

# Core Energy <sup>TM</sup>

## Overview

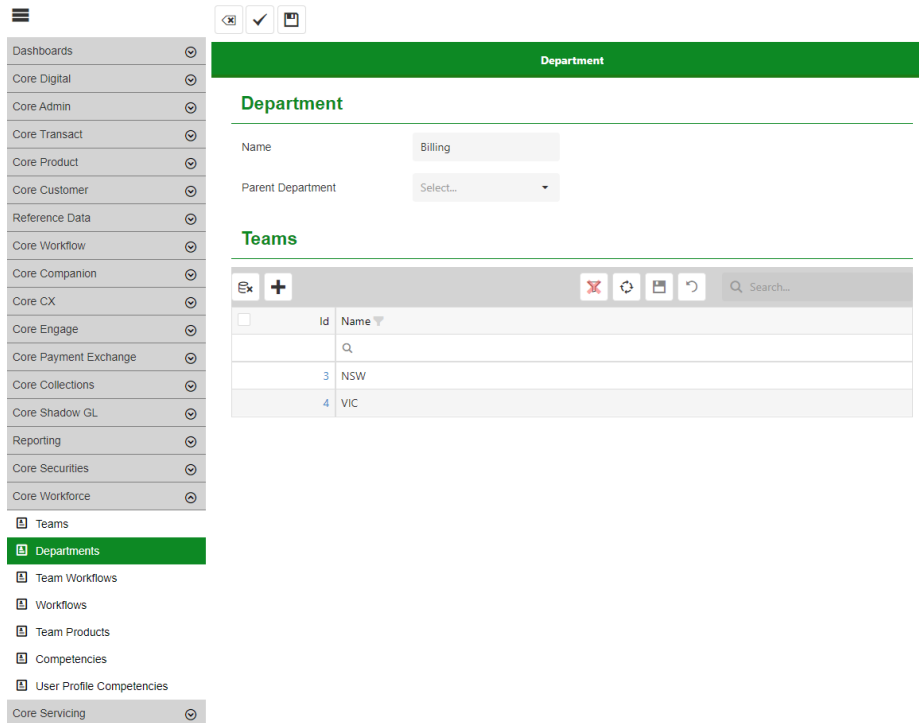
Core Energy is a complete cloud-based solution for electricity and gas retailers. Core Energy provides a centralised view of customers and delivers all necessary functionality regarding market messages, distributors, quoting, onboarding, meter data, billing, and more.

## Features

- ✓ **Omni-channel:** web-based outcomes, natively supports all devices and can be used across business channels.
- ✓ **Automated sign up:** seamless onboarding of customers using an integrated web-based sign up form which automates all necessary market messages, NMI lookups, customer verifications and customer/account creation processes – minimising call centre support and manual intervention.
- ✓ **Responsive CX:** adapts to different devices, resolutions and customer journeys.
- ✓ **Seamless integration:** connect to third party providers for identity verification, credit checks, ABN/CAN verification, meter data, market data or alternate existing systems to collect information.
- ✓ **Flexible pricing structures:** configure customised products (including demand tariffs) using flexible pricing structures. Vary tariffs, daily supply charges, discounts and fees by distributor and meter type while maintaining the conceptual overarching product. Conduct regular pricing changes with ease.
- ✓ **Sophisticated quoting and price prediction tools:** use real-time NMI lookups to facilitate compliant selling, determining available products and respective pricing. Use customer or premise specific usage data to create highly realistic quotes and reduced likelihood of bill shock.
- ✓ **Flexible customer structures:** configure mass market customers and complex B2B structures, handling multiple accounts, premises, NMIs and more. Connect individuals to a companies or businesses using roles to dictate account authority.
- ✓ **Single view of customer:** central view of all customer relationships including accounts, communications, documents, sign ups and servicing details. Use a relationship mesh to visualise the customer relationship with companies, accounts, products and more
- ✓ **Contract and bill generation:** create and generate all documentation using templates including contracts, bills, terms and conditions, letters and more. Surface this documentation against a customer for reference
- ✓ **Bill consolidation:** consolidate bills at varying levels of customer hierarchy.
- ✓ **5-minute billing:** natively handle 5-minute meter data and 5-minute settlement processes.
- ✓ **Self-managed workflow/compliance processes:** create and manage workflow processes in a web-based outcome for customer events, market messages, meter data/billing inquiries, move in/out, life support processes and more.

- ✓ **Flexible organisational structures and user access management:** supports complex workforce structures with businesses, departments, teams, competencies, delegated authority, access levels and more for ultimate control of the solution
- ✓ **Unified communication:** view and manage all customer communications including emails, SMSs, letters and phone calls. Streamline communications with integrations for telephony, screen pops, chat bots or other third-party services.
- ✓ **Message templates:** create and modify email and SMS templates in a web-based editor. Use campaigns functionality for bulk email lists.
- ✓ **Auditing:** track changes to any/all data using full audit trails

## Flexible Organisational Structures & User Access Management



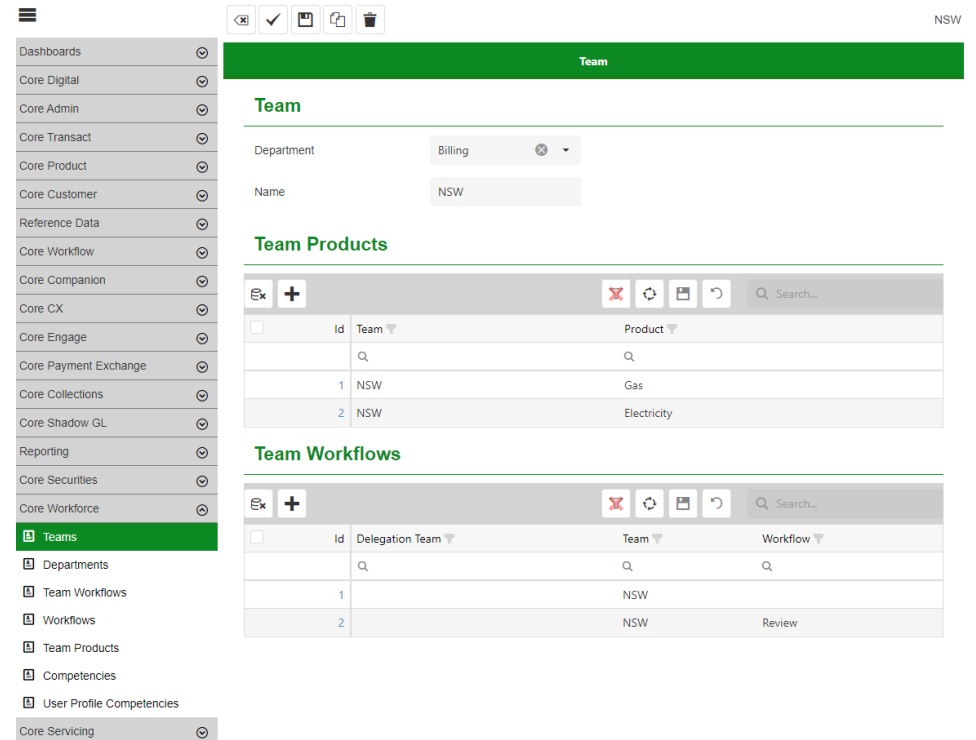
**Department**

Name: Billing

Parent Department: Select...

**Teams**

Id	Name
3	NSW
4	VIC



**Team**

Department: Billing

Name: NSW

**Team Products**

Id	Team	Product
1	NSW	Gas
2	NSW	Electricity

**Team Workflows**

Id	Delegation Team	Team	Workflow
1	NSW	NSW	
2	NSW	NSW	Review

## Self-Managed Workflow/Compliance Processes

- ☰
- Dashboards
- Core Digital
- Core Admin
- Core Transact
- Core Product
- Core Customer
- Reference Data
- Core Workflow
- Smart Queues
- Smart Queue Filters
- Service Level Agreements
- Workflow Event Triggers
- Workflow Actions
- Communication Parameters
- Sales Workflow Stages
- Requests
- Complaints
- Core Companion
- Core CX
- Core Engage
- Core Payment Exchange
- Core Collections
- Core Shadow GL
- Reporting
- Core Securities
- Core Workforce
- Core Servicing

Workflow Event Trigger

Follow Up Required

### Workflow Event Trigger

Name: Follow Up Required

Trigger

```

1 ["AccountStatus","=", "Set Up Complete"],
2 "and",
3 ["AccountState","=", "Closed"],
4 "and",
5 ["ProductName","=", "fgogfjs"]
6
7

```

```

1 ["AccountStatus","=", "Set Up Complete"],
2 "and",
3 ["AccountState","=", "Closed"],
4 "and",
5 ["ProductName","=", "fgogfjs"]
6
7

```

And +

- × AccountStatus Equals Set Up Complete
- × AccountState Equals Closed
- × ProductName Equals fgogfjs

### Workflow Actions

☐	Id	Workflow Event Trigger	Action Types	Message Template	Request Type	Customer	Assigned To	Status
	2	Follow Up Required	Smart Queue,Communication	Welcome		New Customer		Unassigned