microsoft
Dynamics 365

Certified



Times of transformation

Requiring agility and flexibility from integrated utilities

These are challenging times for integrated utilities. Besides ensuring a secure and reliable supply at the lowest cost, integrated utilities need to keep up with the constant stream of regulatory transformations and economic uncertainties.

In recent years, many utility markets have been extensively deregulated. However, certain markets are still being serviced through 'integrated utilities' combining various market roles or combining all 'traditional' utility activities and processes in one utility company.

At the same time, integrated utilities have to prepare for important changes in the industry. The existing infrastructure needs upgrading in order to allow the rollout of new technologies and to accommodate all future development needs.

Customers call for a closer relationship with their utility provider. All this will certainly necessitate substantial investments and change, during economic downturn times in which prices and service costs must be kept to a minimum.

Customer processes and grid-related processes are inseparably linked to one another. The proper functioning of the entire utility value chain from generation over individual connection points to the collection of the invoiced amounts due, must be guaranteed at all times.

The role of an integrated utility is complex and includes many processes that are flawlessly supported by UMAX. Even when switching from a regulated to a deregulated market situation, UMAX will be able to easily support the (former) integrated utility in its new market role.



ELECTRIC SERVICE AMOUNT			
	NO. DAYS	KWH	AVG KWH PER DAY
DAY	31	324	10.5
MONTH	32	1,154	37.0
YEAR	30	473	15.8

UMAX stands for and guarantees

- Maximized customer revenues
- Reduced time & effort spent
- Automated personalized processes differentiated per customer group / value
- Optimized operational margins
- An organization in control
- A helicopter view over the full utility value chain

UMAX for integrated utilities

Guaranteeing your future success

UMAX grew out of the idea to deliver an innovative, flexible, future-proof and affordable business solution that fully supports the customer relations management and physical value chain optimisation of integrated utilities. Moreover, UMAX was created to streamline the core customer/grid-related business processes, to lower the cost-to-serve and to reduce the overall cost of ownership of the IT landscape.

The perfect solution for integrated utilities

UMAX has proven itself as the perfect solution for managing various sequences of customer-related and physical processes taking place in virtually all integrated utilities.

An additional advantage is that the system has been designed to effectively manage the large variety of tasks and channels used to communicate and

interact with B2C and B2B target groups during the 'moments of truth', such as a customer move or a grid extension...

Moreover, the integrated crm, project & warehouse management, billing & collect modules have been conveniently tailored to meet all the requirements of integrated utilities active in the utility sector. Additionally, UMAX seamlessly communicates with 3rd party systems such as sub-contractors, GIS, credit agencies and/or other organizations.

	Market Acquiring new retail & B2B customer
	Sell Support all stages in the selling process
	Serve & Manage Interact with customer requests
	Bill Forecast, simulate & invoice consumptions
	Collect Manage payments & amounts due
	Connect Link connections & network
	Operate Manage metering data
	Maintain Service the network

“With UMAX I can provide my services and Delta can serve its customers, at a high level”

Vincent Meerman
Manager Business Support - Delta

“UMAX enabled us to reduce overall costs by 50%”

Jan Hammenecker - De Watergroep
Commercial Director

Staying in control of your company

The UMAX control framework

Being in control is one thing... staying in control another. For integrated utilities, it is important to keep operational margins as optimal as possible. To do so, you need to have a clear organizational structure, transparent processes & roles and data that is secured... It is equally important to gain insight in the fluctuating path of the actuals and to know what's going on at every level of the organization at all times, in order to react as quickly as possible when necessary.

The UMAX control framework (UCF) provides your key employees with actual and real-time information on the status of key performance indicators (KPI's):

- **Sales indicators:** volume sold, number of contract renewals...
- **Operational indicators:** status of processes, workload, open cases...
- **Financial indicators:** operational margins, cash flow position...

The performance indicators can be translated throughout the organization in a transparent and uniform manner, through role-tailored dashboards. By doing so, managers can focus on 'what really matters' and can measure performance at all times based on real-time and correct actuals.



"By extending our current CIS with the extra functionality, De Watergroep will be ready for the future. We will be able to service our customers better, while reducing our IT architecture to one integrated solution & technology and hence reduce the cost to serve. We are firmly committed to the Microsoft D365F0 platform and the UMAX solution of Itineris."

Bert De Winter - De Watergroep
Director ICT

Managing clients through customer value

Maximize customer contribution margin & reduce costs

Next to managing your assets and guaranteeing the proper functioning of the entire network as well as all the individual connecting points... you need to respond quickly & foremost efficiently to a constant stream of change requests from your residential and business clients. To support integrated utilities in the execution of these tasks, UMAX was founded on the methodologies of...

- 6 sigma and lean management for efficient operational processes
- first-time right service management
- 360° contact circles to offer top quality customer service.

By combining these methodologies, UMAX enables integrated utilities to operate efficiently and keep 'costs-to-serve' under control while all customer interactions are handled

competently and effectively. UMAX's integrated principles for lean management and straight through processing give utilities the necessary tools to focus on efficiency.

These integrated principles help utilities in:

- guaranteeing efficient operations,
- organizing workload in a transparent way,
- clearly defining roles and tasks as well as escalation paths,
- reducing the risk of exceptions occurring,
- concentrating on the exceptions only (in the event they occur),
- re-orienting people & time spent on quickly resolving exceptions

... all this to limit overall cost of servicing and operational costs to a maximum and to safeguard the operational margins for integrated utilities.

Mobile workforce management

To increase productivity, UMAX also offers a mobile workforce management module, informing teams in the field - through various ways of communication such as smartphone, tablet or PDA - about the interventions and type of works to be executed, as well as about all the relevant customer details such as address, meter number,...

By doing so, this module enables you to have your teams work remotely in the field, update their work schedule instantly when an intervention has been executed or report back on the status and reducing process throughput times greatly.

Customer service & billing for utilities

UMAX gives utilities the flexibility, connectivity and intelligence to engage customers on their terms, across channels to deliver modern customer experiences.



CUSTOMER SATISFACTION

UMAX features can help you achieve this goal!



Accessibility & Choice

UMAX is built on a modern technology platform with “connectivity” at its core, delivering customer engagement across channels, plus:

- Built-in customer engagement tools
- Easy integration with solutions already in place
- Customer self service portal
- Output Management lets customers set communications preferences

First Call Resolution

UMAX Front Office empowers customer service agents to resolve customer needs quickly and with quality, by placing the right information easily within reach in a streamlined, single-screen portal built for utility call centers. A Microsoft-style interface and business process wizards make training and onboarding fast.

Consistent Billing

To ensure accurate and on-time billing, UMAX features built-in data validation in key system areas such as data entry, meter read imports, and system interfaces-to prevent wrong data from entering your bill cycle. Bill simulation tools allow utilities to “test run” bill batches and identify non-compliant charges, accounts, agreements and services before final bills go out.

Proactive Notification

UMAX has built-in alert and campaign management tools that help you create multi-channel, real-time touch points with customers, so you can reach them proactively with critical messages about delinquency warnings, rate or account changes, field service appointments, special promotions, new programs and more.

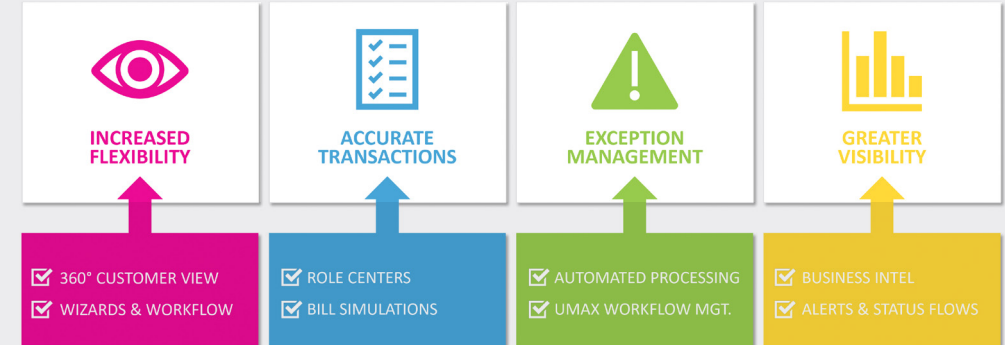
Operational performance for utilities

UMAX supports the unique business needs of utilities, leveraging the power of Microsoft’s integrated, flexible Dynamics 365 enterprise platform in ways that drive greater operational value.



OPERATIONAL EFFICIENCY

UMAX features can help you achieve this goal!



Increased Flexibility

UMAX removes the silos between systems of record, bringing data from across the organization into intelligent, customizable work spaces that help end users take action and sync to your business workflows in real time.

Accurate Transactions

UMAX increases data accuracy through automated workflow management, guiding end users through business processes and validating their actions and inputs, so less is left to human error.

Exception Management

UMAX lets you focus resources on resolving exceptions, not manually moving transactional data around.

Built-in automated workflows handle the heavy lifting while exceptions are pulled into queues for greater visibility, allowing authorized users to process them according to your workflows.

Greater Visibility

“Embedded Analytics” are now a reality as Microsoft continues to refine and integrate its Power BI solutions across the enterprise. UMAX leverages this integration and shared data model to place business intelligence in the hands of decision makers and end-users alike.

Workflows can be monitored by management, and utility operations employees are given the tools they need to quickly resolve issues across the meter-to-cash cycle.

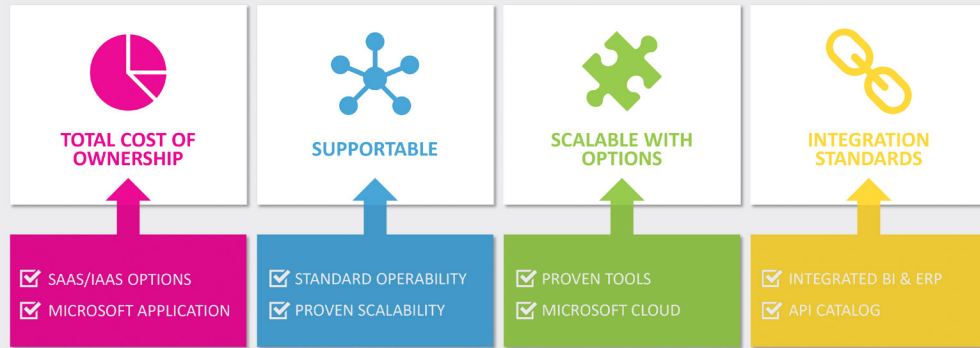
Technology services for today & tomorrow

UMAX connects your CIS to the entire Microsoft ecosystem of cloud-driven solutions, sharing a common data model, running on a 21st-century technology stack, with unparalleled access to support.



OPTIMIZED TECHNOLOGY SERVICES

UMAX features can help you achieve this goal!



Total Cost of Ownership

UMAX brings to utility CIS the automation, intelligence and scalability of the Microsoft cloud and application ecosystem. Whether you want to run your CIS in the cloud, on premises or in a hybrid set-up, Itineris provides a suite of support services that let utilities choose a cost-effective approach to deployment.

Supportable

UMAX delivers utility-specific business capabilities backed by the experience and scalability of the Microsoft Dynamics 365 for Finance & Operations platform. UMAX blends in with standard operations on a Microsoft-based infrastructure and fully leverages the scalability features of the Microsoft cloud ecosystem.

Scalable with Options

UMAX supports different scaling scenarios based upon needs around number of users, number of customers and specific time-based processes. Leveraging the possibilities of virtual infrastructure, UMAX can implement scale-up, scale-out and scale-down scenarios.

Integration Standards

UMAX readily integrates with other systems of record and shares a common data model with other Microsoft technologies, delivering powerful connectivity, data sharing and business intelligence capabilities that enhance operations. The UMAX API framework and Web Services library allows the system to mesh with internal and external systems to support your business processes beyond the application's boundaries.

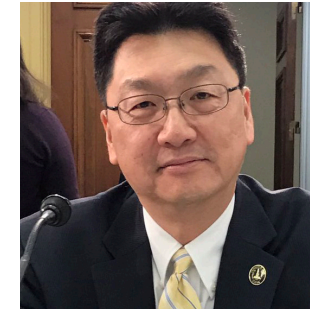
What others have to say

UMAX, a proven solution supporting all utilities



Vincent Meerman
Delta multi-utility company

"UMAX provides all the necessary functions for the utility world as standard. No middleware is needed to run additional software. UMAX forms the basis of our front and back office. It has enabled us to grow from 10,000 connections to 45,000, while the number of staff has remained the same."



Rudy S. Chow
City of Baltimore

"The Department of Public Works has taken on major initiatives to bring our water and wastewater operations into the 21st century—incl. a rollout of new meters, implementation of our new UMAX customer information system and major improvements to our billing processes, such as moving from quarterly to monthly billing. We are very pleased with how smoothly our transition to UMAX has been and are already seeing improvements to customer service and billing."



Jan Hammenecker
De Watergroep

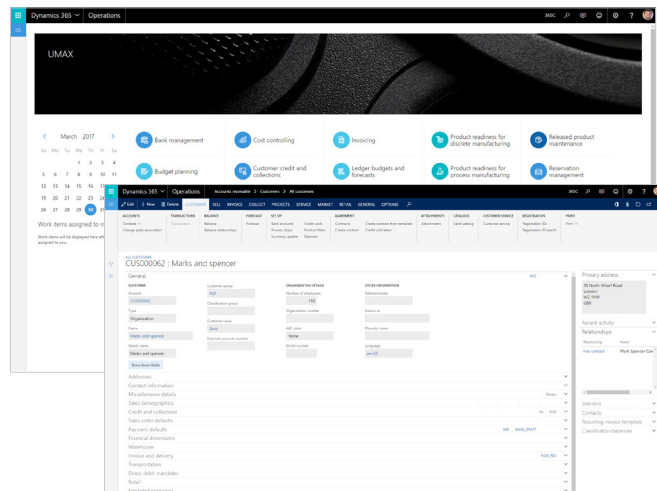
"Our aim is to present ourselves as a growing water company in a dynamic market, and of course this also requires IT systems that grow with you. Our previous billing system did no longer meet our needs. That's why we decided to completely renew our software for customer support and billing, and that's why De Watergroep decided to install UMAX."

UMAX - built on Microsoft Dynamics 365 for Finance and Operations

UMAX is the solution for utilities built on the Microsoft D365FO platform, which is part of Microsoft's top-of-the-line, easy-to-use, integrated and adaptable CIS applications that enable business decision-makers to quickly respond to market shifts, take advantage of new trends, increase their competitive edge and drive business success.

Microsoft D365FO is a proven solution for utilities. Within these organizations it empowers people to anticipate and embrace change so that business can thrive. The solution features an intuitive and easy to use Microsoft Office-like user interface and role-tailored dashboards.

Microsoft D365FO is a scalable solution that can grow as your business expands. Furthermore, through its modular structure, Microsoft D365FO offers flexibility and faster implementations for upgrades and updates.



Built on Microsoft Dynamics 365 for Finance and Operations, UMAX guarantees these advantages:

- Flexible and modular solution
- Low maintenance costs
- Scalable application
- Future-proof solution
- Quick adoption ratio
- Low total cost of ownership

Certified by Microsoft

A proven, robust and trustworthy solution

UMAX is built on the Microsoft's leading D365FO platform. UMAX leverages on the Microsoft Cloud, the Microsoft technology stack and the Microsoft products and services, providing a solution ready to operate in an always connected, mobile and social world.

UMAX delivers value as a proven solution via its solid foundation based on the Microsoft stack. The continuous improvements of the Microsoft cloud platform ensure that UMAX is able to operate, comply and integrate with the latest technology evolutions such as Mobile, Big Data, Internet of Things and

Machine Learning. The UMAX API framework and Web Services Library allow to seamlessly blend in with internal and external systems to support business processes over the application's boundaries.



Who benefits from the power of UMAX?

Discover why they chose UMAX



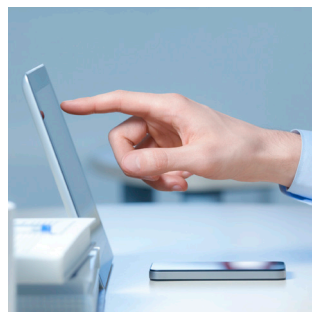
The City of Baltimore Department of Public Works signed a contract to replace the City's legacy customer information system (CIS) with Itineris' UMAX CIS solution and to provide 10 years of support. This is part of a larger initiative, known as the "BaltiMeter Project," focused on modernizing utility operations. UMAX allowed the City to adopt efficient, customer focused processes and to gain enhanced control on the City's water infrastructure management.



Dakota Electric Association, the second-largest electric cooperative in Minnesota, has selected UMAX to replace its aging CIS technology. Dakota Electric is modernizing this critical information system with the goals of enhancing customer service and increasing operational performance and efficiency by removing the limits of current applications. The implementation of the UMAX solution is currently in full flight.



HS Veitur is an integrated utility that provides and sells heating, electricity and water services to 45,000 customers in the Icelandic market. HS Veitur is responsible to produce, distribute and supply energy to residential and commercial customers. The implementation of the UMAX solution at HS Veitur is currently in full flight.



De Watergroep's IT infrastructure for customer management was no longer able to support its rapid evolution, and the mainframe used was unwieldy and expensive to maintain. De Watergroep opted for the UMAX solution (over SAP). Since the initial implementation in 2007, Itineris and De Watergroup have engaged in a strong partnership. Due to its innovative operating model the UMAX solution continues to prove its added value on a daily basis.



Dunea, the water company responsible for providing clean water to 1.3 million Dutch citizens in the region surrounding The Hague, has selected Itineris' UMAX customer information and enterprise resource planning solution (CIS/ERP) as the technology at the heart of a the business transformation, which is currently being implemented, focusing on modernizing the utility's operations for the future.



CFPUA is a utility based in Wilmington (North Carolina, U.S.A.). The Authority strongly prefers a standard solution with no custom programming and highly values UMAX's ability to configure the system to meet the needs of CPFUA. CFPUA wanted a cloud-based solution to minimize their on-premises maintenance and decided to go with 'Dynamics 365 for Finance and Operations'. The implementation is currently in full flight.



UMAX, your best guarantee for future success!

- Optimize operational margins via efficient project and service management
- Manage clients flexibly & efficiently via UMAX' integrated crm processes
- Manage your performance instantly, through the UMAX control framework

Delta multi-utility company

Managing 3 commodities in one solution

Profile

Not only does Delta supply energy and infrastructure services, it also supplies digital services such as Internet, telephony, radio and TV. In Zeeland, its home base, a large proportion of households use Delta's products and services. The company employs over 3000 professionals.

Challenge

Since the liberalization of the Dutch energy market energy suppliers have had to work in a more flexible and professional way and, above all, in a more customer oriented way. The energy sales department of Delta used to work with all kinds of different systems for following up sales, invoicing and customer management. So they looked for a more streamlined system.

Solution

Delta chose the UMAX solution, based on Microsoft D365F0. The Delta employees in the sales department are now supported in all their tasks by the new system as well as all other departments.

Advantages

- Faster & more efficient working
- Correct information
- Greater transparency
- Automatic reporting
- Better planning at business level
- Better customer follow-up
- Stronger competitive position
- Flexible evolution with the market
- Fewer risks for the company



"With UMAX we have realized our ambition: growth in connections & customers"

Vincent Meerman - Delta Manager Business Support



**Smart flexibility.
Delivered.**





umax[®]

maximum performance for utilities

Want to know more about Itineris & UMAX? Please contact us.

Itineris is a global technology company focused on delivering IT solutions and services that drive greater operational value and strengthen customer care capabilities for utility organizations.

A Microsoft Gold Partner, Itineris is the developer of UMAX, a Customer Information System (CIS) fully integrated with and leveraging the power of Microsoft's Dynamics 365 platform for utilities and suppliers in the energy and water/wastewater services.

UMAX has been awarded the Certified for Microsoft Dynamics designation, which signifies that the solution has met Microsoft Corp.'s highest standard for partner-developed enterprise software.

With offices in Europe and North America, Itineris is comprised of more than 350 utility and IT professionals.

For more information

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