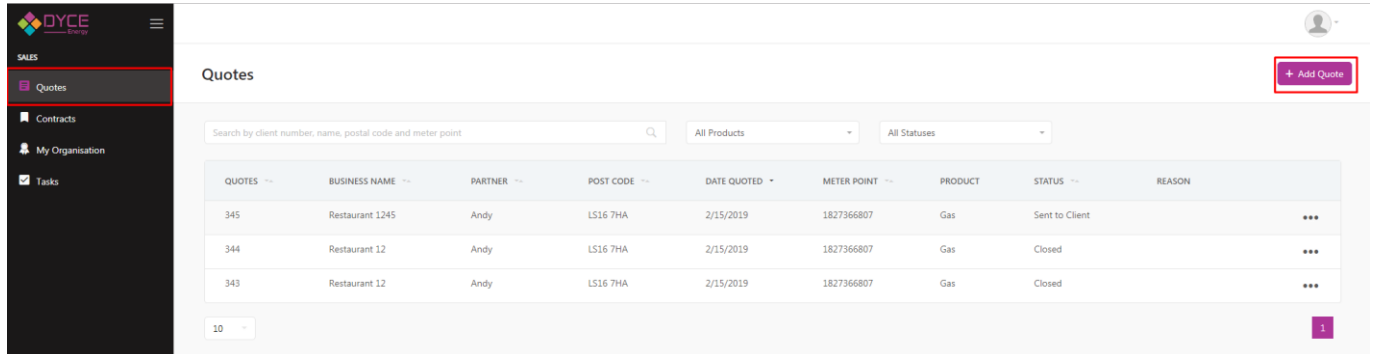


Partner Portal User Guide – Sales Agent

Quotes View

Choose Quotes and then press the button Add Quote.



Quotes

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

All Products All Statuses

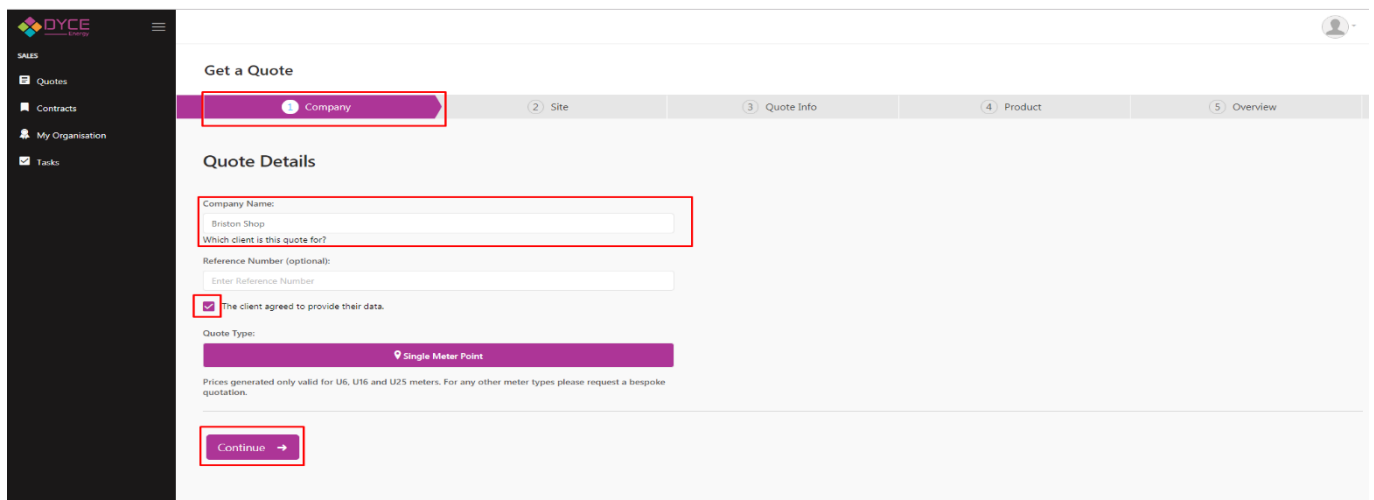
QUOTES	BUSINESS NAME	PARTNER	POST CODE	DATE QUOTED	METER POINT	PRODUCT	STATUS	REASON
345	Restaurant 1245	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Sent to Client	***
344	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	***
343	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	***

10

+ Add Quote

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.

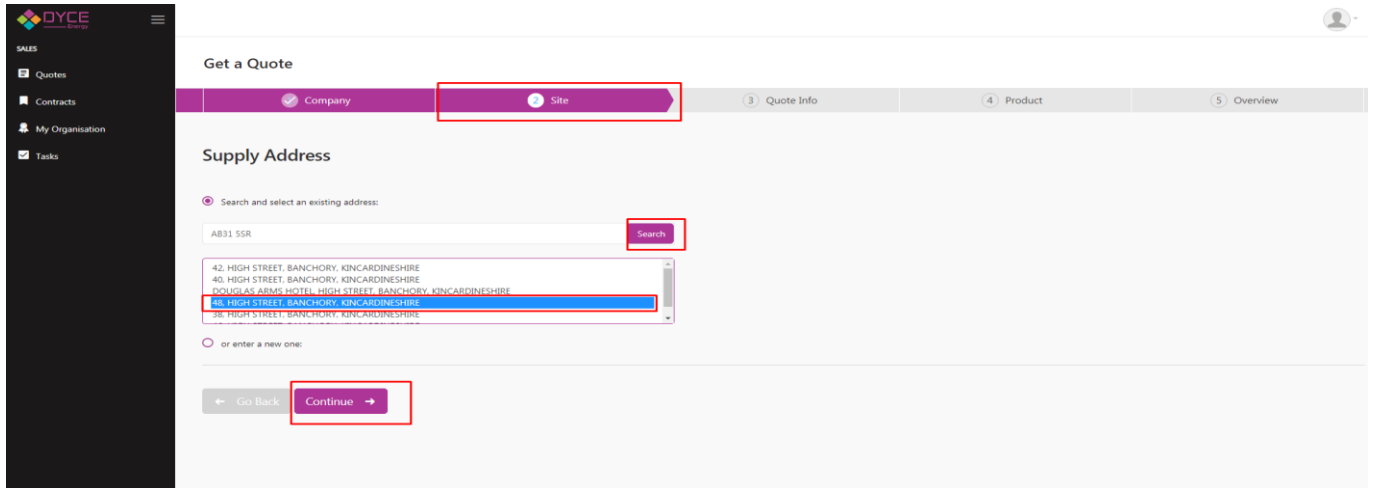
Continue →

Site

The second steps 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

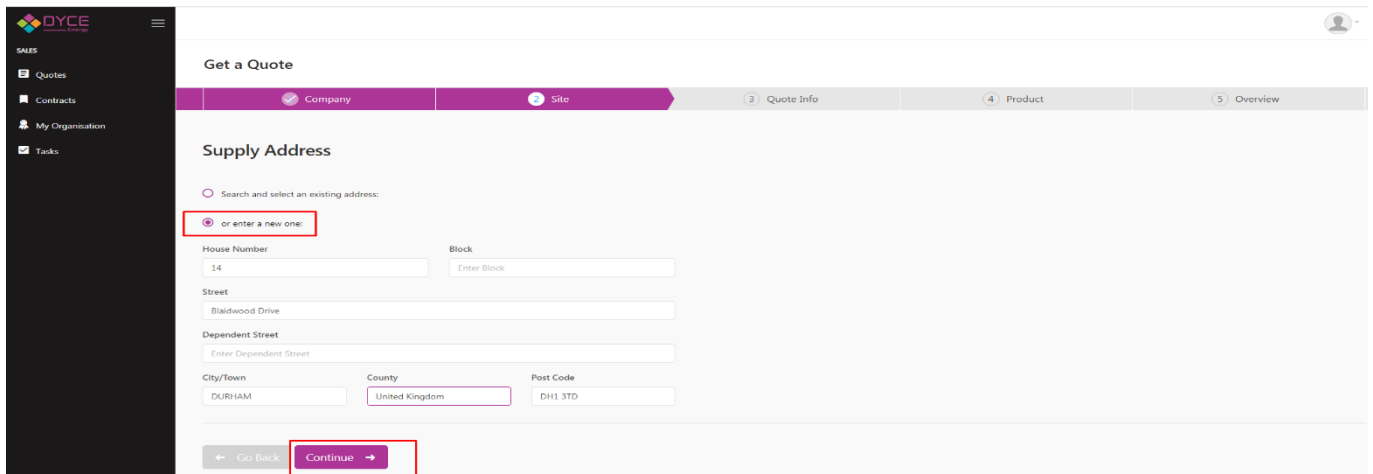
☒ Search and select an existing address:

AB31 5SR

42, HIGH STREET, BANCHORY, KINCARDINESHIRE
 40, HIGH STREET, BANCHORY, KINCARDINESHIRE
46, 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:

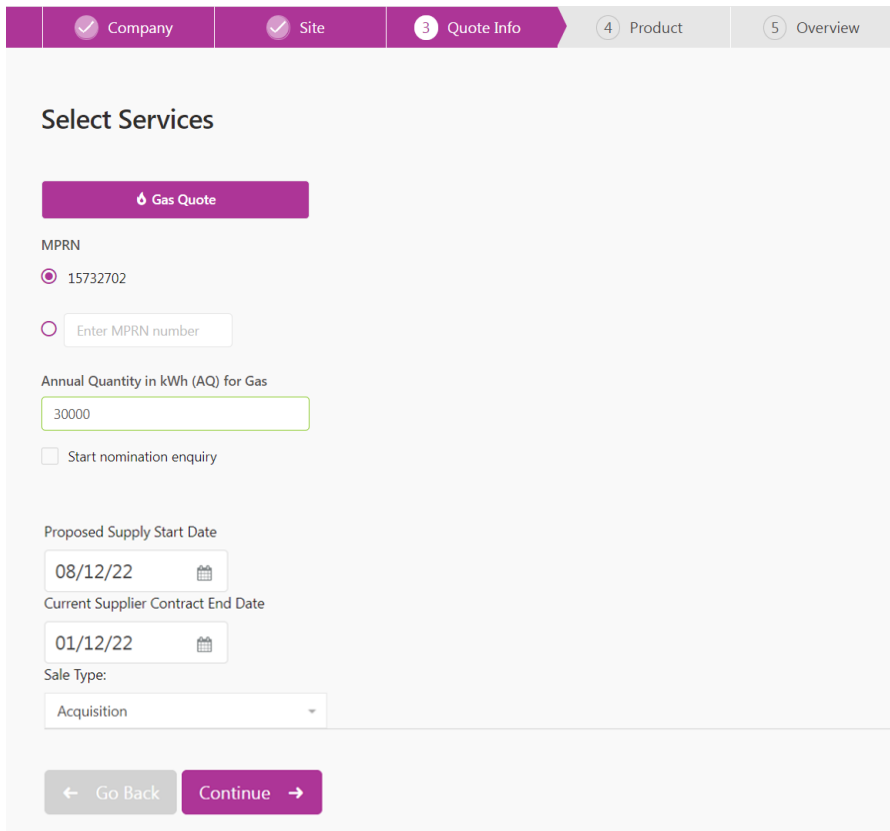
Dependent Street:

City/Town: DURHAM County: United Kingdom Post Code: DH1 3TD

Quote Info

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

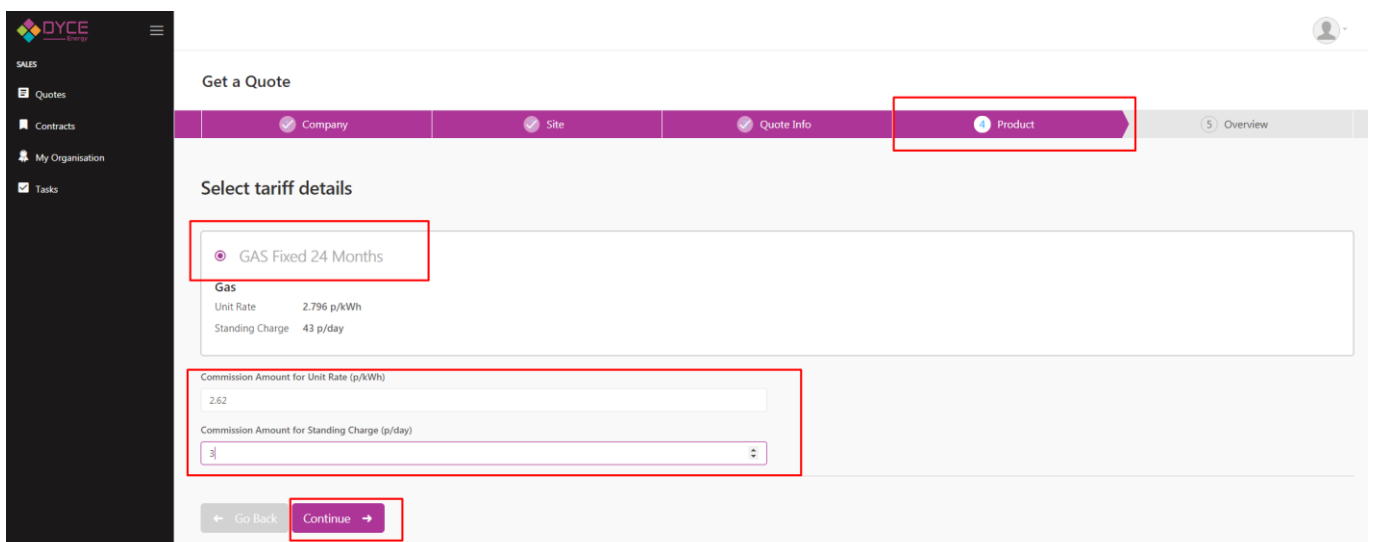
- The first object is the product (Gas is preselected so there is no need for selection)
- The second field that the user needs to fill in is the MPRN. As you can see the meter point in this case is pre selected. However, if you have to enter a new address then in the meter point field you have to enter 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 in the quoting process. The navigation bar at the top has five steps: 1. Company, 2. Site, 3. Quote Info (active), 4. Product, and 5. Overview. The main content area is titled 'Select Services'. It features a 'Gas Quote' button. Below this, there is a section for 'MPRN' with a radio button selected for '15732702' and a text input field for '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 in the quoting process. The navigation bar at the top has five steps: 1. Company, 2. Site, 3. Quote Info, 4. Product (active), and 5. Overview. The main content area is titled 'Select tariff details'. It features a radio button selected for 'GAS Fixed 24 Months'. Below this, there is a section for 'Gas' with 'Unit Rate' of '2.796 p/kWh' and 'Standing Charge' of '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

Company Name
| Venice Magazine

Quote Type
| Single

Supply address
| House number: 48
| Street: HIGH STREET
| Dependent str.:
| City: BANCHORY
| County: KINCARDINESHIRE
| Postal code: AB31 5SR

Selected Services:
| Gas

MPRN:
| 1006736403

Annual Quantity in kWh (AQ) for Gas Reported by the Industry:
|

Reference Number
|

The client agreed to provide their data
| Yes

Annual Quantity in kWh (AQ) for Gas:
| 2500

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 Q

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	
344	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	
343	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	

10

Sent to Client

Accepted

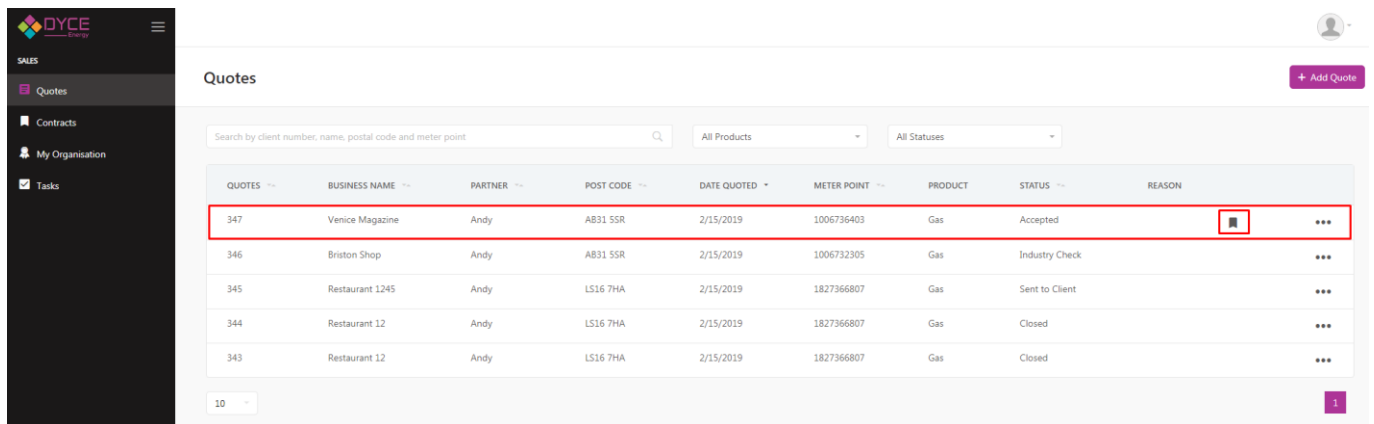
Rejected


Revised

Details

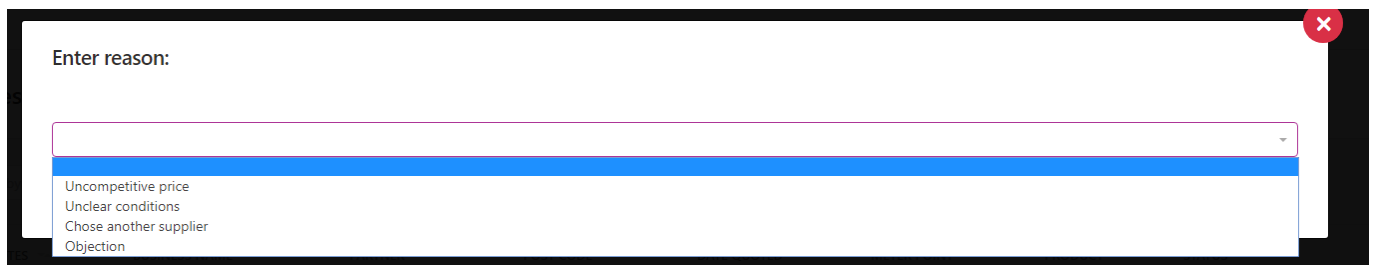
1

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

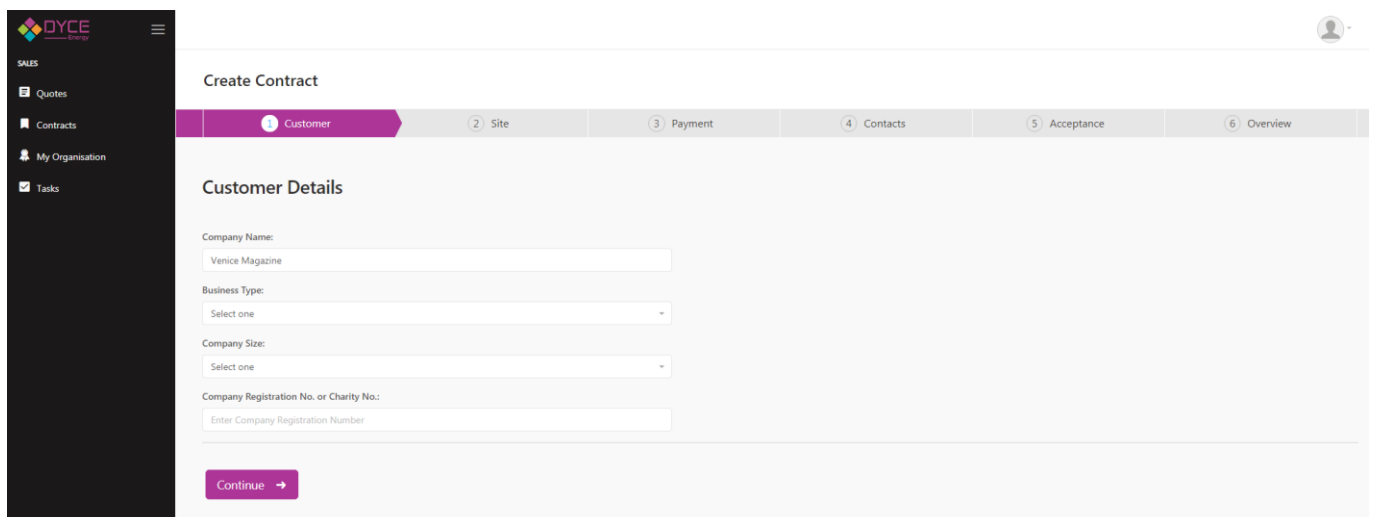
- Revise - when you choose this action a copy from the selected quote will be made so that you don't have to change all of the information

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

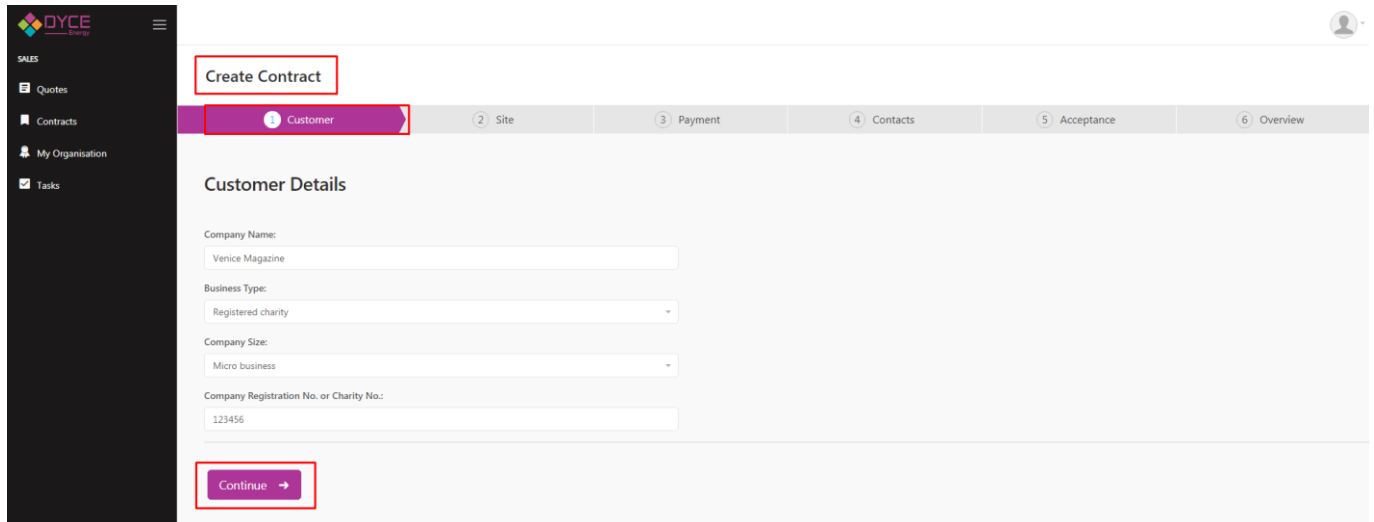
Company Size:
Select one

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)



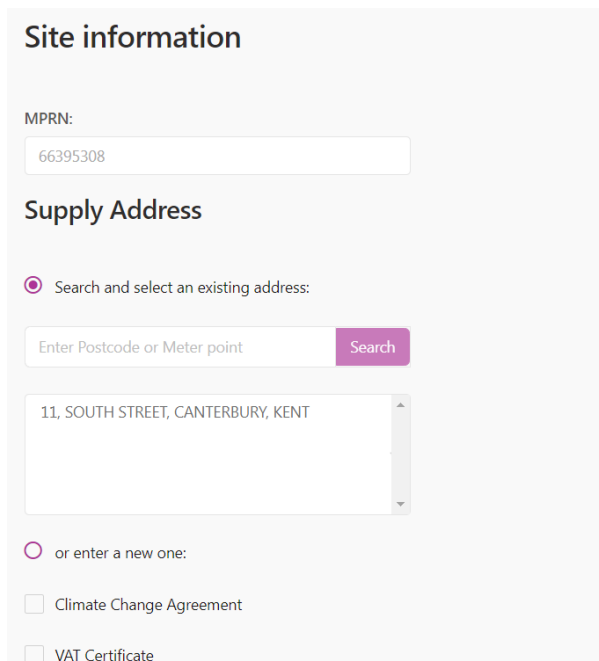
The screenshot shows the 'Create Contract' form in the DYCE Energy system. The form is divided into six steps: 1. Customer, 2. Site, 3. Payment, 4. Contacts, 5. Acceptance, and 6. Overview. The 'Customer' step is currently active and highlighted in purple. The 'Create Contract' button is at the top left, and the 'Continue' button is at the bottom left. The 'Customer Details' section contains the following fields:

- Company Name: Venice Magazine
- Business Type: Registered charity
- Company Size: Micro business
- Company Registration No. or Charity No.: 123456

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.



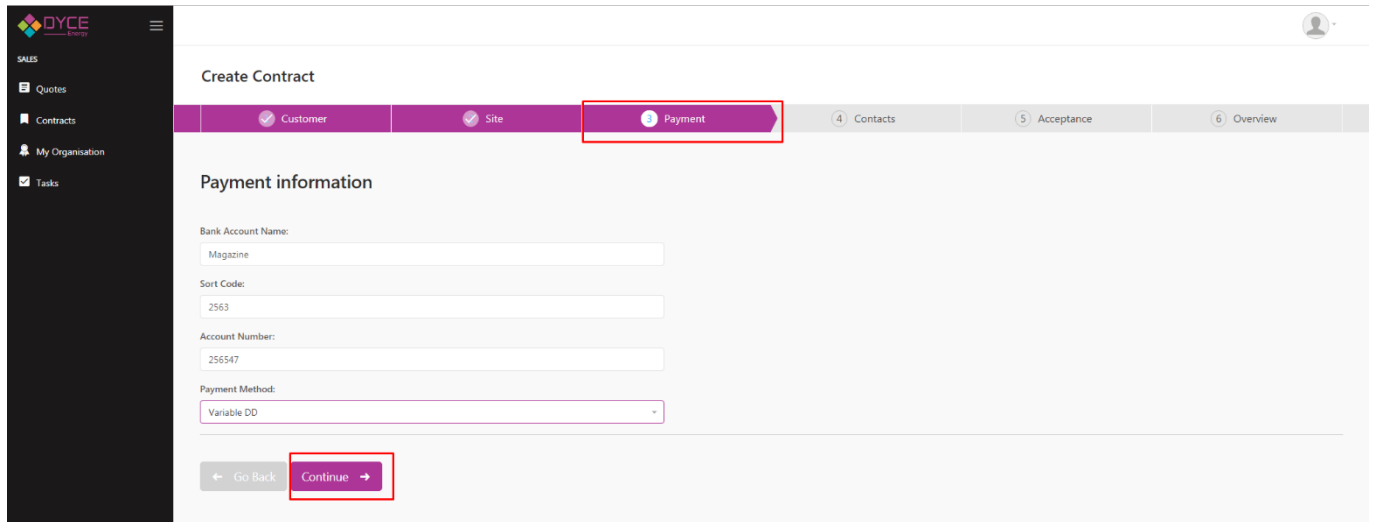
The 'Site information' form contains the following sections:

- MPRN:** 66395308
- Supply Address:**
 - ☒ Search and select an existing address:
 - Enter Postcode or Meter point: [Search]
 - 11, SOUTH STREET, CANTERBURY, KENT
 - ☐ or enter a new one:
- ☐ Climate Change Agreement
- ☐ 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)



Create Contract

Customer Site **Payment** Contacts Acceptance Overview

Payment information

Bank Account Name:
Magazine

Sort Code:
2563

Account Number:
256547

Payment Method:
Variable DD

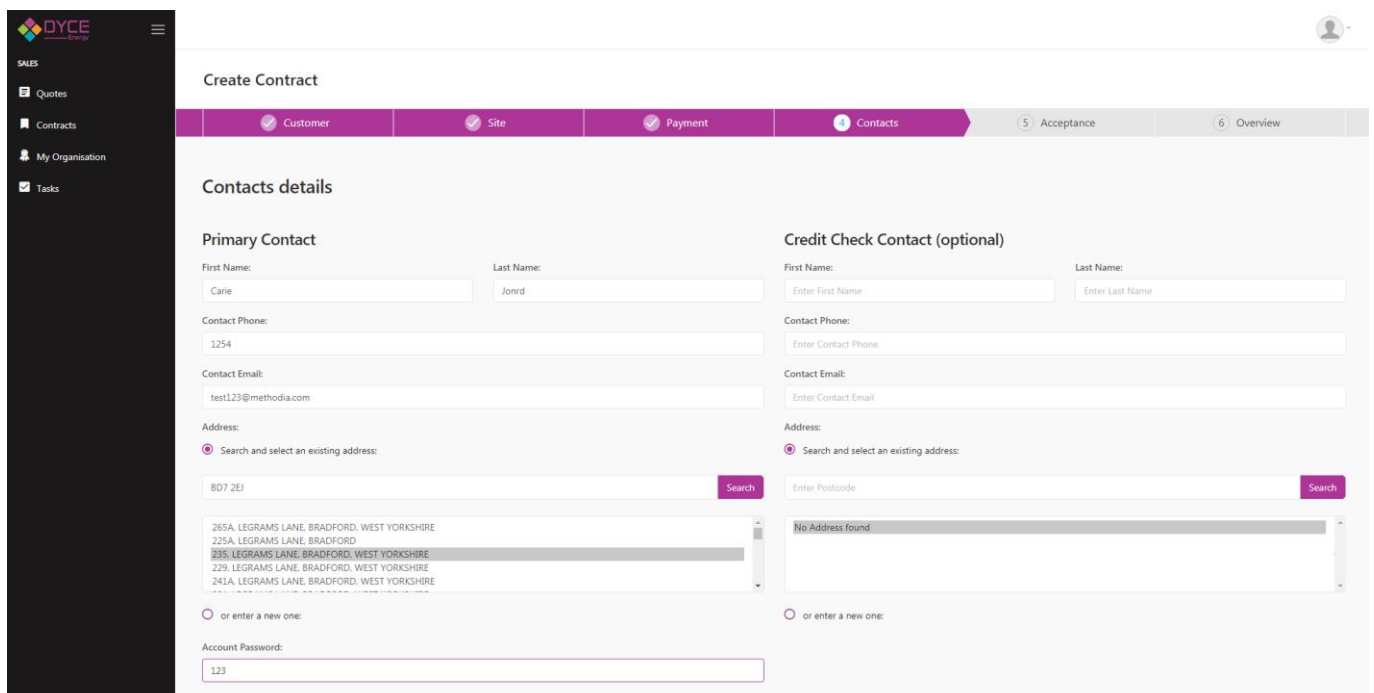
Go Back Continue

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:



Create Contract

Customer Site Payment **Contacts** Acceptance Overview

Contacts details

Primary Contact

First Name: Carrie Last Name: Jonrd

Contact Phone: 1254

Contact Email: test123@methodia.com

Address:
Search and select an existing address:
BD7 2EJ Search

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

or enter a new one:

Account Password: 123

Credit Check Contact (optional)

First Name: Enter First Name Last Name: Enter Last Name

Contact Phone: Enter Contact Phone

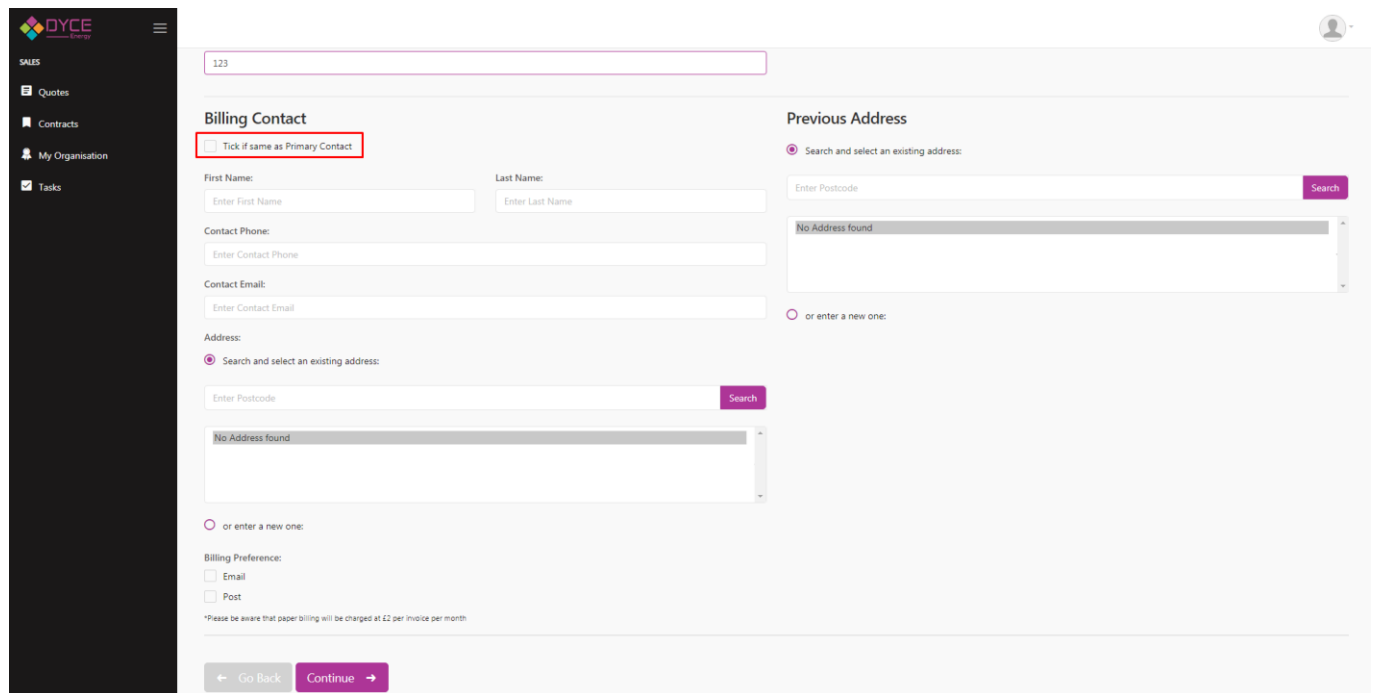
Contact Email: Enter Contact Email

Address:
Search and select an existing address:
Enter Postcode Search

No Address found

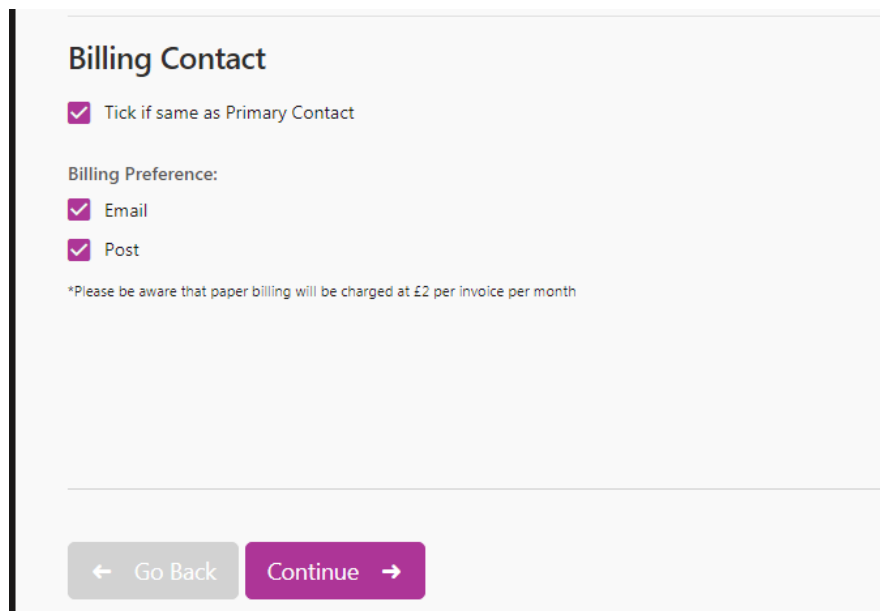
or enter a new one:

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:



- 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



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)

🔍 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

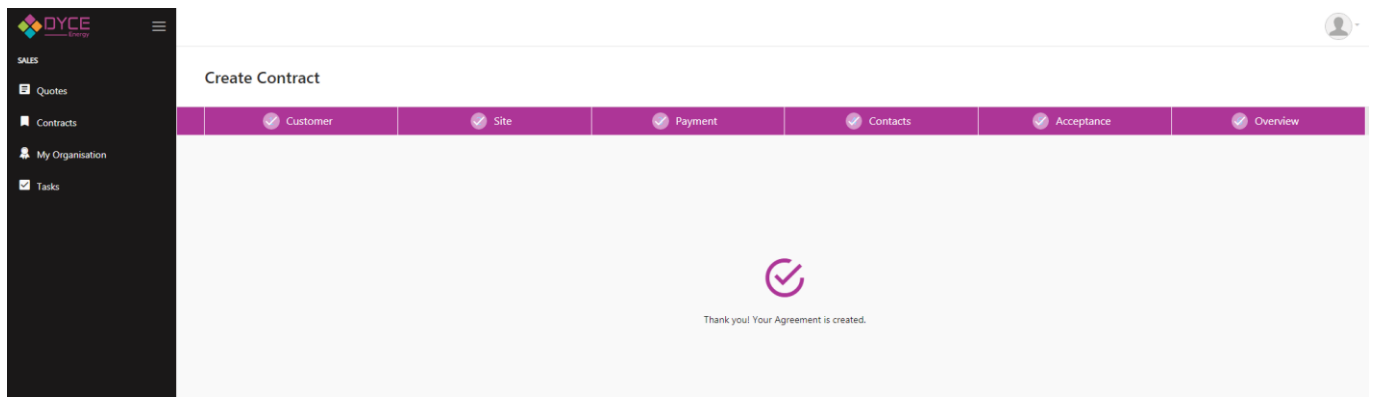
This step shows all the agreement information:

Create Contract

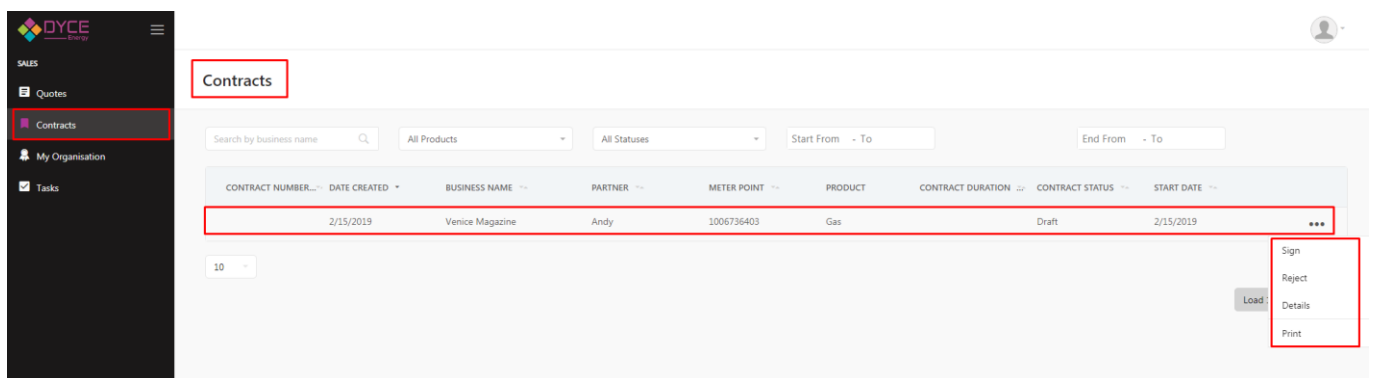
Customer	Site	Payment	Contacts	Acceptance	Overview
<div> <div> Business Name test 0512 Company Size MPRN 66395308 Site address Building number 11 Building name Address 1 SOUTH STREET Address 2 City CANTERBURY County KENT Post code CT1 1EA </div> <div> Business Type Company Registration Number 757876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

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:

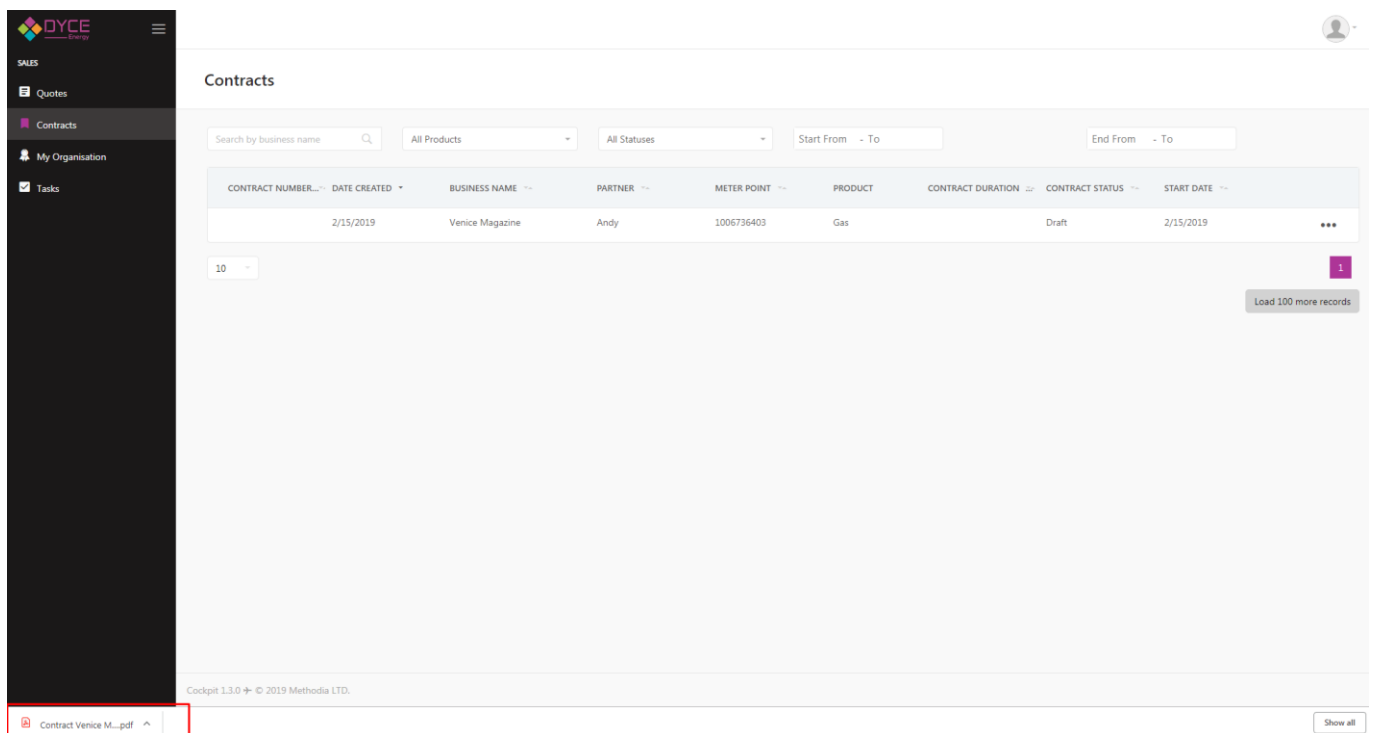


Then open the Contracts window and there you can see the new contract.



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.

SALES

Quotes

Contracts

My Organisation

Tasks

Contracts

All Products

All Statuses

Start From - To

End From - To

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	...

10

1

Load 100 more records

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**.