Customers

Creation and the approval process

Creating a customer

Once you have logged on to the portal, you can create a customer by going to the customers section. From here you will see a list of your existing customers by their status as well as the option to add either a Consumer or Company type customer.

Complete the registration form and your customer will be submitted for approval.

There are 5 stages for customer approval:

Customer approval

New

created by the partner and submitted

Passed Credit Ref

customers who have passed a credit check

Referred

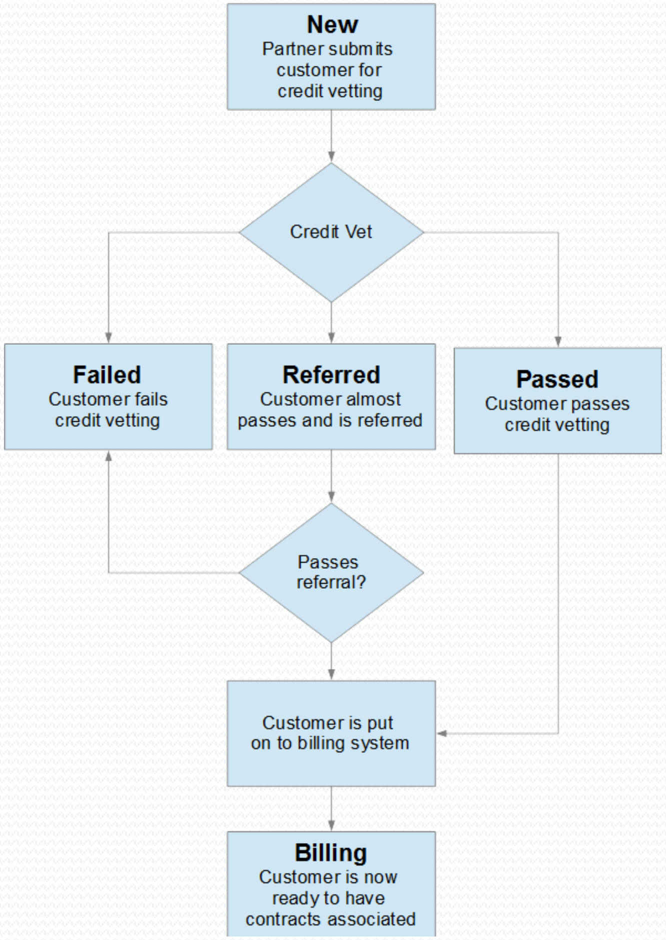
customers who require further credit checks

Failed Credit Ref

customers who have failed credit checks

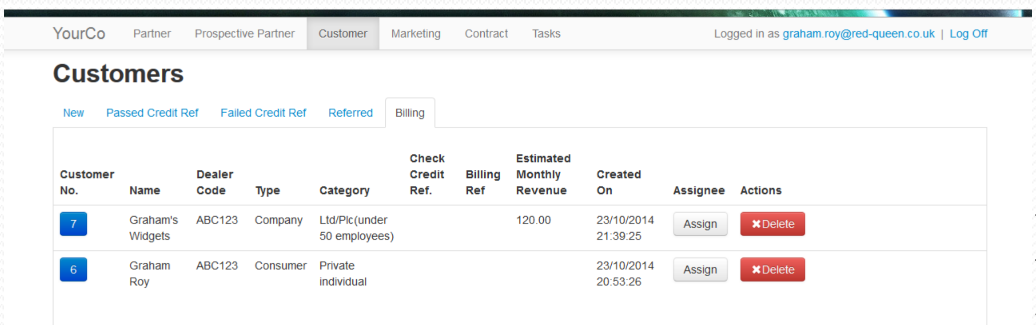
Billing

customers who have been put on the billing system ready for contract submission



Administrating customers

The customer approval process is available to internal users within the admin section.



From here you can manage the approval process and allocate them to staff to process.

It's also possible for your internal staff to amend the details of the customer in case there are any errors shown from the credit report.

Approved Customers

Once approved the customers will be in the partner's 'live' customer section available to have contracts associated to them.

Their summary page also shows the number of existing connections and each contract status, as well as any address and contact details for their customer