SOLID DEALER PORTAL REFERENCE GUIDE

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Dealer Training

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How to complete a business application

How to complete a business application

To capture a business application we follow the same steps to complete a customer application – but there are two differences:

★ The business information captured is different from a customer application.

★ KYC requirements: in addition to the **(1) copy of the NIN or Passport** & **(2) proof of address** – you must also obtain and upload the **(3) proof of business registration** (this is specifically required for a business application).

In summary:

★ Capture the **business** details

2. Check service coverage

3. Create a quote

★ Upload the required KYC documents **(x 3 as above)**

5. Generate a Contract

6. Complete a manual signed acceptance or request an online contract acceptance

7. Check the status for Head Office approval

8. Check the status for the upfront payment from the customer

9. Schedule and book the customer installation

Business application: (1) Capture a new lead

Business application: (1) Capture Organisation details

Business application: (1) Capture a new lead

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Dashboard
- Dashboard

Customer
- Check Coverage
- Sales (1)
- Customers
- Jobs

Administration
- My Details
- Billing
- User Admin
- Logout

🔒 Me Ellanda Micklethwaite
Signed In: 10/Jan 13:09

🔘 New Lead
Please enter the details for the lead click 'Create Lead'

👤 Account Details

Account Use*	Organisation
Business Name*	DONOTINSTALL LTD
Trading Name	DONOTINTALL LTD
Business Contact Number*	080123456789
Identity Type*	Company Number
Identity Number*	RC123456

👤 Primary Contact

Full Name*	Mr	Peter	Pan
Email*	peter@donotinstall.com		
Mobile Contact Number	080123456789		
Work Contact Number	080123456789		
Employer Name	DONOTINSTALL LTD		
Job Title	CEO		

Scroll down to complete the Postal Address section

Business application: (1) Capture a new lead

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Dashboard

- Dashboard

Customer

- Check Coverage
- Sales ①
- Customers
- Jobs

Administration

- My Details
- Billing
- User Admin
- Logout

🔒 Me Ellanda Micklethwaite
Signed In: 10/Jan 13:09

👤 Primary Contact

| Full Name* | Mr | Peter ✓ | Pan ✓ |

Email* | peter@donotinstall.com ✓

Mobile Contact Number | 080123456789 ✓

Work Contact Number | 080123456789 ✓

Employer Name | DONOTINSTALL LTD ✓

Job Title | CEO ✓

🏠 Postal Address

Address Line1* | 42 Test Street ✓

Address Line2 | Secondardy Address line e.g. Fatai Arobieke Street ✓

Address Suburb* | Test suburb ✓

Closest City* | Lagos ✓

State * | Lagos ▼

Country* | Nigeria

Postal Code* | 123456 ✓

[Create Lead] [Reset] [Back]

Business application: (1) Capture a new lead

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Scroll down .....

Business application: (1) Capture a new lead

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Dashboard

📊 Dashboard

Customer

📍 Check Coverage

🖥 Sales ①

👥 Customers

📅 Jobs

Administration

🖫 My Details

🖹 Billing

👤 User Admin

↪ Logout

🔒 Me Ellanda Micklethwaite
Signed In: 10/Jan 13:09

👤 Primary Contact

Full Name*	Mr	Peter	Pan
Email*	peter@donotinstall.com		
Mobile Contact Number	080123456789		
Work Contact Number	080123456789		
Employer Name	DONOTINSTALL LTD		
Job Title	CEO		

🏠 Postal Address

Address Line1*	42 Test Street
Address Line2	Secondardy Address line e.g. Fatai Arobieke Street
Address Suburb*	Test suburb
Closest City*	Lagos
State *	Lagos
Country*	Nigeria
Postal Code*	123456

Continue   Back

Click 'Continue'

Business application: (1) Capture a new lead

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👤 Customer Y15 - DONOTINSTALL LTD

Refresh | Edit Account

Account | Contacts **1** | Debtors **1** | Documents **0**

Account Id	Y15	Status	Lead
Account Type	Organisation	Date Registered	10/Jan/2022
Sales Agent	Mr Web Api	Invoice Delivery	Gets Invoice
Customer Name	Donotinstall Ltd	Address	42 Test Street Test suburb 123456 Nigeria
Primary Contact	Mr Peter Pan	Email Address	peter@donotinstall.com
Phone Number	080123456789	Registration Number	RC123456
Gross Monthly Turnover	₦0.00	Employer	DONOTINSTALL LTD
Job Title	Ceo	Employee Service Length	Not Applicable
Birth Date	Not Specified	Nigerian Citizen	No
Resident Status	Not Applicable		

Quotes **0/0** | Tickets **0/0** | Orders **0/0** | Services **0/0**

New Quote

No	Date	Status	Created By

No quotes have been generated for this customer.

Dashboard
- 📊 Dashboard

Customer
- 📍 Check Coverage
- 📷 Sales **1**
- 👥 Customers
- 📅 Jobs

Administration
- 📋 My Details
- 🖥 Billing
- 👤 User Admin
- ➡ Logout

🔒 Me Ellanda Micklethwaite
Signed In: 10/Jan 13:09

The new customer has been created

We now move on to the next step i.e. check coverage and generate a Quote - Click 'New Quote'

Business application: (2) Generate a quote

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🖻 New Quote

Please enter the details for the order click 'Create Quote'

👤 GPS Location

Location * [   ]   [Open Map] ◄———— **Click on 'Open Map'**

Product Selection

Service Plan* [Please Select ▼]

Hardware* No Hardware Products Configured For This Dealer

Travel Fee

VAS No Value Added Services Configured For This Dealer

[Add VAS Product]

[Create Quote] [Reset] [Close]

Business application: (2) Generate a quote

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📍 Service Coverage Checker:

YahClick

GPS Picker | Coverage Map

Use the "Map" or "Satellite" option.
Move the red location pin to the area where the installation must take place. Use the '+' to zoom in to find the exact location.
Or
Type in the address under "Location Details"

📍 Location Details

Address	Irepedun Plaza, 45 Ikotun - Idimu Rd, Ikotun 102213, Lagos, Nigeria
Latitude	6.5499769	N
Longitude	3.2684930	E

Capture Coordinates | Plot Coordinates | Search for Address | Check Coverage
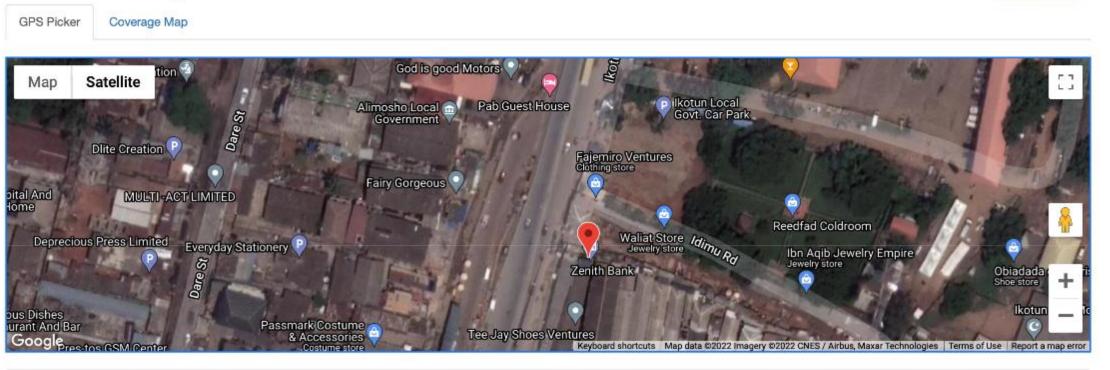
Click 'Check Coverage'

Business application: (2) Generate a quote

Service Coverage Details

Latitude	6.5499769	Longitude	3.268493
Coverage Status	AVAILABLE		
Lookup Response	Thank You! Your request has been successfully executed. Code PIM 10000		

Transport Info: Jupiter

Beam Id	114	Satellite Id	AlYah-3
Min Antenna Size	0.74	Min ODU Power	1.0
Availability	AVAILABLE	Business Availability	AVAILABLE

SLVT Parameters:

Antenna Size	ODU Power	Availability
.74	1	99

Transport Info: Jupiter

Beam Id	57	Satellite Id	Y1B
Min Antenna Size	0.74	Min ODU Power	1.0
Availability	AVAILABLE	Business Availability	AVAILABLE

SLVT Parameters:

Antenna Size	ODU Power	Availability
.9	1	99

Yes! Coverage is available – click the 'x' to close the window

Business application: (2) Generate a quote

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Click 'Capture Coordinates'

Business application: (2) Generate a quote

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GPS Location

Location * 6.5499769,3.268493   Open Map

> The exact location has now been pin-pointed and is automatically entered

Product Selection

Service Plan*   SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000... ▼

Hardware*   HARDWARE: HT2000: HT2000 (NGN0.00) ▼

Travel Fee   IT-000-060K: Installation Travelling

VAS   No Value Added Services Configured For This Dealer

Add VAS Product

> Next complete the Product Selection by choosing the relevant Service from the drop down list. By default, the associated Hardware will appear in the Hardware drop down list.
> Scroll down ….

Quote Summary

Product	Recurring Price (VAT Inclusive)	Once-Off Price (VAT Inclusive)
YTTtest Quarterly Charged	₦48,000.00	₦369,000.00
HT2000	₦0.00	₦0.00
Installation Travelling	₦0.00	₦0.00
Total	₦48,000.00	₦369,000.00

Create Quote   Reset   Close

> Click 'Create Quote'

Business application: (2) Generate a quote

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⓪ New Quote

Quote Created Successfully

👤 GPS Location

Location *	6.5499769,3.268493 [Open Map]

Product Selection

Service Plan*	SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000... ▼
Hardware*	HARDWARE: HT2000: HT2000 (NGN0.00) ▼
Travel Fee	IT-000-060K: Installation Travelling
VAS	No Value Added Services Configured For This Dealer

[Add VAS Product]

Quote Summary

Product	Recurring Price (VAT Inclusive)	Once-Off Price (VAT Inclusive)
YTTtest Quarterly Charged	₦48,000.00	₦369,000.00
HT2000	₦0.00	₦0.00
Installation Travelling	₦0.00	₦0.00
Total	₦48,000.00	₦369,000.00

Scroll down & click 'Continue'

Business application: (2) Generate a quote

Quote: Q39 — Prospect

Customer Name	Donotinstall Ltd	Quote Status	Complete
Quote Number	Q39	Quote Date	10/Jan/2022
Ticket Number	HL133	Ticket Status	Open

Line	Description	Total
1	YTTtest Quarterly Charged	48,000.00
2	HT2000	0.00
3	Installation Travelling	0.00
Total incl 7.50% Vat of ₦ 3,348.84		₦ 48,000.00

Refresh   Open Ticket   Download Quote   Email Quote

Should the customer want a copy of the quote – click "Download Quote" to save to your desktop or click "Email Quote" to the customer

**The Quote has been created – now generate the Contract ….
Click 'Open Ticket'.**

On the next screen click 'Edit Ticket'.

Business application: (3) Create Contract

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✱ Ticket: HL133

CREATE CONTRACT

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	**Category**	New Sale
Create Date	10/Jan/2022 15:17:44	**Last Update**	10/Jan/2022 15:17:44
Customer Name	Donotinstall Ltd	**Primary Contact**	Mr Peter Pan
Service Account	Not Selected	**Account Use**	Organisation
Quote Number	Q39	**Sales Agent**	Me Ellanda Micklethwaite
Last Action	Sales Order logged for quote: Q39. Services: YahClick,Stock Service		
Action to be Taken	• Ensure the customer information has been supplied • Create the contract/proposal agreement for the customer or business		

👤 Business Details

Business Name*	DONOTINSTALL LTD ✓
Trading Name	DONOTINTALL LTD ✓
Business Contact Number*	080123456789 ✓
Gross Monthly Turnover	0.0 ✓
Business Structure*	Select ✕ ⇕
	Please select the business structure
Premises Ownership*	Select ✕ ⇕
	Please select the premises ownership
Identity Type*	Company Number ✓ ⇕
Identity Number*	RC123456 ✓

Scroll down & complete the mandatory fields in the Business Details section – example on next slide

Business application: (3) Create Contract

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✱ Ticket: HL133

CREATE CONTRACT

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	**Category**	New Sale
Create Date	10/Jan/2022 15:17:44	**Last Update**	10/Jan/2022 15:17:44
Customer Name	Donotinstall Ltd	**Primary Contact**	Mr Peter Pan
Service Account	Not Selected	**Account Use**	Organisation
Quote Number	Q39	**Sales Agent**	Me Ellanda Micklethwaite
Last Action	Sales Order logged for quote: Q39. Services: YahClick,Stock Service		
Action to be Taken	• Ensure the customer information has been supplied • Create the contract/proposal agreement for the customer or business		

👤 Business Details

Business Name*	DONOTINSTALL LTD ✓
Trading Name	DONOTINTALL LTD ✓
Business Contact Number*	080123456789 ✓
Gross Monthly Turnover	0.0 ✓
Business Structure*	Proprietary Limited ✓ ⇳
Premises Ownership*	Owner ✓ ⇳
Identity Type*	Company Number ✓ ⇳
Identity Number*	RC123456 ✓

Scroll down & check the Primary Contact & Postal Address section – example on next slide

Business application: (3) Create Contract

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& Primary Contact: Mr Peter Pan

Identity Type *	Company Number ✓⇅
Identity Number*	RC123456 ✓
Employer Name*	DONOTINSTALL LTD ✓
Job Title*	Ceo ✓

⌂ Postal Address

Address Line1*	42 Test Street ✓
Address Line2	Secondardy Address line e.g. Fatai Arobieke Street ✓
Address Suburb*	Test suburb ✓
Closest City*	Lagos ✓
State*	Lagos ✓⇅
Country*	Nigeria ✓
Postal Code*	123456 ⇅ ✓

Business application: (3) Create Contract

YahClick
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Physical Address

Same As Postal	☑
Address Line1*	42 Test Street ✓
Address Line2	Secondardy Address line e.g. Fatai Arobieke Street ✓
Address Suburb*	Test suburb ✓
Closest City*	Lagos ✓
State*	Lagos ✓ ⬍
Country*	Nigeria ✓
Physical Code*	123456 ⬍ ✓

If the Physical Address is the same as the Postal Address – tick the box

Payment Method Type*

Cash Payment: Select the Checkbox for EFT/Cash Payments.

Check for Cash	☑

Make sure the "Check for Cash" box is ticked.

KYC Documents*

KYC Documents*	Upload Documents

Click "Upload Documents"

Business application: (3) Create Contract

Upload the required KYC document.
Assign the relevant label.
Click "Upload KYC / Vetting Document"

Don't forget the additional KYC document required for a Business application – see example on the next slide

Business application: additional documentation

KYC / Vetting document uploaded successfully! 87232 : Donotinstall KYC test document.docx

Upload Documents Attachments: Donotinstall Ltd

KYC / Vetting Document

File	Choose File no file selected
	Note: Attachments cannot exceed the file size limit of 16 MB.

Description	KYC / Vetting documentation

Label	Expiry Date	Action
Certified Copy ID / Passport / Refugee Docs ▲▼	10/01/2022	Add Label
Certificate of Incorporation	10/01/2022	Delete

Documents Attachments: Donotinstall Ltd

Id	Created	Status	Type	SubType	Name	Description	Labels	×
80	10/Jan/2022	Documents Confirmed	KYC	Composite Document	📄 Donotinstall KYC test document.docx	KYC / Vetting documentation	Certificate of Incorporation	✖
79	10/Jan/2022	Documents Confirmed	KYC	Composite Document	📄 Donotinstall KYC test document.docx	KYC / Vetting documentation	Address	✖
78	10/Jan/2022	Documents Confirmed	KYC	Composite Document	📄 Donotinstall KYC test document.docx	KYC / Vetting documentation	ID	✖

Refresh Close

Click "Close"
Then scroll back down to the bottom of the screen . .

Business application: (3) Create Contract

Payment Method Type*

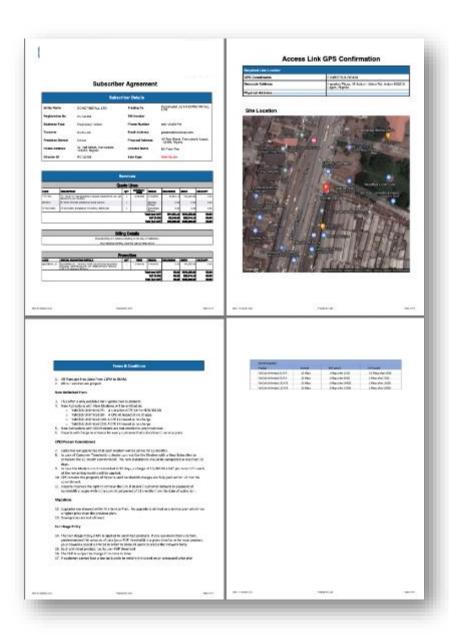### Cash Payment: Select the Checkbox for EFT/Cash Payments.

Check for Cash ☑

KYC Documents*

KYC Documents*   [Upload Documents]

Customer Contract*

Generate Contract   Please capture all customer details before you can download the contract! Click Update Customer, Generate Contract then Proceed.

[Refresh] [Download Quote] [Email Quote] [Update Customer]

Click "Update Customer"

Business application: (3) Create Contract

YahClick
powered by **HUGHES.**

Customer account successfully updated !

✸ Ticket: HL133

CREATE CONTRACT

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	**Category**	New Sale
Create Date	10/Jan/2022 15:17:44	**Last Update**	10/Jan/2022 15:17:44
Customer Name	Donotinstall Ltd	**Primary Contact**	Mr Peter Pan
Service Account	Not Selected	**Account Use**	Organisation
Quote Number	Q39	**Sales Agent**	Me Ellanda Micklethwaite
Last Action	Sales Order logged for quote: Q39. Services: YahClick,Stock Service		
Action to be Taken	• Ensure the customer information has been supplied • Create the contract/proposal agreement for the customer or business		

👤 Business Details

Business Name*	DONOTINSTALL LTD ✓
Trading Name	DONOTINTALL LTD ✓
Business Contact Number*	080123456789 ✓
Gross Monthly Turnover	0.0 ✓
Business Structure*	Proprietary Limited ✓
Premises Ownership*	Owner ✓
Identity Type*	Company Number ✓

Scroll down to the bottom . . .

Business application: (3) Create Contract

Payment Method Type*

Cash Payment: Select the Checkbox for EFT/Cash Payments.

Check for Cash ☑

KYC Documents*

KYC Documents*   [Upload Documents]

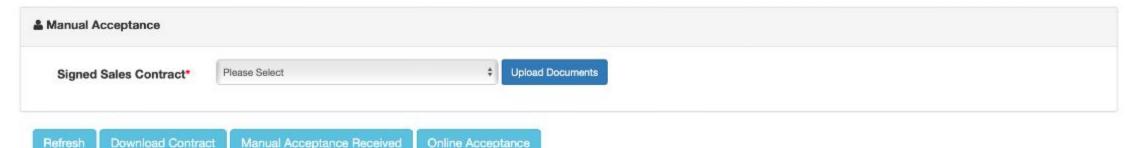| Certificate of Incorporation | 📄 Donotinstall KYC test document.docx |
| Address | 📄 Donotinstall KYC test document.docx |
| ID | 📄 Donotinstall KYC test document.docx |

Customer Contract*

Generate Contract   [Generate Contract]

Click "Generate Contract"

[Refresh] [Download Quote] [Email Quote] [Update Customer] [Proceed]

Business application: (3) Create Contract

Example of Contract

TO NOTE:

If the customer has requested a manual acceptance:
1. **Download the Contract to your desktop**
2. **Print the Contract**
3. **Give the Contract to the customer to sign**
4. **Upload the signed contract (which is covered in "Contract Acceptance"**

Business application: (3) Create Contract

YahClick
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🏠 Payment Method Type*

🏠 Cash Payment: Select the Checkbox for EFT/Cash Payments.

Check for Cash ☑

🏠 KYC Documents*

KYC Documents* **Upload Documents**

Certificate of Incorporation	📄 Donotinstall KYC test document.docx
Address	📄 Donotinstall KYC test document.docx
ID	📄 Donotinstall KYC test document.docx

Customer Contract*

Generate Contract **Generate Contract**

Refresh | **Download Quote** | **Email Quote** | **Update Customer** | **Proceed**

Click "Proceed"

Business application: (3) Create Contract

YahClick powered by HUGHES.

> The contract has been generated successfully

✱ Ticket: HL133

CONTRACT ACCEPTANCE

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	**Category**	New Sale
Create Date	10/Jan/2022 15:17:44	**Last Update**	10/Jan/2022 16:19:12
Customer Name	Donotinstall Ltd	**Primary Contact**	Mr Peter Pan
Service Account	Not Selected	**Account Use**	Organisation
Quote Number	Q39	**Sales Agent**	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal - Create Proposal using the wizard - OR request an electronic acceptance from customer.		

👤 Manual Acceptance

Signed Sales Contract*	Please Select ▲▼	**Upload Documents**

[Refresh] [Download Contract] [Manual Acceptance Received] [Online Acceptance]

Let's recap . . .

We have now:

1. Captured a business customer (created a Lead)
2. Checked service coverage
3. Created a quote
4. Uploaded the required KYC documents
5. Generated a Contract

Now we move on to Contract Acceptance!
The contract can be accepted manually or online.

Let's find your customer first . . . the sequence is always the same:
Search Customer | Open Customer | Open Ticket | Edit Ticket . . .

Contract Acceptance: (4) Find your customer

YahClick
powered by HUGHES

Dashboard
- Dashboard

Customer
- Check Coverage
- Sales **1**
- **Customers**
- Jobs

Administration
- My Details
- Billing
- User Admin

Q Search Customers:

This interface allows you to search for customers based on the criteria specified below.
The search results is limited to **300** accounts.

Account Id   Example: A1

Customer Name   Example: MorClick Ltd

Trading Name   Donotinstall Ltd

Status   Please Select

OR

Site Account Number Example: PRI0000000000

Search

Click "Search"

Contract Acceptance: (4) Find your customer

			Lagos Lagos 100001 Nigeria			
Y10	Sam Donotinstall	Person	40 Test Street Test Suburb Lagos 123456 Nigeria	Inactive Account		0.00
Y11	Cobusplay Three	Person	Box33 Lekki Lagos 123123 Nigeria	Active Account		1,079,612.50
Y12	Bobs Berries	Organisation	2 Blue Lagos Lagos 100001 Nigeria	Active Account		-369,000.00
Y13	Chocolate Factory	Organisation	2 Steel Street Lagos Lagos 100001 Nigeria	Inactive Account		-369,000.00
Y14	Nick Donotinstall	Person	Flat Number 6 35 Ogundana Street Phase 10 Allen Adamawa 100001 Nigeria	Active Account		0.00
Y15	DONOTINSTALL LTD	Organisation	42 Test Street Test suburb Lagos 123456 Nigeria	Prospect		0.00

Sidebar navigation:

Dashboard
- Dashboard

Customer
- Check Coverage
- Sales 1
- Customers
- Jobs

Administration
- My Details
- Billing
- User Admin
- Logout

Me Ellanda Micklethwaite
Signed In: 11/Jan 09:17

Click on the Customer Name

Contract Acceptance: (4) Find your customer

Contract Acceptance: (4) Find your customer

Click "Open Ticket"

Contract Acceptance: (4) Find your customer

Contract Acceptance: (4) IF Manual Acceptance

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⚙ Ticket: HL90

CONTRACT ACCEPTANCE

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	**Category**	New Sale
Create Date	5/Jan/2022 15:50:27	**Last Update**	6/Jan/2022 11:12:48
Customer Name	Sam Donotinstall	**Primary Contact**	Mr Sam Donotinstall
Service Account	Not Selected	**Account Use**	Person
Quote Number	Q23	**Sales Agent**	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal • OR request an electronic acceptance from customer.		

Upload the manual signed customer contract here

👤 Manual Acceptance

Signed Sales Contract* | Please Select ▾ | **Upload Documents**

Click "Upload Documents" to upload the signed contract

Refresh | Download Contract | **Manual Acceptance Received** | Online Acceptance

Once the signed contract has been uploaded – click "Manual Acceptance Received"

We now await Head Office approval – the sales process part is complete!!

Sidebar
Dashboard
- 📊 Dashboard

Customer
- 📍 Check Coverage
- 🖲 Sales **1**
- 👥 Customers
- 📅 Jobs

Administration
- 📑 My Details
- 💳 Billing
- 👤 User Admin
- ➡ Logout

Contract Acceptance: (4) IF Manual Acceptance

Contract Acceptance: (4) IF Manual Acceptance

YahClick
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Dashboard

📊 Dashboard

Customer

📍 Check Coverage

💳 Sales ③

👥 Customers

📅 Jobs

Administration

📑 My Details

💳 Billing

👤 User Admin

➡ Logout

🔒 Mr Trainingten Training
Signed In: 23/Feb 13:46

Sales Contract* — Signed sales contract for order (Contact.pdf) ⌄ **Upload Documents**

KYC Documents* — **Upload Documents**

| ID Address | 📄 Proof of address.docx |
| ID | 📄 ID.docx |

I confirm reviewing and verifying the KYC documents ☑

> Tick here to confirm KYC has been loaded

Special Instructions

Location — 5.5696889,5.7465764 **View Map**

Product — YahClick Unlimited 150 Quarterly Charged

Default To Primary Contact ☑

> Tick here to fill in contact details for the order

Contact First Name* — Test

Contact Last Name* — Test

Email Address* — Test

Day Phone Number* — Test

Night Phone Number

Contract Acceptance: (4) IF Manual Acceptance

Business application: (4) IF Online Acceptance

The contract has been generated successfully

✱ Ticket: HL133   CONTRACT ACCEPTANCE

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	**Category**	New Sale
Create Date	10/Jan/2022 15:17:44	**Last Update**	10/Jan/2022 16:19:12
Customer Name	Donotinstall Ltd	**Primary Contact**	Mr Peter Pan
Service Account	Not Selected	**Account Use**	Organisation
Quote Number	Q39	**Sales Agent**	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal • Create Proposal using the wizard • OR request an electronic acceptance from customer.		

👤 Manual Acceptance

Signed Sales Contract*   Please Select ▼   Upload Documents

Refresh   Download Contract   Manual Acceptance Received   Online Acceptance

To request an online acceptance
Click "Online Acceptance" this will take you to the email that will be sent to the customer as shown on the next slide . . .

Business application: (4) Request online acceptance

YahClick
powered by HUGHES.

Online Acceptance For: Y15:DONOTINSTALL LTD

[Request Online Acceptance] [Refresh]   [Close]

Select the customer contact from the list and click 'Email Quote' to send the email.

👤 Email Message

From	Contact:Me Ellanda Micklethwaite
To	peter@donotinstall.com [Edit]
Subject	Yahclick Nigeria: Q39 Contract Acceptance Request for DONOTINSTALL LTD

Contents

Dear Mr Peter Pan,

Your ___xxx___ contract is ready for consideration and acceptance.

Please CLICK HERE to be directed to our _____ online acceptance platform for quote number: Q39.

If you have selected an unlimited product we want to draw your attention to the _____ FUP (Fair Use Policy) that relates to the speed of the package you have selected as per the _____ Terms and Conditions:

Downlink speeds			
Product	Normal	FUP Level 1	FUP Level2
Unlimited 25 AY3	25 Mbps	1 Mbps after 25GB	0.5 Mbps after 30GB
Unlimited 50 AY3	25 Mbps	5 Mbps after 50GB	1 Mbps after 75GB
Unlimited 100 AY3	25 Mbps	5 Mbps after 100GB	1 Mbps after 120GB
Unlimited 150 AY3	25 Mbps	5 Mbps after 150GB	1 Mbps after 200GB

Kind regards,

Click "Request Online Acceptance"

Business application: (4) Request online acceptance

YahClick
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Online Acceptance For: Y15:DONOTINSTALL LTD

Close

Online Acceptance request successfully actioned!

👤 **Email Message**

From	Contact:Me Ellanda Micklethwaite	
To	peter@donotinstall.com	Edit
Subject	Yahclick Nigeria: Q39 Contract Acceptance Request for DONOTINSTALL LTD	

Contents

Dear Mr Peter Pan,

Your I xxx   contract is ready for consideration and acceptance.

Please **CLICK HERE** to be directed to our   online acceptance platform for quote number: Q39.

If you have selected an unlimited product we want to draw your attention to the   FUP (Fair Use Policy) that relates to the speed of the package you have selected as per the   Terms and Conditions:

Downlink speeds			
Product	Normal	FUP Level 1	FUP Level2
Unlimited 25 AY3	25 Mbps	1 Mbps after 25GB	0.5 Mbps after 30GB
Unlimited 50 AY3	25 Mbps	5 Mbps after 50GB	1 Mbps after 75GB
Unlimited 100 AY3	25 Mbps	5 Mbps after 100GB	1 Mbps after 120GB
Unlimited 150 AY3	25 Mbps	5 Mbps after 150GB	1 Mbps after 200GB

Kind regards,

You have now emailed the customer requesting an online acceptance. Click "Close"

Contract Acceptance: (4) Check Online Acceptance

Check if your customer has signed the ONLINE ACCEPTANCE
Search Customer | Open Customer | Open Ticket | Edit Ticket . . .

Yes! The customer has returned the online acceptance!!
The green blocks indicate the actions that have been completed

We now await Head Office approval – the sales process part is complete!!

Head Office approves the Contract

Ticket: HL133		
Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION	
Status	Open	Category	New Sale
Create Date	10/Jan/2022 15:17:44	Last Update	11/Jan/2022 11:57:19
Customer Name	Donotinstall Ltd	Primary Contact	Mr Peter Pan

Dashboard
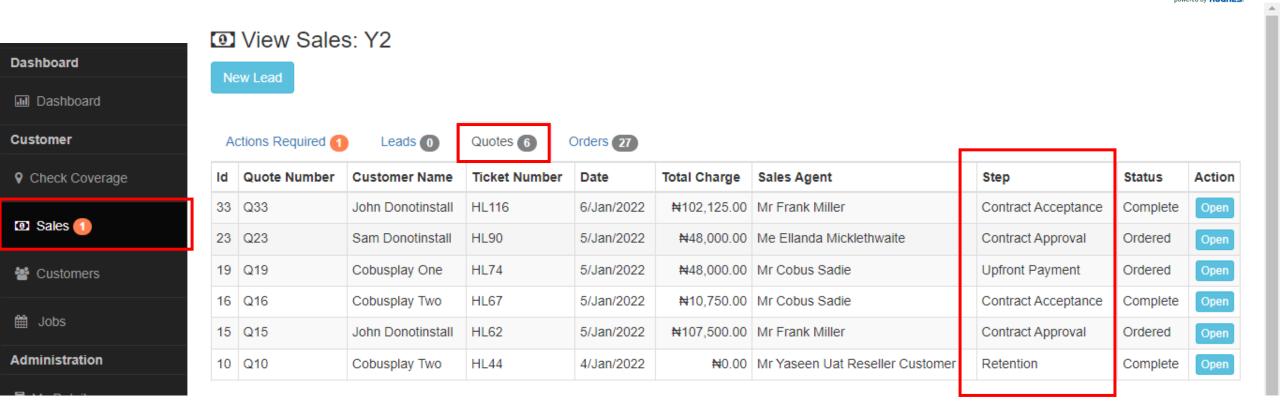- Dashboard

Customer
- Check Coverage
- Sales ①

When Head Office approves the contract - they send an email is sent to the customer

advising the customer of:

1. The upfront payment required for the requested service

2. The attached proforma invoice for the upfront payment

3. The order will not be completed until the customer has made the upfront payment

How to check the status of pending customers

YahClick powered by HUGHES.

View Sales: Y2

New Lead

Actions Required **1**   Leads **0**   Quotes **6**   Orders **27**

Id	Quote Number	Customer Name	Ticket Number	Date	Total Charge	Sales Agent	Step	Status	Action
33	Q33	John Donotinstall	HL116	6/Jan/2022	₦102,125.00	Mr Frank Miller	Contract Acceptance	Complete	Open
23	Q23	Sam Donotinstall	HL90	5/Jan/2022	₦48,000.00	Me Ellanda Micklethwaite	Contract Approval	Ordered	Open
19	Q19	Cobusplay One	HL74	5/Jan/2022	₦48,000.00	Mr Cobus Sadie	Upfront Payment	Ordered	Open
16	Q16	Cobusplay Two	HL67	5/Jan/2022	₦10,750.00	Mr Cobus Sadie	Contract Acceptance	Complete	Open
15	Q15	John Donotinstall	HL62	5/Jan/2022	₦107,500.00	Mr Frank Miller	Contract Approval	Ordered	Open
10	Q10	Cobusplay Two	HL44	4/Jan/2022	₦0.00	Mr Yaseen Uat Reseller Customer	Retention	Complete	Open

Sidebar menu:
- Dashboard
  - Dashboard
- Customer
  - Check Coverage
  - Sales **1**
  - Customers
  - Jobs
- Administration

On this menu under "Quotes" you can view and check the status of the quote (sale in progress) for all your customers:

- Waiting for Contract Acceptance from customer

- Waiting for Contract Approval from Head Office

- Waiting for Upfront Payment from the customer

There are 2 ways to check if the customers upfront payment has been received?

OPTION 1: Search Customer | Open Customer | Open Ticket | Edit Ticket . . .

YES!!! The green block indicated the action is complete – the customer has paid the upfront payment!

We now need to Schedule the installation for our customer!

There are 2 ways to check if the customers upfront payment has been received?

OPTION 2: Click on the JOBS menu – and go to "Installation Tickets"

YES!!! DONOTINSTALL LTD is waiting for Installation – which means he has paid the upfront payment we are good to go . . . We now need to Schedule the installation for our customer!

Schedule the job: (5) **for installation**

Click "Create Job"

Schedule the job: (5) for installation

Click "Create Job"

Schedule the job: (5) for installation

YahClick
powered by **HUGHES.**

⬚ Create New Job:

Complete the form below to create a new job in the system.

Job has been successfully created!

❷ Customer Details

Customer ★	Y15:DONOTINSTALL LTD ▼	Select the customer against which this job will be logged.
Order	X39:Provisioning	

❷ Site Details

Contact Name ★	Peter Pan	Enter the on-site contact's name.
Contact Mobile Number ★	08012345678	Enter the on-site contact's mobile number.
Contact Email Address ★	peter@donotinstall.com	Enter the on-site contact's email address.
Site Physical Address ★	42 Test Street, Test suburb, Lagos, 123456, Nigeria	The physical address of the site.
Site GPS Location ★	6.5744151,3.3732207 ⚑ Open Map	The GPS location of the site.
Site Region ★	Lagos	Region of the site.

❷ Job Details

Scroll down and click "Continue"

Schedule the job: (5) for installation

YahClick
powered by HUGHES.

⬚ Schedule Job: HL140-1-1

Follow the steps below and click 'Schedule Job'.

3. Click-and-drag a time slot for this job

1. Select an Engineer

Select	Engineer	Legend	Show
⬤	Mr Cobus Sadie		☑
○	Mr Frank Miller		☐
○	Mr Anthony Stone		☐

< > today   **Jan 9 - 15, 2022**   month | week | day

	Sun 1/9	Mon 1/10	Tue 1/11	Wed 1/12	Thu 1/13	Fri 1/14	Sat 1/15
6am							
7am							
8am							
9am						9:00 - 10:30 Install - Hardware	
10am						=	
11am							
12pm							
1pm							
2pm							
3pm							
4pm			4:00 - 5:4:00 - 5				

2. Confirm Job Details

Type	On Site Callout - Install - Hardware
Address	42 Test Street, Test suburb, Lagos, 123456, Nigeria
Contact*	Peter Pan
Customer Name	DONOTINSTALL LTD
Phone*	08012345678
Email*	peter@donotinstall.com
Confirmation	Send Email+S ⬍
Instructions	Job Type: Installation - Installation SLA: Standard Under Warranty: Not Specified Bill Customer: Pending Callout

Scroll down and click "Schedule Job"

Schedule the job: (5) for installation

YahClick
powered by **HUGHES.**

Schedule Job: HL140-1-1

Follow the steps below and click 'Schedule Job'.
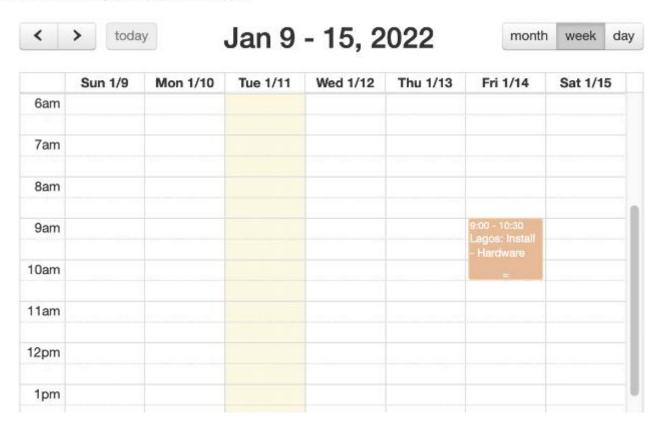
Job was successfully scheduled.

1. Select an Engineer

Select	Engineer	Legend	Show
●	Mr Cobus Sadie		☑
○	Mr Frank Miller		☐
○	Mr Anthony Stone		☐

2. Confirm Job Details

Type	On Site Callout - Install - Hardware
Address	42 Test Street, Test suburb, Lagos, 123456, Nigeria
Contact*	Peter Pan

3. Click-and-drag a time slot for this job

< > today   **Jan 9 - 15, 2022**   month | week | day

	Sun 1/9	Mon 1/10	Tue 1/11	Wed 1/12	Thu 1/13	Fri 1/14	Sat 1/15
6am							
7am							
8am							
9am						9:00 - 10:30 Lagos: Install - Hardware	
10am							
11am							
12pm							
1pm							

Scroll down and click "Continue"

Schedule the job: (5) for installation

YahClick powered by **HUGHES**

Refresh

Scheduling Required (5)

	Ticket Number	Customer	Job Type	Job Status	Contact Name	Contact Number	Contact Email	Address
Create Job	HL48-1	Vernon Donotinstall		Not Scheduled				
Create Job	HL72-1	Cobusplay Two		Not Scheduled				
Create Job	HL46-1	Cobusplay Two		Not Scheduled				
Create Job	HL20-1	Cobusplay Two		Not Scheduled				
Create Job	HL114-1	Bobs Berries		Not Scheduled				

Dashboard
- Dashboard

Customer
- Check Coverage
- Sales ①
- Customers
- Jobs

Administration
- My Details
- Billing
- User Admin
- Logout

Queued Jobs (2)

	Ticket Number	Customer	Job Type	Job Status	Contact Name	Contact Number	Contact Email	Address
Open	HL63-1-1	Jon Donotinstall	Installation	Requires Sign-Off	Jon Donotinstall	08012345678	abc@abc.com	Test Street 1, Abcd, Lagos, 123456, Nigeria
Open	HL117-1-1	Sam Donotinstall	Installation	Assigned to Contractor Person	Sam Donotinstall	08012345679	asd@asd.com	40 Test Street, Test Suburb, Lagos, 123456, Nigeria

If you wish at any time to know what the status is of the installation – always refer to Queued Jobs for the Job status i.e.
- **Assigned to Contractor Person – in Installation queue**
- **In progress – installation in progress**
- **Requires Sign-Off – the installation is complete and awaiting Head Office sign-off**

To recap we completed the following steps from start to finish:

1. Captured a customer

2. Checked service coverage

3. Created a quote

4. Uploaded the required KYC documents

5. Generated a Contract

6. Completed a manual signed acceptance or requested an online contract acceptance & checked the status

7. Checked the status for Head Office approval

8. Checked the status for the upfront payment from the customer

9. Scheduled and booked the customer installation

WELL DONE! YOU HAVE COMPLETED A BUSINESS APPLICATION