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



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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'

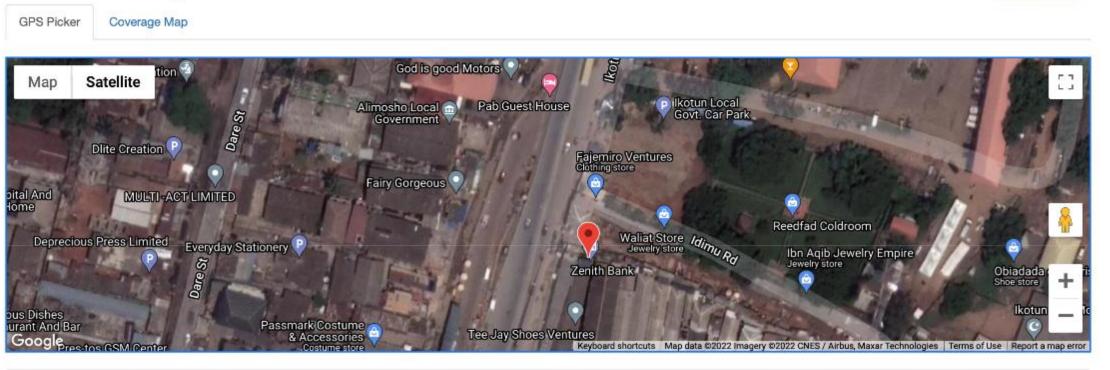
				-	(
Service Coverage De	etails				
Latitude	6.5499769		Longitude	3.	268493
Coverage Status	AVAILABLE	←			
Lookup Response	Thank You	! Your reque:	st has been successfu	ully execute	ed. Code PIM 10000
Transport Info: Jupit	er				
Beam Id	114		Satellite Id	Aľ	Yah-3
Min Antenna Size	0.74		Min ODU Power	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



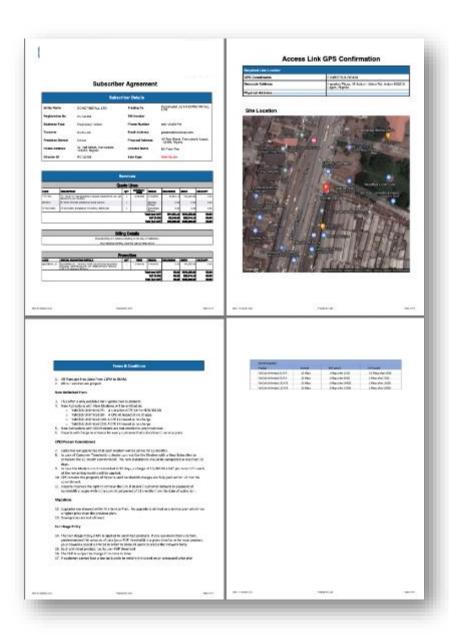
A Payment Method Type*			
A Cash Payment: Select the Checkbox for EFT/Cash Paym	nents.		
Check for Cash	8		
# KYC Documents*			
KYC Documents*	Upload Documents		
	Certificate of Incorporation	Donotinstall KYC test document.docx	
	Address	Donotinstall KYC test	



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



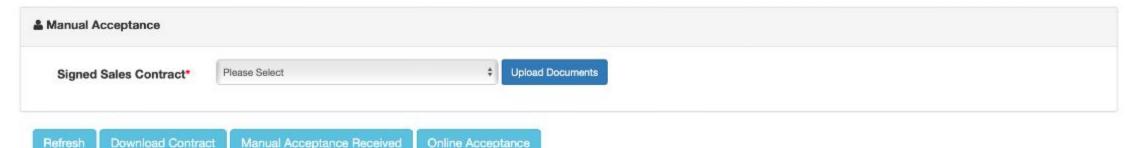


CONTRACT ACCEPTANCE

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



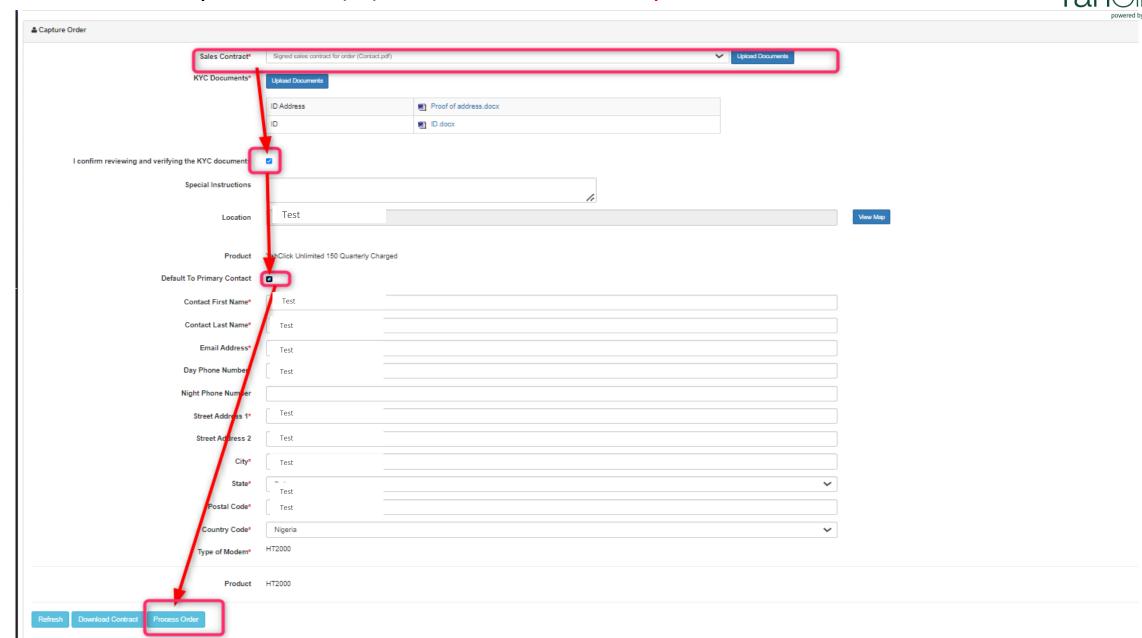
Dashboard	Ticket: HL39						
Jul Dashboard	Steps		CREATE QUOTE \rightarrow CONTRACT ACCEPTANCE \rightarrow PENDING ONLINE ACCEPTANCE \rightarrow CAPTURE ORDER \rightarrow CONTRACT APPROVAL \rightarrow UPFRONT PAYMENT \rightarrow DEPLOY SOLUTION				
Customer	Status		Open	Category	New Sale		
9 Check Coverage	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

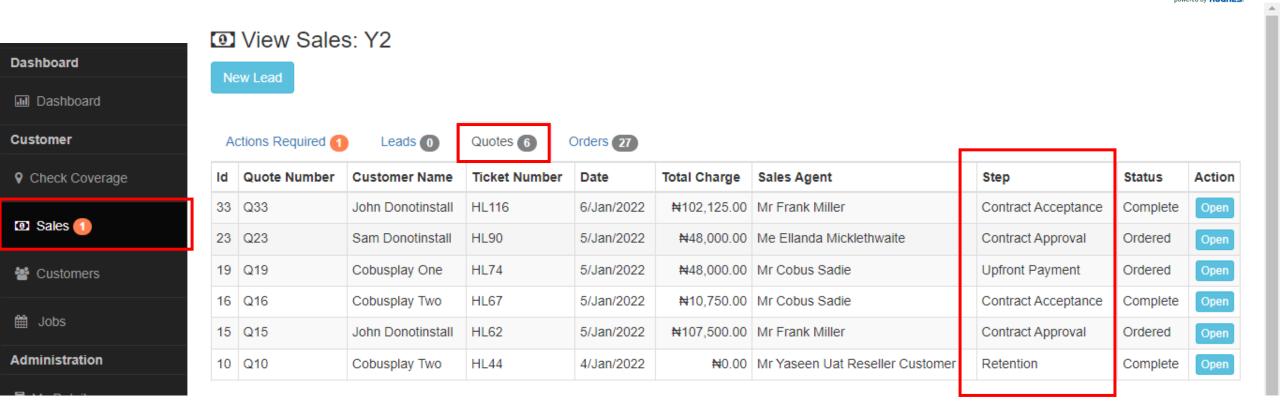
When Head Office approves the contract - they send an email is sent to the customer

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'.

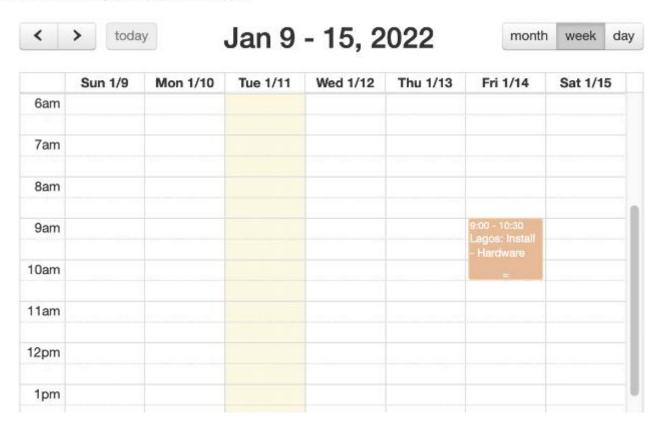
Job was successfully scheduled.

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