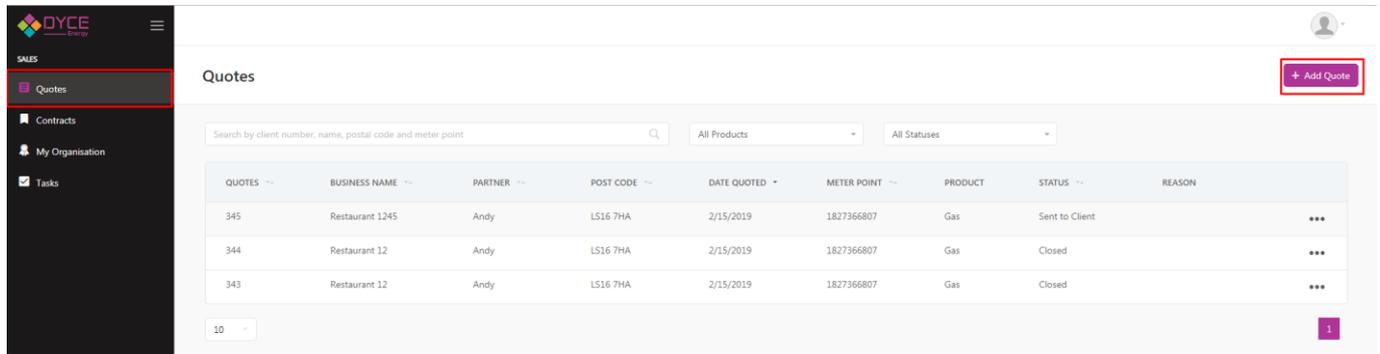


## Partner Portal User Guide – Sales Agent

### Quotes View

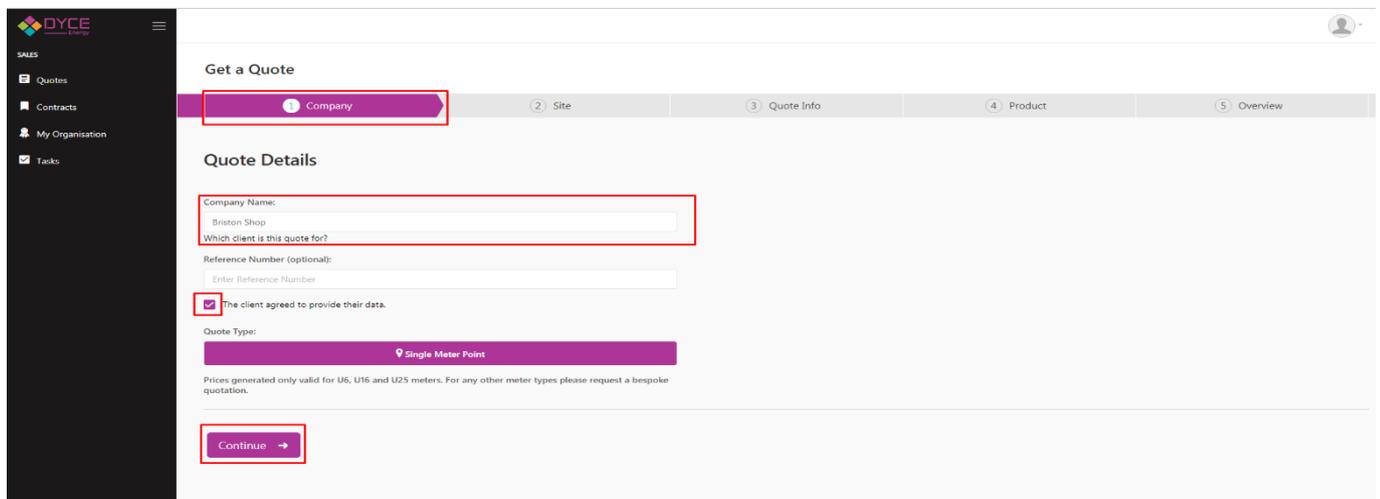
Choose Quotes and then press the button Add Quote.



QUOTES	BUSINESS NAME	PARTNER	POST CODE	DATE QUOTED	METER POINT	PRODUCT	STATUS	REASON
345	Restaurant 1245	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Sent to Client	...
344	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	...
343	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	...

### Company

- click on the field Company name and type the name of the company
- click on the reference number - this field is optional
- tick the client agreed to provide their data



**Get a Quote**

1 Company    2 Site    3 Quote Info    4 Product    5 Overview

**Quote Details**

Company Name:  
Briston Shop

Which client is this quote for?

Reference Number (optional):  
Enter Reference Number

The client agreed to provide their data.

Quote Type:  
Single Meter Point

Prices generated only valid for U6, U16 and U25 meters. For any other meter types please request a bespoke quotation.

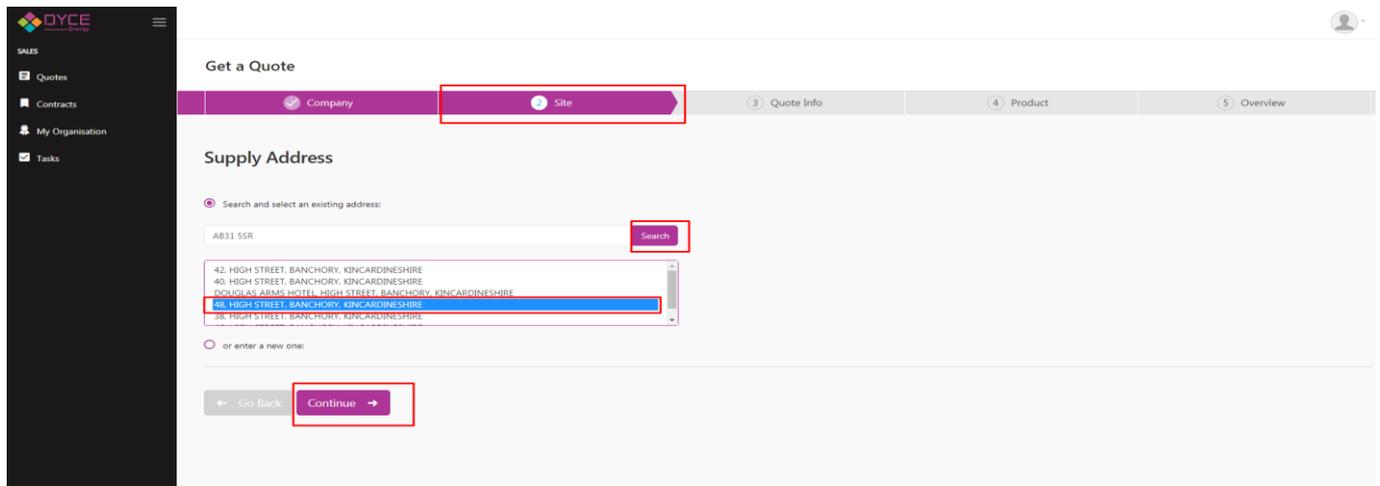
Continue →

## Site

The second step contains information about the clients site - supply information.

This step is mandatory - and the user has two options - either to search for the clients address or to input it manually.

Type the postcode in and click search. The box will show you addresses which are located in the postcode you have entered - scroll till you find the address and click on it. (click the search button twice after you have input postcode)



**Get a Quote**

Company | **Site** | Quote Info | Product | Overview

**Supply Address**

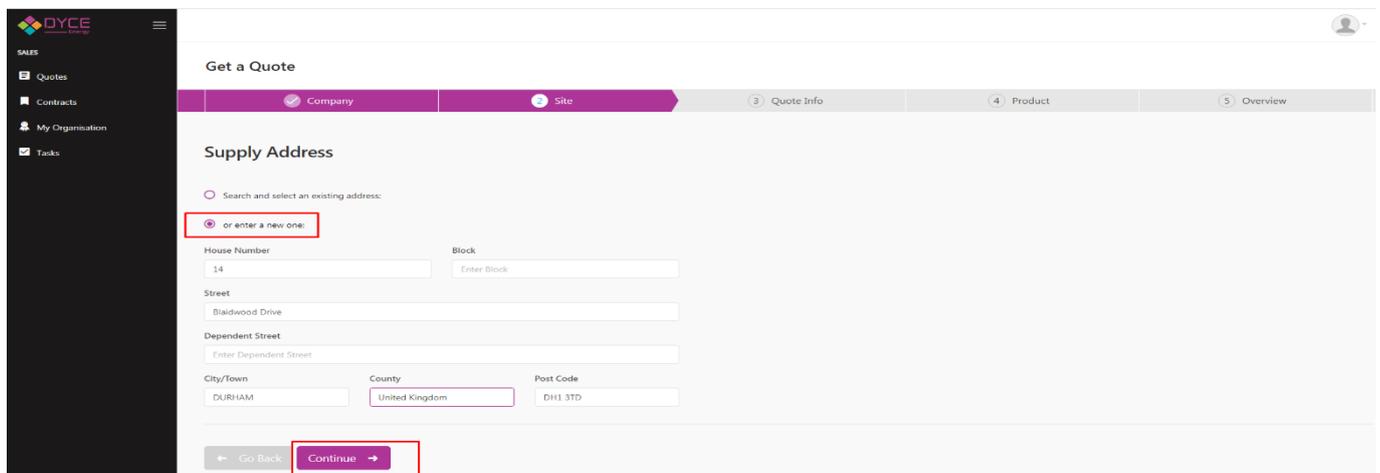
Search and select an existing address:

AB31 5SR

- 42, HIGH STREET, BANCHORY, KINCARDINESHIRE
- 40, HIGH STREET, BANCHORY, KINCARDINESHIRE
- DOUGLAS ARMS HOTEL, HIGH STREET, BANCHORY, KINCARDINESHIRE
- 48, HIGH STREET, BANCHORY, KINCARDINESHIRE**
- 38, HIGH STREET, BANCHORY, KINCARDINESHIRE

or enter a new one:

If you do not find the address select the radio button (to add address manually - street, city and postcode are mandatory fields)



**Get a Quote**

Company | **Site** | Quote Info | Product | Overview

**Supply Address**

Search and select an existing address:

or enter a new one:

House Number: 14  Block:

Street:

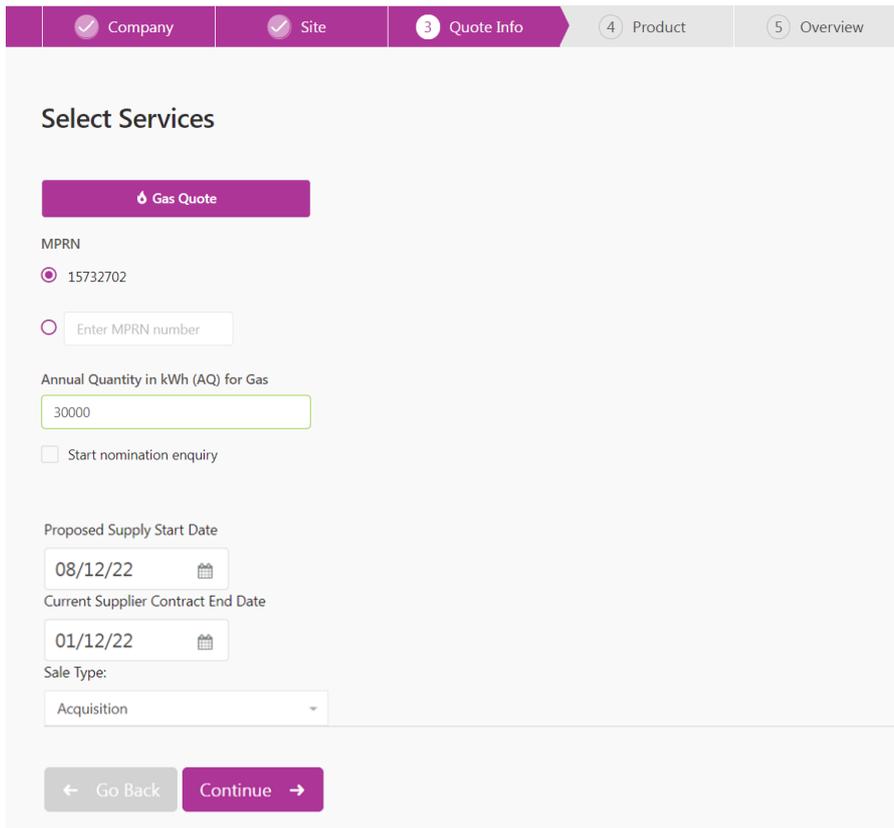
Dependent Street:

City/Town:  County:  Post Code:

## Quote Info

The third step of the quoting process is the Quote info:

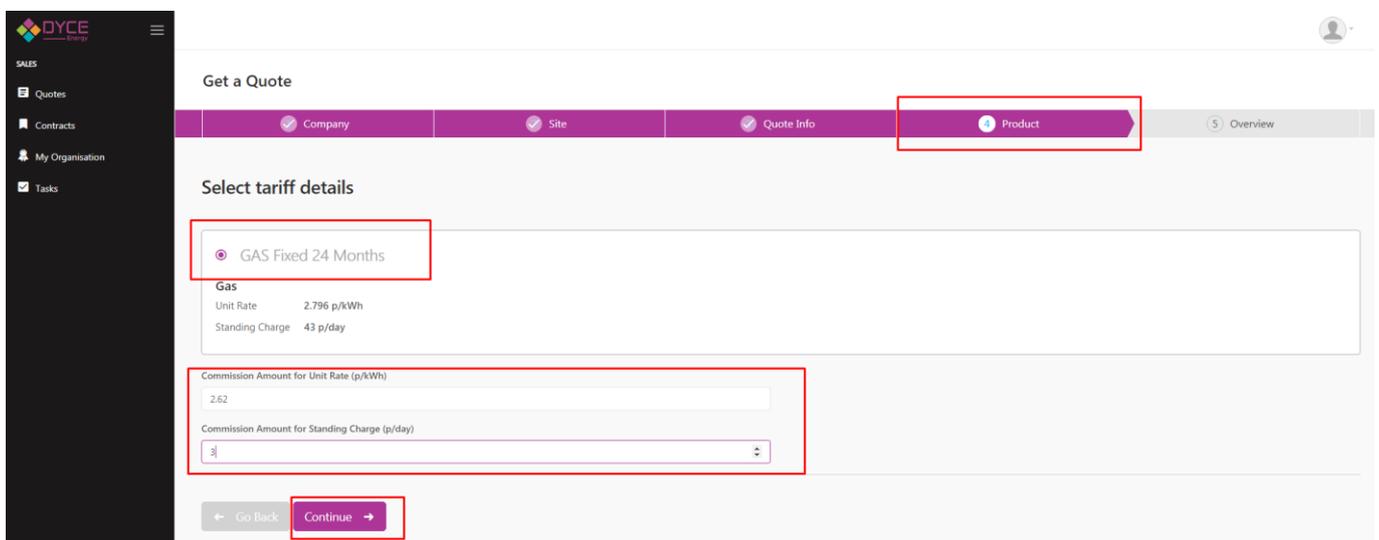
- The first object is the product (Gas is preselected so there is no need for selection)
- The second field that the user needs to fill in is the MPRN. As you can see the meter point in this case is pre selected. However, if you have to enter a new address then in the meter point field you have to enter the meter point number manually
- Input the AQ
- Quotes up to 292,999kWh are available through the portal (quotes above this need to be requested as bespoke)
- Proposed Supply Start Date need to be filled and should be after the Current Supplier Contract End date



The screenshot shows the 'Quote Info' step of the quoting process. The navigation bar at the top indicates the current step is '3 Quote Info', with 'Company' and 'Site' completed, and 'Product' and 'Overview' remaining. The main content area is titled 'Select Services' and features a 'Gas Quote' button. Below this, the 'MPRN' field is pre-filled with '15732702', and there is an option to 'Enter MPRN number'. The 'Annual Quantity in kWh (AQ) for Gas' is set to '30000'. There is a checkbox for 'Start nomination enquiry'. The 'Proposed Supply Start Date' is '08/12/22' and the 'Current Supplier Contract End Date' is '01/12/22'. The 'Sale Type' is set to 'Acquisition'. At the bottom, there are 'Go Back' and 'Continue' buttons.

## Product

The user must select the tariff and input the commission amount (available on s/c and unit rate)



The screenshot shows the 'Product' step of the quoting process. The navigation bar at the top indicates the current step is '4 Product', with 'Company', 'Site', and 'Quote Info' completed, and 'Overview' remaining. The main content area is titled 'Select tariff details' and features a 'GAS Fixed 24 Months' tariff selected. Below this, the 'Gas' details are shown: 'Unit Rate 2.796 p/kWh' and 'Standing Charge 43 p/day'. There are two input fields for commission amounts: 'Commission Amount for Unit Rate (p/kWh)' with a value of '2.62' and 'Commission Amount for Standing Charge (p/day)' with a value of '3'. At the bottom, there are 'Go Back' and 'Continue' buttons.

## Overview

This is the final step of the process where you can see the completed quote.



**Get a Quote**

Company
Site
Quote Info
Product
Overview

**Fixed: Gas 24 Months**

**Company Details**

<b>Company Name</b> Venice Magazine	<b>Reference Number</b> 
<b>Quote Type</b> Single	The client agreed to provide their data Yes
<b>Supply address</b>	
House number 48	
Street HIGH STREET	
Dependent str. BANCHORY	
City KINCARDINESHIRE	
Postal code AB31 5SR	
<b>Selected Services:</b>	
Gas	
<b>MPRN:</b> 1006736403	<b>Annual Quantity in kWh (AQ) for Gas:</b> 2500
<b>Annual Quantity in kWh (AQ) for Gas Reported by the Industry:</b> 	

**GAS**

Unit Rate	5.416 p/kWh
Standing charge	46.000 p/day
Contract length	24 Month

\*Prices are exclusive of CCL and VAT \*Prices are subject to credit approval and Dyce Energy acceptance. \*Prices are for online billing only; paper billing will be charged @ £2 per invoice per month. \*Prices are subject to market movement and Dyce Energy acceptance

The client accepted the above quote

Yes, the client accepted it.

Go Back
Save

Then go to the Quotes Window and there you can see the new Quote. Now you have some options:

SALES

- Quotes
- Contracts
- My Organisation
- Tasks



**Quotes** + Add Quote

Search by client number, name, postal code and meter point

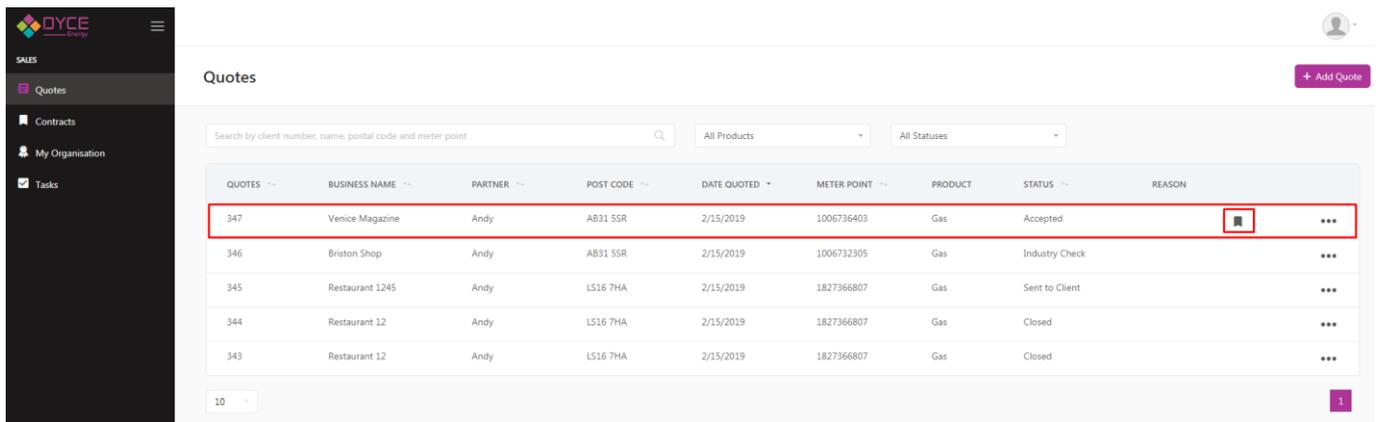
All Products
All Statuses

QUOTES	BUSINESS NAME	PARTNER	POST CODE	DATE QUOTED	METER POINT	PRODUCT	STATUS	REASON
347	Venice Magazine	Andy	AB31 5SR	2/15/2019	1006736403	Gas	Draft	...
346	Briston Shop	Andy	AB31 5SR	2/15/2019	1006732305	Gas	Industry Check	
345	Restaurant 1245	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Sent to Client	Sent to Client
344	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	Rejected
343	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	Revised
								Details

10

1

Click accepted and this icon will appear:



QUOTES	BUSINESS NAME	PARTNER	POST CODE	DATE QUOTED	METER POINT	PRODUCT	STATUS	REASON
347	Venice Magazine	Andy	AB31 5SR	2/15/2019	1006736403	Gas	Accepted	
346	Briston Shop	Andy	AB31 5SR	2/15/2019	1006732305	Gas	Industry Check	
345	Restaurant 1245	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Sent to Client	
344	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	
343	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	

- Sent to a client - this status shows that the quote is sent to the client. This is only an information status. There isn't any functionality.
- Reject - when you reject a quote a drop-down menu will appear asking the reason for rejection



Enter reason:

Uncompetitive price  
Unclear conditions  
Chose another supplier  
Objection

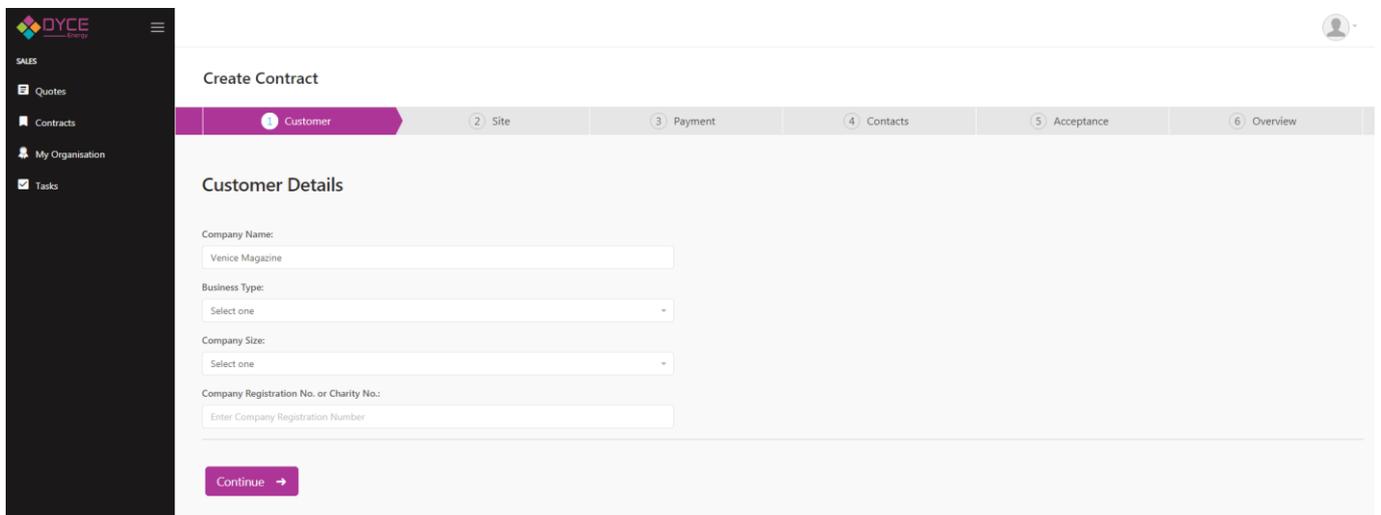
- Revise - when you choose this action a copy from the selected quote will be made so that you don't have to change all of the information

When you click on the create a contract icon (this is the only way to create a contract a new view will appear - **Create Contract**).

## Customer

The create contract process pulls the information from the selected quote and pre fills the fields in the contract.

This is an example - company name is directly pulled from the quote.



**Create Contract**

1 Customer | 2 Site | 3 Payment | 4 Contacts | 5 Acceptance | 6 Overview

**Customer Details**

Company Name: Venice Magazine

Business Type: Select one

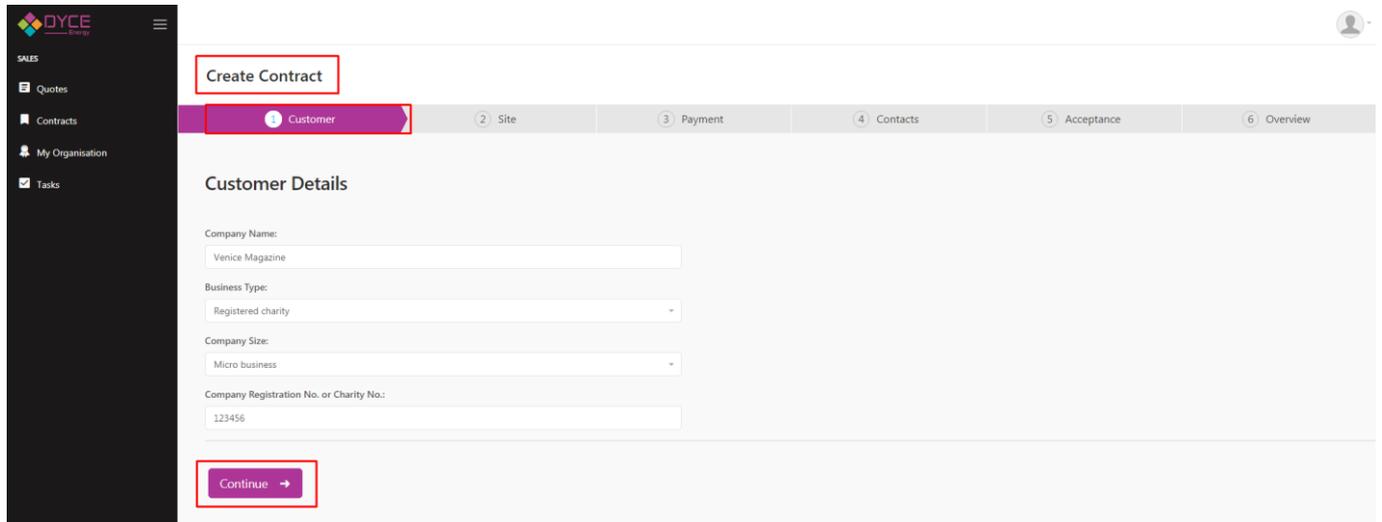
Company Size: Select one

Company Registration No. or Charity No.: Enter Company Registration Number

[Continue →](#)

Here is the information that needs to be completed:

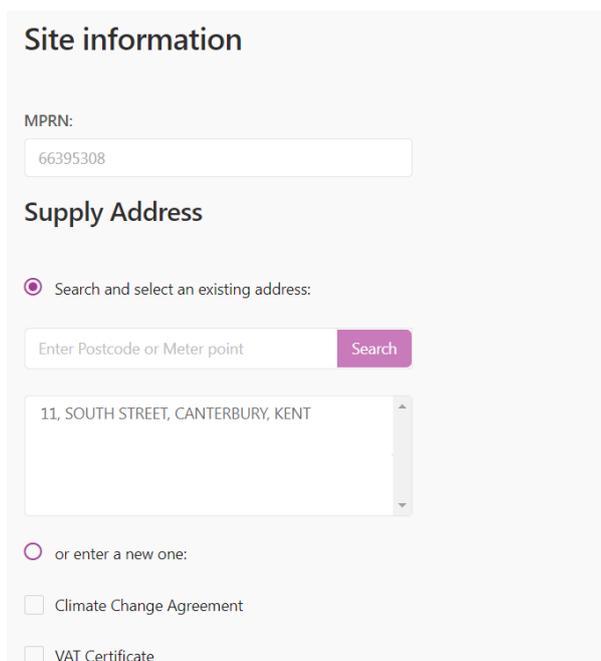
- Fill in information about the client (automatically completed from the quote)
- The next field is the type of business e.g. sole trader, registered charity, limited company
- Company registration number (automatically completed from the quote)



## Site

The second step holds information about the site - here again the information about the site is being taken from the quote and as you can see it is the same as the quotes address.

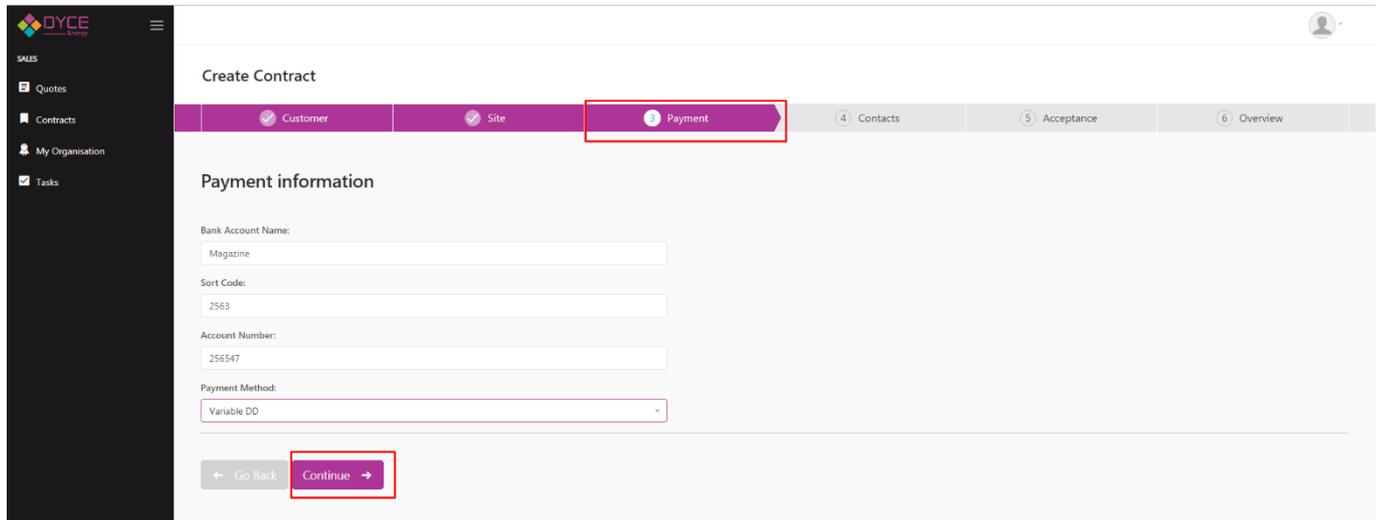
Here you can click if the customer has a climate change agreement or VAT certificate.



## Payment

This step contains the fields for payment information - these fields have to be completed manually

- Complete bank account name (usually the name of the company)
- Sort code
- Account number
- Payment method is a drop down menu (choose fixed or variable dependent on the tariff chosen)



The screenshot shows the 'Create Contract' form in the 'Payment' step. The progress bar indicates steps 1-6: Customer, Site, Payment (current), Contacts, Acceptance, and Overview. The 'Payment information' section includes the following fields:

- Bank Account Name: Magazine
- Sort Code: 2563
- Account Number: 256547
- Payment Method: Variable DD

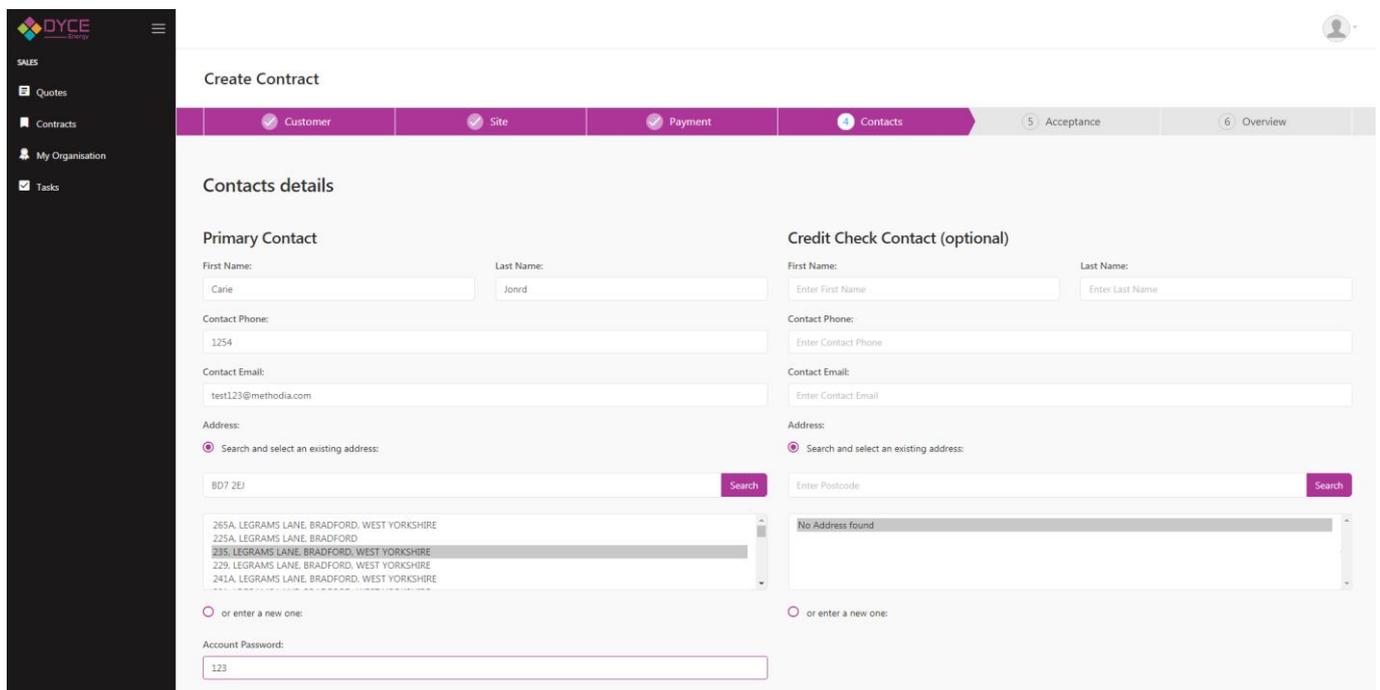
At the bottom, there are two buttons: 'Go Back' and 'Continue'.

## Contacts

This step holds information about the contact you are creating the agreement for. Here we have mandatory fields that need to be completed.

Also in this step you will find several sections about the primary contact, credit check, previous address and billing contact.

- Fill in the first and last name
- Add the contact phone number and email address, afterwards fill in the address by entering the post code and searching:



The screenshot shows the 'Create Contract' form in the 'Contacts' step. The progress bar indicates steps 1-6: Customer, Site, Payment, Contacts (current), Acceptance, and Overview. The 'Contacts details' section includes the following fields:

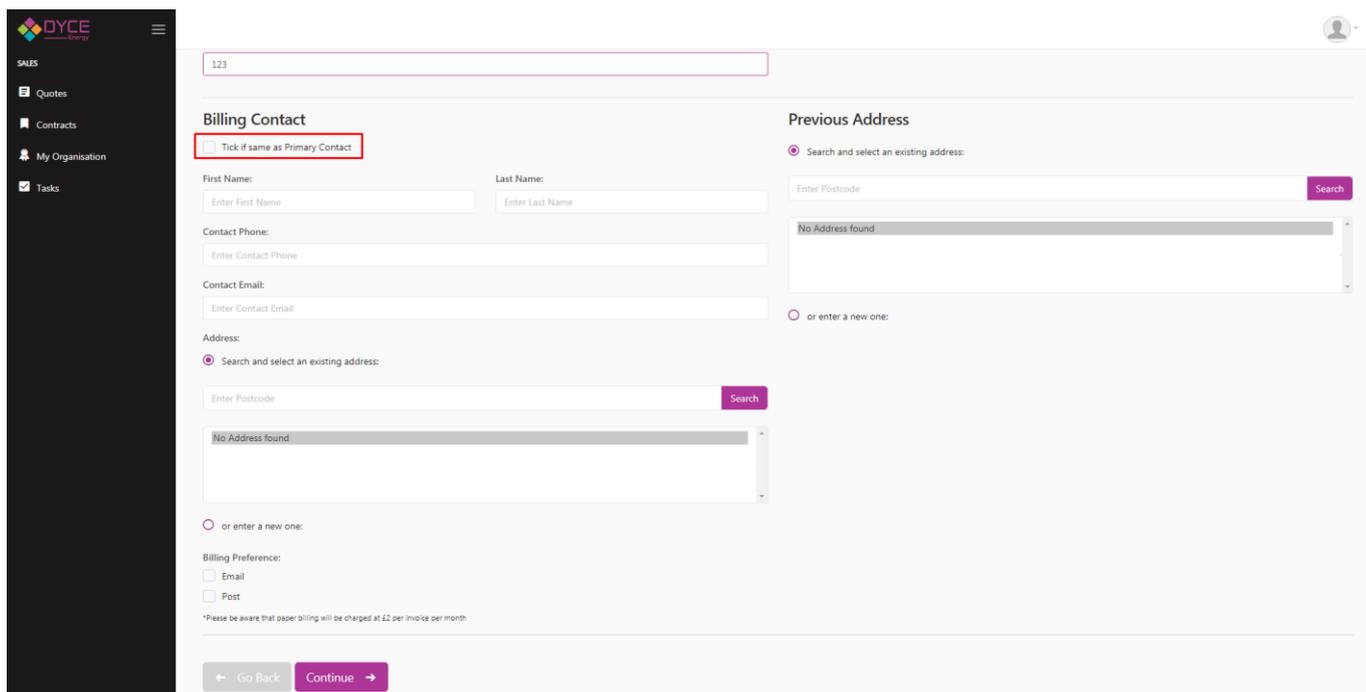
- Primary Contact:**
  - First Name: Carie
  - Last Name: Jonrd
  - Contact Phone: 1254
  - Contact Email: test123@methodia.com
  - Address: Search and select an existing address: BD7 2EJ
- Credit Check Contact (optional):**
  - First Name: Enter First Name
  - Last Name: Enter Last Name
  - Contact Phone: Enter Contact Phone
  - Contact Email: Enter Contact Email
  - Address: Search and select an existing address: Enter Postcode

Below the address search, there is a list of addresses to select from:

- 265A, LEGRAMS LANE, BRADFORD, WEST YORKSHIRE
- 225A, LEGRAMS LANE, BRADFORD
- 235, LEGRAMS LANE, BRADFORD, WEST YORKSHIRE
- 229, LEGRAMS LANE, BRADFORD, WEST YORKSHIRE
- 241A, LEGRAMS LANE, BRADFORD, WEST YORKSHIRE

At the bottom, there is an 'Account Password' field with the value '123'.

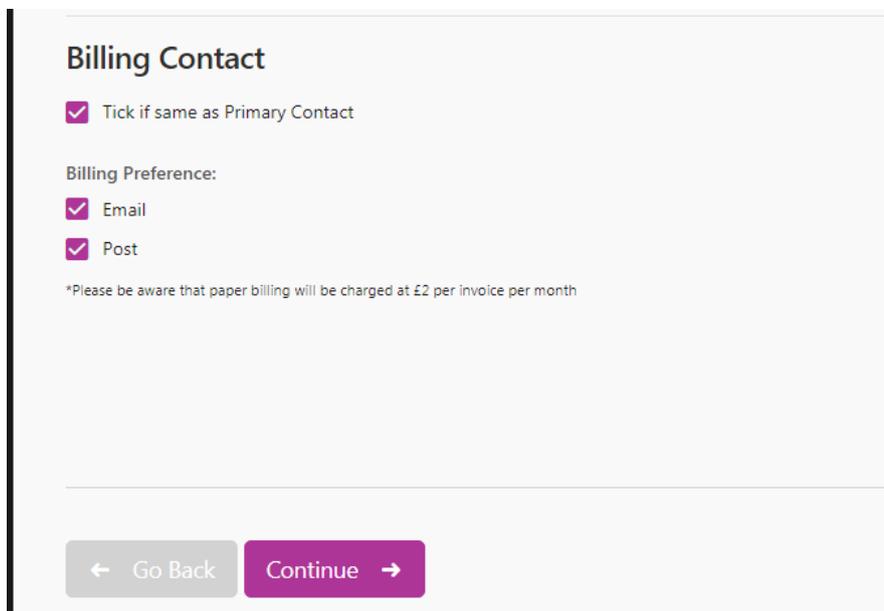
If the billing account is the same as the primary contact there is no need for you to fill in all of the information again just click on the check box and it will automatically fill in the fields:



The screenshot shows a web form for entering billing contact information. On the left is a dark sidebar with navigation options: SALES, Quotes, Contracts, My Organisation, and Tasks. The main form area has a header with the number '123'. Below this is the 'Billing Contact' section, which includes a checkbox labeled 'Tick if same as Primary Contact' (highlighted with a red box). There are input fields for 'First Name', 'Last Name', 'Contact Phone', and 'Contact Email'. Below these is an 'Address' section with a radio button selected for 'Search and select an existing address', a 'Postcode' input field, and a 'Search' button. A dropdown menu below the search button shows 'No Address found'. To the right is the 'Previous Address' section, which has a radio button selected for 'Search and select an existing address', a 'Postcode' input field, and a 'Search' button. A dropdown menu below the search button also shows 'No Address found'. Below the address sections is a radio button for 'or enter a new one:'. At the bottom of the form are 'Billing Preference' checkboxes for 'Email' and 'Post', and a note: '\*Please be aware that paper billing will be charged at £2 per invoice per month'. At the very bottom are 'Go Back' and 'Continue' buttons.

- Tick billing preference
- Only complete the credit check address for sole traders, you can search via postcode or enter manually if it cannot be found

Click continue and go to the next step



This screenshot shows the 'Billing Contact' form after the 'Tick if same as Primary Contact' checkbox has been selected. The 'Billing Preference' section now has both 'Email' and 'Post' checkboxes checked. The 'Go Back' and 'Continue' buttons are visible at the bottom of the form.

## Acceptance

- Select the marketing methods
- The proposed supply date and current supplier contract end date will be preselected
- You can attach an LOA (letter of authority)
- Select the start and end date of the LOA
- Accept terms and conditions and click continue to go to the overview (mandatory)

Q Search customer by Name, Phone, Email, Billing Account and Meter Point



✓ Customer

✓ Site

✓ Payment

✓ Contacts

5 Acceptance

6 Overview

## Acceptance

Marketing consent:

- Mail
- Telephone
- SMS
- Email

Proposed Supply Start Date

31/12/22



Current Supplier Contract End Date

01/12/22



Client Letter of Authority ⓘ

Choose File No file chosen

Letter of Authority Start Date

Date



Letter of Authority End Date

Date



Terms & Conditions

- Terms & Conditions Received

← Go Back

Continue →

## Overview

This step shows all the agreement information:

### Create Contract

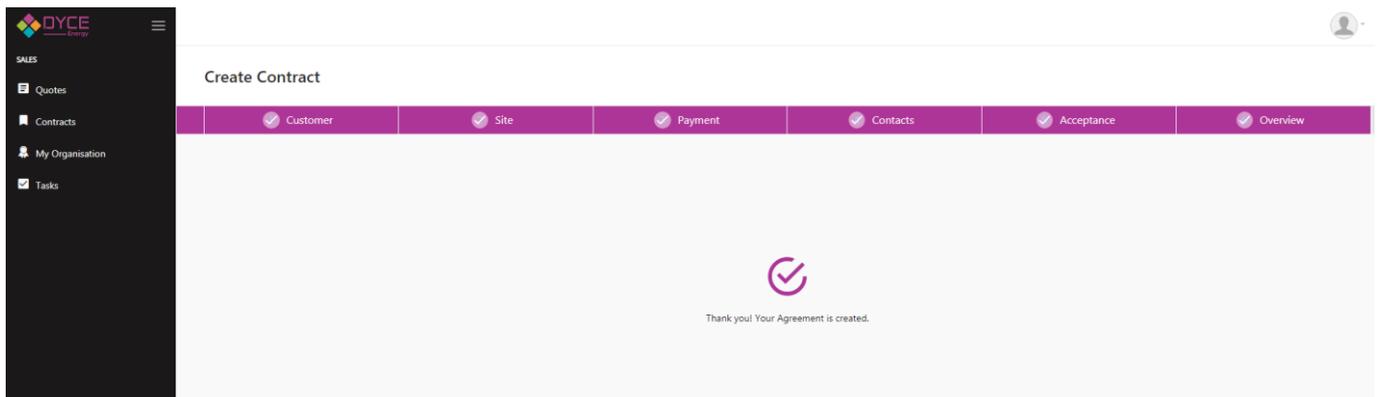
Customer	Site	Payment	Contacts	Acceptance	Overview
<b>Business Name</b> test 0512		<b>Business Type</b> 			
<b>Company Size</b> 		<b>Company Registration Number</b> 757876			
<b>MPRN</b> 66395308		<b>Annual Quantity in kWh (AQ) for Gas:</b> 40000 kWh			
<b>Site address</b>					
Building number: 11 Building name:   Address 1: SOUTH STREET Address 2:   City: CANTERBURY County: KENT Post code: CT1 1EA					
<b>Primary address</b>			<b>Primary contact</b>		
Building number:   Building name: SOLAGLAS LIMITED Address 1: MARSHWOOD CLOSE Address 2:   City: CANTERBURY County: KENT Post code: CT1 1AE			First name: test Last Name: test Contact phone: 3895754 Contact email: test@gamil.com		
<b>Credit check address</b>			<b>Credit check contact</b>		
Building number:   Building name:   Address 1:   Address 2:   City:   County:   Post code:			First name:   Last Name:   Contact phone:   Contact email:		
<b>Previous address</b>					
Building number:   Building name:   Address 1:   Address 2:   City:   County:   Post code:					
<b>Billing address</b>			<b>Billing contact</b>		
Building number:   Building name: SOLAGLAS LIMITED Address 1: MARSHWOOD CLOSE Address 2:   City: CANTERBURY County: KENT Post code: CT1 1AE			First name: test Last Name: test Contact phone: 3895754 Contact email: test@gamil.com		
<b>Climate change agreement</b> No					
<b>Climate change agreement date</b> 					
<b>VAT certificate</b> No					
<b>% Domestic</b> 					
<b>VAT certificate valid from date</b> 					
<b>VAT certificate valid to date</b> 					
<b>Bank Account Name:</b> 389598			<b>Payment Method:</b> Variable DD		
<b>Sort Code:</b> 5589589			<b>Account Number:</b> 490590		
<b>Marketing consent:</b> 			<b>Sale Type:</b> Acquisition		
<b>Proposed Supply Start Date:</b> 12/31/2022			<b>Current Supplier Contract End Date:</b> 12/1/2022		
<b>Letter of Authority Start Date:</b> 			<b>Letter of Authority End Date:</b> 		

← Go Back

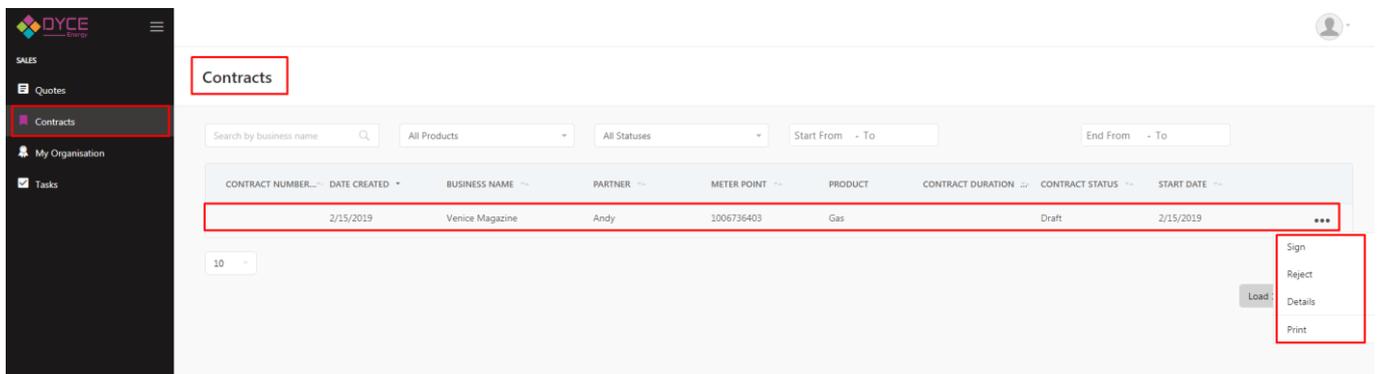
Save →

Click on the save button in order to finish the process.

When you click save you will be presented with the following view and message:

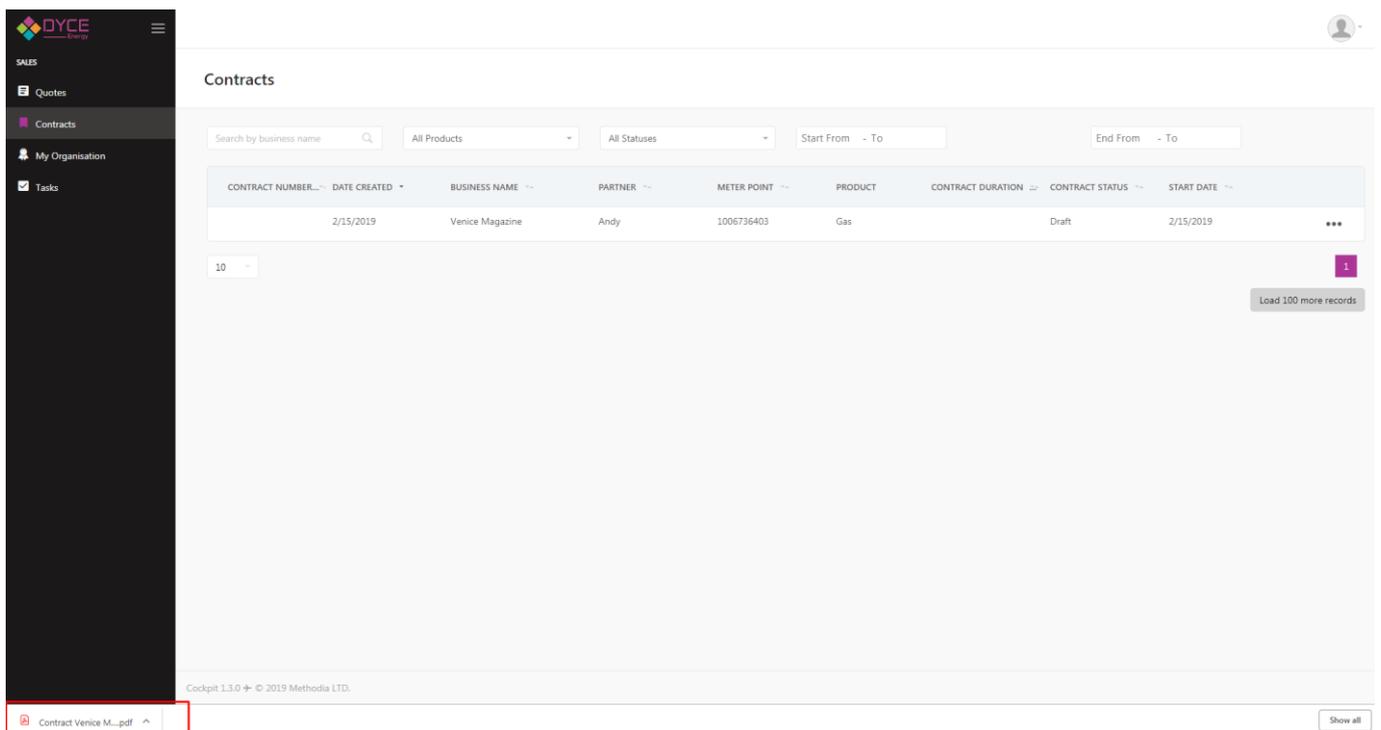


Then open the Contracts window and there you can see the new contract.



Now you have some options:

- Print or save the selected agreement by clicking the 3 dots and selecting PDF. The PDF will be produced as shown in the bottom left hand corner



- Reject - when a user rejects a contract a drop-down menu will appear asking the reason for rejection

Enter reason:

Uncompetitive price  
Chose another supplier  
Objection

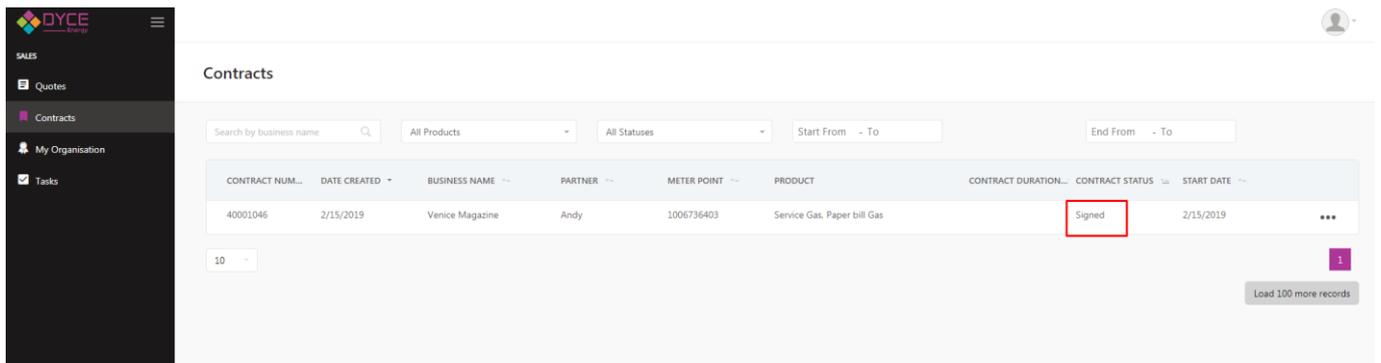
- Details - detailed information about the contract
- When you press the sign button this window appears and the user has to press the button "Mark Contract As Signed"

Attach Signed Contract:

Choose File No file chosen

Mark Contract As Signed Cancel

Then you can see that the status is changed to Signed.



CONTRACT NUM..	DATE CREATED	BUSINESS NAME	PARTNER	METER POINT	PRODUCT	CONTRACT DURATION..	CONTRACT STATUS	START DATE
40001046	2/15/2019	Venice Magazine	Andy	1006736403	Service Gas. Paper bill Gas		Signed	2/15/2019

Once the contract has been accepted by Dyce the status will change to **Processing** and will sit at this stage until the contract goes live, the status will then change to **Live**.