SOLID DEALER PORTAL REFERENCE GUIDE





Dealer Training



How to change client contract details



How to change the client contact details

In the event you have entered the client contact number or email address etc. incorrectly – or the client has changed their contact information - follow these steps ...

The steps to amend a private individual customer account or an business customer account are identical



	Q Search Custo	omers:		
Dashboard	This interface allows you	to search for customers based on the criteria specified below.		
💵 Dashboard	The search results is limit	ed to 300 accounts.		
Customer		Europea M		
Check Coverage	Account Id	Example: A1		
	Customer Name	Example: MorClick Ltd		Enter the customer name if a private individual
I Sales	Trading Name	Example: MorClick		Enter the business name if an Organisation
Customers				
🛱 Johs	Status	Please Select	Ŷ	
	OR			
Administration	Site Account Number	Example: PRI000000000		
🖪 My Details				
🚍 Billing	Search			
🛓 User Admin				
🕀 Logout				
€ Me Ellanda Micklethwaite Signed In: 11/Jan 13:43				

For this example we will use an Organisation



	Q Search Cust	omers:	
Dashboard	This interface allows you	u to search for customers based on the criteria specified be	elow.
Jashboard	The search results is lim	ited to 300 accounts.	
Customer			
9 Chack Coverage	Account Id	Example: A1	
• Oneok obverage	Customer Name	Example: MorClick Ltd	
🗈 Sales 🕥			
	Trading Name	Donotinstall	
Oustomers	Status	Please Select	\$
🛗 Jobs	OR		
Administration		5	
Nv Details	Site Account Number	Example: PRI00000000	
📰 Billing	Search		
Liser Admin			

Click "Search"

Dashboard				Lagos 123456 Nigeria		powered
🖬 Dashboard	¥11	Cobusplay Three	Person	Box33 Lekki	Active Account	1,079,612.50
Customer				123123 Nigeria		
V Check Coverage	Y12	Bobs Berries	Organisation	2 Blue	Active Account	-369,000.00
13) Sales 🕤				Lagos Lagos 100001 Nigeria		
S Customers	V13	Chocolate Eactory	Omanisation	2 Steel Street	Active Account	-369.000.00
🛱 Jobs	110	Chocolate Factory	organisation	Lagos Lagos	Active Account	-505,000.00
dministration				100001 Nigeria		
n My Details	¥14	Nick Donotinstall	Person	Flat Number 6 35 Ogundana Street	Active Account	0.00
Billing User Admin			_	Phase 10 Allen Adamawa 100001 Nigeria		
togout	(15	DONOTINSTALL LTD	Organisation	42 Test Street Test suburb Lagos 123456	Active Account	0.00
Me Ellanda Micklethwaite				Nigeria		
ngmeta m. + matem tasika	¥16	Business ABCD	Organisation	Box33 Lekki Lagos 234001 Nigeria	Active Account	0.00
				1 - Short on		

Back to Search

Click on the client Name

Yah

Yah	:Click
	powered by HUGHES.

Dashboard	Lostomer Y	15 - DONOTII	NSTALL LTD			Active Account
뒖 Dashboard	Herresh Edit Account					
Customer	Account Contacts		Documenta 😈			
9 Check Coverage	Account Id		Y15	Status	Active Account	
	Account Type		Organisation	Date Registered	10/Jan/2022	
(ii) Sales (iii)	Sales Agent		Mr Web Api	Invoice Delivery	Gets Invoice	
CustomersJobs	Customer Name		Donotinstall Ltd	Address	42 Test Street Test suburb Lagos 123456	
Administration	Primary Contact		Mr Peter Pan	Email Address	peter@donotinstall.com	
Ny Details	Phone Number		08012345678	Registration Number	RC123456	
🚍 Billing	Gross Monthly Turnover		₩0.00	Employer		
	Job Title		Ceo	Employee Service Length	Not Applicable	
👗 User Admin	Birth Date		Not Specified	Nigerian Citizen	No	
🝽 Logout	Resident Status		Not Applicable			
■ Me Ellanda Micklethwaite Signed In: 11/Jan 13:43	Quotes 1/1 Ticket	s (1/4) Orders (0/	1 Services (0/1)	v Si	how 10	
	No Date	Status	Created By		Lines Total	Charge Action
	Q39 10/Jan/2022	Ordered	Me Ellanda Micklethwait	te on 10/Jan/2022 15:17		

Click on the "Contacts" Tab





Click "Edit"



	Edit Contact: Y15		Active Account
Dashboard	Please enter the new details for the contact be	low and click the "Update Contact" button	
🖬 Dashboard			
Customer	O Contact Details		
Check Coverage	Contact Name 🚖	Mr Peter Pan	
💿 Sales 🕥	Contact Type 🚖	Account Owner	•
🔮 Customers	Job Title	Сво	
🛱 Jobs	Cell Number 🚖	08012345678	
Administration	Work Number	08012345678	
Ny Details	Home Number	Enter Phone Number with no punctuation e.g. 012701222	
🖶 Billing	Email Address	peter@donotinstall.com	
🚢 User Admin	Rica Certification Number	Enter Rica Certification Number	
🕩 Logout	RICA Agreement Document	Choose File no file selected	
	Send Invoice		
	Self-Admin Credentials		
	Access Right 🚖	Customer Admin	

Correct the error and scroll down . . .

	Contact Name 🖈	Mr \$	Peter	Pan	
Dashboard	Contact Type 🚖	Account Owner		\$	
🖬 Dashboard	Job Title	Ceo			
Customer	Cell Number 🚖	08012345678			
Check Coverage	Work Number	08012345678			
(3) Sales	Home Number	Enter Phone Number with no punct	uation e.g. 012701222		
督 Customers	Email Address	peter@donotinstall.com			
🛱 Jobs	Rica Certification Number	Enter Rica Certification Number			
Administration	RICA Agreement Document	Choose File no file selected			
n My Details	Send Invoice	2			
🖶 Billing	Self-Admin Credentials				
👗 User Admin	Access Right 🚖	Customer Admin			
(+ Logout	Username 🚖	xyfvgw			
	Suggested Password	WfkMPGe7 (click HERE to re	set the password)		
■ Me Ellanda Micklethwaite	Password ★	Enter a password e.g. Passw0rdt			
Signed In: 11/Jan 13:43		(Click to Show value)			
	Confirm Password 🚖	Enter a password e.g. Passw0rdl			
	Update Contact Back				Click "Update Contact"





	🛔 Edit Contact: Y15					Active Acco
board	Contact successfully created!					
Dashboard						
omer	O Contact Details					
neck Coverage	Contact Name ★	Mr \$	Peter	Pan		
ales 🕤	Contact Type ★	Account Owner			*	
ustomers	Job Title	Fire fighter				
obs	Cell Number ★	08012345678				
nistration	Work Number	08012345678				
/ Details	Home Number	Enter Phone Number with no pund	ctuation e.g. 012701222			
illing	Email Address	peter@donotinstall.com				
er Admin	Rica Certification Number	Enter Rica Certification Number				
gout	RICA Agreement Document	Choose File no file selected				
	Send Invoice	0				
Ilanda Micklethwaite I In: 11/Jan 13:43	Self-Admin Credentials					
	Access Right ★	Customer Admin				

WELL DONE! The contact detail has been corrected.



The End