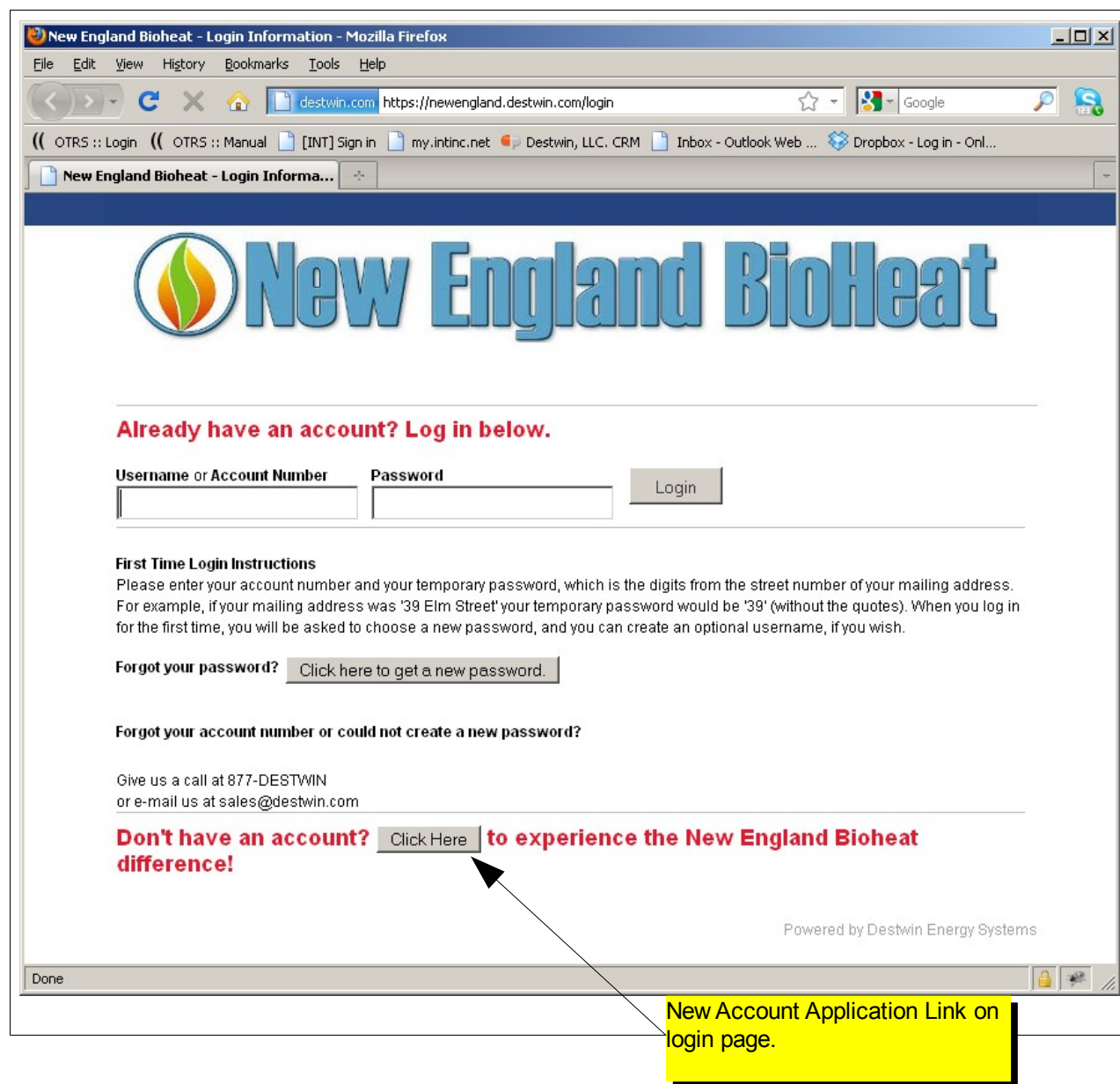


Destwin Quick Reference  
Console Version 2.0  
How to manage New Customer Applications  
25-AUG-11

This Quick Reference describes how to process information submitted by customers from the New Account Application link.



New England Bioheat - Mozilla Firefox

File Edit View History Bookmarks Tools Help

destwin.com https://newengland.destwin.com/customersignup

OTRS :: Login OTRS :: Manual [INT] Sign in my.intinc.net Destwin, LLC. CRM Inbox - Outlook Web ... Dropbox - Log in - Onl...

New England Bioheat

# New England BioHeat

## New Customer Application

**Account Information**

\* First Name:

\* Last Name:

\* Street Address:

\* City:

\* State:

\* Zip:

\* Email:

\* Phone:

Work Phone:

Cell Phone:

Best Time to Call:

Type of Building: ☐ Single Family ☐ Multi-Fam

Type of Tank: ☐ Aboveground ☐ Underground ☐ Basement

Tank Size:

Fill Pipe Location:  
(Make sure pipe is clearly marked)

☐ Back of House

☐ Left Side

☐ Right Side

☐ Front of House

Set Up Account Cancel

After customers successfully complete this form and click on the Set Up Account button, that application is written to the New Customer Applications log available in the Admin pages.

Done

Typical New Customer Application page.

New England Bioheat - Manage Customer Application Submissions - Mozilla Firefox

destwin.com https://newengland.destwin.com/customerlog#

OTRS :: Login OTRS :: Manual [INT] Sign in my.intinc.net Destwin, LLC CRM Inbox - Outlook Web ... Dropbox - Log in - Onl...

New England Bioheat - Manage Custo...

# Destwin

Dealer Management Console v2.0  
Web tools for the Oil & Propane Industry  
Client: New England Bioheat

Admin Functions Contract Mgmt Risk Mgmt

**Manage Customer Application Submissions** Status: any

Refresh Data

Showing records starting from 2011-08-30 19:09:43

From: +/- HH:MM:

1 Rick Smith 800211 300 Main Anytown CT 23456 4567890 r@gomm.com 2011-08-24 14:09:50 unprocessed

2 Robert Smith 800210 887 Main Street monroe CT 06468 2032616027 robert@yahoo.com 2011-08-11 15:48:02 accepted

3 Steve O 800209 34 Main St Redding CT 23456 3456789 st@g.com 2011-08-04 11:04:05 unprocessed Assign

OLIVER MCPHERSON 30484 34 Walnut Rd MONROE CT 06468 01/29/2009

Monroe Board of Ed 31000 502 Mahogany Ave NEWTOWN CT 06470 01/21/2009

DALTON GERAGHTY 31229 34 Ash Rd EASTON CT 06612

LANA TOWNSELL 31686 34 Maple Ave EASTON CT 06612

IOLA DEYETTE 32073 34 Pine Blvd TRUMBULL CT 06611 01/23/2009

JON JUTTE 32695 34 Mahogany Dr MONROE CT 06468 01/29/2009

OTHA SEBURG 33214 34 Maple Ave BROOKFIELD CT 06804 01/02/2009

DERICK OMLI 33633 34 Birch Blvd TRUMBULL CT 06611 02/15/2008

HUMBERTO NADEAU 37475 34 Birch Ave TRUMBULL CT 06611 01/21/2009

DELORA YETMAN 37821 34 Maple Terr SHELTON CT 06484 01/03/2009

https://newengland.destwin.com/customerlog

The New Cust App Log is accessed from the Contract Mgmt dropdown.

The system identifies possible matches within the database to allow you to assign the new application to an existing account if that is appropriate. To assign an account click first on the radio button that matches the new entry (if applicable) and then on the Assign button. If there are no matches, process the new customer accordingly. When done, you can change the status of the New Application by clicking on the Status field.

Click on the Name field for view information submitted in the application.

New England Bioheat - Manage Customer Application Submissions - Mozilla Firefox

destwin.com https://newengland.destwin.com/customerlog

OTRS :: Login OTRS :: Manual [INT] Sign in my.intinc.net Destwin, LLC CRM Inbox - Outlook Web ... Dropbox - Log in - Onl...

New England Bioheat - Manage Custo...

# Destwin

Dealer Management Console v2.0  
Web tools for the Oil & Propane Industry  
Client: New England Bioheat

Admin Functions Contract Mgmt Risk Mgmt Pricing Payments Scheduler

**Manage Customer Application Submissions** Status: any

Refresh Data

Showing records starting from 2011-06-26 19:09:43 and BEFORE 2011-08-30 19:09:43

From: 65 days ago To: +/- HH:MM:

1 Rick Smith 800211 300 Main Anytown CT 23456 4567890 r@gomm.com 2011-08-24 14:09:50 unprocessed

2 Robert Smith 800210 887 Main Street monroe CT 06468 2032616027 robert@yahoo.com 2011-08-11 15:48:02 accepted

3 Steve O 800209 34 Main St Redding CT 23456 3456789 st@g.com 2011-08-04 11:04:05 unprocessed Assign

OLIVER MCPHERSON 30484 34 Walnut Rd MONROE CT 06468 01/29/2009

Monroe Board of Ed 31000 502 Mahogany Ave NEWTOWN CT 06470 01/21/2009

DALTON GERAGHTY 31229 34 Ash Rd EASTON CT 06612

LANA TOWNSELL 31686 34 Maple Ave EASTON CT 06612

IOLA DEYETTE 32073 34 Pine Blvd TRUMBULL CT 06611 01/23/2009

JON JUTTE 32695 34 Mahogany Dr MONROE CT 06468 01/29/2009

OTHA SEBURG 33214 34 Maple Ave BROOKFIELD CT 06804 01/02/2009

DERICK OMLI 33633 34 Birch Blvd TRUMBULL CT 06611 02/15/2008

HUMBERTO NADEAU 37475 34 Birch Ave TRUMBULL CT 06611 01/21/2009

DELORA YETMAN 37821 34 Maple Terr SHELTON CT 06484 01/03/2009

Done

Status field.

Assign button.

Radio buttons to assign an existing account (if applicable).

Typical New Customer Application log