



# Evolving the Customer Touchpoint Experience

**Advanced Customer Portals  
Intelligent Document Designs  
Streamlined Experience for All**

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# At a Glance Contents

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Why MPX Makes a Difference	3
Online Customer Portal	4
Innovative Payment Technologies	5
Staff Console	6
Document Redesign	7
Data Security and Quality Controls	8

# Why MPX Makes a Difference

Today's consumers are in control, receiving exceptional service from companies like Amazon, Apple, and other customer-oriented companies.

Consumers are changing the oil and propane business forever, demanding simplicity, value, and instant gratification.



## **Expecting Full Access Nights & Weekends**

Customers use your online portal more than they call or see you in person. Your portal should elevate their experience and deliver the service they expect.

Whether online or in print, your customers' documents should reflect the same brand personality as your website.

## **Less Visits, Less Calls - Still Want a Relationship**

If they're not speaking with you in person, your statements and portal should thoughtfully inspire them to use more of your services, with personalized offers based on their relationship with you.

Your customer documents should answer questions and provide clarity, not cause confusion.

## **Your Staff Wants to be Great - Equip Them**

Many customers prefer self-service over calling customer service. But when they do call, they expect personalized attention, from someone who knows them and the specifics of their account.

Our portals put all correspondence for each customer at your customer service person's fingertips, resulting in competent and quick problem resolution.

## **Other Documents**

Duty-to-Warn, budget plan mailings, and other outgoing documents are thoughtfully delivered.

Document imaging and scanning services are also available to ensure ready access to customer history originating as hardcopy physical documents, such as contracts.

## **Easy Access to Operational Materials**

Fulfillment of operational print materials supports consistency across all channels so that each location team has the materials available to deliver service excellence when called upon.

# Online Customer Portal

**ACME Energy** Invoices / Statements Payments Accounts Preferences Contact Us Logoff

## Invoices/Statements

With ACME Energy's MyAccount online, you can view invoices and statements, as well as pay these documents online. You may filter and search for documents using the filters below.

**Filter Options**

All Accounts All Months **APPLY FILTER**

Show 10 entries

Account	Document	Due Date	Amount Due	
999999 (Home)	Statement	05/23/2017	\$345.67	<a href="#">VIEW/PAY</a>
999999 (Home)	Delivery Invoice	02/12/2017	\$234.56	<a href="#">VIEW/PAY</a>
999999 (Home)	Delivery Invoice	01/19/2017	\$123.45	<a href="#">VIEW/PAY</a>
999999 (Home)	Delivery Invoice	01/03/2017	\$321.01	<a href="#">VIEW/PAY</a>

Showing 1 to 4 of 4 entries

## HOW TO READ YOUR STATEMENT

### Pay My Bill

**ACME Energy** 1234 Main Street, Energypol, US 12345, Phone: (800) 555-1234, Email: billing@acmeenergy.com, Web: www.acmeenergy.com

John and Jane Smith, 123 Elm St, Anytown US 00000

**Important! Safety Information Enclosed**

We appreciate your business and we would like to share with you some tips on how to keep you and your family safe this heating season.

Please find the enclosed safety information and review it carefully with your family.

If you have safety-related questions or concerns, please call our team at 1.888.310.1924.

Date	Ref Num	Activity	Amount
05/22/17	119463	167 Fuel Oil Price 165.15 @ \$3.22/03	\$412.59

Date	Ref Num	Activity	Amount
05/20/17	31564	Credit Card Payment	\$200.00

**Past Due Amount** \$133.08 + **Charges** \$412.59 - **Payments/Credits** \$200.00 = **PLEASE PAY THIS AMOUNT** \$345.67

Please see the back of this statement for additional information.

**ACME Energy** Please detach and return this stub with your payment.

[DOWNLOAD](#)

Select the payment method on file or choose "Add a New Payment Method"

Select Payment Method

**Payment Amount**

☒ Amount Due \$345.67

☐ Specify Amount \$

**Payment Date**

☒ Pay Today 05/28/17

☐ Other Date

**SUBMIT PAYMENT**

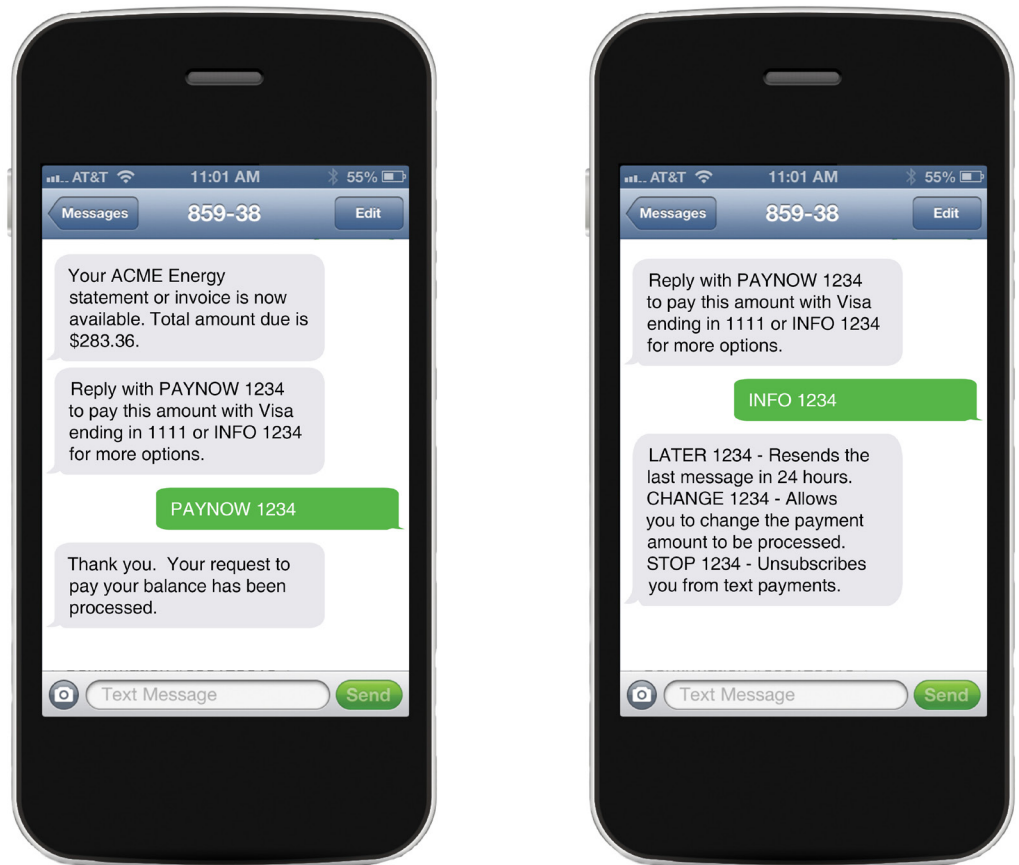
## Features Customers Want

- Make one-time, recurring, or scheduled payments
- Setup automatic payments
- Order product or services
- View bills and other customer communications
- Set notification preferences with email or text messages
- Manage additional users who can access the portal
- Manage multiple accounts from a single user profile
- Access to other documents and communications (either generated by staff or from other physical sources)

# Innovative Payment Solutions

## Text-To-Pay

- Immediate
- Convenient
- Cheaper



## Other Payment Options

- AutoPay with **charge-smart**\* automation triggered by statements or API
- Saved payment methods online for easy one-time payments
- Recurring payments based on duration or number of payments made

\* **Charge-smart** automation from MPX is an evolution of AutoPay where amounts are calculated based on several factors including document type, account balance, type of amount due (i.e. budget vs non-budget), and duplicate detection.

# Staff Console

The screenshot displays the MPX Staff Console interface. The top navigation bar includes 'Document Search', 'User Management', and 'Logout'. The main content area is divided into two sections: 'Document search' and 'View Document'.

**Document search section:**

- Search criteria: Account #, Document ID, Date range (08/01/2014 to 08/01/2014), and Description.
- Results (820): A table listing documents with columns for Doc ID, Account #, Date, and Description.

**View Document section:**

- Document title: ACME Energy.
- Account information: 1234 Main Street, Energyltown, US 12345, Phone: (800) 555-1234, Email: billing@acmeenergy.com, Web: www.acmeenergy.com.
- Customer information: John and Jane Smith, 123 Elm St, Anytown US 00000.
- Account summary table:
 

Account Number	Account Balance	Statement Date
555555	\$125.35	03/20/2017
- Plan details: Plan #1 Heating Oil, Plan Start Date: 06/01/16, # of Payments: 10, Plan Payment: \$395.00, Paid Ahead: \$633.56.
- Important Things to Know About Your Plan:
  - Your Plan Payment is due on the 20th of every month.
  - Any charges incurred outside your plan will display below under "Non-Plan Activity".
  - Non-Plan Charges are separate from Plan Payment amounts and are added to your Amount Due.
- Activity Included in Your Plan table:
 

Date	Ref Num	Activity	Amount
02/22/17		Payment, Thank you!	\$395.00 CR
03/01/17		Payment, Thank you!	\$341.96 CR
03/05/17	119463	#2 Fuel Oil Price Plan 202.6g @ \$2.848/g	\$577.21
		Location: Tank 1 123 Elm St / Anytown US / Rear of house	
03/11/17		Payment, Thank you!	\$291.60 CR
- Non-Plan Activity table:
 

Date	Ref Num	Activity	Amount
02/22/17	1212834	Install hot water heater	\$925.0
02/29/17	118462	Service Call, 275g oil tank	\$270.0
- Document list table:
 

Doc ID	Account #	Date	Description	Download	View
5414656	100026288	08/12/2014	LN2200 Notice	Download	View
5414658	100030718	08/12/2014	LN2200 Notice	Download	View
5414660	100028798	08/12/2014	LN2200 Notice	Download	View

## Customer Support Tools

The Staff Console provides standard customer support functionality to help any customer navigate the portal.

### Document Search and Reprints:

- Staff can view all documents received by the customer, including notifications
- Mailed documents can be reprinted using the same or new mailing address

### Customer Payment Support:

- Details for every payment, completed or scheduled to help with troubleshooting
- Auditing detail to the user level with reason codes

# Document Redesign

MYTOWN ENERGY  
P.O. BOX 123 ANYPLACE, US 12345  
(888) 555-1010 • 1-800-999-9999

\*\*\* STATEMENT \*\*\*

JOSEPH CUSTOMER  
9999 ELM STREET  
ANYTOWN, US 00000-9999

ACCT# 123456 6/20/16

DATE	REF #	DESCRIPTION	AMOUNT	REF #	AMOUNT
6/02/16	5181955	PREVIOUS BALANCE	332.95	PR BAL	332.95
6/06/16	15544	BUDGET CREDIT	0.01CR	5181955	0.01CR
6/06/16	15544	PROPANE GAS 153.0 GAL@1.790	273.87	15544	273.87
6/17/16	18538	PROPANE GAS 34.5 GAL@1.790	61.76	18538	61.76
6/17/16	18538	PROPANE GAS 34.5 GAL@1.790	61.76	18538	61.76
		< BALANCE >	668.57	<BAL>	668.57
		< PAY THIS AMT >	332.94	<DUE>	332.94

ACCT# 123456

MyTown Energy  
(888) 555-1010  
1-800-999-9999

Thank you for your business!

Joseph Customer  
9999 Elm Street  
Anytown, US 00000-9999

Account Number: 123456  
Amount Due: \$332.94  
Due Date: Upon Receipt  
Amount Enclosed: \_\_\_\_\_

Please Remit to:  
MyTown Energy  
P.O. Box 123  
Anyplace, US 12345-0123

**ACME**  
Energy

1234 Main Street  
Energytown, US 12345  
Phone: (800) 555-1234  
Email: billing@acmeenergy.com  
Web: www.acmeenergy.com

John and Jane Smith  
123 Elm St  
Anytown US 00000

Account Number	Account Balance	Statement Date
999999	\$345.67	05/23/2017

**Important!**  
**Safety Information Enclosed**

We appreciate your business and we would like to share with you some tips on how to keep you and your family safe this heating season.

**Please find the enclosed safety information and review it carefully with your family.**

If you have safety-related questions or concerns, please call our team at **1.888.310.1924**.

**New Charges**

Date	Ref Num	Activity	Amount
05/22/17	119463	#2 Fuel Oil Price 185.1g @ \$2.229/g	\$412.59
		Location: Tank 1 123 Elm St / Anytown US / Rear of house	

**Payments and Credits**

Date	Ref Num	Activity	Amount
02/22/17	31564	Credit Card Payment	\$200.00

<b>Past Due Amount</b>	<b>Charges</b>	<b>Payments/Credits</b>	<b>PLEASE PAY THIS AMOUNT</b>
\$133.08	\$412.59	\$200.00	<b>\$345.67</b>

Please see the back of this statement for additional information.

**ACME**  
Energy

Phone: (800) 555-1234  
1234 Main Street  
Energytown, US 12345

☐ **Paperless Billing Enrollment.** See reverse.  
☐ **Address Change.** See reverse.

John and Jane Smith  
123 Elm St  
Anytown US 00000

**Please detach and return this stub with your payment.**

Account Number	Statement Date	Amount Due	Amount Enclosed
999999	05/23/17	<b>\$345.67</b>	

**Please remit to:**  
ACME Energy  
PO Box 12345  
Payments US 00001-1234

1002055555505000000000426848

## Document Design Benefits

Our redesign expertise provides:

1. A modernized look, consistent to branding
2. Improved clarity, reducing customer inquiries
3. Space to cross-promote products and services
4. Enhanced data presentation and graphics
5. Clear presentation of amount due

## Marketing Integration

A marketing-based design allows for integrated messaging to communicate relevant and personalized marketing messages or organizational announcements on operational documents.

## Strategic Redesign Methodology

We redesign documents based on our clients' needs without limiting options to a selection of templates.

# Data Security and Quality Controls

## Security, Accuracy & Privacy

- SSAE No. 18 Level 2 and PCI Level 1 certified. MPX is compliant with strict guidelines set forth by the most demanding industries (i.e. healthcare and banking).
- Audits and quality control systems incorporate digital checks and balances throughout the process. For instance:
  - Calculating a running total for each file or batch that can be matched to a control number. Job will not process through completion without a positive confirmation of these numbers.
  - Processing reports that show piece count per incoming file, requiring approval from the client to proceed before printing can begin.
  - Automated workflow cannot proceed without proper pre-process and successful output.
- The peaks of monthly business are covered by trained, professional per diem staff, (not temps), to fully ensure proper security.



## Tracking and Reporting Capabilities

- Standard MPX audit procedures are in place to ensure data processing and production procedures are completed properly.
- Every step of the production process requires supervisory signoff prior to proceeding to the next step.
- Audit checklists are maintained for every lot of every job produced at our production facility.
- Mail delivered to the mail consolidation service is also tracked through specific auditing measures and is scanned until it is delivered to the local USPS distribution center.

