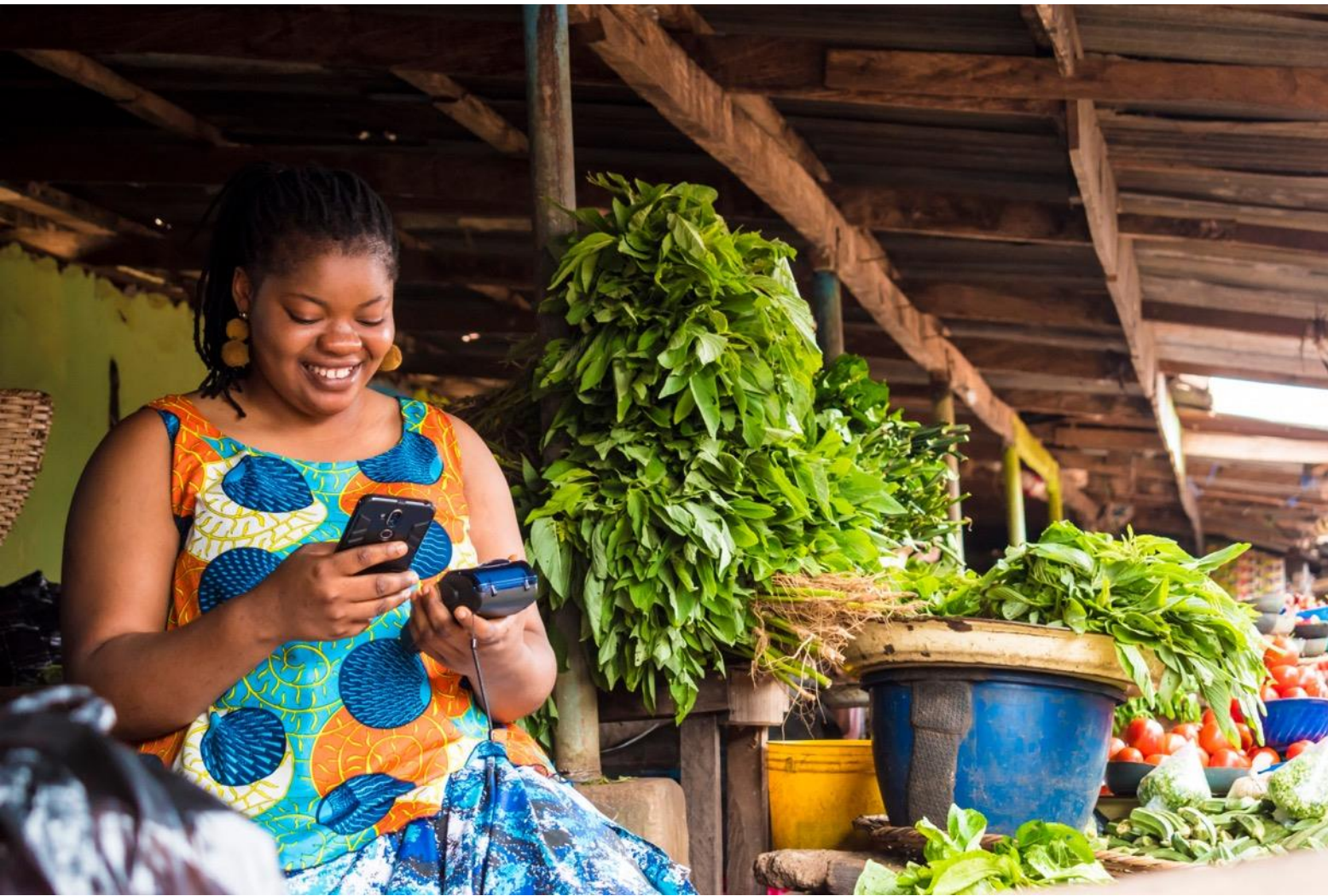


SOLID DEALER PORTAL REFERENCE GUIDE



Dealer Training

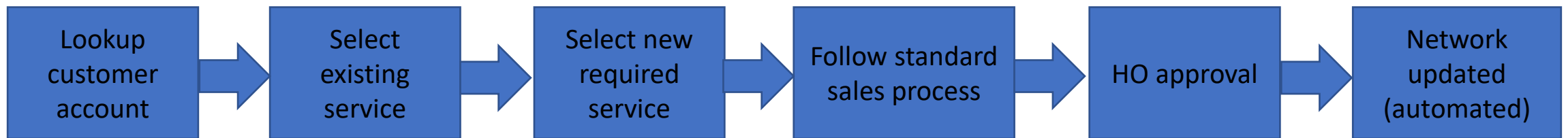


How to complete a service change (upgrade or downgrade)

How to complete a service change (upgrade or downgrade)

Introduction

- Service change allow the upgrade/downgrade of the service of an existing active customer
- Some Principles
 - Service change is not possible during the period of the prepaid service (Like first three months of a three month upfront paid product).
 - A Service Change = a new contract with the customer as it changes the financial billing obligations of the customer.
- Basic Steps



Step 1: Lookup customer account

Dashboard

Dashboard

Customer

Check Coverage

Sales

Customers

Jobs

Administration

My Details

Billing

User Admin

Logout

🔍 View Customers: 2 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↕
Y4	Test Services	Organisation		Active Account	85,000.00
Y147		Person		Prospect	0.00

Back to Search

Step 1: Lookup customer account

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Mr Cobus Sadie
Signed In: 31/Mar 16:39

Customer Y4 - Test Services

Active Account

Refresh Edit Account

Account Contacts 2 Debtors 1 Documents 10

Account Id	Y4	Status	Active Account
Account Type	Organisation	Date Registered	5/Jan/2022
Sales Agent	Mr Cobus Sadie	Invoice Delivery	Gets Invoice
Customer Name	Test Services	Address	
Primary Contact	Mr Tim	Email Address	
Phone Number		Registration Number	
Gross Monthly Turnover	NO.		
Job Title	Sal	Service Length	Not Applicable
Birth Date	Not Specified	Nigerian Citizen	No
Resident Status	Not Applicable		

Existing active services are here

Quotes 7/9 Tickets 11/14 Orders 5/7 Services 2/5

New Quote

Show 10

Step 2: Select existing service

Dashboard

Dashboard

Customer

Check Coverage

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User Admin

Logout

Mr Cobus Sadie
Signed In: 31/Mar 16:39

Primary Contact	Mr Tim	Email Address	
Phone Number		Registration Number	
Gross Monthly Turnover	₦0.00	Employer	
Job Title	Sales Manager	Employee Service Length	Not Applicable
Birth Date	Not Specified	Nigerian Citizen	
Resident Status	Not Applicable		

Quotes 7/9

Tickets 11/14

Orders 5/7

Services 2/5

Request Cancellation

Action	Account-Id	Status	Services	Product	Start Date	End Date
<div>Open</div>	Y4-1	Active	ou Street HL-	HT2000: HT2000 (₦0.00) invoiced 3 Monthly - billed to:5/Jan/2022	5/Jan/2022	
				Q75GBROLLV1: YahClick 75GB Data Rollover Quarterly Charged (₦0.00) set (₦410,232.56) - billed to:6/Jan/2022	6/Jan/2022	6/Jan/2022
				Q75GBROLLV1: YahClick 75GB Data Rollover Quarterly Charged (₦0.00) set (₦410,232.56) - billed to:5/Apr/2022	6/Jan/2022	15/Apr/2022
				UQUNLIMITED150V1: YahClick Unlimited 150 Quarterly Charged (₦45,581.39) - Not Billed	15/Apr/2022	
<div>Open</div>	Y4-5	Active	YahClick:Migrateddummy2, STAG-N00025	UQUNLIMITED150V1: YahClick Unlimited 150 Quarterly Charged (₦0.00) - Not Billed	18/Mar/2022	

Select the service to change

Step 2: Select existing service

 View Sub-Account: Y4-5, Migrateddummy2

Active

New Ticket

Change Service

Renew Service

Back

Refresh

View Network Status

Current product of this customer

Product

UQUNLIMITED150V1: YahClick Unlimited 150 Quarterly Charged (N0.00) - Not Billed

18/Mar/2022

End Date

Status

Active

Upgrade/Downgrade Ticket History

Id	Ticket Number	Customer Name	Sales Agent	Current Step	Create Date	Upgrade/Downgrade Product	Action
204	HL221	Test Services	Mr Cobus Sadie	Create Contract	31/Mar/2022 15:14:50	UQ50GBROLLV1	Open


YahClick: Product Parameters

Downlink Speed (Mbps)	25 Mbps	Uplink Speed (Mbps)	3 Mbps
72h Allowance	UNLIMITED	Monthly Allowance	UNLIMITED
Customer Type	Consumer	Offer Display Name	YahClick Unlimited 150 AY3
FAP Token	No FAP Token	Terminal Type Required	Home Or Business
Offer Code Suffix	Y3JUJU200GB5		


YahClick: Site Parameters


Default To Primary Contact	Yes	Contact First Name	Tim
Contact Last Name		Email Address	
Day Phone Number		Street Address 1	
City	Lagos	State	

Dashboard


 Dashboard

Customer


 Check Coverage


 Sales


Customers


 Jobs


Administration

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 Mr Cobus Sadie
Signed In: 31/Mar 16:39

Step 3: Select new service

 New Service Change Request for: Test Services

Please enter the details of this upgrade/downgrade.

Service to Change						
Id	Service Account	Services	Contract	Status	Start Date	End Date
17	Y4-5	YahClick: Migrateddummy2, STAG-N00025	UQUNLIMITED150V1: YahClick Unlimited 150 Quarterly Charged (N0.00)	Active	18/Mar/2022	-

Service Change Details

Select Contact*

Mr Tim

Select a contact person

New Product*

UQ200GBROLLV1: YahClick 200GB Data Rollover Quarterly Charged (NGN178,000.00)

Select the new product

Log Service Change

Refresh

Close

Step 3: Select new service

 New Service Change Request for: Test Services

Service Change Request successfully logged to customer account!

Service to Change						
Id	Service Account	Services	Contract	Status	Start Date	End Date
17	Y4-5	YahClick: Migrateddummy2, : STAG-N00025	UQUNLIMITED150V1: YahClick Unlimited 150 Quarterly Charged (N0.00)	Active	18/Mar/2022	-

Service Change Details

Select Contact*

Mr Tim

New Product*

UQ200GBROLLV1: YahClick 200GB Data Rollover Quarterly Charged (NGN178,000.00)

Step 4: follow standard sales process

View Sales Order Ticket : HL223

CREATE CONTRACT

Steps	<div>CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE →</div> <div>PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER →</div> <div>CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION</div>		
Status	Open	Category	Service Change
Create Date	31/Mar/2022 16:55:23	Last Update	31/Mar/2022 16:55:23
Customer Name	Test Services	Primary Contact	Mr Tim
Service Account	Y4-5:YahClick: Migrateddummy2, STAG- N00025	Account Use	Organisation
Quote Number	Q104	Sales Agent	Mr Cobus Sadie
Last Action	Service Change Sales Order logged for quote: Q104. Services: YahClick		
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		

Ticket Info:			
Customer	Y4	TEST SERVICES	
Primary Contact	Mr Tim	Service Account	Y4-5:YahClick: Migrateddummy2, STAG-N00025

Edit Ticket

Step 4: follow standard sales process

☀ View Sales Order Ticket : HL223

CREATE CONTRACT

Steps

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

The upgrade quote has been created, the rest of the sales process now follows


Status		Category	Service Change
Create Date	31/Mar/2022 16:55:23	Last Update	31/Mar/2022 16:55:23
Customer Name	TEST SERVICES	Primary Contact	Mr Tim
Service Account	Y4-5:YahClick: Migrateddummy2, STAG-N00025	Account Use	Organisation
Quote Number	Q104	Sales Agent	Mr Cobus Sadie
Last Action	Service Change Sales Order logged for quote: Q104. Services: YahClick		
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	Y4: TEST SERVICES		
Primary Contact	Mr Tim	Service Account	Y4-5:YahClick: Migrateddummy2, STAG-N00025

Edit Ticket

Step 4: follow standard sales process

 Ticket: HL223

CREATE CONTRACT

Steps

CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE →

PENDING ELECTRONIC ACCEPTANCE → PENDING ONLINE ACCEPTANCE → CAPTURE ORDER →

CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION

Customer Contract*

Generate Contract

Generate Contract

Create the new contract. (Since this is an existing customer, there is normally no need to update any customer information)

Refresh

Download Quote

Email Quote

Update Customer

Proceed

Step 4: follow standard sales process

Dashboard

Dashboard

Customer

Check Coverage

Sales

Customers

Jobs

Administration

My Details

Billing

User Admin

Logout

View Sales Order Ticket : HL223

CONTRACT APPROVAL

Steps	CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION		
Status	Open	Category	Service Change
Create Date	31/Mar/2022 16:55:23	Last Update	31/Mar/2022 17:04:33
Customer Name	Test Services	Primary Contact	Mr Tim
Service Account	Y4-5:YahClick: Migrateddummy2, Street HL-STAG-N00025	Account Use	Organisation
Quote Number	Q104	Sales Agent	Mr Cobus Sadie
Last Action	Order Processed Successfully via Dealer Portal by Contact:Cobus Sadie		
Action to be Taken	<div>Review the order and supporting documentation.</div> <ul style="list-style-type: none">Perform the necessary KYC, Vetting and Contract checks.Click the 'Contract Approved' button.		

Ticket Info:			
Customer	Y4: TEST SERVICES		
Primary Contact	Mr Tim	Service Account	Y4-5:YahClick: Migrateddummy2,
Quote	Q104:NGN178,000.00		

Edit Ticket

Step 5: Follow the sale ...

- Head Office approval is required as usual
- No upfront payment is required as it is an existing service
- Following the HO approval, the upgrade is automated into the network and normally takes about 10 minutes

Well done – you have completed a service change