

SOLID DEALER PORTAL REFERENCE GUIDE

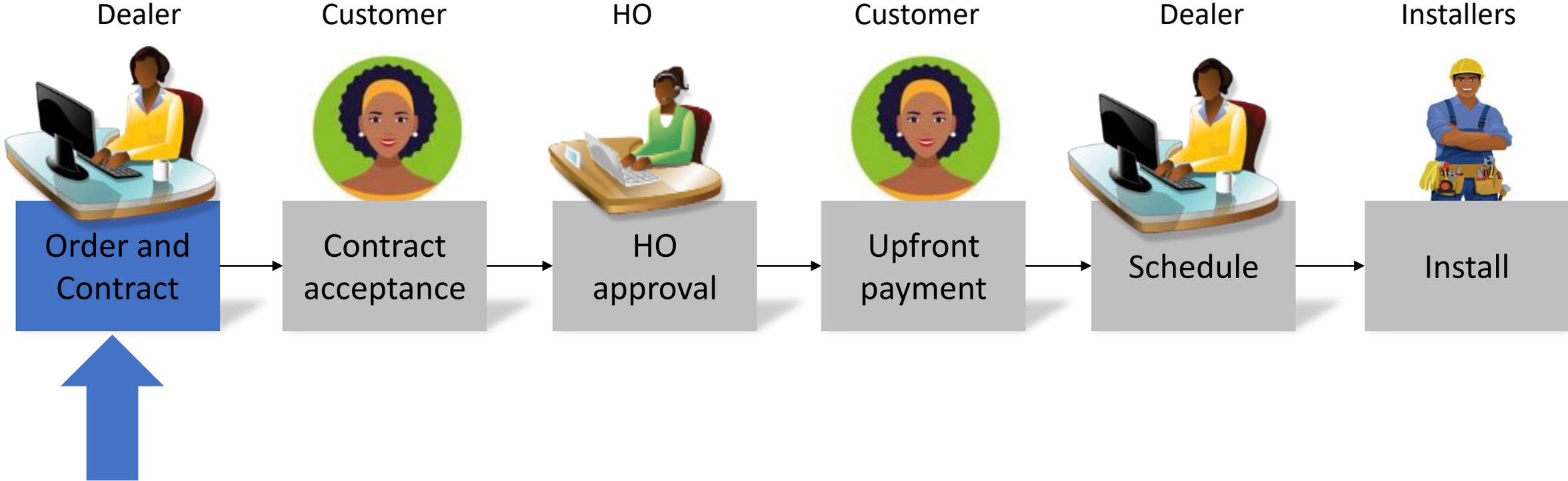


Dealer Training



How to complete a customer application

Presentation roadmap



Preparation: Ready to capture a sale?

You need the following to capture a sale on the system:

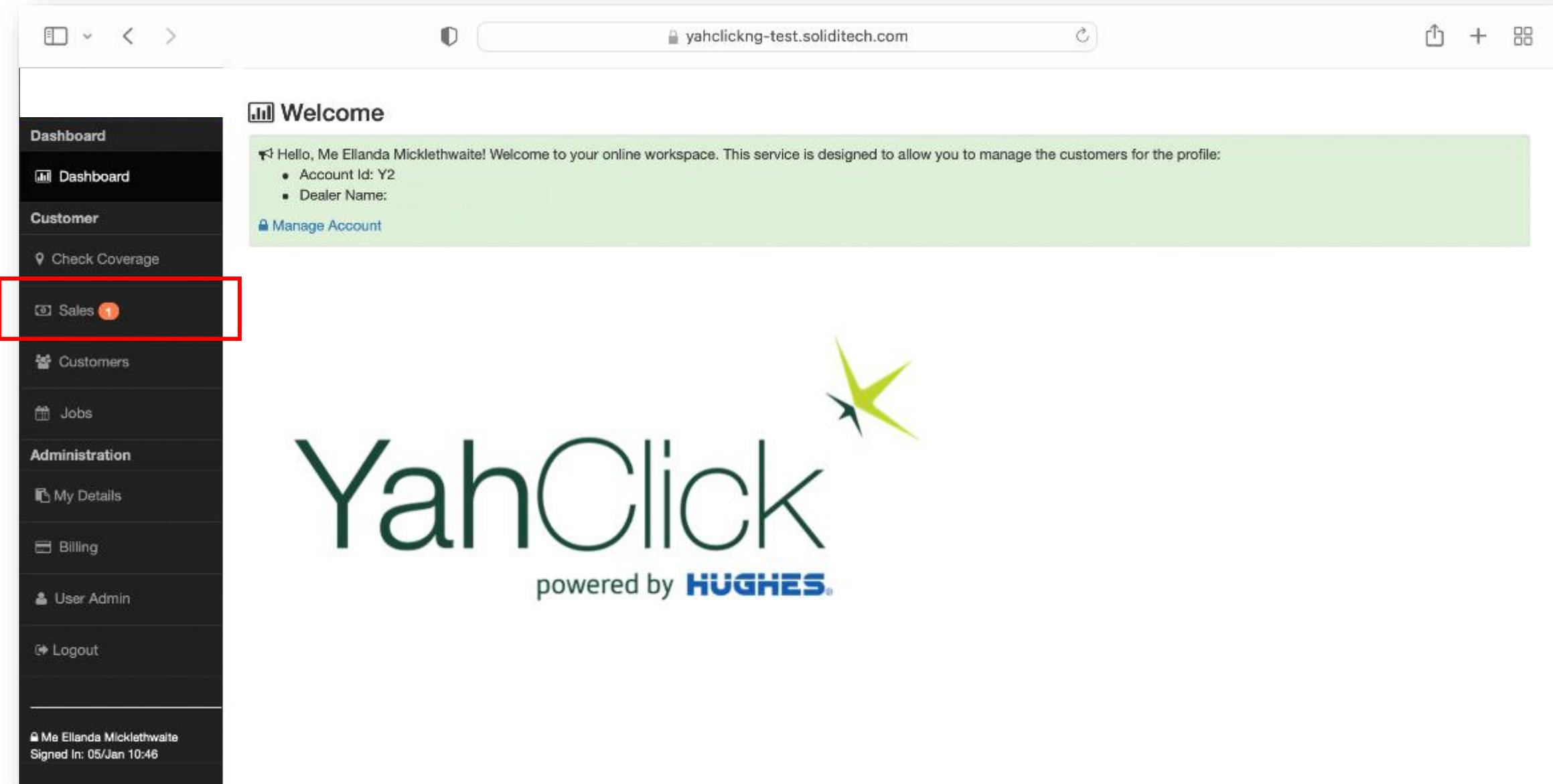
- Title, name & surname like Mr Joe Adeola
- Identity number (NIN) like 1234567891
- For a business also the business number like RC123456
- Email and mobile phone
- Street address with postal code
- Postal address with postal code
- Documentation: Digital file copy of Identity, Proof of address
- Documentation: Digital file copy of proof of business registration
- Installation location: Address/coordinates

How to complete a customer application

In this section we will learn how to:

1. Capture a new lead
2. After creating a lead – generate a Quote
3. Then move to create and capture the order
4. Request an Online Acceptance
5. Return to Sales to capture and process the customer order

Customer application: (1) Capture a new lead



The screenshot shows a web browser window with the URL `yahclickng-test.soliditech.com`. The page features a dark sidebar on the left with a navigation menu. The main content area displays a 'Welcome' message to the user, 'Me Ellanda Micklethwaite', and provides account details: 'Account Id: Y2' and 'Dealer Name:'. A 'Manage Account' link is also visible. The YahClick logo, 'powered by HUGHES', is prominently displayed at the bottom of the page.

Navigation Menu (Left Sidebar):

- Dashboard
- Dashboard
- Customer
 - Check Coverage
 - Sales** (highlighted with a red box)
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout
- Me Ellanda Micklethwaite
Signed In: 05/Jan 10:46

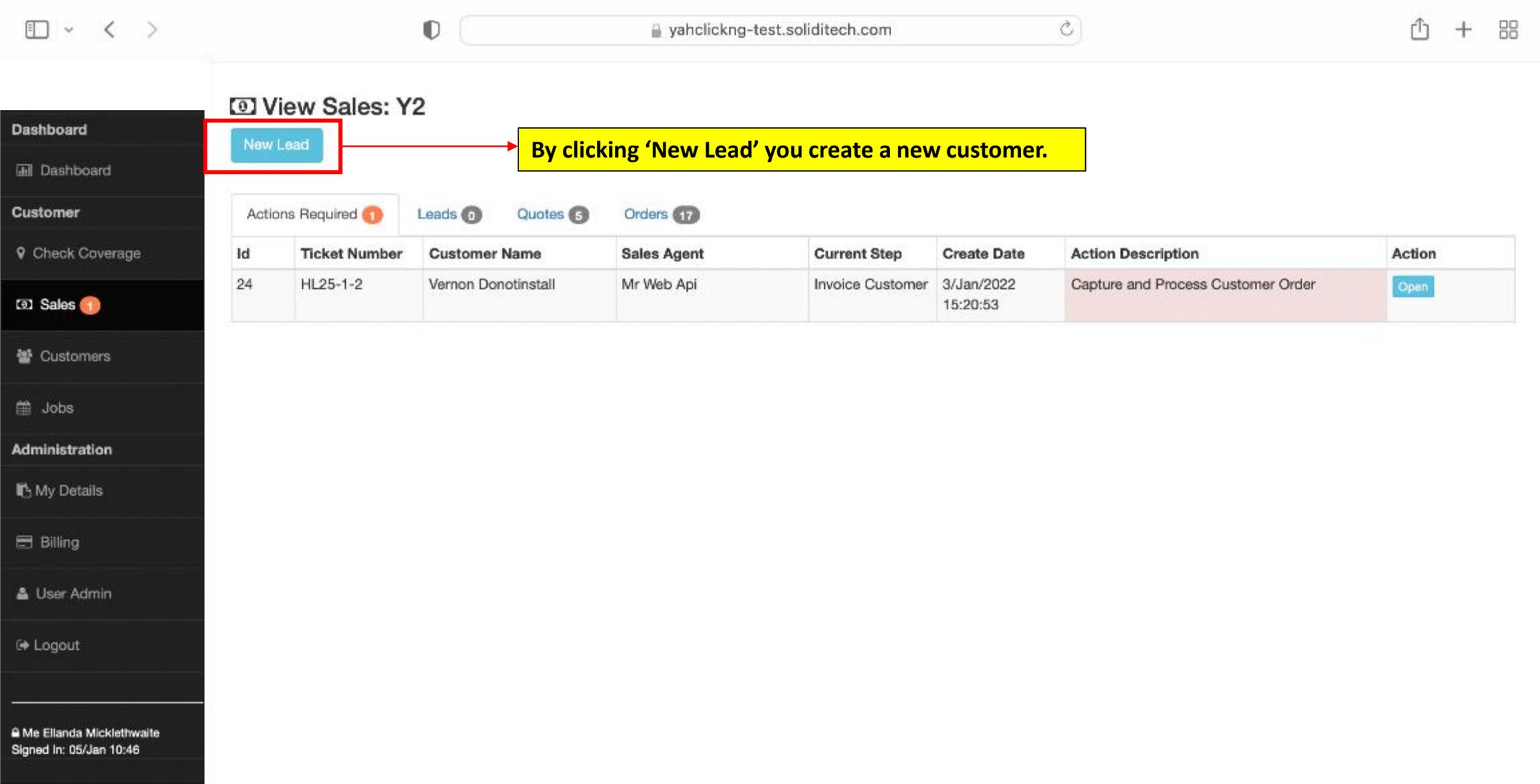
Welcome Message:

Hello, Me Ellanda Micklethwaite! Welcome to your online workspace. This service is designed to allow you to manage the customers for the profile:

- Account Id: Y2
- Dealer Name:

[Manage Account](#)

Customer application: (1) Capture a new lead



The screenshot shows a web browser window with the URL `yahclickng-test.soliditech.com`. The page title is **View Sales: Y2**. On the left sidebar, the **Sales** menu item is highlighted with a red circle and a notification badge showing '1'. A red box highlights the **New Lead** button in the top navigation area. A yellow callout box with a red arrow pointing to the button contains the text: **By clicking 'New Lead' you create a new customer.**

Below the navigation, there are summary statistics: **Actions Required** (1), **Leads** (0), **Quotes** (5), and **Orders** (17). A table displays the following data:

Id	Ticket Number	Customer Name	Sales Agent	Current Step	Create Date	Action Description	Action
24	HL25-1-2	Vernon Donotinstall	Mr Web Api	Invoice Customer	3/Jan/2022 15:20:53	Capture and Process Customer Order	Open

The bottom of the sidebar shows the user's name **Me Ellanda Micklethwaite** and the login time **Signed In: 05/Jan 10:46**.

Customer application: (1) Capture a new lead

Browser: yahclickng-test.soliditech.com

New Lead

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

Account Details

- Account Use*
- Identity Type*
- Identity Number*

Primary Contact

- Full Name*
 - Select the title
 - Enter the first name
 - Enter the last name
- Email*
Please enter the email address
- Mobile Contact Number
Please enter the mobile number
- Work Contact Number
- Employer Name
- Job Title

Postal Address

- Address Line1*

It is important to note that the fields highlighted in red are mandatory

Enter the required information – see example on next slide ...

Customer application: (1) Capture a new lead

Browser: yahclickng-test.soliditech.com

New Lead

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

Account Details

Account Use*	Person ✓
Identity Type*	Nigeria Identification Number ✓
Identity Number*	12345878910 ✓

Primary Contact

Full Name*	Mr ✓	Sam ✓	Donotinstall ✓
Email*	asd@asd.com ✓		
Mobile Contact Number	08012345679 ✓		
Work Contact Number	08012345679 ✓		
Employer Name	ASD Ltd ✓		
Job Title	Finance Manager ✓		

Postal Address

Address Line1*	Enter postal Address e.g. Block 18 Plot 2 ✗ <small>Please enter the address line 1</small>
Address Line2	Secondarily Address line e.g. Fafel Amoleka Street ✓

Me Elanda Micklethwaite
Signed In: 05/Jan 10:46

Scroll down to complete the Postal Address section

Customer application: (1) Capture a new lead

Browser: yahclickng-test.soliditech.com

Primary Contact

Full Name*	Mr ✓	Sam ✓	Donotinstall ✓
Email*	asd@asd.com ✓		
Mobile Contact Number	08012345679 ✓		
Work Contact Number	08012345679 ✓		
Employer Name	ASD Ltd ✓		
Job Title	Finance Manager ✓		

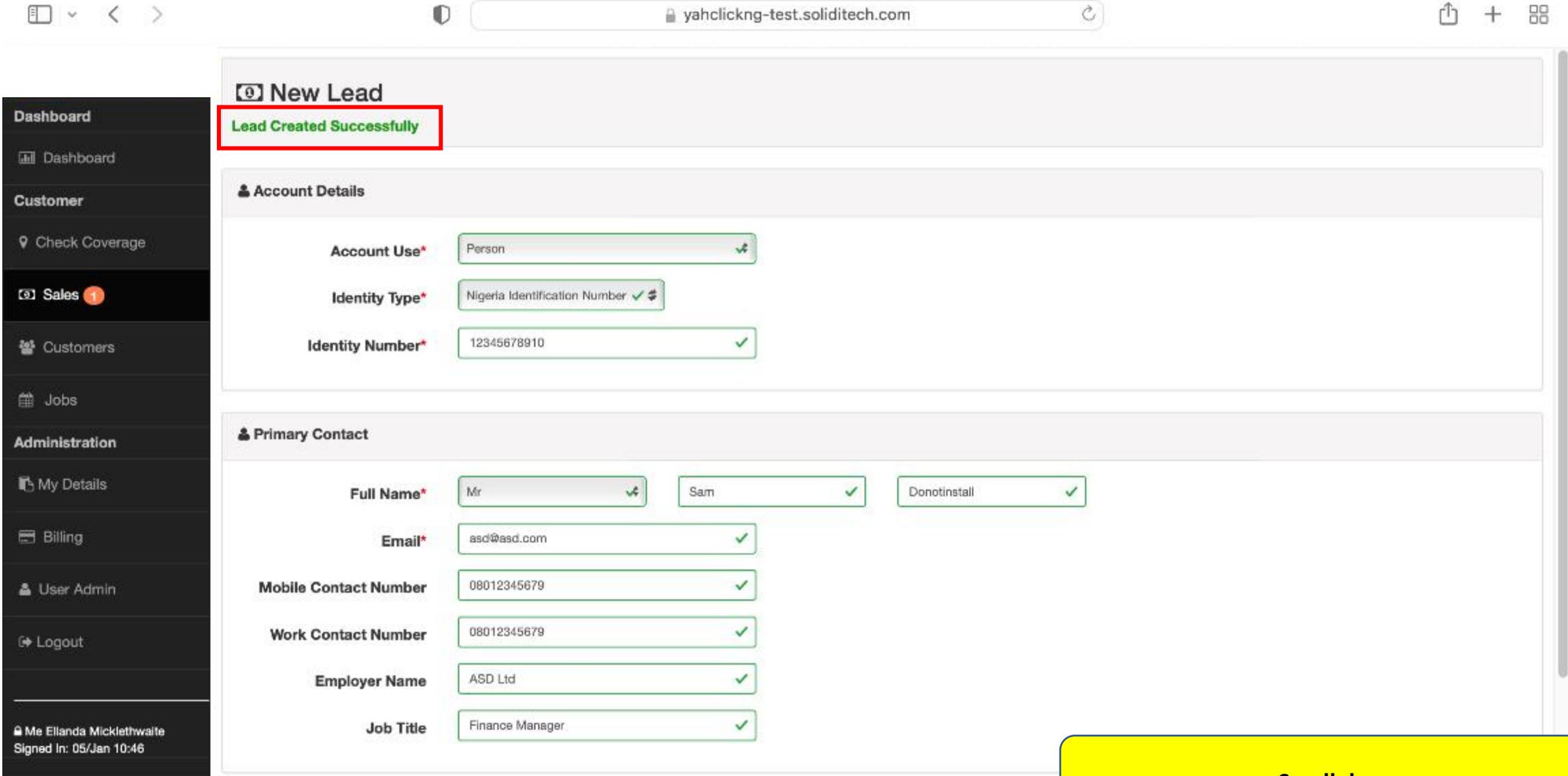
Postal Address

Address Line1*	40 Test Street ✓		
Address Line2	Secondary Address line e.g. Fatai Arobieke Street ✓		
Address Suburb*	Test Suburb ✓		
Closest City*	Lagos ✓		
State*	Lagos ✓		
Country*	Nigeria ✓		
Postal Code*	123456 ✓		

Create Lead | Reset | Back

Once all fields have been completed click 'Create Lead'

Customer application: (1) Capture a new lead



The screenshot shows a web browser window with the URL `yahclickng-test.soliditech.com`. The page title is "New Lead". A red box highlights a green message: "Lead Created Successfully". Below this, there are two sections: "Account Details" and "Primary Contact".

Account Details

Account Use*	Person ✓
Identity Type*	Nigeria Identification Number ✓
Identity Number*	12345678910 ✓

Primary Contact

Full Name*	Mr ✓	Sam ✓	Donotinstall ✓
Email*	asd@asd.com ✓		
Mobile Contact Number	08012345679 ✓		
Work Contact Number	08012345679 ✓		
Employer Name	ASD Ltd ✓		
Job Title	Finance Manager ✓		

Scroll down

Customer application: (1) Capture a new lead

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
- Sales 1
- Customers
- Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout
- Me Ellanda Micklethwaite
Signed In: 05/Jan 10:46

Primary Contact

Full Name*	Mr ✓	Sam ✓	Donotinstall ✓
Email*	asd@asd.com ✓		
Mobile Contact Number	08012345679 ✓		
Work Contact Number	08012345679 ✓		
Employer Name	ASD Ltd ✓		
Job Title	Finance Manager ✓		

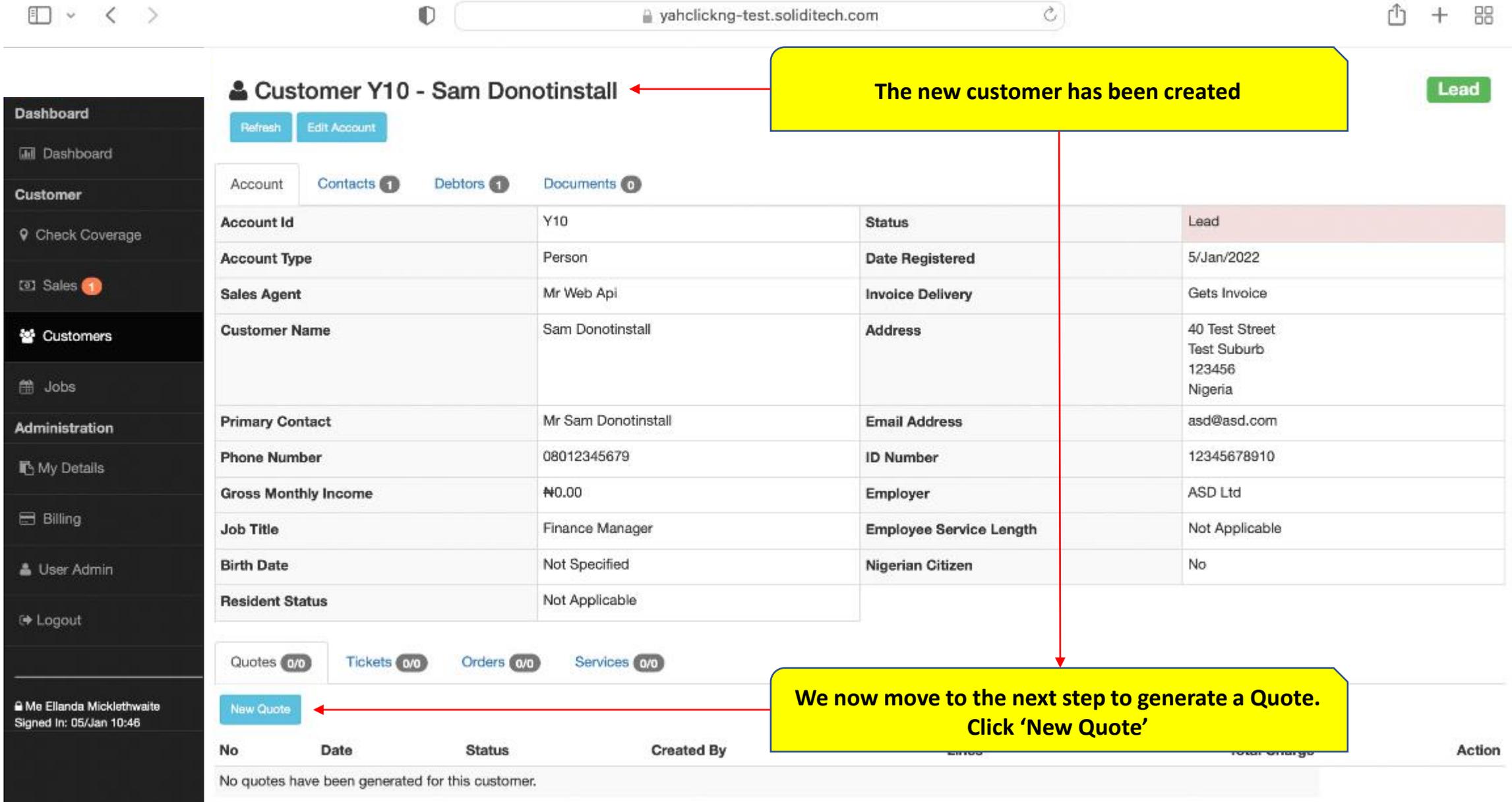
Postal Address

Address Line1*	40 Test Street ✓		
Address Line2	Secondary Address line e.g. Fatai Arobieke Street ✓		
Address Suburb*	Test Suburb ✓		
Closest City*	Lagos ✓		
State *	Lagos ✓		
Country*	Nigeria ✓		
Postal Code*	123456 ✓		

[Continue](#) [Back](#)

Click 'Continue'

Customer application: (1) Capture a new lead



Customer Y10 - Sam Donotinstall Lead

Refresh Edit Account

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

Account Id	Y10	Status	Lead
Account Type	Person	Date Registered	5/Jan/2022
Sales Agent	Mr Web Api	Invoice Delivery	Gets Invoice
Customer Name	Sam Donotinstall	Address	40 Test Street Test Suburb 123456 Nigeria
Primary Contact	Mr Sam Donotinstall	Email Address	asd@asd.com
Phone Number	08012345679	ID Number	12345678910
Gross Monthly Income	₦0.00	Employer	ASD Ltd
Job Title	Finance Manager	Employee Service Length	Not Applicable
Birth Date	Not Specified	Nigerian Citizen	No
Resident Status	Not Applicable		

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

New Quote

No Date Status Created By Action

No quotes have been generated for this customer.

Customer application: (2) Generate a quote

New Quote

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

GPS Location

Location *

[Open Map](#)

Click on 'Open Map'

Product Selection

Service Plan*

Hardware*

No Hardware Products Configured For This Dealer

Travel Fee

VAS

No Value Added Services Configured For This Dealer

[Add VAS Product](#)

[Create Quote](#) [Reset](#) [Close](#)

Customer application: (2) Generate a quote

📍 Service Coverage Checker:

YahClick

GPS Picker Coverage Map



Move the red location pin to the area where the installation must take place. Use the '+' to zoom in to find the exact location.

📍 Location Details

Address

2CJM+X9 Esagi, Nigeria

Customer application: (2) Generate a quote

Service Coverage Checker:

YahClick

GPS Picker Coverage Map



Location Details

Address

18 Akinrinlo St, Ikotun 102213, Lagos, Nigeria

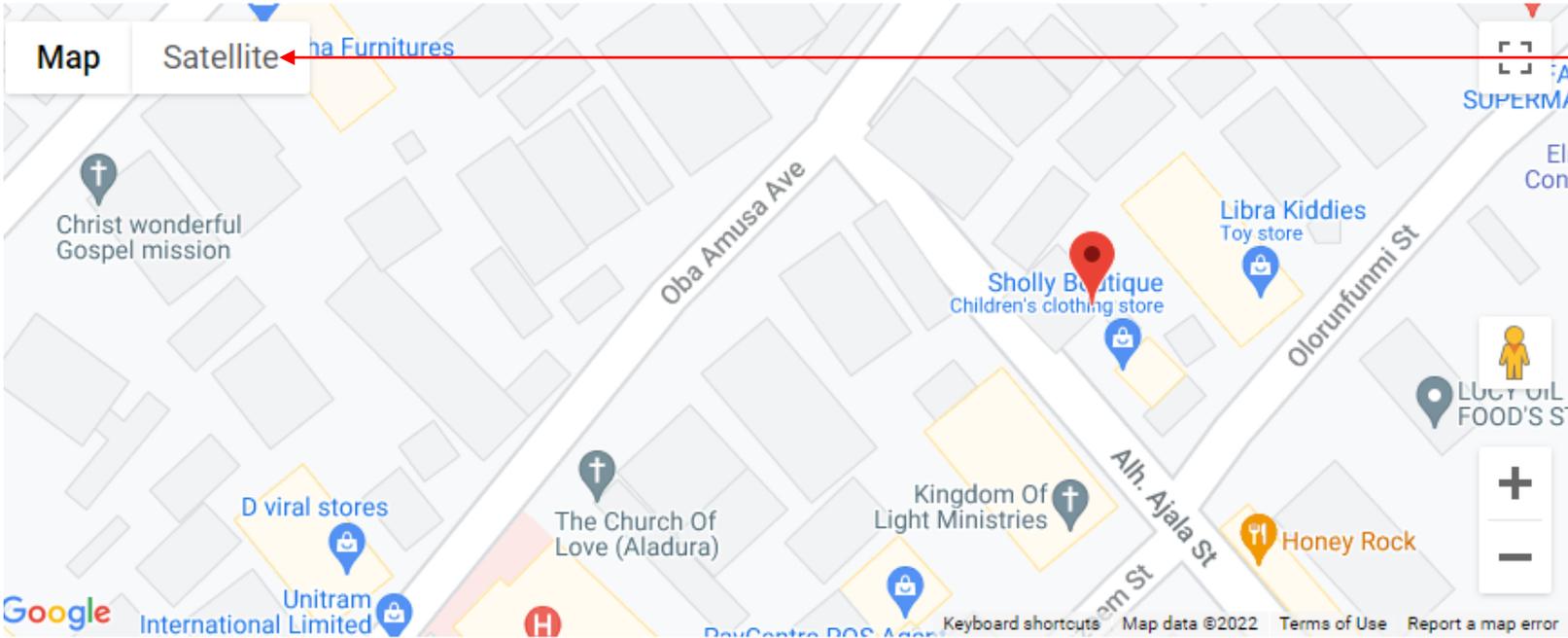
This also works the other way round. You can type in the address and the map with the red pin will be updated with the new location.

Customer application: (2) Generate a quote

Service Coverage Checker:

YahClick

GPS Picker Coverage Map



Location Details

Address

18 Akinrinlo St, Ikotun 102213, Lagos, Nigeria

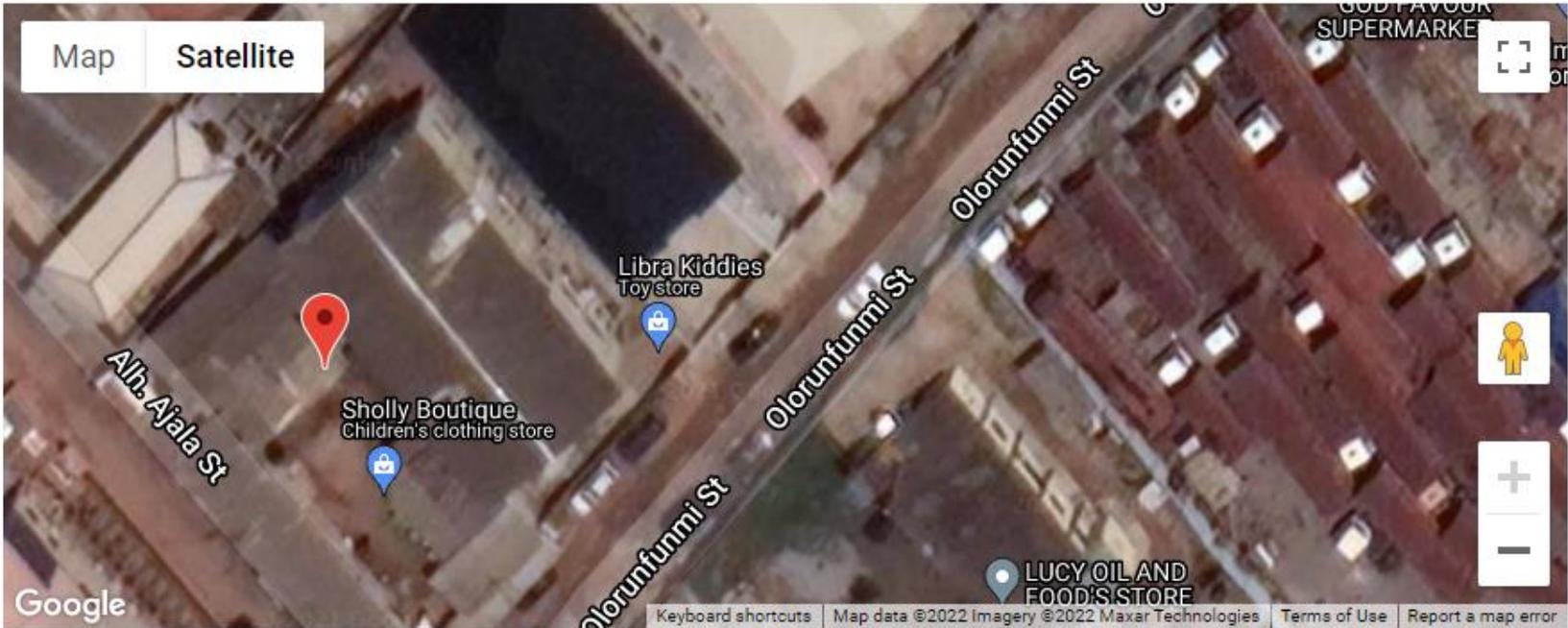
There is also an option to click the 'Satellite' tab for a different view. See next slide for example satellite view ...

Customer application: (2) Generate a quote

📍 Service Coverage Checker:

YahClick

GPS Picker Coverage Map



📍 Location Details

Address
18 Akinrinlo St, Ikotun 102213, Lagos, Nigeria

Scroll down

Customer application: (2) Generate a quote



Location Details

Address
18 Akinrinlo St, Ikotun 102213, Lagos, Nigeria

Latitude
6.5665657
N

Longitude
3.2755508
E

[Capture Coordinates](#) [Plot Coordinates](#) [Search for Address](#) [Check Coverage](#)

Click 'Check Coverage'

Customer application: (2) Generate a quote

×

Service Coverage Details			
Latitude	6.5665657	Longitude	3.2755508
Coverage Status	AVAILABLE ←		
Lookup Response	Thank You! Your request has been successfully executed. Code PIM 10000		

Transport Info: Jupiter			
Beam Id	114	Satellite Id	AIYah-3
Min Antenna Size	0.74	Min ODU Power	1.0
Availability	AVAILABLE	Business Availability	AVAILABLE

SLVT Parameters:		
Antenna Size	ODU Power	Availability
.74	1	99

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

Customer application: (2) Generate a quote



Location Details

Address

Latitude

Longitude

[Capture Coordinates](#) [Plot Coordinates](#) [Search for Address](#) [Check Coverage](#)

Click 'Capture Coordinates'

Customer application: (2) Generate quote

New Quote

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

GPS Location

Location *

6.5665657,3.2755508

Open Map

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

Product Selection

Service Plan*

SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000.00) set (NGN369,000.00)

Hardware*

HARDWARE: HT2000: HT2000 (NGN0.00)

Travel Fee

IT-000-060K: Installation Travelling

VAS

No Value Added Services Configured For This Dealer

Add VAS Product

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

Customer application: (2) Generate quote

Product Selection

Service Plan* SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000.00) set (NGN369,000.00) ▼

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

Travel Fee IT-000-060K: Installation Travelling

VAS No Value Added Services Configured For This Dealer

[Add VAS Product](#)

Quote Summary

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

[Create Quote](#) [Reset](#) [Close](#)

Click 'Create Quote'

Customer application: (2) Generate quote

 New Quote

Quote Created Successfully

GPS Location

Location *

6.5665657,3.2755508

Open Map

Product Selection

Service Plan*

SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000.00) set (NGN369,000.00) ▼

Hardware*

HARDWARE: HT2000: HT2000 (NGN0.00) ▼

Travel Fee

IT-000-060K: Installation Travelling

VAS

No Value Added Services Configured For This Dealer

Add VAS Product

Quote Summary

Scroll down

Customer application: (2) Generate quote

Product Selection

Service Plan*

SUBPLANSNEW: YTTTEST: YTTtest Quarterly Charged (NGN48,000.00) set (NGN369,000.00) ▼

Hardware*

HARDWARE: HT2000: HT2000 (NGN0.00) ▼

Travel Fee

IT-000-060K: Installation Travelling

VAS

No Value Added Services Configured For This Dealer

Add VAS Product

Quote Summary

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

Continue Close

Click 'Continue'

Customer application: (2) Generate quote

Quote: Q23

Prospect

Customer Name	Sam Donotinstall	Quote Status	Complete
Quote Number	Q23	Quote Date	05/Jan/2022
Ticket Number	HL90	Ticket Status	Open

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

[Refresh](#)
[Open Ticket](#)
[Download Quote](#)
[Email Quote](#)

Quote

Subscriber Details

Full Name: Sam Donotinstall, Date of Birth: [Redacted]
 ID Number: 1234567890, Phone Number: 0812345678
 Work Number: 0812345678, Physical Address: [Redacted]
 Postal Address: 49 Test Street, Test Suburb, 123456, Nigeria, NG Citizen: No
 Employer: ABC Ltd, Length of Service: Not Applicable
 Occupation: Finance Manager, Gross Monthly Income: NGN 0.00
 Sale Type: New Quote

Services

LINE	DESCRIPTION	QTY	UNIT PRICE	TAXES	DISCOUNT	NETP	CHECK-OFF
1	YTTtest Quarterly Charged (2000/2000) (2000/2000) (2000/2000)	1	48,000.00	0.00	0.00	48,000.00	0.00
2	HT2000 (2000/2000) (2000/2000) (2000/2000)	1	0.00	0.00	0.00	0.00	0.00
3	Installation Travelling (2000/2000) (2000/2000) (2000/2000)	1	0.00	0.00	0.00	0.00	0.00
Total incl VAT							₦ 48,000.00
Total incl VAT							₦ 48,000.00

Billing Details

Agree taking in advance starting on the day of installation.
 Your effective monthly payment: ₦ 48,000.00

Promotion

LINE	SPECIAL PROMOTION OFFER	QTY	UNIT PRICE	TAXES	DISCOUNT	NETP	CHECK-OFF
1	Special Promotion Offer (2000/2000) (2000/2000) (2000/2000)	1	0.00	0.00	0.00	0.00	0.00
Total incl VAT							₦ 0.00
Total incl VAT							₦ 0.00

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

**The Quote has been created – we now need to generate the Contract ...
Click ‘Open Ticket’**

Customer application: (3) Create Contract

View Sales Order Ticket : HL90

CREATE CONTRACT

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	5/Jan/2022 15:50:27
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Sales Order logged for quote: Q23. Services: YahClick,Stock Service		
Action to be Taken	<ul style="list-style-type: none">• Ensure the customer information has been supplied• Create the contract/proposal agreement for the customer or business		

Ticket Info:			
Customer	Y10:SAM DONOTINSTALL		
Primary Contact	Mr Sam Donotinstall	Service Account	Not Selected

Edit Ticket

Click 'Edit Ticket'

Customer application: (3) Create Contract

Ticket: HL90

CREATE CONTRACT

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	5/Jan/2022 15:50:27
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Sales Order logged for quote: Q23. Services: YahClick,Stock Service		
Action to be Taken	<ul style="list-style-type: none">• Ensure the customer information has been supplied• Create the contract/proposal agreement for the customer or business		

Primary Contact: Mr Sam Donotinstall

Identity Type * ✓ ↕

Identity Number* ✓

Birth Date* ✗
Select the birth date

Scroll down & complete the mandatory fields in the Primary Contact section – example on next slide

Customer application: (3) Create Contract

- Dashboard
- Customer
- Sales 1
- Customers
- Jobs
- Administration
- My Details
- Billing
- User Admin

Primary Contact: Mr Sam Donotinstall

Identity Type *	Nigeria Identification Number ✓ ↕
Identity Number *	12345678910 ✓
Birth Date *	28/05/1970 ✓
Nigerian Citizen *	No ✓ ↕
Resident Status *	Permanent Resident ✓ ↕
Gross Monthly Income	0,0 ✓
Employee Service Length	Select ✓ ↕
Employer Name *	ASD Ltd ✓
Job Title *	Finance Manager ✓

Postal Address

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

Customer application: (3) Create Contract

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing

Postal Address

Address Line1*	40 Test Street	✓
Address Line2	Secondary Address line e.g. Fatai Arobieke Street	✓
Address Suburb*	Test Suburb	✓
Closest City*	Lagos	✓
State*	Lagos	✓ ↕
Country*	Nigeria	✓ ↕
Postal Code*	123456	✓

Physical Address

Customer application: (3) Create Contract

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing

Physical Address

Same As Postal

Address Line1* 40 Test Street ✓

Address Line2 Secondary Address line e.g. Fatai Arobieke Street ✓

Address Suburb* Test Suburb ✓

Closest City* Lagos ✓

State* Lagos ✓ ↕

Country* Nigeria ✓ ↕

Physical Code* 123456 ✓

If the Physical Address is the same as the Postal Address – tick the box
Scroll down ...

Customer application: (3) Create Contract

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin

Closest City* Lagos ✓

State* Lagos ✓

Country* Nigeria ✓

Physical Code* 123456 ✓

Payment Method Type*

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

Check for Cash

Make sure "Check for Cash" is ticked

KYC Documents*

KYC Documents* [Upload Documents](#)

We now need to Upload the KYC Documents. Click "Upload Documents" and follow the 4 easy steps on the following slides . . .

Customer application: (3) Create Contract

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document 1

File Choose File No file chosen

Note: Attachments cannot exceed the file size limit of 16 MB.

Description

KYC / Vetting documentation

Label	Expiry Date	Action
<div style="border: 1px solid #ccc; padding: 2px;">Certified Copy ID / Passport / Refugee Docs ▼</div>	<div style="border: 1px solid #ccc; padding: 2px;">06/01/2022</div>	<div style="border: 1px solid #ccc; padding: 2px; background-color: #00a0c0; color: white; text-align: center; width: fit-content;">Add Label</div>

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	✕
No document attachments								

Refresh Upload KYC / Vetting Document Close

Customer application: (3) Create Contract

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document

File Sam Donoti...st KYC.docx

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 06/01/2022

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	x
No document attachments								

My first upload is a copy of the customers NIN

2

Click "Add Label"

Customer application: (3) Create Contract

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document

File Sam Donoti...st KYC.docx
Note: Attachments cannot exceed the file size limit of 16 MB.

Description
KYC / Vetting documentation

Label	Expiry Date	Action
Proof of Address	06/01/2022	<input type="button" value="Add Label"/>
Certified Copy ID / Passport / Refugee Docs	06/01/2022	<input type="button" value="Delete"/>

The assigned label will now appear on the second line as indicated

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	x
No document attachments								

3

Click "Upload KYC / Vetting Document"

Customer application: (3) Create Contract

KYC / Vetting document uploaded successfully! 87197 : Sam Donotinstall Test KYC.docx

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document

File No file chosen
Note: Attachments cannot exceed the file size limit of 16 MB.

Description
KYC / Vetting documentation

Label	Expiry Date	Action
Proof of Address	06/01/2022	<input type="button" value="Add Label"/>
Certified Copy ID / Passport / Refugee Docs	06/01/2022	<input type="button" value="Delete"/>

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	x
65	06/Jan	Documents Confirmed	KYC	Composite Document	Sam Donotinstall Test KYC.docx	KYC / Vetting documentation	ID	

The system advises the upload was successful and the uploaded document can be viewed here

Click "Close" and scroll back down to "KYC Documents". We will now move on to uploading the Proof of Address

Customer application: (3) Create Contract

- Dashboard
- Dashboard
- Customer
- Check Coverage
- Sales **1**
- Customers
- Jobs
- Administration
- My Details
- Billing
- User Admin

Closest City* Lagos ✓

State* Lagos ✓

Country* Nigeria ✓

Physical Code* 123456 ✓

Payment Method Type*

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

Check for Cash

KYC Documents*

KYC Documents* [Upload Documents](#)

**We now need to Upload the Proof of Address.
Click "Upload Documents"**

Customer application: (3) Create Contract

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document **1**

File Sam Donoti...st KYC.docx

Note: Attachments cannot exceed the file size limit of 16 MB.

Description
KYC / Vetting documentation

Label **Expiry Date** **Action**

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	
65	06/Jan/2022	Documents Confirmed	KYC	Composite Document	 Sam Donotinstall Test KYC.docx	KYC / Vetting documentation	ID	<input type="button" value="x"/>

My second upload is a copy of the customers Proof of Address

Customer application: (3) Create Contract

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document

File Sam Donoti...st KYC.docx
Note: Attachments cannot exceed the file size limit of 16 MB.

Description
KYC / Vetting documentation



Label	Expiry Date	Action
<div style="border: 2px solid red; padding: 5px;"><ul style="list-style-type: none">Certified Copy ID / Passport / Refugee DocsCertified Copy ID / Passport / Refugee Docs<li style="background-color: #007bff; color: white;">Proof of Address</div>	<input type="text" value="06/01/2022"/>	<input type="button" value="Add Label"/>

Select "Proof of Address" from the dropdown list & click "Add Label"

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	
65	06/Jan/2022	Documents Confirmed	KYC	Composite Document	 Sam Donotinstall Test KYC.docx	KYC / Vetting documentation	ID	

Customer application: (3) Create Contract

Upload Documents Attachments: Sam Donotinstall

KYC / Vetting Document

File Sam Donoti...st KYC.docx

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	06/01/2022	<input type="button" value="Add Label"/>
Proof of Address	06/01/2022	<input type="button" value="Delete"/>

The assigned label will now appear on the second line as indicated

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels
65	06/Jan/2022	3 <input type="button" value="Completed"/>	KYC	Composite Document	Sam Donotinstall Test KYC.docx	KYC / Vetting documentation	ID <input type="button" value="x"/>

Click "Upload KYC / Vetting Document"

Customer application: (3) Create Contract

KYC / Vetting document uploaded successfully! 87198 : Sam Donotinstall Test KYC.docx

KYC / Vetting Document

File No file chosen

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

Proof of Address

Documents Attachments: Sam Donotinstall

Id	Created	Status	Type	SubType	Name	Description	Labels	x
66	06/Jan/2022	Documents Confirmed	KYC	Composite Document	 Sam Donotinstall Test KYC.docx	KYC / Vetting documentation	Address	<input type="button" value="x"/>
65	06/Jan/2022	Documents Confirmed	KYC	Composite Document	 Sam Donotinstall Test KYC.docx	KYC / Vetting documentation	ID	<input type="button" value="x"/>

The system advises the upload was successful and the uploaded document can be viewed here

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

Customer application: (3) Create Contract

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Payment Method Type*

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

Check for Cash

KYC Documents*

KYC Documents* [Upload Documents](#)

Customer Contract*

Generate Contract

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

- Refresh
- Download Quote
- Email Quote
- Update Customer**

Click "Update Customer"

Customer application: (3) Create Contract

Customer account successfully updated !

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Ticket: HL90

CREATE CONTRACT

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	5/Jan/2022 15:50:27
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Sales Order logged for quote: Q23. Services: YahClick,Stock Service		
Action to be Taken	<ul style="list-style-type: none">Ensure the customer information has been suppliedCreate the contract/proposal agreement for the customer or business		

Primary Contact: Mr Sam Donotinstall

Identity Type * ✓ ↕

Identity Number *

Scroll down to the bottom . . .

Customer application: (3) Create Contract

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

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

Check for Cash

KYC Documents*

KYC Documents* [Upload Documents](#)

Address	 Sam Donotinstall Test KYC.docx
ID	 Sam Donotinstall Test KYC.docx

Customer Contract*

Generate Contract [Generate Contract](#)

Click "Generate Contract"

[Refresh](#) [Download Quote](#) [Email Quote](#) [Update Customer](#) [Proceed](#)

Customer application: (3) Create Contract

Contract-Q23.pdf | 1 / 4 | 75% | [Navigation icons]

1



2



3



Subscriber Agreement

Subscriber Details			
Full Name	Sam Donotinstall	Date of Birth	28/05/1970
ID Number	12345678910	Phone Number	08012345679
Work Number	08012345679	Physical Address	40 Test Street, Test Suburb, Lagos, 123456, Nigeria
Postal Address	40 Test Street, Test Suburb, 123456, Nigeria	NG Citizen	No
Employer	ASD Ltd	Length of Service	Not Applicable
Occupation	Finance Manager	Gross Monthly Income	NGN 0.00
Sale Type	New Quote		

Services							
Quote Lines							
CODE	DESCRIPTION	QTY	CONTRACT TERM	PERIOD	RECURRING	SETUP	ONCE-OFF
YTTTEST	YTTTEST: YTTTest Quarterly Charged (NGN48,000.00) set (NGN0,000.00) YahClick	1	12 Months	3 Monthly	44,651.16	343,255.82	0.00
HT2000	HT2000: HT2000 (NGN0.00) Stock Service	1		Monthly Charge	0.00	0.00	0.00
IT-000-060K	IT-000-060K: Installation Travelling (NGN0.00)	1		Immediate Charge	0.00	0.00	0.00
Total (incl VAT)					44,651.16	343,255.82	0.00
VAT (7.5%)					3,348.94	265,744.18	0.00
Total (incl VAT)					48,000.00	609,000.00	0.00

Example of Contract

TO NOTE:

If the customer is going to do 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")

Customer application: (3) Create Contract

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

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

Check for Cash

KYC Documents*

KYC Documents* [Upload Documents](#)

Address	 Sam Donotinstall Test KYC.docx
ID	 Sam Donotinstall Test KYC.docx

Customer Contract*

Generate Contract [Generate Contract](#)

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

Click "Proceed"

Customer application: (3) Create Contract

The contract has been generated successfully

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Ticket: HL90

CONTRACT ACCEPTANCE

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	6/Jan/2022 11:12:48
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal <ul style="list-style-type: none">• Create Proposal using the wizard• OR request an electronic acceptance from customer.		

Manual Acceptance

Signed Sales Contract*

Let's recap . . .

We have now:

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

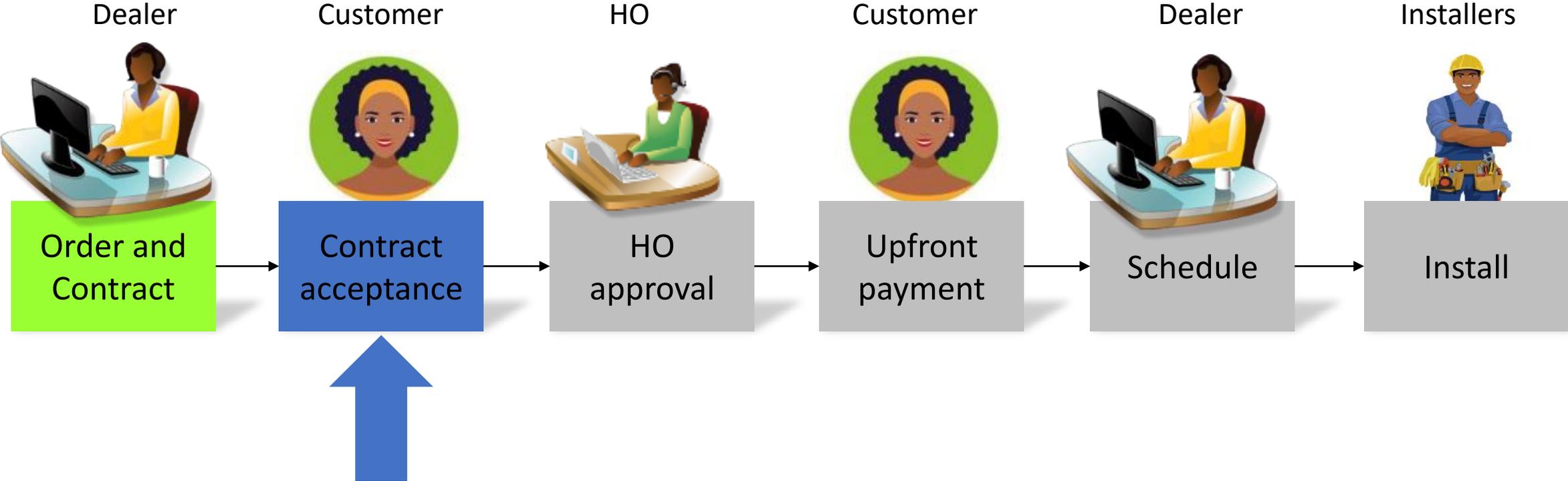
Now we move on to Contract Acceptance!

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 . . .

Presentation roadmap



Contract Acceptance: (4) Find your Customer

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers**
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Search Customers:

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

Account Id

Customer Name

Trading Name

Status

OR

Site Account Number

Search

Click "Search"

Contract Acceptance: (4) Find your Customer

View Customers: 1 Account(s)

Your current customer accounts are listed below, please click on an account to view the details for that customer and their active services.
The search results is limited to 300 accounts.

Id	Customer Name	Account Use	Address	Status	Balance
Y10	Sam Donotinstall	Person	40 Test Street Test Suburb Lagos 123456 Nigeria	Prospect	0.00

[Back to Search](#)

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Click on the Customer Name

Contract Acceptance: (4) Find your Customer

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
- Sales 1
- Customers
- Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Account Id	Y10	Status	Prospect
Account Type	Person	Date Registered	5/Jan/2022
Sales Agent	Mr Web Api	Invoice Delivery	Gets Invoice
Customer Name	Sam Donotinstall	Address	40 Test Street Test Suburb Lagos 123456 Nigeria
Primary Contact	Mr Sam Donotinstall	Email Address	asd@asd.com
Phone Number	08012345679	ID Number	12345678910
Gross Monthly Income	₦0.00	Employer	ASD Ltd
Job Title	Finance Manager	Employee Service Length	Not Applicable
Birth Date	28/05/1970	Nigerian Citizen	No
Resident Status	Permanent Resident		

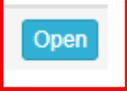
Quotes 0/1 Tickets 0/1 Orders 0/0 Services 0/0

New Quote

Show 10

No	Date	Status	Created By	Lines	Total Charge	Action
Q23	5/Jan/2022	Complete	Me Ellanda Micklethwaite on 05/Jan/2022 15:50	3	₦48,000.00	Open

Scroll down and click "Open"



Contract Acceptance: (4) Find your Customer

Quote: Q23

Prospect

Customer Name	Sam Donotinstall	Quote Status	Complete
Quote Number	Q23	Quote Date	05/Jan/2022
Ticket Number	HL90	Ticket Status	Open

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

Refresh **Open Ticket** Download Quote Email Quote

Click "Open Ticket"

- Dashboard
- Dashboard
- Customer
- Check Coverage
- Sales 1
- Customers
- Jobs
- Administration
- My Details
- Billing
- User Admin
- Logout

Contract Acceptance: (4) Find your Customer

View Sales Order Ticket : HL90

CONTRACT ACCEPTANCE

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	6/Jan/2022 11:12:48
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal <ul style="list-style-type: none">• Create Proposal using the wizard• OR request an electronic acceptance from customer.		

Ticket Info:			
Customer	Y10:SAM DONOTINSTALL		
Primary Contact	Mr Sam Donotinstall	Service Account	Not Selected

[Edit Ticket](#)

Click "Edit Ticket"

- Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Contract Acceptance: (4) IF Manual Acceptance

- Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Ticket: HL90 **CONTRACT ACCEPTANCE**

Steps: CREATE QUOTE → CREATE CONTRACT → **CONTRACT ACCEPTANCE** → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE
→ CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION

Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	6/Jan/2022 11:12:48
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal		

Upload the manual signed customer contract here

- OR request an electronic acceptance from customer.

Manual Acceptance

Signed Sales Contract*

Click "Upload Documents" to upload the signed contract

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

Contract Acceptance: (4) IF Manual Acceptance

- Dashboard
- Customer
 - Check Coverage
 - Sales 3
 - Customers
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Ticket: HL39

CAPTURE ORDER

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	23/Feb/2022 11:44:45	Last Update	23/Feb/2022 13:17:48
Customer Name	Test	Primary Contact	Test
Service Account	Not Selected	Account Use	Person
Quote Number	Q38	Sales Agent	Mr Trainingeight Training
Last Action	Manual Acceptance Processed Successfully via Dealer Portal by Contact:Trainingeight Training		
Action to be Taken	Complete Finance Admin and Process Order <ul style="list-style-type: none">Please review the comments and correct any issues before clicking the 'O		

Select or upload the manually signed sales contract

Capture Order

Sales Contract*

KYC Documents*

Contract Acceptance: (4) IF Manual Acceptance

- Dashboard
- Customer
 - Check Coverage
 - Sales 3
 - Customers
 - Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout
- Mr Trainingten Training
Signed In: 23/Feb 13:46

Sales Contract* Signed sales contract for order (Contact.pdf) [Upload Documents](#)

KYC Documents* [Upload Documents](#)

ID Address	Proof of address.docx
ID	ID.docx

I confirm reviewing and verifying the KYC documents Tick here to confirm KYC has been loaded

Special Instructions

Location 5.5696889,5.7465764 [View Map](#)

Product YahClick Unlimited 150 Quarterly Charged

Default To Primary Contact Tick here to fill in contact details for the order

Contact First Name*

Contact Last Name*

Email Address*

Day Phone Number*

Night Phone Number

Contract Acceptance: (4) IF Manual Acceptance

Capture Order

Sales Contract* Signed sales contract for order (Contact.pdf)

KYC Documents*

ID Address	<input type="button" value="Proof of address.docx"/>
ID	<input type="button" value="ID.docx"/>

I confirm reviewing and verifying the KYC document

Special Instructions

Location 5.5898889,5.7465764

Product YahClick Unlimited 150 Quarterly Charged

Default To Primary Contact

Contact First Name*

Contact Last Name*

Email Address*

Day Phone Number

Night Phone Number

Street Address 1*

Street Address 2

City*

State*

Postal Code*

Country Code*

Type of Modem* HT2000

Product HT2000

Contract Acceptance: (4) **ONLINE** Acceptance

To find your customer - follow the steps as previously indicated:
Search Customer | Open Customer | Open Ticket | Edit Ticket . . .

- Dashboard
 - Dashboard
- Customer
 - Check Coverage
 - Sales **1**
 - Customers
- Jobs
- Administration
 - My Details
 - Billing
 - User Admin
 - Logout

Ticket: HL90

CONTRACT ACCEPTANCE

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	6/Jan/2022 11:12:48
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Contract Created Successfully via Dealer Portal by Contact:Ellanda Micklethwaite		
Action to be Taken	Complete and Dispatch Proposal <ul style="list-style-type: none">Create Proposal using the wizardOR request an electronic acceptance from customer.		

Manual Acceptance

Signed Sales Contract*

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

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

Contract Acceptance: (4) ONLINE Acceptance

Online Acceptance For: Y10:Sam Donotinstall

Request Online Acceptance

Refresh

Close

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

Email Message

From Contact:Me Ellanda Micklethwaite

To

Edit

Subject

Contents

Dear Mr Sam Donotinstall,

Your **xxxx** contract is ready for consideration and acceptance.

Please **CLICK HERE** to be directed to our **xxxx** online acceptance platform for quote number: Q23.

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

Downlink speeds			
Product	Normal	FUP Level 1	FUP Level2

Click "Request Online Acceptance"

Contract Acceptance: (4) ONLINE Acceptance

Online Acceptance For: Y10:Sam Donotinstall

Close

Online Acceptance request successfully actioned!

Email Message

From Contact:Me Ellanda Micklethwaite

To [Edit](#)

Subject

Contents

Dear Mr Sam Donotinstall,

Your **xxxx** contract is ready for consideration and acceptance.

Please [CLICK HERE](#) to be directed to our **xxxx** online acceptance platform for quote number: Q23.

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

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

Contract Acceptance: (4) 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
- Customer
- Sales 1
- Administration

Ticket: HL90

Steps

CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CONTRACT APPROVAL

UPFRONT PAYMENT → DEPLOY SOLUTION

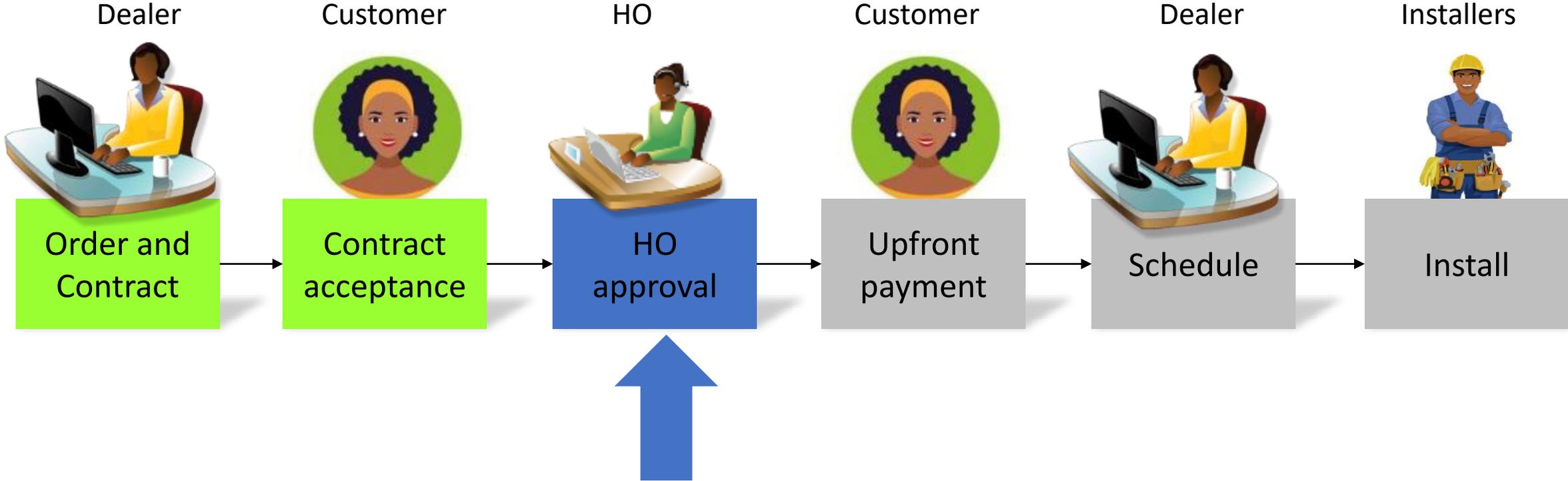
Status	Open	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	6/Jan/2022 13:09:47
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Quote Accepted Online		
Action to be Taken	Review the order and supporting documentation. <ul style="list-style-type: none">Perform the necessary KYC, Vetting and Contract checks.Click the 'Contract Approved' button.		

Contract Approval

This contract is pending approval by Hyperia. Only once it is approved, will the order be processed.

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

Presentation roadmap



Head Office approves the Contract

Now we await Head office to approve the Upfront Payment

UPFRONT PAYMENT

Dashboard

Dashboard

Customer

Check Coverage

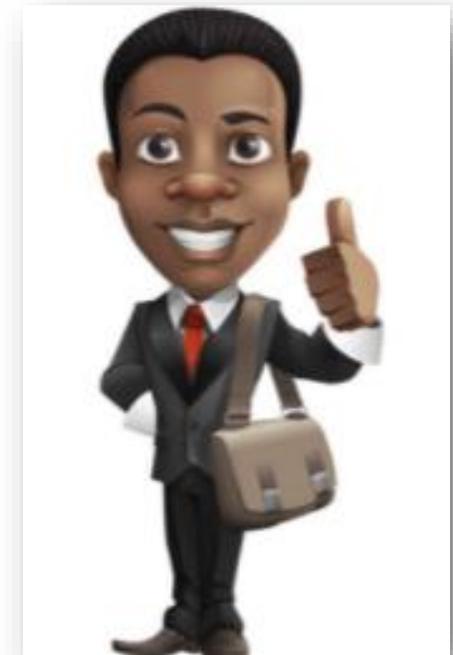
Sales 1

Ticket: HL133

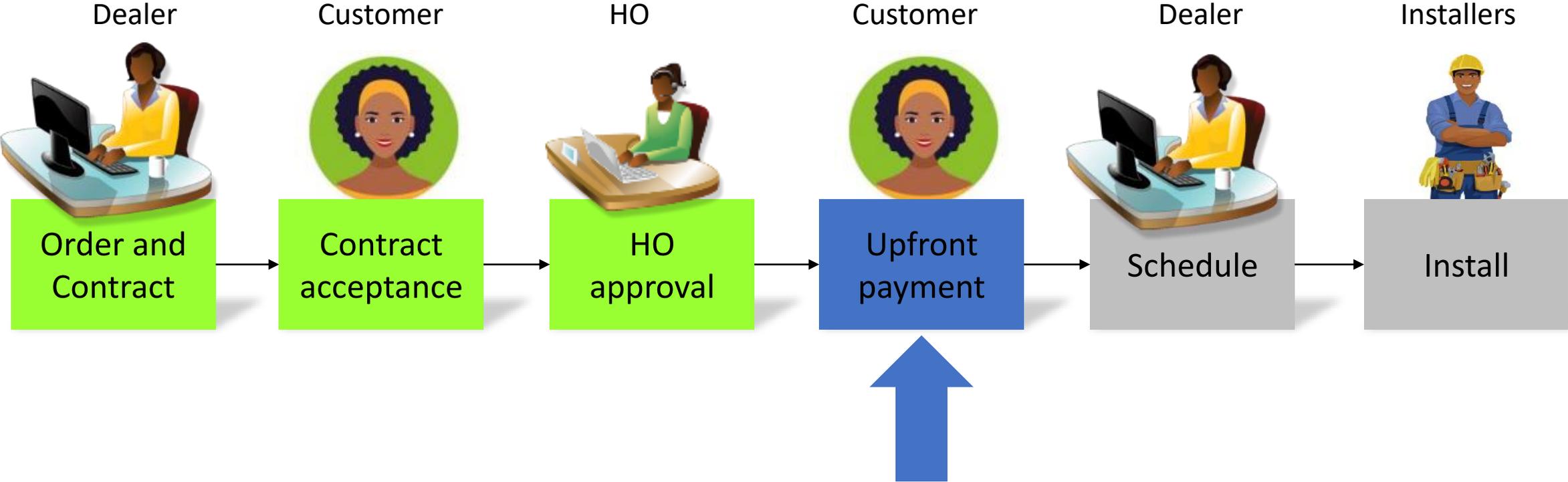
Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	New Sale
Create Date	10/Jan/2022 15:17:44	Last Update	11/Jan/2022 11:57:19
Customer Name	Donotinstall Ltd	Primary Contact	Mr Peter Pan

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



Presentation roadmap



How to check the status of pending customers

Dashboard

Dashboard

Customer

Check Coverage

Sales 1

Customers

Jobs

Administration

View Sales: Y2

New Lead

Actions Required 1

Leads 0

Quotes 6

Orders 27

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

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 . . .

View Sales Order Ticket : HL90 **COMPLETE**

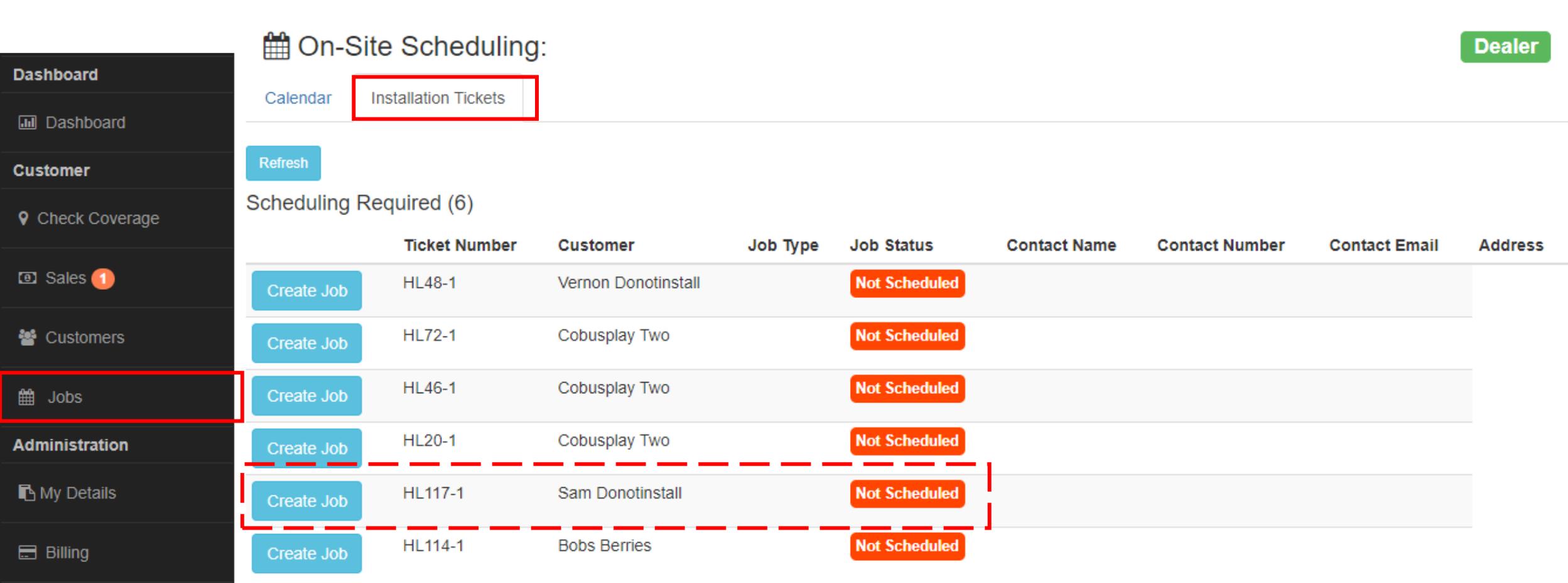
Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CONTRACT APPROVAL →		
	UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Closed	Category	New Sale
Create Date	5/Jan/2022 15:50:27	Last Update	6/Jan/2022 13:50:55
Customer Name	Sam Donotinstall	Primary Contact	Mr Sam Donotinstall
Service Account	Not Selected	Account Use	Person
Quote Number	Q23	Sales Agent	Me Ellanda Micklethwaite
Last Action	Approved for test		
Action to be Taken	Ticket workflow process complete!		

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”



The screenshot shows the 'On-Site Scheduling' interface. A sidebar on the left contains a 'Jobs' menu item highlighted with a red box. The main area shows a 'Dealer' button in the top right, a 'Calendar' tab, and a 'Installation Tickets' tab highlighted with a red box. Below these is a 'Refresh' button and a section titled 'Scheduling Required (6)'. A table lists six tickets, each with a 'Create Job' button and a 'Not Scheduled' status. The row for ticket HL117-1, customer Sam Donotinstall, is highlighted with a red dashed box.

	Ticket Number	Customer	Job Type	Job Status	Contact Name	Contact Number	Contact Email	Address
Create Job	HL48-1	Vernon Donotinstall		Not Scheduled				
Create Job	HL72-1	Cobusplay Two		Not Scheduled				
Create Job	HL46-1	Cobusplay Two		Not Scheduled				
Create Job	HL20-1	Cobusplay Two		Not Scheduled				
Create Job	HL117-1	Sam Donotinstall		Not Scheduled				
Create Job	HL114-1	Bobs Berries		Not Scheduled				

YES!!! Sam Donotinstall 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!

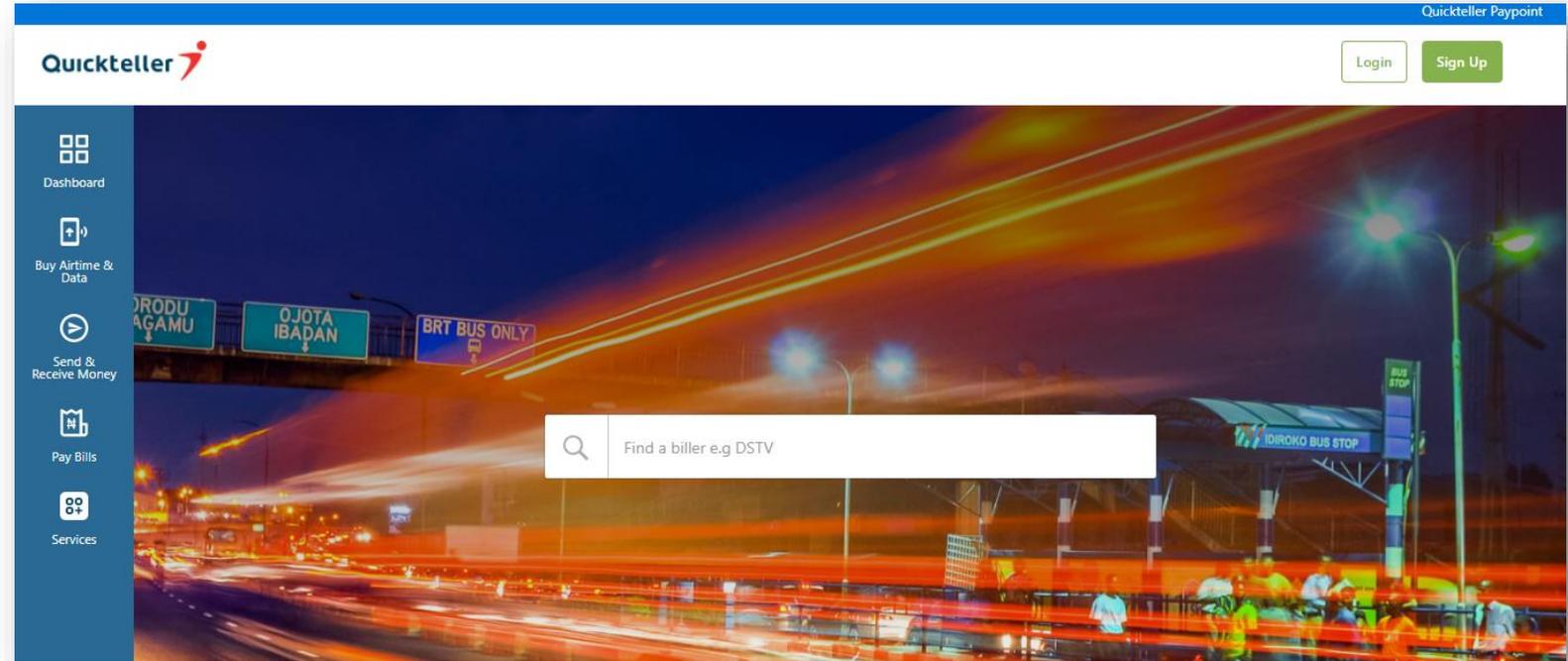
Customer payment options

- QuickTeller @ www.quickteller.com

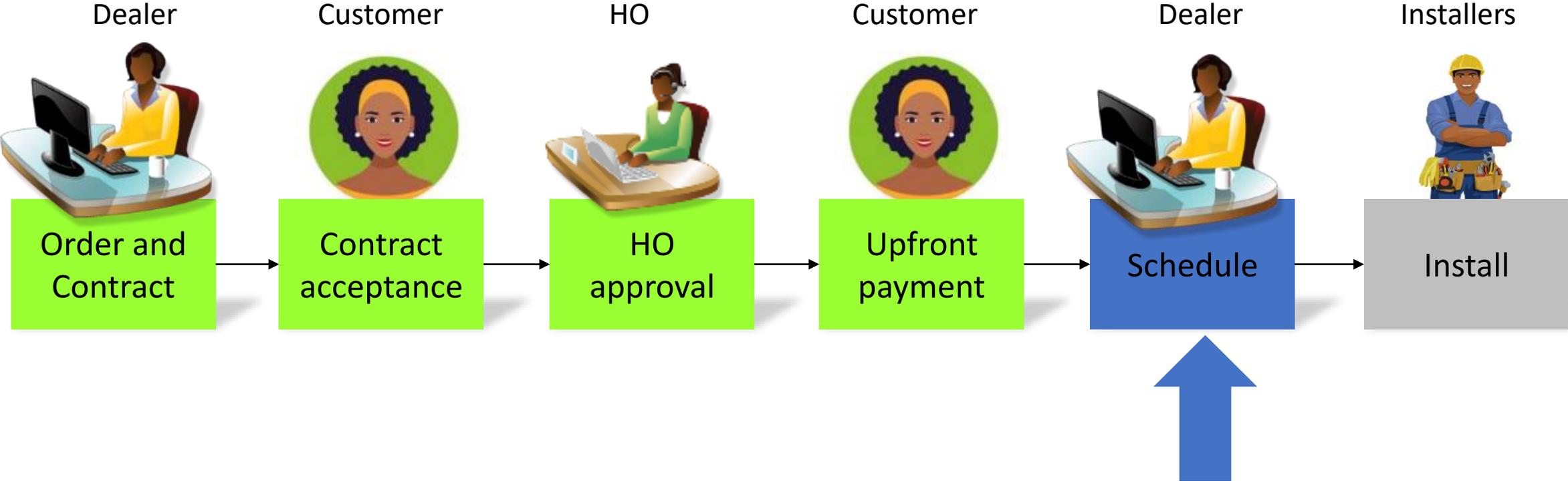
or

- Bank deposit

- ❖ Bank Name: xxx
- ❖ Branch Name: xxx
- ❖ Branch Code: xxx
- ❖ Account Name: xxx
- ❖ Bank Account No: xxx
- ❖ Reference: Customer Account Number (like Y123)



Presentation roadmap



Schedule the job: (5) for installation

Dealer

On-Site Scheduling:

Calendar

Installation Tickets

Refresh

Scheduling Required (6)

	Ticket Number	Customer	Job Type	Job Status	Contact Name	Contact Number	Contact Email	Address
Create Job	HL48-1	Vernon Donotinstall		Not Scheduled				
Create Job	HL72-1	Cobusplay Two		Not Scheduled				
Create Job	HL46-1	Cobusplay Two		Not Scheduled				
Create Job	HL20-1	Cobusplay Two		Not Scheduled				
Create Job	HL117-1	Sam Donotinstall		Not Scheduled				
Create Job	HL114-1	Bobs Berries		Not Scheduled				

Click "Create Job"

Schedule the job: (5) for installation

Create New Job:

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

Customer Details

Customer ★ Y10.SAM.DONOTINSTALL Select the customer against which this job will be logged.

Order X23.Provisioning

Site Details

Contact Name ★ Sam DonotInstall Enter the on-site contact's name.

Contact Mobile Number ★ 08012345678 Enter the on-site contact's mobile number.

Contact Email Address ★ asd@asd.com Enter the on-site contact's email address.

Site Physical Address ★ 40 Test Street, Test Suburb, Lagos, 123456, Nigeria The physical address of the site.

Site GPS Location ★ 6.453471599999999,3.3699 The GPS location of the site. [Open Map](#)

Site Region ★ Lagos Region of the site.

Job Details

Job Type ★ Installation The type of callout.

Job Instructions ★ The instructions for the on site engineer.
YahClick Site Installation for YahClick order: 20195581 with SAN: and pin: for service plan: YahClick 4Gen 5GB Request by Contact.Me Eitanda Middelthwaite.

Hardware to Install ★ The hardware that the engineer will need to install to complete this job.

Include	Type	Sub-Type	Status
<input checked="" type="checkbox"/>	ODU	AY3ODU	Order
<input checked="" type="checkbox"/>	VSAT Modem	HT2000	Order

Create Job

Click "Create Job"

Schedule the job: (5) for installation

📄 Create New Job:

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

Job has been successfully created!

📄 Customer Details

Customer ★

Y10:SAM DONOTINSTALL

Select the customer against which this job will be logged.

Order

X23:Provisioning

📄 Site Details

Contact Name ★

Sam Donotinstall

Enter the on-site contact's name.

Contact Mobile Number ★

08012345679

Enter the on-site contact's mobile number.

Contact Email Address ★

asd@asd.com

Enter the on-site contact's email address.

Site Physical Address ★

40 Test Street, Test Suburb, Lagos, 123456, Nigeria

The physical address of the site.

Scroll down and click "Continue"

Schedule the job: (5) for installation

Select the Engineer & timeslot in the calendar

Schedule Job: HL117-1-1

Follow the steps below and click 'Schedule Job'.

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

1. Select an Engineer

Select	Engineer	Legend	Show
<input checked="" type="radio"/>	Mr Cobus Sadie		<input checked="" type="checkbox"/>
<input type="radio"/>	Mr Frank Miller		<input type="checkbox"/>

2. Confirm Job Details

Type On Site Callout - Install - Hardware

Address 40 Test Street, Test Suburb, Lagos, 123456, Nigeria

Contact* Sam Donotinstall

< > today Jan 2 - 8, 2022 month week day

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

10:00 - 12:30
Install -
Hardware

Scroll down and click "Schedule Job"

Schedule the job: (5) for installation

☐ Schedule Job: HL117-1-1

Follow the steps below and click 'Schedule Job'.

Job was successfully scheduled.

1. Select an Engineer

Select	Engineer	Legend	Show
<input checked="" type="radio"/>	Mr Cobus Sadie		<input checked="" type="checkbox"/>
<input type="radio"/>	Mr Frank Miller		<input type="checkbox"/>

2. Confirm Job Details

Type	On Site Callout - Install - Hardware
Address	40 Test Street, Test Suburb, Lagos, 123456, Nigeria
Contact*	Sam Donotinstall
Customer Name	Sam Donotinstall

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

< > today Jan 2 - 8, 2022 month week day

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

Scroll down and click "Continue"

Schedule the job: (5) for installation

Refresh

Scheduling Required (5)

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

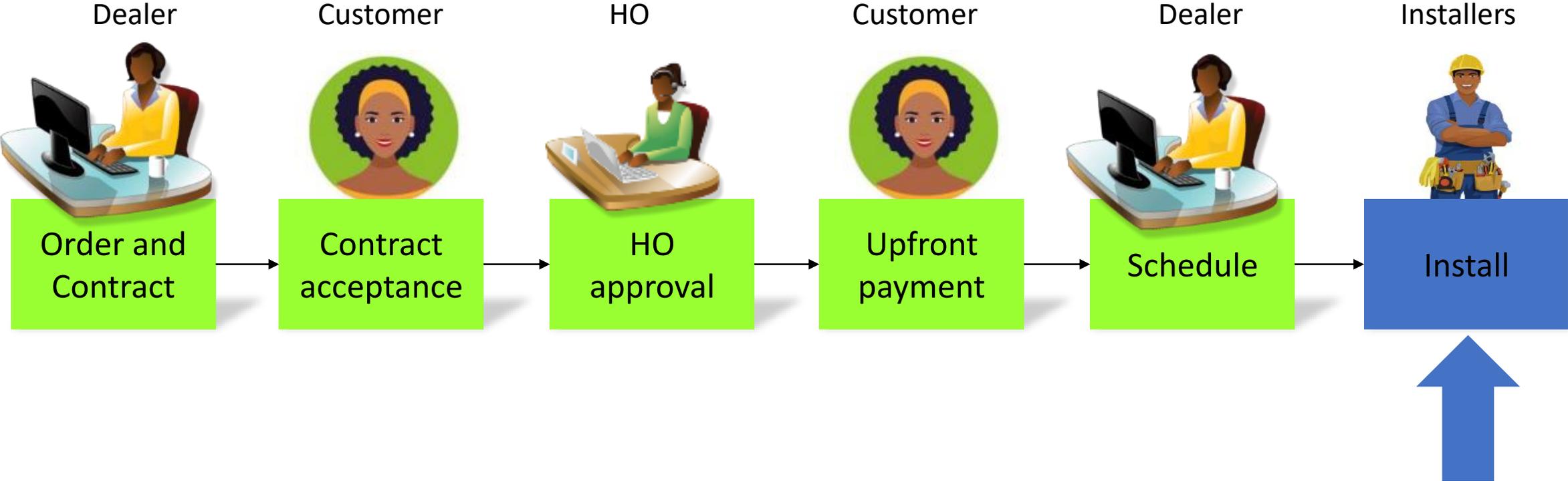
Queued Jobs (2)

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

If you wish to know what the status is of the installation – always refer to Queued Jobs for the Job status i.e.

- Assigned to Contractor Person = in Installation queue
- In progress = installation in progress
- Requires Sign-Off = the installation is complete and awaiting Head Office sign-off

Presentation roadmap



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 CUSTOMER APPLICATION