

Quick Checklist:

1. Create New Company
2. Complete the Company Details page
3. Add a site using Meter Lookup
4. Complete the contact information
5. Send LOA
6. Upload the signed LOA in the Documents section
7. Get to the pricing page when adding the site. If a site is already there, then use Generate Quotes option to get to the pricing page.
8. Select the commodity
9. Add consumption information
10. Add current supplier name, renewal date and uplift
11. Click Compare to get the comparative prices
12. Filter prices per your requirements
13. Share the prices with your customer
14. Once a price is selected, use CAPILite to get to the supplier portal
15. Complete all the sections
16. Upload LOA
17. Generate contract and send to the customer
18. If contract is sent via DocuSign, you will get notified once the customer has signed it.
If contract is sent as a pdf, then upload it as soon as you get it back from the customer.
Login to the supplier portal, get to My sites, look up the required site and check everything. The Submit button should be active. Click it.
Important: Just uploading the contract to the supplier doesn't send it to the supplier. You need to hit the Submit button for a submission.
19. Update Progress step in B360 to Customer Signs

For any issues, raise a support ticket: <https://www.powwr.com/support>