

SOLID DEALER PORTAL REFERENCE GUIDE



Dealer Training



How to identify contract rejection notes

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 . . .

Dashboard

- Dashboard

Customer

- Check Coverage
- Sales **1**
- Customers
- Jobs

Administration

- My Details
- Billing
- User Admin
- Logout

Me Ellanda Micklethwaite
Signed In: 11/Jan 13:43

Ticket: HL147

CONTRACT APPROVAL

Steps: CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → CAPTURE ORDER → **CONTRACT APPROVAL** → UPFRONT PAYMENT → 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. <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.

Refresh Download Contract

**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?**

How to identify contract rejection notes

- Dashboard
- Customer
- Check Coverage
- Sales 2**
- Customers
- Jobs
- Administration
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- Me Ellanda Micklethwaite
Signed In: 11/Jan 13:43

View Sales: Y2

New Lead

Actions Required **2** Leads **0** Quotes **9** Orders **35**

Id	Ticket Number	Customer Name	Sales Agent	Current Step	Create Date	Action Description	Action
130	HL147	DONOTINSTALL LTD	Mr Web Api	Capture Order	11/Jan/2022 15:26:09	Corrections Required As Per Instructions	Open
24	HL25-1-2	Vernon Donotinstall	Mr Web Api	Invoice Customer	3/Jan/2022 15:20:53	Capture and Process Customer Order	Open

**All contract rejection notes will always be listed in the SALES menu in the "Actions Required" Tab
Find your customer & click "Open"**

How to identify contract rejection notes

- Dashboard
- Customer
- Sales **2**
- Customers
- Jobs
- Administration
- My Details
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- Logout
- Me Ellanda Micklethwaite
Signed In: 11/Jan 13:43

View Sales Order Ticket : HL147

CAPTURE ORDER

Steps: CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION

Status	Open	Category	New Sale
Create Date	11/Jan/2022 15:26:09	Last Update	11/Jan/2022 16:16:22
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	Contract not approved		
Action to be Taken	Complete Finance Admin and Process Order • Please review the comments and correct any issues before clicking the 'Order Processed' button. • Corrections Required		

Ticket Info:

Customer	Y15:DONOTINSTALL LTD		
Primary Contact	Mr Peter Pan	Service Account	

2 Edit Ticket

1 Status History

In this case there is no action as the contract was rejected because the owner of the business is under debt review.

Open: Contract not approved
Cobus Sadie 11/Jan/2022 16:16:22

Allocated: Order Processed Successfully via Dealer Portal by Contact:Ellanda Micklethwaite
Cobus Sadie 11/Jan/2022 16:15:37

Open: Order Processed Successfully via Dealer Portal by Contact:Ellanda Micklethwaite

Before you move to "Edit" the Ticket ...
– please do the following – **1**
Check the STATUS HISTORY

The "Status History" will advise why the contract has been rejected e.g. outstanding or incorrect documents submitted.

If this is the case - once you have obtained the required / correct documentation - move on to Edit Ticket **2** see next slide for example . . .

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Ticket: HL147 CAPTURE ORDER

Steps: CREATE QUOTE → CREATE CONTRACT → CONTRACT ACCEPTANCE → CAPTURE ORDER → CONTRACT APPROVAL → UPFRONT PAYMENT → DEPLOY SOLUTION

Status	Open	Category	New Sale
Create Date	11/Jan/2022 15:26:09	Last Update	11/Jan/2022 16:16:22
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	Contract not approved		
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 'Order Processed' button.Corrections Required		

Capture Order

Sales Contract* Upload Documents

KYC Documents* Upload Documents

Certificate of Incorporation	Donotinstall KYC test document.docx
Address	Donotinstall KYC test document.docx
ID	Donotinstall KYC test document.docx



Re-upload the relevant document/s
Assign the relevant label
Add then click "Process Order"
The status will then revert back to "awaiting Head Office approval"

The End