SOLID DEALER PORTAL REFERENCE GUIDE





Dealer Training



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



- 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



| □ - < > | | | 0 | 🔒 yahclickng- | test.soliditech.com | | C | ① + 器 |
|----------------|-------|---------------|---------------------|------------------------------|----------------------------------|------------------------|------------------------------------|--------|
| Dashboard | New I | iew Sales: Y: | | <mark>cking 'New Leac</mark> | <mark>l' you create a nev</mark> | w custome | • | |
| Customer | Actio | ns Required 🕥 | Leads O Quotes S | Orders (17) | | | | |
| Check Coverage | ld | Ticket Number | Customer Name | Sales Agent | Current Step | Create Date | Action Description | Action |
| (D) Sales (1) | 24 | HL25-1-2 | Vernon Donotinstall | Mr Web Api | Invoice Customer | 3/Jan/2022 15:20:53 | Capture and Process Customer Order | Open |
| 👹 Customers | | | | | | | | |
| 🛱 Jobs | | | | | | | | |
| Administration | | | | | | | | |
| Ny Details | | | | | | | | |
| Billing | | | | | | | | |
| 🚨 User Admin | | | | | | | | |
| G Logout | | | | | | | | |
| | | | | | | | | |

Business application: (1) Capture Organisation details



| 20.000 | New Lead | | | | | |
|------------------|-------------------------------------|---|-----------------------|---|--|-------------------|
| Dashboard | Please enter the details for the le | ad click 'Create Lead' | | | | |
| Jashboard | (| | | | | |
| Customer | Account Details | | | | | |
| 9 Check Coverage | Account Use* | Organisation | • (ئر | Choose 'Organisation' fr | om the drop-down box | |
| 🖾 Sales | Business Name* | Enter the customer's company Please enter the business name | name X | | | |
| 🔮 Customers | Trading Name | Enter the business trading nam | e 🗸 | | | |
| 📛 Jobs | Business Contact Number* | | × | | | |
| Administration | Number | | _ | | and foremation draw drawn have | |
| 🖺 My Details | Identity Type* | Select | 4 | Lnoose Company Num | per' from the drop-down box | |
| 🖶 Billing | Identity Number* | Business Registration r unber l | f avaliable o.g R 🖌 🕨 | The business registration | n # format is always RC + 6 digits | |
| 🛔 User Admin | A Primary Contact | | | | | |
| 🍽 Logout | Full Name* | Select × | First Name e.g Jon | Last Name e.g Andrews × Enter the last name | | |
| | Email* | Enter contact email address e.g Please enter the email address | j. info@mybiz.co 🗙 | | | |
| | Mobile Contact Number | Mobile Number with no punctua Please enter the mobile number | ation e.g. 07012 🗙 | | It is important to note that the f in red are mandatory | ieids nighlighted |
| | Work Contact Number | Work Number with no punctuat | ion e.g. 094614(🗸 | | Enter the required information - | - see example or |
| | Employer Name | Enter the employer name e.g. N | AorClick | | next slide | |



| Dashboard | I New Lead | |
|--|---|-------------------|
| | Please enter the details for the lead click 'Create Lead' | |
| Dashboard | Account Details | |
| Customer | | |
| Check Coverage | Account Use* Organisation | |
| 9) Sales 🕥 | Business Name* DONOTINS TALL LTD 🗸 | |
| 🚰 Customers | Trading Name DONOTINTALL LTD | |
| 🛗 Jobs | Business Contact Number | |
| Administration | Identity Type* Company Number 🗸 👙 | |
| 🖒 My Details | Identity Number* RC123456 | |
| 🗄 Billing | | |
| 🕹 User Admin | & Primary Contact | |
| + Logout | Full Name* Mr 🗳 Peter 🗸 Pan 🗸 | |
| | Email* peter@donotinstall.com ✓ | |
| Me Ellanda Micklethwaite Igned In: 10/Jan 13:09 | Mobile Contact Number 080123456789 | |
| | Work Contact Number 080123456789 | |
| | Employer Name DONOTINSTALL LTD | |
| | Job Title CEO 🗸 | |
| | Scroll down to complete the P | ostal Address sec |

| Yah Click [×] |
|-------------------------------|
| powered by HUGHES. |

| Dashboard | A Primary Contact | |
|---|------------------------|--|
| Jashboard | Euli Namat | Mr 📌 Peter 🗸 Pan 🗸 |
| Customer | Full Name* | |
| Check Coverage | Email* | peter@donotinstall.com 🗸 |
| Sales (1) | Mobile Contact Number | 080123456789 |
| | Work Contact Number | 080123456789 |
| Customers | Employer Name | DONOTINSTALL LTD |
| 🛱 Jobs | Job Title | CEO |
| Administration | | |
| Ny Details | 希 Postal Address | |
| 🖃 Billing | | |
| | Address Line1* | 42 Test Street 🗸 |
| 🛓 User Admin | Address Line2 | Secondardy Address line e.g. Fatai Arobieke Street 🗸 |
| 🗭 Logout | Address Suburb* | Test suburb |
| | Closest City* | Lagos |
| ■ Me Ellanda Micklethwaite Signed In: 10/Jan 13:09 | State * | Lagos 🔻 |
| | Country* | Nigeria 🗸 |
| | Postal Code* | 123456 🕀 👁 🗸 |
| | | Once all fields have been completed |
| | Create Lead Reset Back | click 'Create Lead' |

| shbard shbard t Dashbard stomer Check Coverage & Account Use* Check Coverage & Account Use* Business Name* DONOTINSTALL LTD Trading Name DONOTINSTALL LTD Business Contact Number* Number* Identity Type* Company Number* Identity Type* Identity Number* | |
|--|--|
| hboard Dashboard bomer Check Coverage Account Use* Business Name* DONOTINSTALL LTD Trading Name DONOTINSTALL LTD Jobs Business Contact Number* Identity Type* Campany Number* RC123466 | |
| Solver age Account Use* Organisation Sales () Subiness Name* DONOTINSTALL LTD Customers Trading Name DONOTINSTALL LTD Subiness Contact Number* Inistration Identity Type* Company Number* | |
| Account Use* Organisation Sales Image: Construction of the second s | |
| Sales O Business Name* Customers Trading Name Jobs Business Contact Number* 080123456789 Number* Company Number | |
| Customers Trading Name Jobs Business Contact Number* 080123456789 Number* 080123456789 Number* Company Number My Details Identity Type* Billing | |
| Jobs Jobs Business Contact Number* Identity Type* Company Number Billing | |
| Jobs Number* ministration Identity Type* My Details Identity Number* Billing | |
| My Details Identity Type* Company Number RC123456 | |
| Billing | |
| | |
| User Admin & Primary Contact | |
| | |
| Logout Full Name* Mr 🖈 Peter 🗸 Pan 🗸 | |
| Email* peter®donotinstall.com 🗸 | |
| ed In: 10/Jan 13:09 Mobile Contact Number | |
| Work Contact Number 080123456789 | |
| Employer Name DONOTINSTALL LTD 🗸 | |
| Job Title CEO 🗸 | |

Yah

| | A Primary Contact | | | |
|----------------|------------------------------------|-------------------------------|-------|------------------|
| Dashboard | Full Name* | A Peter V | Pan 🗸 | |
| Dashboard | Email* peter@donotinstall.com | n 🗸 | | |
| Customer | Mobile Contact Number 080123456789 | ~ | | |
| Check Coverage | Work Contact Number 080123456789 | ~ | | |
| 🖸 Sales 🕦 | Employer Name DONOTINSTALL LTD | ~ | | |
| 🚰 Customers | Job Title CEO | ~ | | |
| 🛗 Jobs | | | | I |
| Administration | # Postal Address | | | |
| 🖺 My Details | Address Line1* 42 Test Street | | ~ | |
| 🖽 Billing | | ne e.g. Fatai Arobieke Street | ~ | |
| 🛓 User Admin | Address Suburb* Test suburb | | ~ | |
| G+ Logout | Closest City* Lagos | | ~ | |
| | State * Lagos | | • | |
| | Country* Nigeria | | * | |
| | Postal Code* 123456 | | | |
| | Continue Back | | | |
| | | | | Click 'Continue' |



| ashboard | Customer Y15 - DONOT | INSTALL LTD < | | The new customer has been created |
|--|---|-------------------|-------------------------|--|
| M Dashboard | Refresh Edit Account | | | |
| Customer | Account Contacts ① Debtors ① | Documents 💿 | | |
| Check Coverage | Account Id | Y15 | Status | Lead |
| | Account Type | Organisation | Date Registered | 10/Jan/2022 |
| D Sales | Sales Agent | Mr Web Api | Invoice Delivery | Gets Invoice |
| Gustomers | Customer Name | Donotinstall Ltd | Address | 42 Test Street Test suburb 123456 Nigeria |
| dministration | Primary Contact | Mr Peter Pan | Email Address | peter@donotinstall.com |
| ት My Details | Phone Number | 080123456789 | Registration Number | RC123456 |
| | Gross Monthly Turnover | N0.00 | Employer | DONOTINSTALL LTD |
| B Billing | Job Title | Ceo | Employee Service Length | Not Applicable |
| User Admin | Birth Date | Not Specified | Nigerian Citizen | No |
| + Logout | Resident Status | Not Applicable | | |
| | Quotes (0/0) Tickets (0/0) Orders | a/o) Services a/o | | ★ |
| Me Ellanda Micklethwaite igned In: 10/Jan 13:09 | New Quote | | We now r | nove on to the next step i.e. check coverage generate a Quote - Click 'New Quote' |
| | No Date Status | Created By | | |
| | No quotes have been generated for this custon | ner. | | |



| New Quote Please enter the details for | the order click 'Create Quote' | | |
|--|--|---------------------|--|
| Seps Location | | | |
| Locatio | 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 | | |





Service Coverage Checker:





| Q Location De | tails | | |
|---------------|---|------|------------------------|
| Address | Irepedun Plaza, 45 Ikotun - Idimu Rd, Ikotun 102213, Lagos, Nigeria | | |
| Latitude | 6.5499769 | N \$ | |
| Longitude | 3.2684930 | E | |
| Capture Coc | ordinates Plot Coordinates Search for Address Check Coverage | | Click 'Check Coverage' |

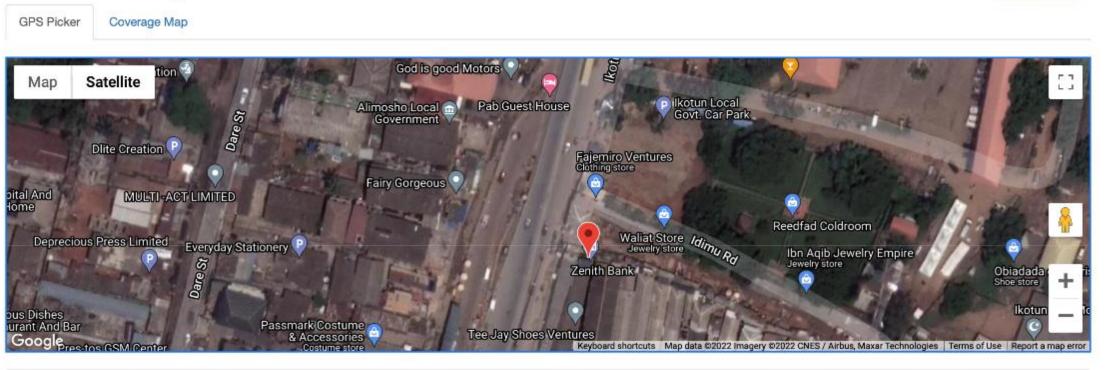
| | | | | - | (|
|-----------------------|-----------|---------------|-----------------------|--------------|--------------------|
| Service Coverage De | etails | | | | |
| Latitude | 6.5499769 | | Longitude | 3. | 268493 |
| Coverage Status | AVAILABLE | ← | | | |
| Lookup Response | Thank You | ! Your reque: | st has been successfu | ully execute | ed. Code PIM 10000 |
| | | | | | |
| Transport Info: Jupit | er | | | | |
| Beam Id | 114 | | Satellite Id | Aľ | Yah-3 |
| Min Antenna Size | 0.74 | | Min ODU Power | 1.0 | D |
| Availability | AVAILABLE | | Business Availabili | ity 🔼 | VAILABLE |
| SLVT Parameters: | | | | | |
| Antenna Size | | ODU Pow | er | Availabi | lity |
| .74 | | 1 | | 99 | |
| | | | | | |
| Transport Info: Jupit | | | | | |
| Beam Id | 57 | | Satellite Id | Y1 | |
| Min Antenna Size | 0.74 | | Min ODU Power | 1.0 | |
| Availability | AVAILABLE | | Business Availabil | ity 🔺 | VAILABLE |
| SLVT Parameters: | | | | | |
| Antenna Size | | ODU Powe | er | Availabi | lity |
| .9 | | 1 | | 99 | |
| | | | | | |

YahClick



Service Coverage Checker:





| Q Location Det | tails | | |
|----------------|---|-----------------------------|----|
| Address | Irepedun Plaza, 45 Ikotun - Idimu Rd, Ikotun 102213, Lagos, Nigeria | | |
| Latitude | 6.5499769 | N | \$ |
| Longitude | 3.2684930 | E | \$ |
| Capture Coo | rdinates Plot Coordinates Search for Address Check Coverage | Click 'Capture Coordinates' | |



| & GPS Location | | |
|--|--|---|
| Lo | cation * 6.5499769,3.268493 | The exact location has now been pin-pointed and is automatically entered |
| Product Selection Service Plan* Hardware* Travel Fee VAS | SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000 HARDWARE: HT2000: HT2000 (NGN0.00) T-000-060K: Installation Travelling 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 | N0.00 |
| Installation Travelling | ₩0.00 | N 0.00 |
| Total | ₩48,000.00 | ₩369,000.00 |



Click 'Create Quote'



| New Quo | te |
|--------------------|--|
| Quote Created Succ | essfully |
| CPS Location | |
| Lo | 6.5499769,3.268493 Open Map |
| Product Selection | |
| Service Plan* | SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000 |
| Hardware* | HARDWARE: HT2000 (NGN0.00) |
| Travel Fee | IT-000-060K: Installation Travelling |
| VAS | No Value Added Services Configured For This Dealer |
| | Add VAS Product |
| | |

| 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 | N 0.00 | N 0.00 | |
| Total | ₩48,000.00 | N369,000.00 | Scroll down & click 'Cor |



| 🖬 Quo | te: Q39 | | | | Prospect | Quote Subscriber Details Suisty Name DONOTINGTALL LTD Treating As Donoting Ind 1.4 DONOTINGTAL |
|-------------|-------------------------|------------------|---------------|----------|--------------------------------|---|
| Customer N | ame | Donotinstall Ltd | Quote Status | Complete | 1 | Registration No. 10222436 TNN Number Restricts Tape Phone Number 00012246780 |
| Quote Numb | ber | Q39 | Quote Date | 10/Jan/2 | 2022 | Dumaneer HSM 0: 20 Eanal Address policy Science Scienc |
| licket Numb | ber | HL133 | Ticket Status | Open | | Director ID 11:12:5578 Balls Type New Guards |
| .ine | Description | | | | Total | Services Quote Lines DIS 1900/FDS 1900 Proces and 1910 Proces and 1910 Proces |
| | YTTtest Quarterly Cha | arged | | | 48,000.00 | YTTEET YTTEET< |
| | HT2000 | | | | 0.00 | Tension Viti Bendini Bandini Uri (2008) Bandini Tension Viti Bandini Tension Viti Bendini Records |
| | Installation Travelling | | | | 0.00 | Billing Details Passes Integrate and the an experimental and the analysis of |
| | | | | ſ | | |
| | | | | | "Download Quote" to s Quote | want a copy of the quote – click ave to your desktop or click "Em " to the customer ated – now generate the Contract |
| | L | | | | | ck 'Open Ticket'. |

On the next screen click 'Edit Ticket'.



Ticket: HL133

| Steps | $ \begin{array}{c} \hline \textbf{CREATE QUOTE} \rightarrow \textbf{CREATE CONTRACT} \rightarrow \textbf{CONTRACT ACCEPTANCE} \rightarrow \textbf{PENDING ELECTRONIC ACCEPTANCE} \rightarrow \textbf{PENDING ONLINE ACCEPTANCE} \rightarrow \textbf{CAPTURE ORDER} \rightarrow \textbf{CONTRACT APPROVAL} \rightarrow \textbf{UPFRONT PAYMENT} \rightarrow \textbf{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 I Create the contract/proposal agree | | | | |

& Business Details

| Business Name* | DONOTINSTALL LTD | ~ |
|--------------------------|--|------|
| Trading Name | DONOTINTALL LTD | × |
| Business Contact Number* | 080123456789 | ~ |
| Gross Monthly Turnover | 0.0 | 0 🗸 |
| Business Structure* | Select Please select the business structure | x # |
| 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

CREATE CONTRACT

0.0

Owner

Proprietary Limited

Company Number

RC123456

Gross Monthly Turnover

Business Structure*

Premises Ownership*

Identity Type*

Identity Number*



Ticket: HL133

| Steps | A REAL PROPERTY OF A READ PROPERTY OF A REAL PROPER | and the second se | → CONTRACT ACCEPTANCE → PENDING ELECT DVAL → UPFRONT PAYMENT → DEPLOY SOLUTION | | ightarrow pending online acceptance $ ightarrow$ |
|--------------------|--|---|---|------------|--|
| 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 logg | ed for quote: Q39. S | Services: YahClick,Stock Service | | |
| Action to be Taken | | stomer information h stract/proposal agree | as been supplied ement for the customer or business | | |
| Business Details | | | | | |
| | Business Name* | DONOTINSTALL LT | D | v] | |
| | Trading Name | DONOTINTALL LTD | t. | ~ | |
| Bu | siness Contact Number* | 080123456789 | | ~ | |

14

V#

V#

0 1

~

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

CREATE CONTRACT



| imary Contact: Mr Peter Pan | | |
|---|--|----|
| Identity Type * | Company Number | |
| Identity Number* | RC123456 | |
| Employer Name* | DONOTINSTALL LTD | ~ |
| Job Title* | Ceo | ~ |
| Address Line1* | 42 Test Street | ~ |
| Address Line 14 | 42 Test Street | 2] |
| | Secondardy Address line e.g. Fatal Arobieke Street | ~ |
| Address Line? Address Suburb* | Secondardy Address line e.g. Fatal Arobieke Street | |
| Address Line2 | C | ~ |
| Address Line2 Address Suburb* | Test suburb | |
| Address Line2 Address Suburb* Closest City* | Test suburb Lagos | |



| Physical Address | | |
|---|--|---|
| Same As Postal | ∅ ◀ | If the Physical Address is the same as the Postal Address – tick the box |
| Address Line1* | 42 Test Street | ~ |
| Address Line2 | Secondardy Address line e.g. Fatal Arobieke Street | ✓ |
| Address Suburb* | Test suburb | × |
| Closest City* | Lagos | ✓ |
| State* | Lagos 🗸 🕏 | |
| Country* | Nigeria | ٩. |
| Physical Code* | 123456 2 | |
| Payment Method Type* | | |
| A Cash Payment: Select the Checkbox for EFT/Cash Payn | nents. | |
| Check for Cash | | Make sure the "Check for Cash" box is ticked. |
| KYC Documents* | | |
| | | |



| Upload Documer | nts Attachments: | Donotinstal | l Ltd | | | | | |
|---|--------------------------|-------------|-----------------------|--|--------------------------------|----------|---|-----|
| KYC / Vetting Doc | ument | | | | | | | |
| File | | | stalltest docur | nent le size limit of 16 MB. | | | Upload the required KYC document. Assign the relevant label. | |
| Description | KYC / Ve | tting docum | entation | | | | Click "Upload KYC / Vetting Documen | lt" |
| Label | | | | Expiry Date | Actio | n | | |
| / Certified Copy II Proof of Address | D / Passport / Refu s | gee Docs | | \$ 10/01/2022 | Ad | id Label | | |
| Certificate of Inc | orporation | | | | | | Don't forget the additional KYC document r for a Business application – see example on | |
| Documents Attack | nments: Donotinsta | ıll Ltd | | | | | slide | |
| ld Created | Status | Туре | SubType | Name | Description | Labels | × | |
| 79 10/Jan/2022 | Documents Confirmed | KYC | Composite Document | Donotinstall KYC test document.docx | KYC / Vetting documentation | Address | | |
| 78 10/Jan/2022 | Documents | KYC | Composite | Donotinstall KYC test document.docx | KYC / Vetting documentation | ID | | |

Refresh Uploed KYC / Vetting Document Close

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 |

| Doc | uments Attach | ments: Donotinst | all Ltd | | | | | |
|-----|---------------|------------------------|---------|-----------------------|--|--------------------------------|---------------------------------|---|
| ld | Created | Status | Туре | 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 | × |



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



| A Payment Method Type* | |
|--|---|
| 希 Cash Payment: Select the Checkbox for EFT/Cash Payme | nts. |
| Check for Cash | |
| | |
| 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 Custor | er |

Click "Update Customer"

Business application: (3) Create Contract



Customer account successfully updated !

Ticket: HL133

CREATE CONTRACT

| Steps | CREATE QUOTE | | | ONIC ACCEPTANCE \rightarrow PENDING ONLINE ACCEPTANCE \rightarrow |
|--------------------|--------------------------------|--|---|---|
| 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 log | ed for quote: Q39. Ser | vices: YahClick,Stock Service | |
| Action to be Taken | | stomer information has htract/proposal agreem | been supplied ent for the customer or business | |
| & Business Details | | | | |
| | | | | |
| | Business Name* | DONOTINSTALL LTD | | ✓ |
| | Business Name* Trading Name | DONOTINSTALL LTD | | ✓ ✓ |
| | | | | ✓ ✓ ✓ |
| | Trading Name | DONOTINTALL LTD | | ✓ |

Premises Ownership*

Identity Type* Company Number

Owner

1\$

14

Scroll down to the bottom . . .

ID



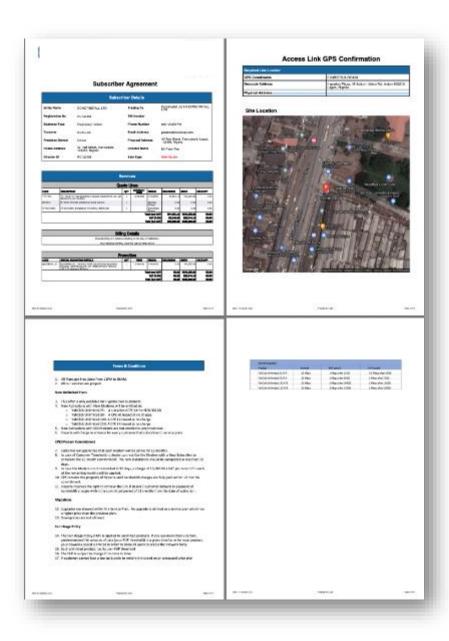
| A Payment Method Type* | | | |
|---|------------------------------|-------------------------------------|--|
| A Cash Payment: Select the Checkbox for EFT/Cash Paym | nents. | | |
| Check for Cash | 8 | | |
| # KYC Documents* | | | |
| KYC Documents* | Upload Documents | | |
| | Certificate of Incorporation | Donotinstall KYC test document.docx | |
| | Address | Donotinstall KYC test | |



Donotinstall KYC test

document.docx





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"

ID



| A Payment Method Type* | | | |
|---|---------------------------------|-------------------------------------|--|
| A Cash Payment: Select the Checkbox for EFT/Cash Payr | ments. | | |
| Check for Cash | • | | |
| ∯ KYC Documents* | | | |
| KYC Documents* | Upload Documents | | |
| | Certificate of Incorporation | Donotinstall KYC test document.docx | |
| | Address | Donotinstall KYC test | |

document.docx

document.docx

Donotinstall KYC test



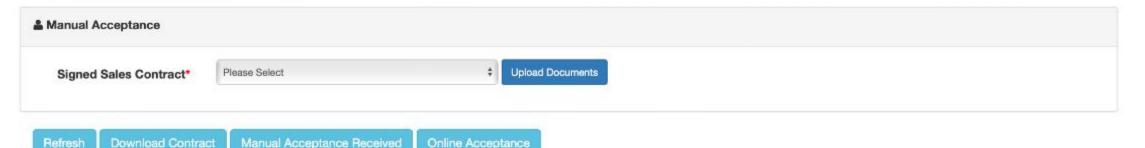


CONTRACT ACCEPTANCE

The contract has been generated successfully

Ticket: HL133

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



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 . . .



| | Dashboard | Q Search Custo | omers: | |
|---|------------------|--|---|--|
| | M Dashboard | This interface allows you The search results is limit | to search for customers based on the criteria specified below. ted to 300 accounts. | |
| | Customer | Account Id | Example: A1 | |
| | • Check Coverage | Customer Name | Example: MorClick Ltd | |
| Г | 🖸 Sales 🚺 | Frading Name | Donotinstall Ltd | |
| L | Customers | Status | Please Select \$ | |
| | 🛱 Jabs | OR | | |
| | Administration | Site Account Number | Example: PRI000000000 | |
| | Ny Details | _ | | |
| | 🚍 Billing | Search | | |
| | 🌲 User Admin | | | |

Click "Search"



| Dashboard | | | | Lagos Lagos 100001 Nigeria | | |
|--|-----|-------------------|--------------|--|----------------------------|-----------------------|
| Dashboard Customer Custocerage | Y10 | Sam Donotinstall | Person | 40 Test Street Test Suburb Lagos 123456 Nigeria | Inactive Account | 0.00 |
| Check Coverage | ¥11 | Cobusplay Three | Person | Box33 Lekki Lagos 123123 Nigeria | Active Account | 1,079,612.50 |
| Jobs Administration | Y12 | Bobs Berries | Organisation | 2 Blue Lagos Lagos 100001 Nigeria | Active Account | -369,000.00 |
| Ny Details | Y13 | Chocolate Factory | Organisation | 2 Steel Street Lagos 100001 Nigeria | Inactive Account | -369,000.00 |
| User Admin Logout Me Ellanda Micklethwaite | ¥14 | Nick Donotinstall | Person | Flat Number 6 35 Ogundana Street Phase 10 Allen Adamawa 100001 Nigeria | Active Account | 0.00 |
| Signed In: 11/Jan 09:17 | Y15 | DONOTINSTALL LTD | Organisation | 42 Test Street Test suburb Lagos 123456 Nigeria | Prospect Click on the C | 0.00 Customer Name |



| tacts 1 Debtors 1 | Y15 Organisation Mr Web Api Donotinstall Ltd Mr Peter Pan | Status Date Registered Invoice Delivery Address Email Address | Prospect 10/Jan/2022 Gets Invoice 42 Test Street Test suburb Lagos 123456 Nigeria peter@donotinstall.com |
|--------------------|---|---|--|
| | Organisation Mr Web Api Donotinstall Ltd Mr Peter Pan | Date Registered Invoice Delivery Address | 10/Jan/2022 Gets Invoice 42 Test Street Test suburb Lagos 123456 Nigeria |
| | Mr Web Api Donotinstall Ltd Mr Peter Pan | Invoice Delivery Address | Gets Invoice 42 Test Street Test suburb Lagos 123456 Nigeria |
| | Donotinstall Ltd Mr Peter Pan | Address | 42 Test Street Test suburb Lagos 123456 Nigeria |
| | Mr Peter Pan | | Test suburb Lagos 123456 Nigeria |
| | | Email Address | Nigeria |
| | | Email Address | |
| | 090102458790 | | |
| | 080123456789 | Registration Number | RC123456 |
| nover | ₩0.00 | Employer | DONOTINSTALL LTD |
| | Ceo | Employee Service Length | Not Applicable |
| | Not Specified | Nigerian Citizen | |
| | Not Applicable | | Scroll down and click "Open" |
| | | | |
| Tickets 0/1 Orders | 0/0 Services 0/0 | | |
| | | | Show 10 |
| | Fickets (0/1) Orders | | |



| Dashboard | Customer N | ame | Donotinstall Ltd | Quote Status | Complete | |
|---|----------------|------------------------|------------------|---------------|----------|------------|
| I Dashboard | | | | | | |
| | Quote Num | ber | Q39 | Quote Date | 10/Jan/2 | 2022 |
| Customer | Ticket Num | ber | HL133 | Ticket Status | Open | |
| Check Coverage | | Barrit | | | | 7.11 |
| (D) Sales | Line | Description | | | | Total |
| La Galles 😈 | 1 | YTTtest Quarterly (| Charged | | | 48,000.0 |
| 😬 Customers | 2 | HT2000 | | | | 0.00 |
| | 3 | Installation Travellin | g | | | 0.00 |
| 🛱 Jobs | Total incl 7.5 | 0% Vat of ₦ 3,348.84 | | | | ₩ 48,000.0 |
| 🚯 My Details | | | | | | |
| Billing | | | | | | |
| | | | | | | |
| Billing User Admin Logout | | | | | | |

Click "Open Ticket"



Click "Edit Ticket"

| ashboard | | | | | | | |
|---|--------------------|------------------|--|-----------------|--------------------------|--|--|
| 🗉 Dashboard | Steps | | CREATE QUOTE \rightarrow CREATE CONTRACT \rightarrow CONTRACT ACCEPTANCE \rightarrow PENDING ONLINE ACCEPTANCE \rightarrow DEPLOY SOLUTION | | | | |
| ustomer | Status | Open | | Category | New Sale | | |
| | Create Date | 10/Jan/2 | 022 15:17:44 | Last Update | 11/Jan/2022 10:24:53 | | |
| Check Coverage | Customer Name | Donotins | tall Ltd | Primary Contact | Mr Peter Pan | | |
| 🖸 Sales 🕥 | Service Account | Not Selec | cted | Account Use | Organisation | | |
| Customers | Quote Number | Q39 | | Sales Agent | Me Ellanda Micklethwaite | | |
| | Last Action | | Quote Accepted Online | | | | |
| 🗎 Jobs | Action to be Taken | | Review the order and supporting documentation. Perform the necessary KYC, Vetting and Contract checks. Click the 'Contract Approved' button. | | | | |
| dministration | | | | | | | |
| ት My Details | | | | | | | |
| | @ Ticket Info: | | | | | | |
| Billing | Customer Y15:DO | | LL LTD | | | | |
| User Admin | Primary Contact | | | Service Account | Not Selected | | |
| | Quote | Q39:NGN48,000.00 | D | | | | |
| Logout | Edit Ticket | | | | | | |
| Me Ellanda Micklethwaite gned In: 11/Jan 09:35 | Status History | | | | | | |



| Dashboard | Ticket: HL90 | | | CONTRACT ACCEPTANCE | | | |
|----------------|---|---|---|--|--|--|--|
| Jashboard | Steps | CREATE QUOTE \rightarrow CREATE CONTRACT \rightarrow CONTRACT APPROVAL | $\begin{array}{c} \text{ONTRACT ACCEPTANCE} \rightarrow \text{PENDING ELECTRONIC} \\ \rightarrow \text{UPFRONT PAYMENT} \rightarrow \text{DEPLOY SOLUTION} \end{array}$ | ACCEPTANCE \rightarrow PENDING ONLINE ACCEPTANCE | | | |
| Customer | Status | Open | Category | New Sale | | | |
| Check Coverage | Create Date | 5/Jan/2022 15:50:27 | Last Update | 6/Jan/2022 11:12:48 | | | |
| Sales 1 | Customer Name | Sam Donotinstall | Primary Contact | Mr Sam Donotinstall | | | |
| | Service Account | Not Selected | Account Use | Person | | | |
| Customers | Quote Number | Q23 | Sales Agent | Me Ellanda Micklethwaite | | | |
| ∰ Jobs | Last Action | Contract Created Successfully via Dealer Portal by Contact: Ellanda Micklethwaite | | | | | |
| Administration | Action to be Taken Upload the manual signed customer contract here • OR request an electronic acceptance from customer. | | | | | | |
| 🖪 My Details | | | | | | | |
| 🚍 Billing | & Manual Acceptance | | | | | | |
| 🛓 User Admin | Signed Sales Contract* Please Select V Upload Documents Click "Upload Documents" to upload the signed contract | | | | | | |
| C Logout | | | | | | | |
| We no | Refresh Download Contract Mar w await Head Office approval – th | | contract has been uploaded – click ual Acceptance Received" | | | | |

Contract Acceptance: (4) IF Manual Acceptance



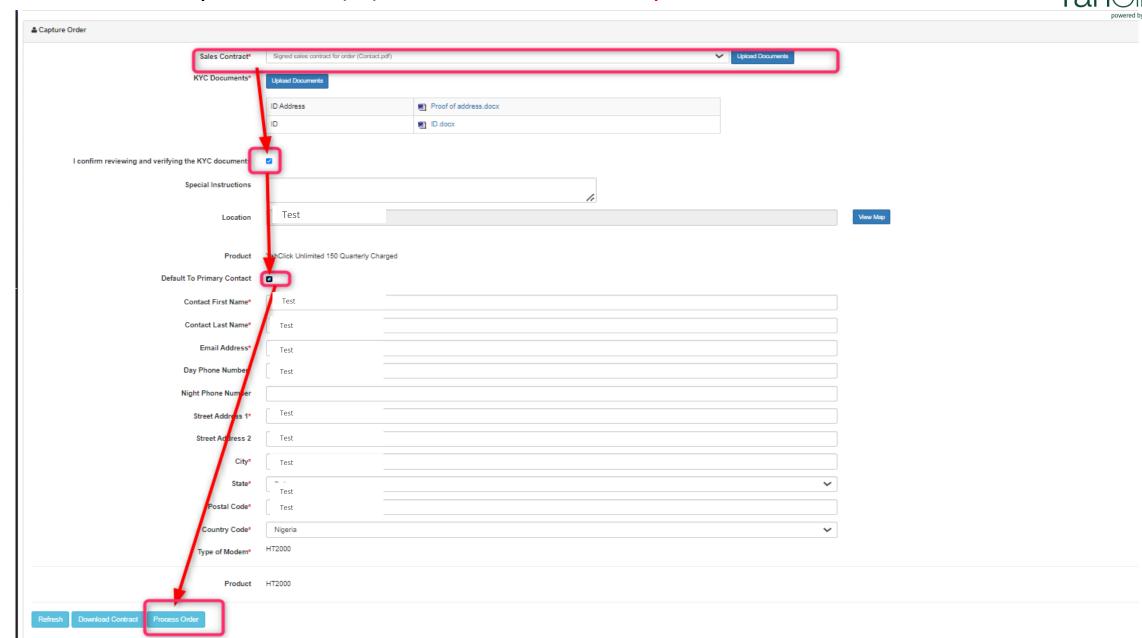
| Dashboard | Ticket: HL39 | | | | | | |
|-------------------------|---|---------------------------------|--|----------------------|---------------------------|--|--|
| Jul Dashboard | Steps | | CREATE QUOTE \rightarrow CONTRACT ACCEPTANCE \rightarrow PENDING ONLINE ACCEPTANCE \rightarrow CAPTURE ORDER \rightarrow CONTRACT APPROVAL \rightarrow UPFRONT PAYMENT \rightarrow DEPLOY SOLUTION | | | | |
| Customer | Status | | Open | Category | New Sale | | |
| 9 Check Coverage | Create Date | | 23/Feb/2022 11:44:45 | Last Update | 23/Feb/2022 13:17:48 | | |
| Image: Sales 3 | Customer Name | | Test | Primary Contact | Test | | |
| | Service Account | | Not Selected | Account Use | Person | | |
| Customers | Quote Number | | Q38 | Sales Agent | Mr Trainingeight Training | | |
| 🛗 Jobs | Last Action Manual Acceptance Processed Successfully via Dealer Portal by Contact: Trainingeight Training | | | | lining | | |
| Administration | Action to be Taken | | Complete Finance Admin and Process OrderPlease review the comments and correct a | Soloct or upload the | | | |
| 🖪 My Details | Capture Order | | | | | | |
| Billing | | | | | | | |
| | Sales Contract* | Please Sele | Please Select V Upload Documents | | | | |
| 💄 User Admin | KYC Documents* | KYC Documents* Upload Documents | | | | | |
| 🕩 Logout | | - oproda 2000 | | | | | |

Contract Acceptance: (4) IF Manual Acceptance



| Dashboard | Sales Contract* | Signed sales contract for | r order (Contact.pdf) | ✓ Upload Documents | |
|--|--|---------------------------|-----------------------|--------------------|---|
| Jashboard | KYC Documents* | Upload Documents | | | |
| Customer | | ID Address | Proof of address.docx | | |
| ♥ Check Coverage | | ID | 圖 ID.docx | | |
| Sales | | | | | Tick here to confirm KYC |
| 嶜 Customers | I confirm reviewing and verifying the KYC documents | ✓ | | | has been loaded |
| 🛗 Jobs | Special Instructions | | | | |
| Administration | Location | 5.5696889,5.7465764 | | | View Map |
| 🖪 My Details | Location | 3.3030003,3.1403104 | Ť | | |
| Billing | Product | YahClick Unlimited 150 | Quarterly Charged | | Tick here to fill in contact details for the order |
| 🛓 User Admin | Default To Primary Contact | 2 | | | |
| € Logout | Contact First Name* | Test | | | |
| | Contact Last Name* | Test | | | |
| Mr Trainingten Training Signed In: 23/Feb 13:46 | 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

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



CONTRACT ACCEPTANCE

Business application: (4) Request online acceptance



Online Acceptance For: Y15:DONOTINSTALL LTD

| | | | Quote' to send the email. | |
|--|---|---|---|---|
| mail Message | | | | |
| om | Co | ntact:Me Ellanda Mic | klethwaite | |
| | pe | ter@donotinstail.com | I | Edit |
| oject | () | /ahclick Nigeria: Q39 | Contract Acceptance Req | quest for DONOTINSTALL LTD |
| | | | | |
| ar Mr Peter Pan, | ot is ready for | consideration and ac | ceptance. | |
| ease CLICK HERE | to be directed | d to our onlin | ceptance. e acceptance platform for raw your attention to the | r quote number: Q39. FUP (Fair Use Policy) that relates to the speed of the package you have selected as per the Terms and Conditions: |
| ar Mr Peter Pan, ur xxx contrac ease <mark>CLICK HERE</mark> | to be directed | d to our onlin | e acceptance platform for | |
| ar Mr Peter Pan, ur _{XXX} contrac ase <mark>CLICK HERE</mark> ou have selected | to be directed | d to our onlin | e acceptance platform for | |
| ar Mr Peter Pan, ur xxx contrac base CLICK HERE rou have selected Downlink speeds | to be directed | d to our onlin product we want to de | e acceptance platform for raw your attention to the | |
| ar Mr Peter Pan, ur xxx contrac ease CLICK HERE rou have selected Downlink speeds Product | to be directed an unlimited p Normal | d to our onlin product we want to de | e acceptance platform for raw your attention to the FUP Leval2 | |
| ar Mr Peter Pan, ur xx contract base CLICK HERE rou have selected Downlink speeds Product Unlimited 25 AY3 | to be directed an unlimited p Normal 25 Mbps | d to our onlin product we want to de FUP Level 1 1 Mbps after 25GB | e acceptance platform for raw your attention to the FUP Level2 0.5 Maps after 30GB | |

Click "Request Online Acceptance"

Business application: (4) Request online acceptance



Online Acceptance For: Y15:DONOTINSTALL LTD Close Online Acceptance request successfully actioned! Email Message Contact:Me Ellanda Micklethwaite From То 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 Normal FUP Level 1 FUP Level2 Product Unlimited 25 AY3 25 Mbps 1 Mbps after 25GB 0.5 Mbps after 30GB 25 Mbps 5 Mbps after 50GB 1 Mbps after 75GB Unlimited 50 AY3 Unlimited 100 AY3 25 Mbps 5 Mbps after 100GB 1 Mbps after 120GB Unlimited 150 AY8 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

| Dashboard | Ticket: HL133 | | | CONTRACT APPROVAL | | | |
|---|--------------------------------------|--|---|--------------------------|--|--|--|
| 🔟 Dashboard | Steps | CREATE QUOTE CREATE CONTRACT | CREATE QUOTE CREATE CONTRACT CONTRACT ACCEPTANCE PENDING ONLINE ACCEPTANCE DEPLOY SOLUTION | | | | |
| Customer | Status | Open | Category | New Sale | | | |
| Check Coverage | Create Date | 10/Jan/2022 15:17:44 | Last Update | 11/Jan/2022 10:24:53 | | | |
| ଥି Sales 👩 | Customer Name | Donotinstall Ltd | Primary Contact | Mr Peter Pan | | | |
| | Service Account | Not Selected | Account Use | Organisation | | | |
| Customers | Quote Number | Q39 | Sales Agent | Me Ellanda Micklethwaite | | | |
| 🛱 Jobs | Last Action | Quote Accepted Online | Quote Accepted Online | | | | |
| Administration | Action to be Taken | Perform the necessary KYC, Vetti | Review the order and supporting documentation. • Perform the necessary KYC, Vetting and Contract checks. | | | | |
| 🔥 My Details | | Click the 'Contract Approved' but | iton. | | | | |
| 🗄 Billing | Contract Approval | | | | | | |
| 🌡 User Admin | This contract is pending approval by | y Hyperia. Only once it is approved, will the ord | ler be processed. | | | | |
| 🕈 Logout | | | | | | | |
|) Me Ellanda Micklethwaite Signed In: 114Jan 09:35 | Refresh Download Contract | | | | | | |

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

| Head Of | fice approves | the Contract | | Now we await Head office to approve the Upfront Payment |
|----------------|-----------------|---|-----------------|--|
| Dashboard | # Ticket: HL133 | | | UPFRONT PAYMENT |
| Dashboard | Steps | CREATE QUOTE CREATE CONTRACT DEPLOY SOLUTION | | |
| Customer | Status | Open | Category | New Sale |
| Check Coverage | Create Date | 10/Jan/2022 15:17:44 | Last Update | 11/Jan/2022 11:57:19 |
| 🗊 Sales 🜖 | Customer Name | Donotinstall Ltd | Primary Contact | Mr Peter Pan |

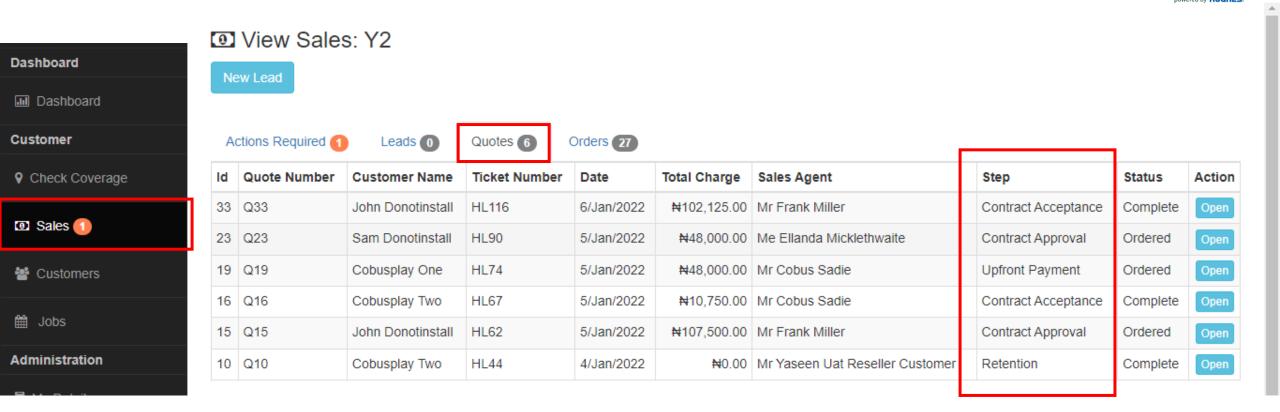
When Head Office approves the contract - they send an email is sent to the customer

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



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 . . .

| Dashboard | Ticket: HL133 | | | COMPLETE | | | |
|----------------|--------------------|---|-----------------|--------------------------|--|--|--|
| M Dashboard | Steps | CREATE QUOTE \rightarrow CREATE CONTRACT \rightarrow CONTRACT ACCEPTANCE \rightarrow PENDING ONLINE ACCEPTANCE \rightarrow CONTRACT APPROVAL \rightarrow UPPRON | | | | | |
| Customer | Status | Closed | Category | New Sale | | | |
| Check Coverage | Create Date | 10/Jan/2022 15:17:44 | Last Update | 11/Jan/2022 12:18:19 | | | |
| D Sales (1) | Customer Name | Donotinstall Ltd | Primary Contact | Mr Peter Pan | | | |
| | Service Account | Not Selected | Account Use | Organisation | | | |
| 📽 Customers | Quote Number | Q39 | Sales Agent | Me Ellanda Micklethwaite | | | |
| 🗂 Jobs | Last Action | PAYMENT APPROVED | | | | | |
| dministration | Action to be Taken | Ticket workflow process complete! | | | | | |
| 🕒 My Details | | | | | | | |

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"



| Dashboard | | Scheduling: | | | | | | | Dealer |
|-------------------|----------------|---------------|---------------------|----------|---------------|--------------|----------------|---------------|---------|
| 🕍 Dashboard | | ation Tickets | | | | | | | |
| Customer | Refresh | | | | | | | | |
| Check Coverage | Scheduling Rec | uired (6) | | | | | | | |
| | | Ticket Number | Customer | Job Type | Job Status | Contact Name | Contact Number | Contact Email | Address |
| 🖾 Sales <u>()</u> | Create Job | HL48-1 | Vernon Donotinstall | | Not Scheduled | | | | |
| 📽 Custamers | Create Job | HL72-1 | Cobusplay Two | | Not Scheduled | | | | |
| 🛱 Jobs | Create Job | HL46-1 | Cobusplay Two | | Not Scheduled | | | | |
| Administration | Create Job | HL20-1 | Cobusplay Two | | Not Scheduled | | | | |
| 🖒 My Details | Create Job | HL114-1 | Bobs Berries | | Not Scheduled | , | | | |
| 🖽 Billing | Create Job | HL140-1 | DONOTINSTALL LTD | | Not Scheduled | | | | |
| | | | | | | | | | |

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!



| Dashboard | 🛗 On-Site | e Scheduling: | | | | | | | Dealer |
|-------------------|------------------|----------------|---------------------|----------|---------------|--------------|----------------|---------------|---------|
| Lef Dashboard | Calendar Install | lation Tickets | | | | | | | |
| Customer | Refresh | | | | | | | | |
| Check Coverage | Scheduling Red | | | | | | | | |
| | | Ticket Number | Customer | Job Type | Job Status | Contact Name | Contact Number | Contact Email | Address |
| 🖾 Sales <u>()</u> | Create Job | HL48-1 | Vernon Donotinstall | | Not Scheduled | | | | |
| 📽 Custamers | Create Job | HL72-1 | Cobusplay Two | | Not Scheduled | | | | |
| 🛱 Jobs | Create Job | HL46-1 | Cobusplay Two | | Not Scheduled | | | | |
| Administration | Create Job | HL20-1 | Cobusplay Two | | Not Scheduled | | | | |
| 🔁 My Details | Create Job | HL114-1 | Bobs Berries | | Not Scheduled | | | | |
| 🖽 Billing | Create Job | HL140-1 | DONOTINSTALL LTD | | Not Scheduled | | | | |

Click "Create Job"



Create New Job:

| 9 Customer Details | | | | | |
|-------------------------|---------------|---|----------------|--------|---|
| Customer ★ | Y15:DONOT | INSTALL LTD | | • | Select the customer against which this job will be logged. |
| Order | X39:Provisi | ioning | | | |
|) Site Details | | | | | |
| Contact Name 🚖 | Peter Pan | | | | Enter the on-site contact's name. |
| Contact Mobile Number 🖈 | 09012846670 | e | | | Enter the on-site contact's mobile number. |
| Contact Email Address 🚖 | peter@donot | instal.com | | | Enter the on-site contact's email address. |
| Site Physical Address 🚖 | 42 Test Stree | t, Test suburb, Lagos, 1 | 23456, Nigeria | A | The physical address of the site. |
| Site GPS Location 🖈 | 6.5744151,3 | 3732207 🛛 🛷 Open M | ab | | The GPS location of the site. |
| Site Region 🚖 | Lagos |]ه | | | Region of the site. |
| Job Details | | | | | |
| Job Type ★ | Trata lation | : | | | The type of callout. |
| Job Instructions 🚖 | SAN: and pl | Installation for YahClick n: for service plan: YahC Contact:Me Ellanda Mick | Xick 4Gen 5GB | 4 | The instructions for the on-site engineer. |
| | 255 C/ | ars Remain | | | |
| Hardware to Install 🔶 | Hardware to | be Installed | | | The hardware that the engineer will need to install to complet this job. |
| | Include | Туре | Sub-Type | Statua | |
| | 8 | ODU | AY30DU | Order | |
| | 0 | VSAT Modem | HT2000 | Onter | |

Click "Create Job"

Create New Job:

| b has been successfully created! | | |
|----------------------------------|---|---|
| O Customer Details | | |
| Customer 🚖 | Y15:DONOTINSTALL LTD | Select the customer against which this job will be logged |
| Order | X39:Provisioning | |
| Ø 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. |

O Job Details

Scroll down and click "Continue"

Yah



Select the Engineer & timeslot in the calendar

C Schedule Job: HL140-1-1

Follow the steps below and click 'Schedule Job'.

Bill Customer: Pending Callout

| 1. Select an En | | | < | > too | lay | Jan 9 | - 15, 2 | 022 | month | week |
|-----------------|---|------------|------|---------|----------|----------|-------------------|----------|-----------------------|----------|
| Select Engineer | L | egend Show | | | | •••••• | , - | | | |
| O Mr Co | bus Sadie | 2 | | Sun 1/9 | Mon 1/10 | Tue 1/11 | Wed 1/12 | Thu 1/13 | Fri 1/14 | Sat 1/15 |
| O - Mr Fra | nk Miller | C | 6am | | | | | | | |
| O Mr Ant | thony Stone | | 7am | | | | | | | |
| | | | 8am | | | | | | | |
| 2. Confirm Job | Details | | 9am | | | | | | 9:00 - 10:30 | |
| Туре | On Site Callout - Install - Hardware | 6 | | | | | | | Install - Hardware | |
| Address | ddress 42 Test Street, Test suburb, Lagos, 123456, Nigeria | | 10am | | | | | | = | |
| | | | 11am | | | | | | | |
| | | | 12pm | | | | | | | |
| Contact* | Peter Pan | | | | | | | | | |
| Customer Name | DONOTINSTALL LTD | | 1pm | | | | | | | |
| Phone* | 08012345678 | | 2pm | | | | | | | |
| Email* | peter@donotinstall.com | | 3pm | | | | | | | |
| Confirmation | Send Email+S \$ | | 4pm | | | | 4:00 - 5:4:00 - 5 | | | |

Scroll down and click "Schedule Job"

day



C Schedule Job: HL140-1-1

Follow the steps below and click 'Schedule Job'.

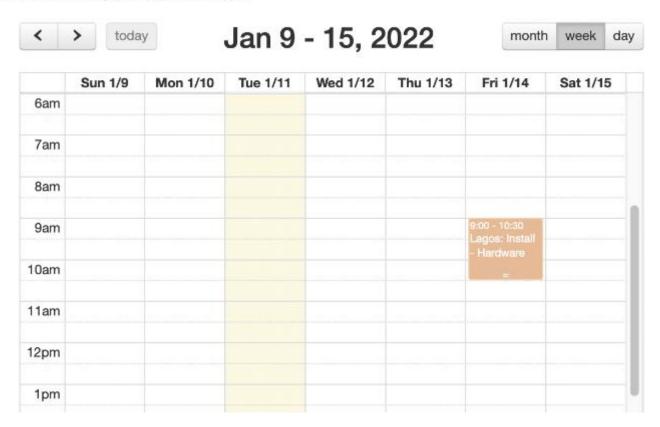
Job was successfully scheduled.

1. Select an Engineer

| Select | Engineer | Legend | Show |
|--------|------------------|--------|------|
| 0 | Mr Cobus Sadie | | 0 |
| 0 | Mr Frank Miller | | |
| | Mr Anthony Stone | | |

| Туре | 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



Scroll down and click "Continue"

| | Refresh | | | | | | | | | |
|----------------|-----------------------|------------------|-------------------------------------|--------------|--------------------------|----------------------------|-------------------------|------------------|---|------------|
| hboard | Schedul | ing Requ | ired (5) | | | | | | | |
| Dashboard | | - | Ticket Number | Customer | Job Type | Job Status | Contact Name | Contact Numb | oer Contact Email | Address |
| stomer | Create | Job | HL48-1 | Vernon Dono | tinstall | Not Scheduled | | | | |
| Check Coverage | Create | Job | HL72-1 | Cobusplay T | wo | Not Scheduled | | | | |
| 3 Sales 🚺 | Create | Job | HL46-1 | Cobusplay T | wo | Not Scheduled | | | | |
| Customers | Create | Job | HL20-1 | Cobusplay T | WO | Not Scheduled | | | | |
| 🖞 Jobs | Create | Job | HL114-1 | Bobs Berries | | Not Scheduled | | | | |
| Iministration | | | | | | | | | | |
| My Details | Queued | Jobs (2) | | | | | | | | |
| Billing | | Ticket Number | Customer | Јор Туре | Job Status | Contact Na | Contact me Number | Contact Email | Address | |
| User Admin | Open | HL63-1-1 | Jon Donotinstall | Installation | Requires Sign-Off | Jon Donotinstall | 08012345678 | abc@abc.com | Test Street 1, Abcd, Lagos Nigeria | s, 123456, |
| Logout | Open | HL117-1-1 | I Sam Donotinstall | Installation | Assigned to Contractor F | Person Sam Donotinstall | 08012345679 | asd@asd.com | 40 Test Street, Test Subur 123456, Nigeria | b, Lagos, |
| | <mark>lf you v</mark> | wish at ar | ny time to know | w what the | status is of the inst | allation – alway | /s refer to Queu | ed Jobs for th | e Job status i.e. | |
| | | - | Contractor Per – installation in | | stallation queue | | | | | |
| | • | | | | complete and awai | ting Head Office | <mark>e sign-off</mark> | | | |

Yał



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