SOLID DEALER PORTAL REFERENCE GUIDE





Dealer Training



How to identify contract rejection notes



In this section we will learn how to:

- 1. Select Sales to view Notifications
- 2. Check the status history
- 3. Edit the Ticket upload and process the order

Awaiting Head Office contract approval . . .



Ticket: HL147			CONTRACT APPROVAL		
Steps	CREATE QUOTE \rightarrow CREATE CONTRACT \rightarrow CONTRACT ACCEPTANCE \rightarrow CAPTURE ORDER \rightarrow CONTRACT APPROVAL \rightarrow UPFRONT PAYMENT \rightarrow DEPLOY SOLUTION				
Status	Open	Category	New Sale		
Create Date	11/Jan/2022 15:26:09	Last Update	11/Jan/2022 15:35:20		
Customer Name	Donotinstall Ltd	Primary Contact	Mr Peter Pan		
Service Account	Y15-2:No Services	Account Use	Organisation		
Quote Number	Q44	Sales Agent	Me Ellanda Micklethwaite		
Last Action	Order Processed Successfully via Dealer Portal by Contact: Ellanda Micklethwaite				
Action to be Taken	 Review the order and supporting documentation. 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 ord	er be processed.			
			J		
	Ticket: HL147 Steps Status Create Date Customer Name Service Account Quote Number Last Action Action to be Taken Contract Approval This contract is pending approval	Image: Status Open Create Date 11/Jan/2022 15:26:09 Customer Name Donotinstall Ltd Service Account Y15-2:No Services Quote Number Q44 Last Action Order Processed Successfully via D Action to be Taken Perform the necessary KYC, Vettill Image: Contract Approval Direction the contract Approval by Hyperia. Only once it is approved, will the order	Image: Status CHEATE GUGTE CHEATE CONTRACT CONTRACT CACCEPTANCE CAPTURE ORDER Status Open Category Create Date 11/Jan/2022 15:26:09 Last Update Customer Name Donotinstall Ltd Primary Contact Service Account Y15-2:No Services Account Use Quote Number Q44 Sales Agent Last Action Order Processed Successfully via Dealer Portal by Contact: Ellanda Micklethwaite Action to be Taken Pierform the necessary KYC, Vetting and Contract checks. Cick the 'Contract Approval Cick the 'Contract Approved' button.		

Signed In: 11/Jan 13:43

We have captured the order for this client and await contract approval from Head Office... Where do we find notification that Head Office rejected the contract?

Dashboard		iew Sales: Y	2					
Jashboard	NGW	Leau						
Customer	Actio	ns Required ₂	Leads O Quotes 9	Orders 35				
Check Coverage	Id	Ticket Number	Customer Name	Sales Agent	Current Step	Create Date	Action Description	Action
3 Sales 2	130	HL147	DONOTINSTALL LTD	Mr Web Api	Capture Order	11/Jan/2022 15:26:09	Corrections Required As Per Instructions	Open
📽 Customers	24	HL25-1-2	Vernon Donotinstall	Mr Web Api	Invoice Customer	3/Jan/2022 15:20:53	Capture and Process Customer Order	Open
🛱 Jobs								
Administration								
🚯 My Details								
🚍 Billing								
🚨 User Admin								
G+ Logout								
							All contract rejection note	s will always be lis

ted in Tab Find your customer & click "Open"



	View Sales Orde	er Ticket : HL147	CAPTURE ORDER				
Dashboard	Steps						
Dashboard	Status	Open	Category	New Sale			
Customer	Create Date	11/Jan/2022 15:26:09	Last Update	11/Jan/2022 16:16:22			
Check Coverage	Customer Name	Donotinstall Ltd	Primary Contact	Mr Peter Pan			
(i) Sales (2)	Service Account	Y15-2:No Services	Account Use	Organisation			
🗑 Customers	Quote Number	Q44	Sales Agent	Me Ellanda Micklethwaite			
	Last Action	Contract not approved	Contract not approved				
🛗 Jobs	Action to be Taken	Complete Finance Admi • Please review the com-	 Complete Finance Admin and Process Order Please review the comments and correct any issues before clicking the 'Order Processed' button. 				
Administration		Corrections Required					
🚯 My Details	Ticket Info:						
🖶 Billing	Customer	Y15:DONOTINSTALL LTD					
🌡 User Admin	Primap Sontact	Mr Peter Pan	Service Account	Before you move to "Edit" the Ticket – please do the following –			
€ Logout	Edit Ticket	In this case there is n	o action as the	Check the STATUS HISTORY			
	Status History	contract was rejected the business is under	l because the owner of debt review.	The "Status History" will advise why the contract has been rejected e.g. outstanding or incorrect			
Signed In: 11/Jan 13:43	Open: Contract not a Cobus Sadie 11/Jan/2022 18/18/22	approved	documents submitted.				
	Cobus Sadie 11/Jan/2022 16:15:37	cessed Successfully via Dealer Portal by Contact:Elland	a Micklethwaite	If this is the case - once you have obtained the required / correct documentation - move on to Edit Ticket (2) see next slide for example			

Open: Order Processed Successfully via Desiar Portal by Contact-Filanda Micklethwaite

YahClick

Dashboard	Ticket: HL147				CAPTURE ORDER		
🔟 Dashboard	Steps	CREATE QUOTE -> CREATE CONTRACT -> CONTRACT ACCEPTANCE -> CAPTURE ORDER -> CONTRACT APPROVAL -> UPFRONT PAYMENT -> DEPLOY SOLUTION					
Customer	Status		n	Category	New Sale		
Check Coverage	Create Date		larv/2022 15:26:09	Last Update	11/Jan/2022 16:16:22		
Fall Salas	Customer Name		otinstall Ltd	Primary Contact	Mr Peter Pan		
Service Account		Y15	-2:No Services	Account Use	Organisation		
🔮 Customers	Quote Number			Sales Agent	Me Ellanda Micklethwaite		
🛗 Jobs	Last Action		Contract not approved				
Administration	Action to be Taken		Complete Finance Admin and Process Order Please review the comments and correct any issues before clicking the 'Order Processed' button. Commentee Resulted				
Ny Details		• •					
🚍 Billing	Lapture Order						
👗 User Admin	Sales Contract*	Upfront Payment Pro-Forma Invoice (Quote-Q39-2022-01-11.pdf)					
🖙 Logout	KYC Documents*	Upload Documents					
● Me Ellanda Micklethwaite Signed In: 11/Jan 13:43		Certificate of Incorporation	Donotinstall KYC test document.docx				
		Address	Donotinstall KYC test document.docx		Re-upload the relevant document/s		
		ID	Donotinstall KYC test document.docx		Assign the relevant label Add then click "Process Order"		
					The status will then revert back to "awaiting Hea		



The End