Partner Portal User Guide – Sales Agent

Quotes View

Choose Quotes and then press the button Add Quote.
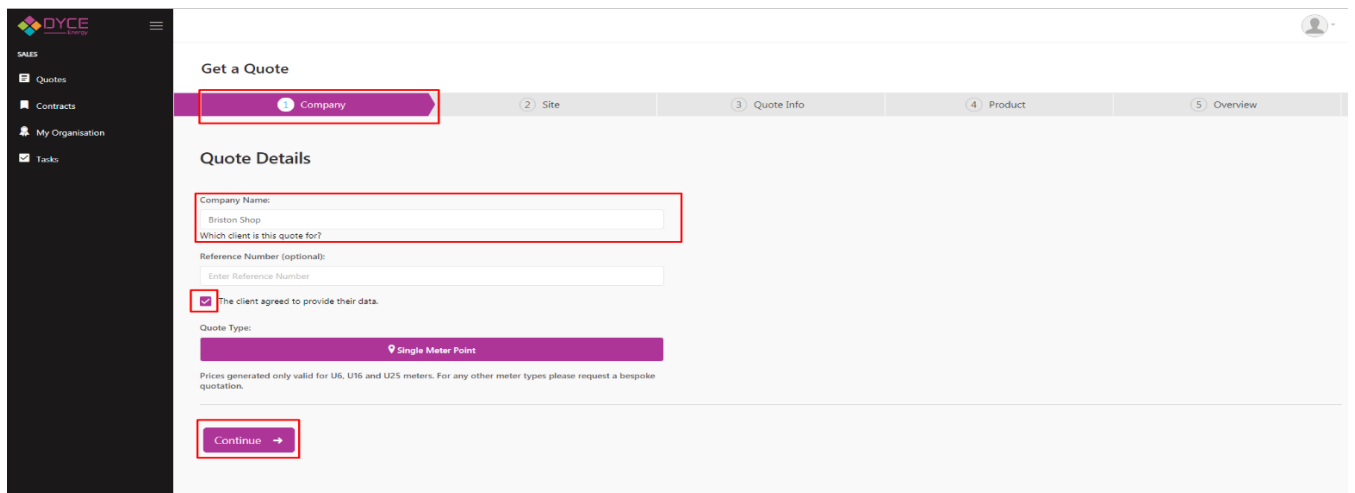
Company

- 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

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)

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

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

Product

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

Overview

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

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

Click accepted and this icon will appear:

- Sent to a client - this status shows that the quote is sent to the client. This is only an information status. Thereisn'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 tochange 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.

Here is the information that needs to be completed:

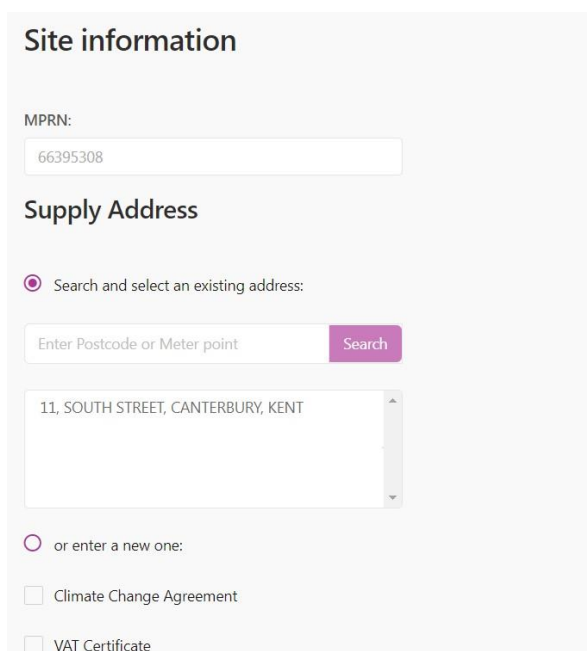- Fill in information about the client (automatically completed from the quote)

- 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 thequote 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)

Contacts

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

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

- Fill in the first and last name

- Add the contact phone number and email address, afterwards fill in the address by entering the post codeand searching:

If the billing account is the same as the primary contact there is no need for you to fill in all of the information againjust 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 itcannot 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 →]

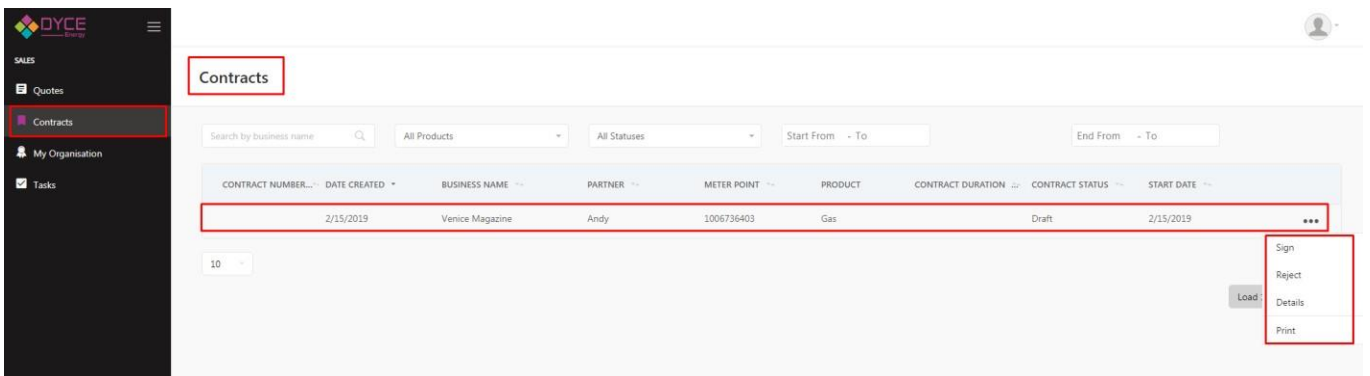## Overview

This step shows all the agreement information:

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:
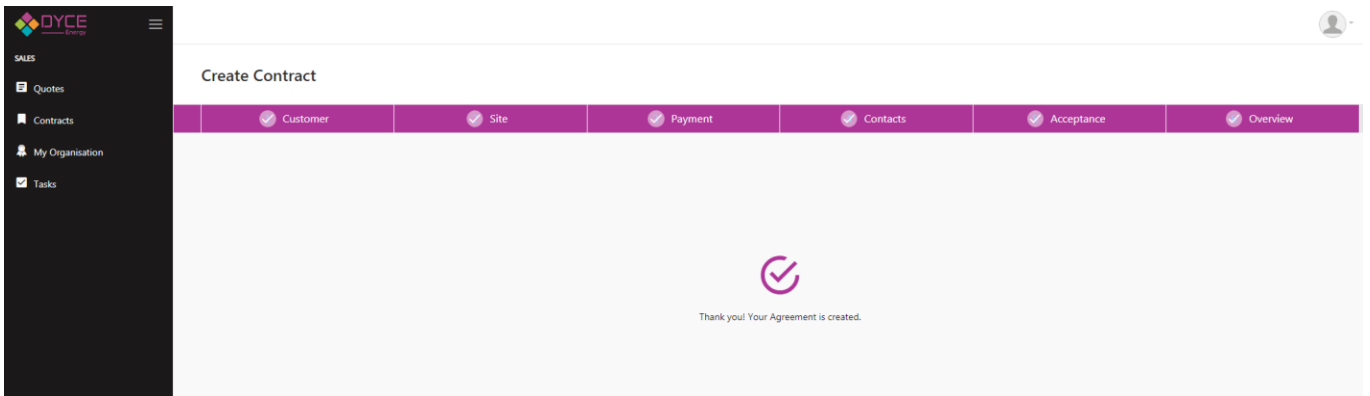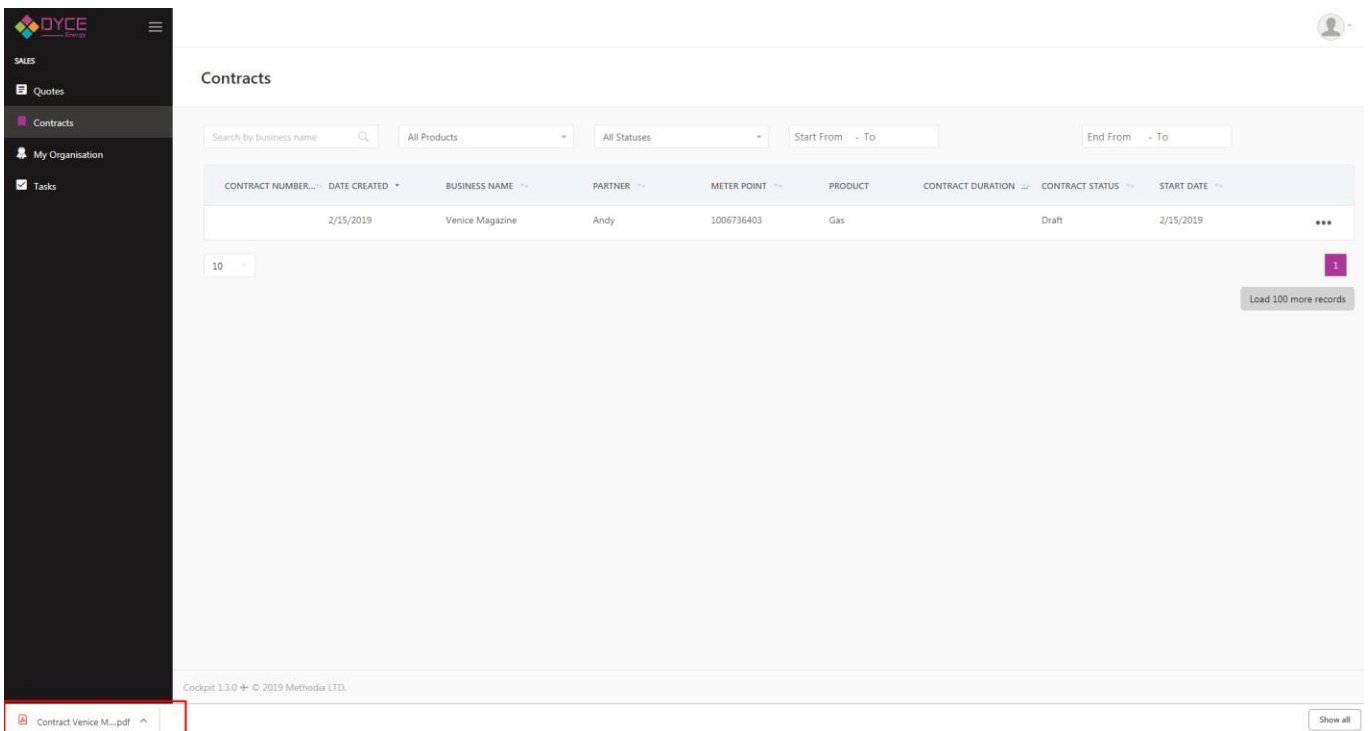

Then open the Contracts window and there you can see the new contract.

Now you have some options:

- Print or save the selected agreement by clicking the 3 dots and selecting PDF. The PDF will be produced asshown 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:
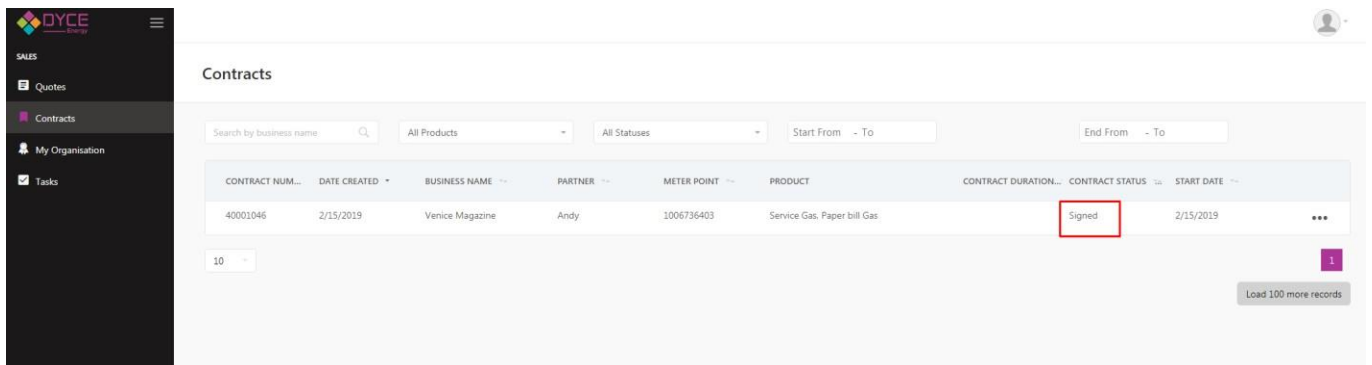
Uncompetitive price
Chose another supplier
Objection

- 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 AsSigned"

Attach Signed Contract:

Choose File   No file chosen

Mark Contract As Signed   Cancel

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

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