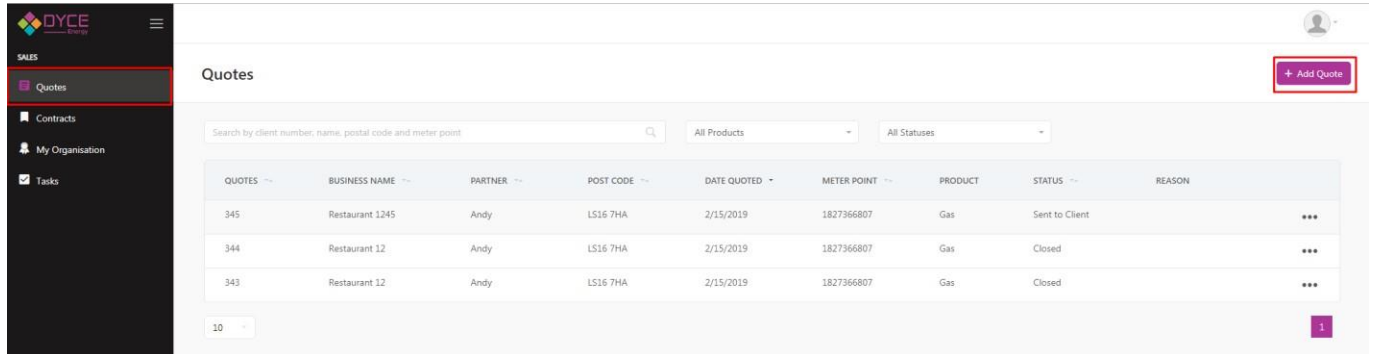


Partner Portal User Guide – Sales Agent

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

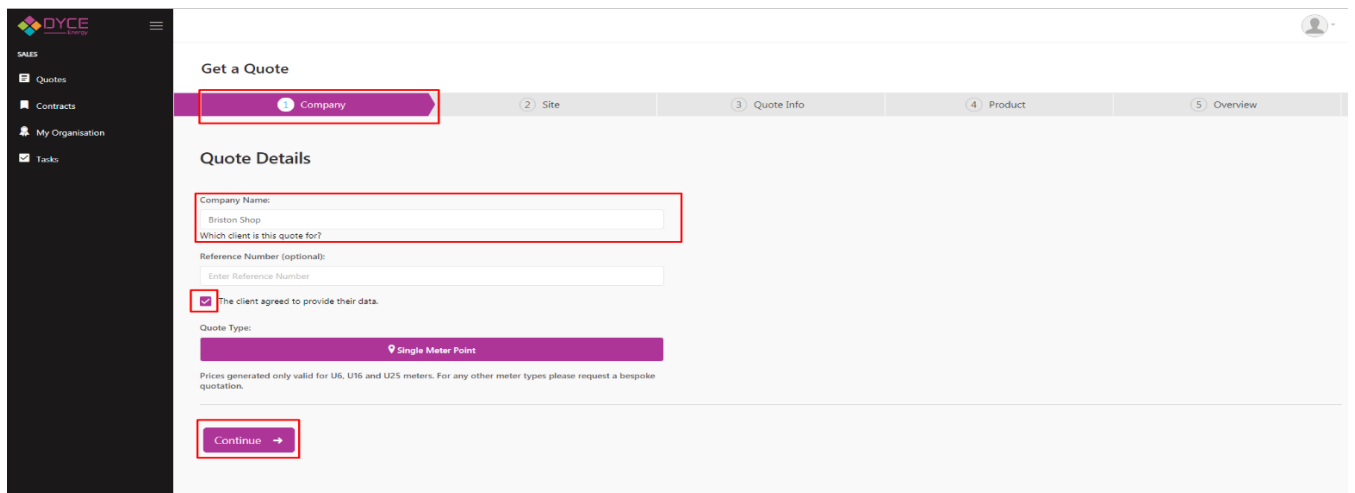
QUOTES	BUSINESS NAME	PARTNER	POST CODE	DATE QUOTED	METER POINT	PRODUCT	STATUS	REASON
345	Restaurant 1245	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Sent to Client	...
344	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	...
343	Restaurant 12	Andy	LS16 7HA	2/15/2019	1827366807	Gas	Closed	...

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)

The screenshot shows the 'Get a Quote' form in the 'Site' step. The 'Supply Address' section has two radio buttons: 'Search and select an existing address:' (selected) and 'or enter a new one:'. A search box contains 'AB31 5SR' and a 'Search' button. A dropdown menu shows search results: '42, HIGH STREET, BANCHORY, KINCARDINESHIRE', '40, HIGH STREET, BANCHORY, KINCARDINESHIRE', 'DODDIE'S ARMS HOTEL, HIGH STREET, BANCHORY, KINCARDINESHIRE', '88, HIGH STREET, BANCHORY, KINCARDINESHIRE' (highlighted), and '38, HIGH STREET, BANCHORY, KINCARDINESHIRE'. At the bottom, there are 'Go Back' and 'Continue' buttons.

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

The screenshot shows the 'Get a Quote' form in the 'Site' step. The 'Supply Address' section has two radio buttons: 'Search and select an existing address:' and 'or enter a new one:' (selected). Below are input fields for 'House Number' (14), 'Block' (Enter Block), 'Street' (Blaidwood Drive), 'Dependent Street' (Enter Dependent Street), 'City/Town' (DURHAM), 'County' (United Kingdom), and 'Post Code' (DH1 3TD). At the bottom, there are 'Go Back' and 'Continue' buttons.

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 a quoting process. At the top, there is a navigation bar with five steps: 1. Company, 2. Site, 3. Quote Info (highlighted), 4. Product, and 5. Overview. Below the navigation bar, the main content area is titled 'Select Services'. It features a purple button labeled 'Gas Quote'. Underneath, there is a section for 'MPRN' with a radio button selected for '15732702' and a text input field for 'Enter MPRN number'. Below that is a section for 'Annual Quantity in kWh (AQ) for Gas' with a text input field containing '30000'. There is a checkbox for 'Start nomination enquiry' which is unchecked. Further down, there are two date pickers: 'Proposed Supply Start Date' set to '08/12/22' and 'Current Supplier Contract End Date' set to '01/12/22'. Below the dates is a 'Sale Type' dropdown menu set to 'Acquisition'. At the bottom, there are two buttons: 'Go Back' and 'Continue'.

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 a quoting process. At the top, there is a navigation bar with five steps: 1. Company, 2. Site, 3. Quote Info, 4. Product (highlighted), and 5. Overview. Below the navigation bar, 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 two lines of text: 'Unit Rate 2.796 p/kWh' and 'Standing Charge 43 p/day'. Below that, there are two text input fields: 'Commission Amount for Unit Rate (p/kWh)' with the value '2.62' and 'Commission Amount for Standing Charge (p/day)' with the value '3'. At the bottom, there are two buttons: 'Go Back' and 'Continue'.

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	Reference Number
Quote Type Single	The client agreed to provide their data Yes
Supply address	
House number: 48	
Block:	
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: 2500
Annual Quantity in kWh (AQ) for Gas Reported by the Industry: 	

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

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
1

- Sent to Client
- Accepted
- Rejected
- Revised
- Details

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

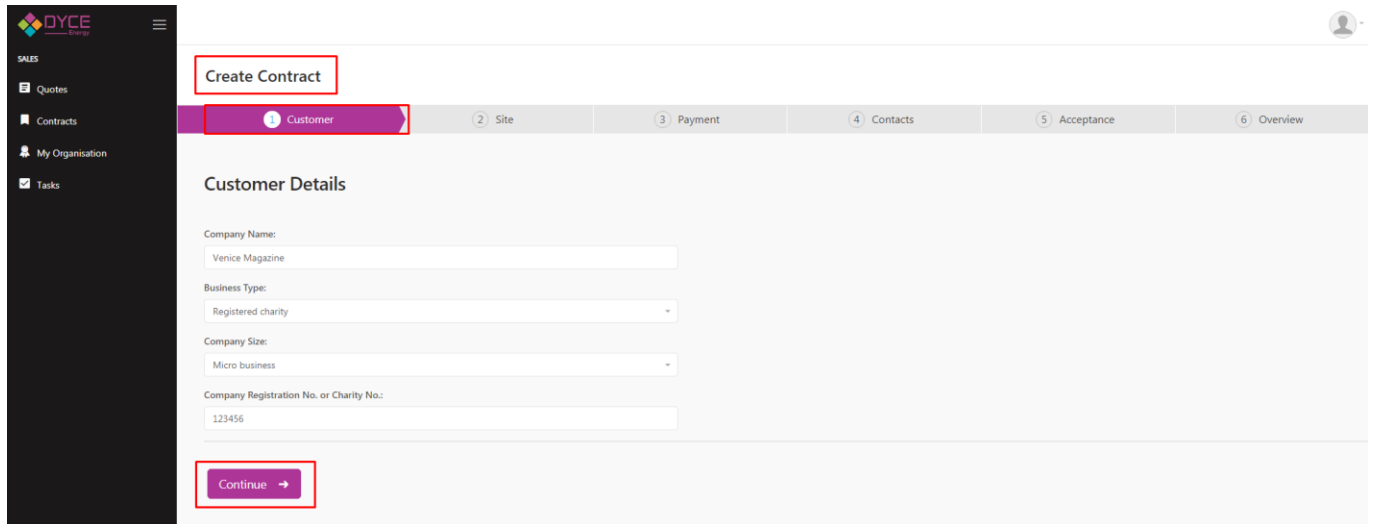
Company Size:
Select one

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

Continue →

Here is the information that needs to be completed:

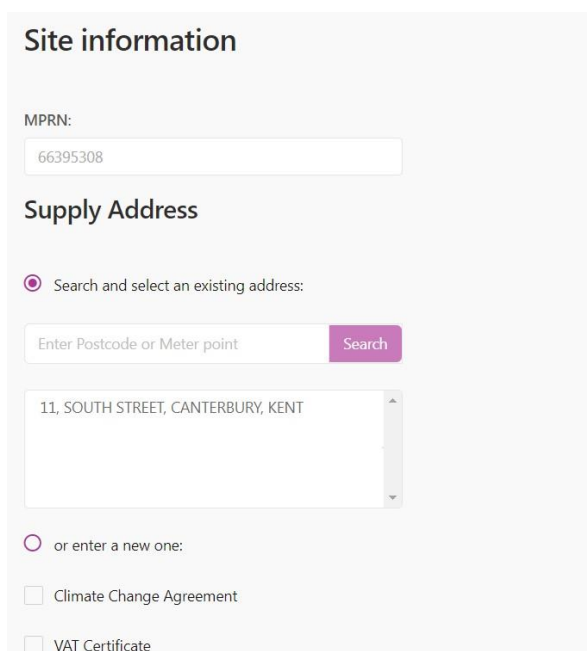
- Fill in information about the client (automatically completed from the quote)
- The next field is the type of business e.g. sole trader, registered charity, limited company
- Company registration number (automatically completed from the quote)



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)

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: Carie Last Name: Jonrd

Contact Phone: 1254

Contact Email: test123@methodia.com

Address: 807 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: 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:

123

Billing Contact

Tick if same as Primary Contact

First Name: Enter First Name

Last Name: Enter Last Name

Contact Phone: Enter Contact Phone

Contact Email: Enter Contact Email

Address: Enter Postcode

Search and select an existing address:

or enter a new one:

Billing Preference:

Email

Post

*Please be aware that paper billing will be charged at £2 per invoice per month

- 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

Billing Contact

Tick if same as Primary Contact

Billing Preference:

Email

Post

*Please be aware that paper billing will be charged at £2 per invoice per month

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

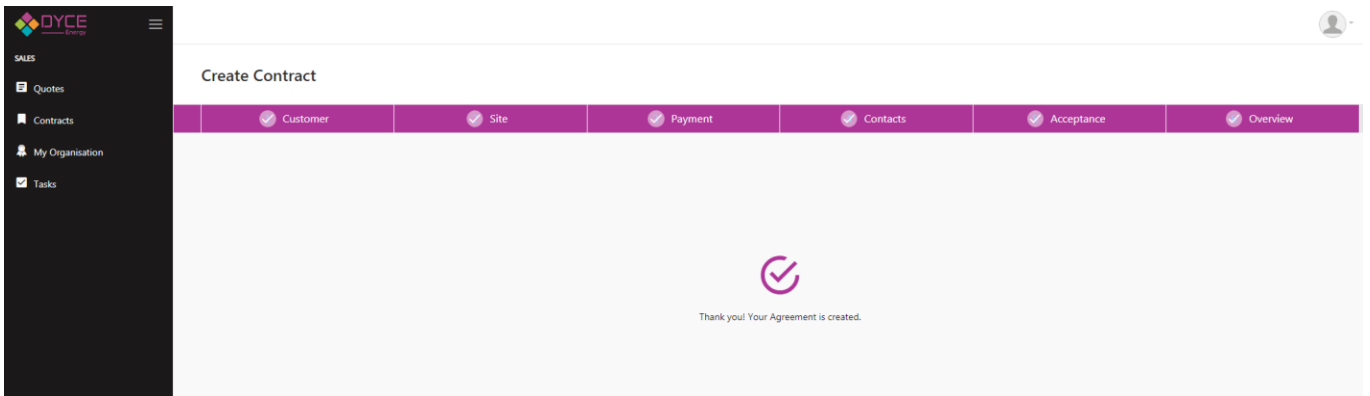
<input checked="" type="checkbox"/> Customer	<input checked="" type="checkbox"/> Site	<input checked="" type="checkbox"/> Payment	<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Acceptance	6 Overview
Business Name <input type="text" value="test 0512"/>		Business Type <input type="text" value=""/>			
Company Size <input type="text" value=""/>		Company Registration Number <input type="text" value="757876"/>			
MPRN <input type="text" value="66395308"/>		Annual Quantity in kWh (AQ) for Gas: <input type="text" value="40000 kWh"/>			
Site address					
Building number <input type="text" value="11"/>					
Building name <input type="text" value="SOUTH STREET"/>					
Address 1 <input type="text" value="SOUTH STREET"/>					
Address 2 <input type="text" value=""/>					
City <input type="text" value="CANTERBURY"/>					
County <input type="text" value="KENT"/>					
Post code <input type="text" value="CT1 1EA"/>					
Primary address					
Building number <input type="text" value=""/>					
Building name <input type="text" value="SOLAGLAS LIMITED"/>					
Address 1 <input type="text" value="MARSHWOOD CLOSE"/>					
Address 2 <input type="text" value=""/>					
City <input type="text" value="CANTERBURY"/>					
County <input type="text" value="KENT"/>					
Post code <input type="text" value="CT1 1AE"/>					
Primary contact					
First name <input type="text" value="test"/>					
Last Name <input type="text" value="test"/>					
Contact phone <input type="text" value="3895754"/>					
Contact email <input type="text" value="test@gamil.com"/>					
Credit check address					
Building number <input type="text" value=""/>					
Building name <input type="text" value=""/>					
Address 1 <input type="text" value=""/>					
Address 2 <input type="text" value=""/>					
City <input type="text" value=""/>					
County <input type="text" value=""/>					
Post code <input type="text" value=""/>					
Credit check contact					
First name <input type="text" value=""/>					
Last Name <input type="text" value=""/>					
Contact phone <input type="text" value=""/>					
Contact email <input type="text" value=""/>					
Previous address					
Building number <input type="text" value=""/>					
Building name <input type="text" value=""/>					
Address 1 <input type="text" value=""/>					
Address 2 <input type="text" value=""/>					
City <input type="text" value=""/>					
County <input type="text" value=""/>					
Post code <input type="text" value=""/>					
Billing address					
Building number <input type="text" value=""/>					
Building name <input type="text" value="SOLAGLAS LIMITED"/>					
Address 1 <input type="text" value="MARSHWOOD CLOSE"/>					
Address 2 <input type="text" value=""/>					
City <input type="text" value="CANTERBURY"/>					
County <input type="text" value="KENT"/>					
Post code <input type="text" value="CT1 1AE"/>					
Billing contact					
First name <input type="text" value="test"/>					
Last Name <input type="text" value="test"/>					
Contact phone <input type="text" value="3895754"/>					
Contact email <input type="text" value="test@gamil.com"/>					
Climate change agreement					
<input type="text" value="No"/>					
Climate change agreement date					
<input type="text" value=""/>					
VAT certificate					
<input type="text" value="No"/>					
% Domestic					
<input type="text" value=""/>					
VAT certificate valid from date					
<input type="text" value=""/>					
VAT certificate valid to date					
<input type="text" value=""/>					
Bank Account Name: <input type="text" value="389598"/>		Payment Method: <input type="text" value="Variable DD"/>			
Sort Code: <input type="text" value="5589589"/>		Account Number: <input type="text" value="490590"/>			
Marketing consent: <input type="text" value=""/>		Sale Type: <input type="text" value="Acquisition"/>			
Proposed Supply Start Date: <input type="text" value="12/31/2022"/>		Current Supplier Contract End Date: <input type="text" value="12/1/2022"/>			
Letter of Authority Start Date: <input type="text" value=""/>		Letter of Authority End Date: <input type="text" value=""/>			

← Go Back

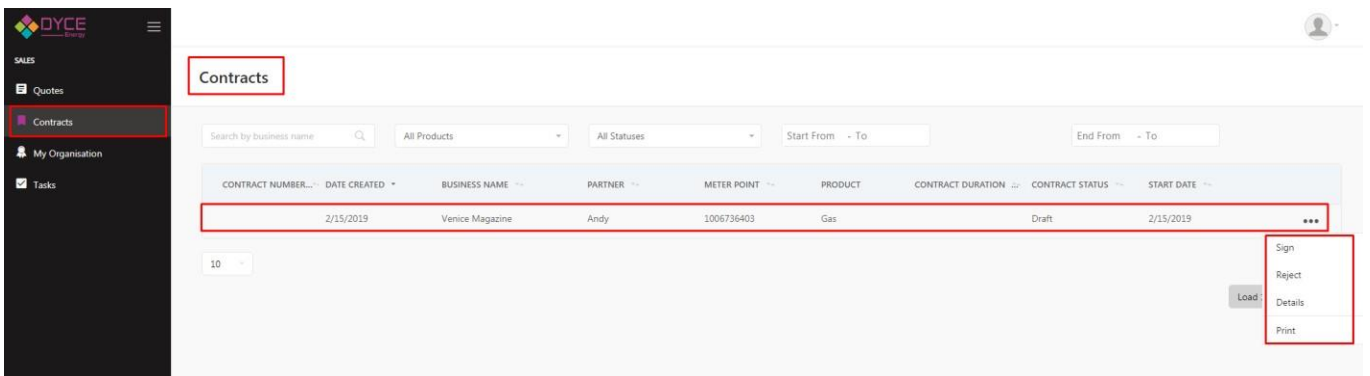
Save →

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:

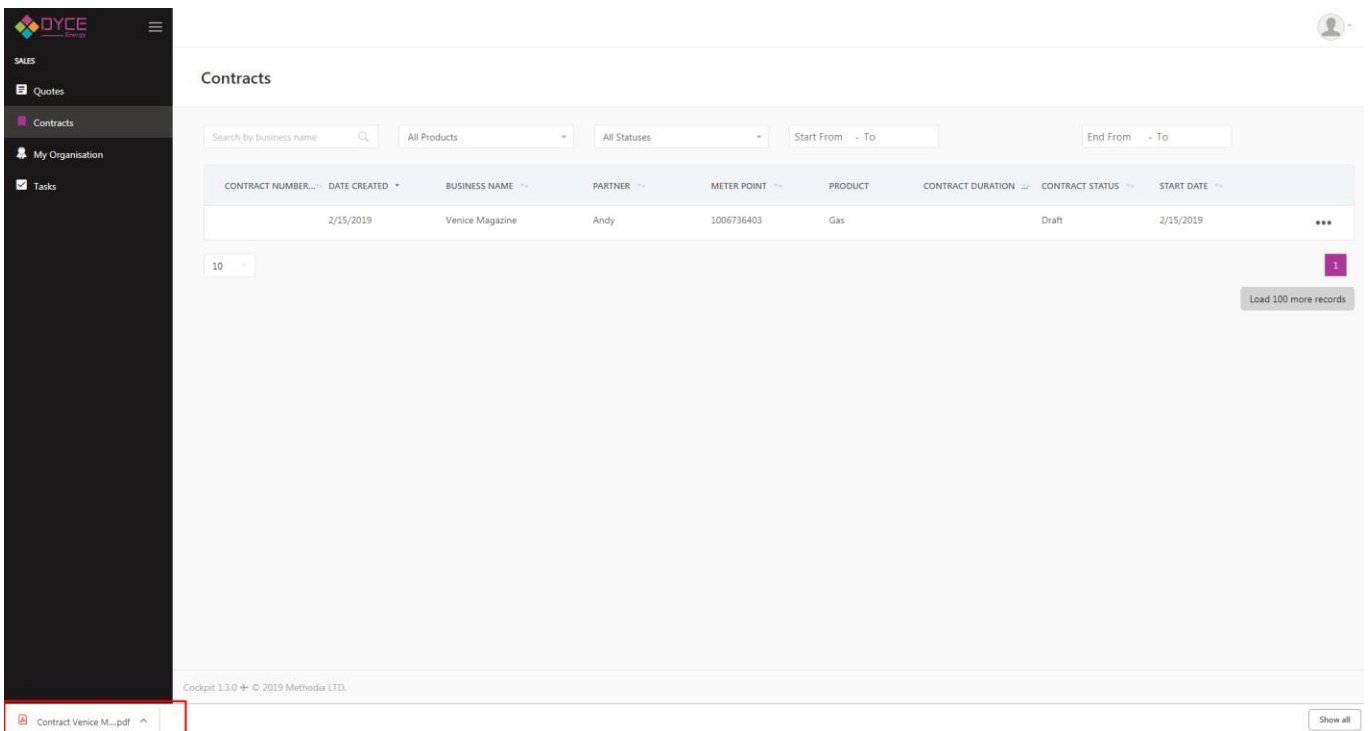


Then open the Contracts window and there you can see the new contract.



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

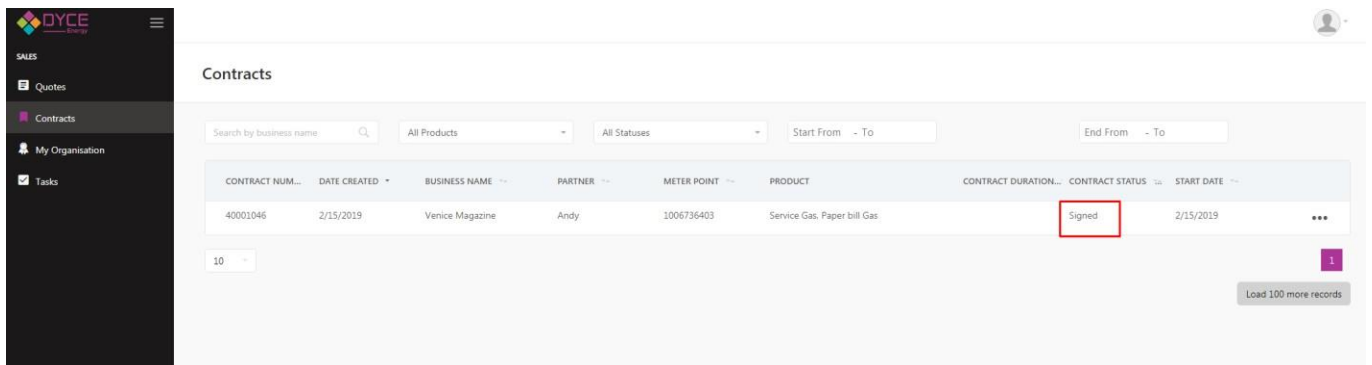
- ⋮ Details - detailed information about the contract
- ⋮ When you press the sign button this window appears and the user has to press the button "Mark Contract AsSigned"

Attach Signed Contract:

Choose File No file chosen

Mark Contract As Signed Cancel

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



The screenshot shows the 'Contracts' management page in the Dyce Energy system. The interface includes a sidebar with navigation options: SALES, Quotes, Contracts, My Organisation, and Tasks. The main content area displays a table of contracts with the following columns: CONTRACT NUM..., DATE CREATED, BUSINESS NAME, PARTNER, METER POINT, PRODUCT, CONTRACT DURATION..., CONTRACT STATUS, and START DATE. A single contract is listed with the following details: CONTRACT NUM... 40001046, DATE CREATED 2/15/2019, BUSINESS NAME Venice Magazine, PARTNER Andy, METER POINT 1006736403, PRODUCT Service Gas, Paper bill Gas, CONTRACT STATUS Signed (highlighted with a red box), and START DATE 2/15/2019. The table also shows a pagination control set to 10 records and a 'Load 100 more records' button.

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.