



Vision DSM Navigation Overview

Log In to VisionDSM

Visit
<http://client.aegonline.com>
in your web browser

Applied Energy Group - Utility consultants, consulting for the electric utility and gas utility - Internet Explorer provided by

<http://client.aegonline.com/login/>

File Edit View Favorites Tools Help Links AEG NOAA Google Maps Mrs Baron Google

About AEG Consulting Services Client Experience News and Events Links and Resources Contact

Client Login

CLIENT LOGIN

USERNAME

PASSWORD

Submit Clear

Lost your password? Click here

info@appliedenergygroup.com

Internet | Protected Mode: On 100%

Enter UserName and
Password and click Submit
button

Search for Customer

Enter Customer Search criteria to find for program participation information, and click Search button. Use wildcard "*" if necessary.

AEOnline.com :: VisionDSM - DSM Control Center - Internet Explorer provided by Dell

http://client.aegonline.com/DSMVisionDSM.asp

File Edit View Favorites Tools Help Links AEG NOAA Google Maps Mrs Baron Google

AEOnline.com :: VisionDSM - DSM Control Center

Vision Demand Side Management

SYSTEM

Search

CONTROL

Close All Tabs

Edit Your Profile

Log Out

SEARCH CUSTOMERS

Last Name

Company

Address

Acct #

Phone

Application #

Search

CALL MANAGEMENT

Call Counter

REPORTS

Ad-Hoc Report Generator

Canned Reports

Search System

Project Quickview

NEW APPS CURRENT APPS PENDING W/F ASSIGNED WORK QUEUE BOOKMARKS PENDING REBATE

PROJECT QUICKVIEW: APPLICATIONS

Add: New Application

Utility	Program	Project #	Premise name	Created	Edited	Status	Action
KCPL	APPLICATION POOL	KCPLCR0409090002	ELEMENT FITNESS, LLC	APR-9 2009 3:33PM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0408090002	HIGH TECH POLISHING	APR-8 2009 10:39AM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0407090001	CAPITAL REALTY	APR-7 2009 3:07PM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0403090010	REALTY ASSOCIATES, IOWA CORP	APR-3 2009 3:53PM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0403090008	REALTY ASSOCIATES, IOWA CORP	APR-3 2009 3:25PM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0403090007	REALTY ASSOCIATES, IOWA CORP	APR-3 2009 3:08PM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0403090002	DST DATA CENTER	APR-3 2009 10:42AM		APPLICATION RECEIVED	
BGE	CHIP PLAY PATCH	BGCPP50403090001	TESTY	APR-3 2009 9:47AM		APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0402090001	SHIRKEY NURSING AND REHAB CNTR	APR-2 2009 1:10PM	APR-6 2009 1:52PM	APPLICATION RECEIVED	
KCPL	APPLICATION POOL	KCPLCR0327090020	KARBANK	MAR-27 2009 5:43PM		APPLICATION RECEIVED	

PAGE 1 2 3 4 5 > >>

Viewing 1 - 10 of 59 Records

Internet | Protected Mode: On 100%

Select Participating Customer's Account

For existing participants, select your customer from the list of Customer Accounts . Click the View Customer Applications button to see program participation information

The screenshot displays the 'Vision Demand Side Management' web application. The left sidebar contains navigation options: CONTROL (Close All Tabs, Edit Your Profile, Log Out), SEARCH CUSTOMERS (Last Name: Maslak, Company, Address, Acct #, Phone, Application #, Search), CALL MANAGEMENT (Call Counter), and REPORTS (Ad-Hoc Report Generator, Canned Reports). The main content area shows search results for 'customer accounts' and 'customer contacts'. Red arrows point from the text box to the 'View Customer Applications' button in the 'Action' column of the 'customer accounts' table and to the 'SEARCH CUSTOMERS' section.

Last name	First name	Acct number	Email	Status	Action
MASLAK	KENNY	1189993513	KMASLAK@APPLIEDENERGYGROUP.COM	ACTIVE	
MASLAK	KENNY		CRUDMOP@YAHOO.COM	ACTIVE	
MASLAK	TOM		CRUDMOP@WATERMELON18.COM	ACTIVE	

Acct last name	Last name	First name	Company	Account #	Address	Phone	Action
MASLAK	MASLAK	KENNY			115 STRATHMORE VILLAGE DR	(631) 736-5393	
MASLAK	MASLAK	TOM		123123123	1377 MOTOR PARKWAY	(631) 881-7100	
MASLAK	MASLAK	TOM		12123123123	1377 MOTOR PARKWAY	(134) 645-4545	
MASLAK	MASLAK	KENNY		123123123	1377 MOTOR PARKWAY SUITE 401	(123) 345-1231	
MASLAK	MASLAK	KENNY			1377 MOTOR PARKWAY	(631) 881-7127	

Select Program/Project

For existing participants, select the program and the project the customer is inquiring about. Note the Status of the Application. Click the View Project button to see details on the application.

The screenshot shows the AEGonline.com Vision DSM Control Center interface. The main content area displays a table titled "Applications for Customer: Maslak, Kenny". The table has columns for Utility, Program, Project #, Last name, Premise name, Created, Status, and Action. The first row is highlighted in yellow and has red arrows pointing to the "HVAC RESIDENTIAL" program and "APPLICATION RECEIVED" status. The table also includes a "PAGE 1" indicator and "Viewing 1 - 6 of 6 Records".

Utility	Program	Project #	Last name	Premise name	Created	Status	Action
BGE	HVAC RESIDENTIAL	BGHRPS0326090003	MASLAK	MASLAK	MAR-26 2009 12:58PM	APPLICATION RECEIVED	
BGE	HVAC RESIDENTIAL	BGHRPS0317090001	MASLAK	MASLAK	MAR-26 2009 4:48PM	APPLICATION RECEIVED	
DEMO	CONED DEMO PROGRAM	BGHRPS030205090001	MASLAK	MASLAK	FEB-5 2009 3:56PM	QUALIFYING	
DEMO	SOCAL DEMO PROGRAM	DMDPPS1219080001	MASLAK	MASLAK	DEC-19 2008 2:34PM	APPLICATION RECEIVED	
DEMO	ONLINE DEMO PROGRAM	DMDPCR1210080001	MASLAK	MASLAK	DEC-10 2008 4:08PM	PREQUALIFICATION	
KCPL	KANSAS CUSTOM REBATE	KCPLCR0910080001	MASLAK	BED BATH & BEYOND #87	SEP-10 2008 9:53AM	PREAPPROVED	

View Program/Project Detail

The center column shows Application Summary, including Application Status

The screenshot displays the Vision Demand Side Management web application interface. The browser address bar shows the URL: <http://client.aegonline.com/DSMVisionDSM.asp>. The page title is "Vision Demand Side Management".

The main content area is titled "Application # 590504D2080549BEA1E97A8323393FA6 Project # Kansas Custom Rebate Customer: KCPLCR0910080001". Below this, there are tabs for "WORKFLOW", "NOTES", "EQUIPMENT", "FILES", "DOCS", "APPLICATION", "REBATES", and "AUDIT".

The center column displays "Application Information" for the selected project:

- Project #: KCPLCR0910080001
- Program: KCPL: KANSAS CUSTOM REBATE
- Customer: ART ARNOLD
- Received: Sep-10 2008 9:53AM
- Last Edited: Jan 16 2009 12:28PM
- Status Upd: Sep-11 2008 3:38PM
- Status: PREAPPROVED

Below the application information, there are sections for "Primary Contact", "Premise Contact", "Contractor Contact", and "Application Criteria".

The right column displays a "PROJECT: WORKFLOW" table with the following data:

Item	Action	Created	Action
EMAIL CUSTOMER AND CONTRACTOR	SEND EMAIL	SEP-11 2008 3:38PM	✓
SEND PREAPPROVAL LETTER	SEND LETTER	SEP-11 2008 3:38PM	✓
ENTER REBATE INFO	PERFORM TASK	SEP-11 2008 3:38PM	✓

The table indicates "PAGE 1" and "Viewing 1 - 3 of 3 Records".

The bottom of the page shows a navigation bar with "Search", "System", "Project Quickview", "Search Results", "Customer Apps: 1000095", and "Project # Kansas Custom Rebat...". The status bar at the bottom indicates "Internet | Protected Mode: On" and "100%".

View Program/Project Detail

Click Rebates Tab to see status of rebate payments and when the Payment Request was exported to Accounts Payable System.

Click Docs Tab to see any letters that have been sent to the customer.

Click Equipment Tab to see the list of energy efficient measures that are being rebated.

Click Files Tab to see any supporting documents that have been uploaded.

Click Application Tab to see the data the customer submitted on the application form.

The screenshot displays the 'Vision Demand Side Management' web application. The browser address bar shows 'http://client.aegonline.com/DSM/VisionDSM.asp'. The application header includes the 'Vision' logo and 'Demand Side Management'. The main content area is divided into several sections:

- Left Sidebar:** Contains navigation options like 'CONTROL' (Close All Tabs, Edit Your Profile, Log Out), 'SEARCH CUSTOMERS' (Last Name: maslak, Company, Address, Acct #, Phone, Application #), 'CALL MANAGEMENT' (Call Counter), and 'REPORTS' (Ad-Hoc Report Generator, Canned Reports).
- Application Information:** Shows 'Project # KCPLCR0910080001', 'Program: KCPL: KANSAS CUSTOM REBATE', and 'Customer: ART ARNOLD'. It also lists 'Received: Sep-10 2008 9:53AM', 'Last Edited: Jan 16 2009 12:28PM', and 'Status Upd: Sep-11 2008 3:38PM'. The status is 'PREAPPROVED'.
- Workflow Section:** Includes a 'PROJECT: WORKFLOW' header, a 'Create New Custom Task' button, and a table of workflow items.
- Workflow Table:**

Item	Action	Created	Action
EMAIL CUSTOMER AND CONTRACTOR	SEND EMAIL	SEP-11 2008 3:38PM	✓
SEND PREAPPROVAL LETTER	SEND LETTER	SEP-11 2008 3:38PM	✓
ENTER REBATE INFO	PERFORM TASK	SEP-11 2008 3:38PM	✓

The bottom of the page shows a navigation bar with 'Project Quickview', 'Search Results', 'Customer Apps: 1000095', and 'Project # Kansas Custom Rebat...'. The status bar at the very bottom indicates 'Internet | Protected Mode: On' and '100%' zoom.



View Program/Project Detail: Notes

Click Notes Tab to see any customer service notes, or to Add Notes regarding your transactions with the customer regarding this application.

The screenshot displays the VisionDSM web application interface. The browser address bar shows the URL <http://client.aegonline.com/DSMVisionDSM.asp>. The page title is "Demand Side Management". The main content area is titled "Application # 590504D2080549BEA1E770022393FA" and "Project # Kansas Custom Rebate" with "Customer: KCPLCR0910080001". The "NOTES" tab is selected, showing a table of workflow items. The table has columns for "Item", "Action", "Created", and "Action". The items listed are "EMAIL CUSTOMER AND CONTRACTOR", "SEND PREAPPROVAL LETTER", and "ENTER REBATE INFO". The status of the application is "PREAPPROVED".

Item	Action	Created	Action
EMAIL CUSTOMER AND CONTRACTOR	SEND EMAIL	SEP-11 2008 3:38PM	✓
SEND PREAPPROVAL LETTER	SEND LETTER	SEP-11 2008 3:38PM	✓
ENTER REBATE INFO	PERFORM TASK	SEP-11 2008 3:38PM	✓

PAGE 1 Viewing 1 - 3 of 3 Records

View Program/Project Detail: Notes

To Add Notes, click the Add New Notes button. In the resulting Field, type the description of the transaction with the customer. From the Notes Type dropdown menu, select Public for notes that you want the customer to be able to see online, or Private for notes that can only be seen by KCP&L and AEG. Click Submit to save note.

The screenshot displays the AEGonline.com Vision DSM Control Center interface. The main window shows the 'Project # Kansas Custom Rebate' details. A 'PROJECT: NOTES' section is visible, with an 'Add: New Notes' button highlighted by a red arrow. A dialog box titled 'ENTER NOTES' is open, showing a form with a 'Note:' text area, a 'Note Type:' dropdown menu (set to '--Select--'), and a 'Submit' button. Another red arrow points to the 'Add/Edit NOTE' button in the dialog box. The interface includes a search bar, navigation tabs (WORKFLOW, NOTES, EQUIPMENT, FILES, DOCS, APPLICATION, REBATES, AUDIT), and a sidebar with various tools and reports.

View Program/Project Detail: Workflow

Click Workflow Tab to view the tasks that are being completed by various parties in processing the application. The status of each task appears in the Action column. This is where you will see what may be holding up an application, or what a customer still must do before KCP&L and AEG can complete the application process.

The screenshot displays the Vision DSM Control Center interface. The main content area is titled "Application # 590504D208009... Project # Kansas Custom Rebate Customer: KCPLCR0910080001". The "WORKFLOW" tab is selected, showing a table of tasks. The table has columns for "Item", "Action", "Created", and "Action". The tasks listed are:

Item	Action	Created	Action
EMAIL CUSTOMER AND CONTRACTOR	SEND LETTER	SEP-11 2008 3:38PM	✓
SEND PREAPPROVAL LETTER	SEND LETTER	SEP-11 2008 3:38PM	✓
ENTER REBATE INFO	PERFORM TASK	SEP-11 2008 3:38PM	✓

The status of the application is "PREAPPROVED". The interface also includes a search bar, navigation tabs (CONTROL, SEARCH CUSTOMERS, CALL MANAGEMENT, REPORTS), and a footer with the AEG logo and "Applied Energy Group".