

We are releasing a new feature with functionality around renewals. The goal is to help inform your customers of upcoming renewals. An automatic DocuSign contract with the same range, term and supplier will be sent to the customer.

AUTO RENEWAL FEATURE - OCT 2020

As default, the auto-renewal email will be sent 90 days in advance, 60 days in advance, 30 days in advance, on day of expiration, and 30 days after expiration. BOX Brokers can customize to send to all of these options, or remove any of the interval frequency. They will simply need to just ask their Account Manager to customize this on their behalf.

Generate Auto Renewals for Contracts Expiring On These Intervals

3 Months
 2 Months
 1 Month
 Current Month
 Last Month

In addition, if there is a specific customer that they do NOT want to receive any of these emails, they can utilize the flag feature on the Contracts tab to opt out for that contract as pictured.

Flags

Do not send to Auto Renewal X v

Do not send to Auto Renewal

Do not send to Auto Renewal

Do not send to Auto Renewal

Do not send to Auto Renewal

You will also be able to customize what phone number and email will be the Agency's Renewal Contact. Your BOX Account Manager can help you with this as well!

Email

Phone

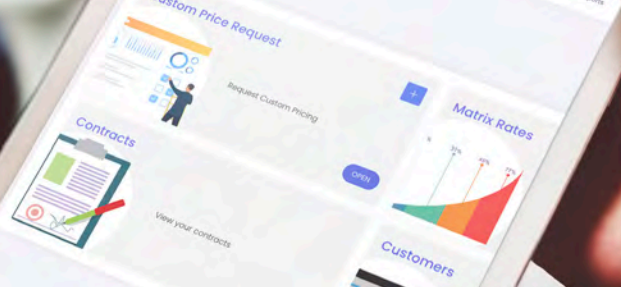
Type	Category
Auto-Renewal -1	
Auto-Renewal 0	
Auto-Renewal 1	
Auto-Renewal 2	
Auto-Renewal 3	

Agents will be able to view once a contract has been sent under Type on the Contracts side. You can utilize this filtration to manage calls and follow ups with your customers.



BROKER ONLINE EXCHANGE

BrokerOnlineExchange.com
(817) 350-4880

**What if my customer already renewed through BOX?**

The system will recognize this, and the auto-renewal emails will not be sent.

Will my customer receive a reminder email?

Yes, only 1 time three days after the original DocuSign was sent.

Will I be copied on the email?

Yes, the broker will be CC'd.

What if I already sent a renewal contract to my customer?

If a broker generates a renewal proposal anywhere in the process between 90 and -30 days, the auto renewal will not be sent for 30 days. This allows the broker 30 days to renew the contract that he or she provided to the customer.

Is this for Matrix and Custom?

Only Matrix

What if the customer dropped?

An auto-renewal email will NOT be sent.

Once it has been renewed, will the emails continue?

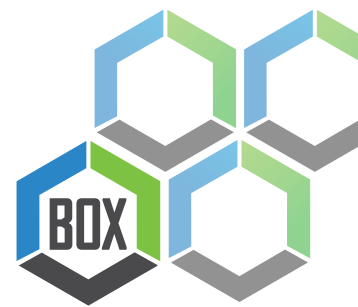
No, once renewed, they will not receive anymore.

Will the contract stay in there forever even if they are not signed?

After 90 days, if there is no signature, it will be deleted from MSC. Also, once signed, all other renewal attempts will be deleted.

When will the DocuSign expire?

It will expire 30 days after being sent, therefore the customer has 30 days to sign.



BROKER ONLINE EXCHANGE

**BOX**

EMAIL - EXAMPLE

The email to customers for 90 days, 60 days and 30 days in advance -

Hi (First Name)!

On behalf of (Supplier), we would like to thank you for being a great customer! As your current contract is coming to a close on 09/01/2020, we want to ensure that you continue to get cost protection against rising electricity rates. In an effort to keep your budget certainty and keep your costs low, we have negotiated a special renewal rate with (Supplier).

Details of your fixed-rate plan below:

Supplier: Direct Energy
Term: 12 Month Contract
Rate: Fixed Rate at \$ 0.07 kWh
Renewal Start Date: 09/01/2020

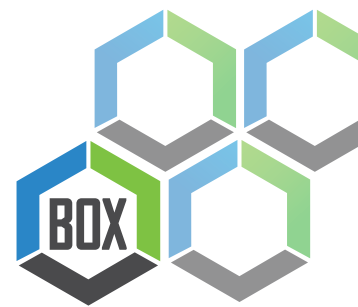
Above, you will find the "Review Document" button for the renewal contract. Click on the link and accept all the required fields so your electricity contract will continue without interruption with Direct Energy. Your new contract will take effect on 09/01/2020.

If you have any questions or concerns regarding your new contract, please do not hesitate to reach out to us at:

Agency
Phone Number
Email

By partnering with (broker) and (Supplier), you will continue to receive the same great service and benefits! We look forward to the opportunity to continue serving you and your business's electricity and gas needs!

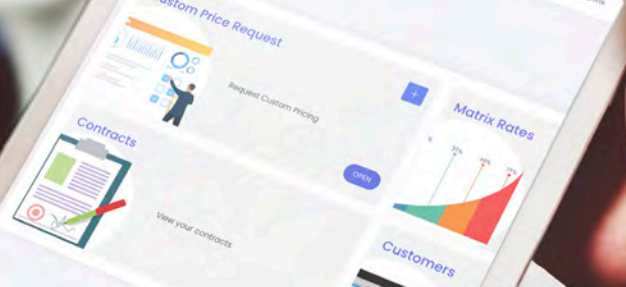
Agent Name
Agency
(Agency Logo)



BROKER ONLINE EXCHANGE

BrokerOnlineExchange.com
(817) 350-4880

EMAIL - EXAMPLE



The email for 0 days and 30 days after expiration -

Hi (First Name)!

We have been trying to contact you about your (commodity) contract. Your previous contract has officially expired on 09/01/2020, and therefore you will be subject to unpredictable and volatile electricity rates if you do not sign a new electricity contract.

Above, you will find the "Review Document" button for a renewal contract with a new supplier that we are suggesting for you. Click on the link and accept all the required fields to continue with a fixed electricity plan with (supplier).

The plan details are as follows:

Supplier: Direct Energy
Term: 12 Month Contract
Rate: Fixed Rate at \$ 0.07 kWh
Renewal Start Date: 09/01/2020

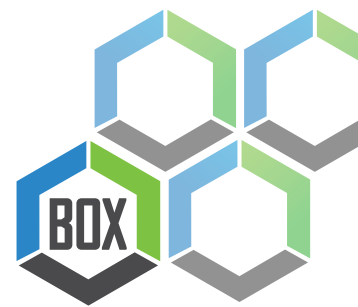
If you are dissatisfied with this proposal, please contact us below to shop other supplier options in your area.

Agency
Agency Phone Number
Agency Email

We have enjoyed serving your business's electricity and gas needs, and we would love to continue partnering with you!

Sincerely,

Agent Name
Agency
(Agency Logo)



BROKER ONLINE EXCHANGE

BrokerOnlineExchange.com
(817) 350-4880

**BOX**

EMAIL - EXAMPLE

For situations where the supplier is no longer available, we will automatically send the same term, range, with the supplier who is the best rate. Below is an example

Hi (First Name)!

We want to thank you for being a great customer! As your current contract is coming to a close on 09/01/2020, we want to ensure that you continue to get cost protection against rising electricity rates. In an effort to keep your budget certainty and keep your costs low, we have negotiated a special renewal rate with a different supplier. Details of your fixed-rate plan below:

Supplier: Direct Energy
Term: 12 Month Contract
Rate: Fixed Rate at \$ 0.07 kWh
Renewal Start Date: 09/01/2020

Above, you will find the "Review Document" button for the renewal contract. Click on the link and accept all the required fields so your electricity contract will continue without interruption. Your new contract will take effect on 09/01/2020.

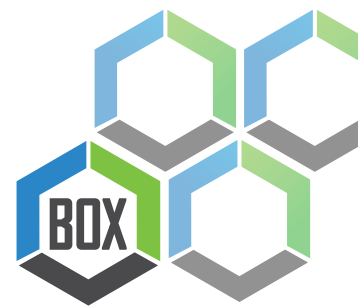
If you have any questions or concerns regarding your new contract, please do not hesitate to reach out to us at:

Agency
Agency Phone Number
Agency Email

By partnering with (Agency) and (Supplier), you will continue to receive the same great service and benefits! We look forward to the opportunity to continue serving you and your business's electricity and gas needs!

Sincerely,

Agent Name
Agency
(Agency Logo)



BROKER ONLINE EXCHANGE

BrokerOnlineExchange.com
(817) 350-4880