

4 training guide

Guide to...
QUOTE BUILDER

plan.com



Introducing v4 training guides

Welcome to the v4 partner training guides

These guides pull together everything you need to know about v4, giving you the responsiveness required to win and support customers.

There are two types of training guides:

- Introducing... guides are top-level guides that explain how to navigate and understand the portal.
- Guide to... guides are more in-depth, step-by-step documents that explain specific features and actions.

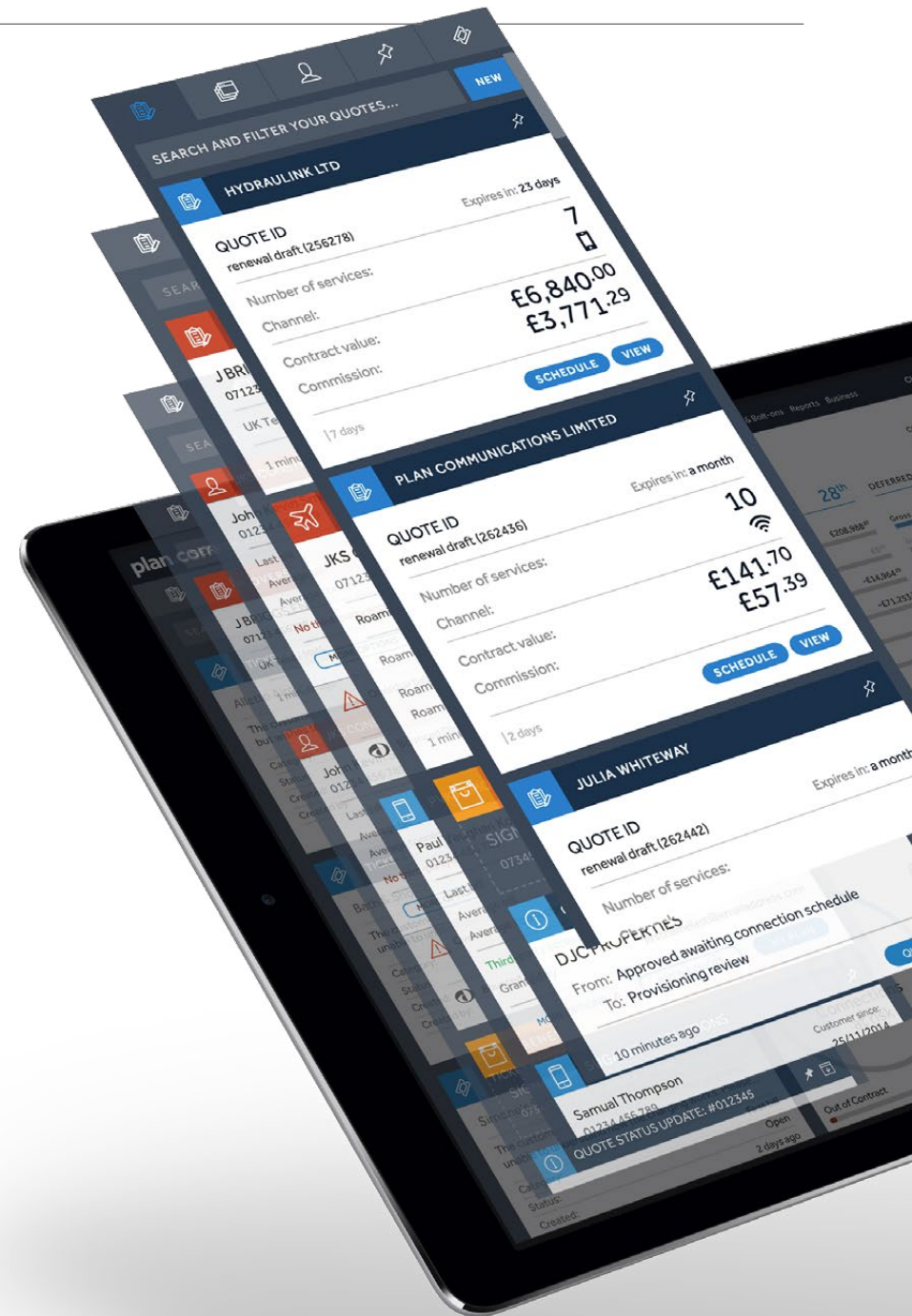
This is the Guide to the **Quote Builder**, which forms part of the v4 Partner Feed.

These guides aren't for everyone... some areas of the v4 portal are only available to people with certain permissions. If you can't access a certain section or feature, please contact your primary user.

Related guides

INTRODUCING... THE FEED

GUIDE TO... PERMISSIONS



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Introducing the Quote Builder

Being flexible and having the ability to tailor every deal is key to winning new business

Having control over how you build each deal means that you will always be competitive.

The brand new Quote Builder in v4 provides you with even more tools to stay ahead.



View all elements of the deal in a single window – no more switching between screens!

The screenshot displays a user interface for managing quotes. At the top, there is a navigation bar with icons for home, list, user, search, and settings. Below this is a search bar with the text "SEARCH AND FILTER YOUR QUOTES..." and a "NEW" button. The main content area shows a list of quotes, each with a header bar containing the company name and a right-pointing arrow. The first quote is for "HYDROMATIC LTD" and includes the following details: "QUOTE ID: Renewal draft (123456)", "Expires in: 30 days", "Number of services: 7", "Channel: [mobile icon]", "Contract value: £6,840.00", "Commission: £3,771.29", and "10 minutes ago". At the bottom of this quote card are "SCHEDULE" and "VIEW" buttons. The second quote is for "SAMDRAW CONSULTANCY" and includes: "QUOTE ID: Renewal draft (123456)", "Expires in: 29 days", "Number of services: 2", "Channel: [mobile icon]", "Contract value: £846.20", "Commission: £521.08", and "10 minutes ago". It also has "SCHEDULE" and "VIEW" buttons. The third quote is for "SUMMIT LANDSCAPES" and is partially visible at the bottom.

The Quote Builder

You can't miss the new Quote Builder – it sits in the top left corner of your screen

The quote feed shows all of your ongoing quotes.

You'll see a top-level overview with key information on each quote.

Quick links allow you to view each quote in more detail.

VIEW

View takes you into each individual quote.

SCHEDULE

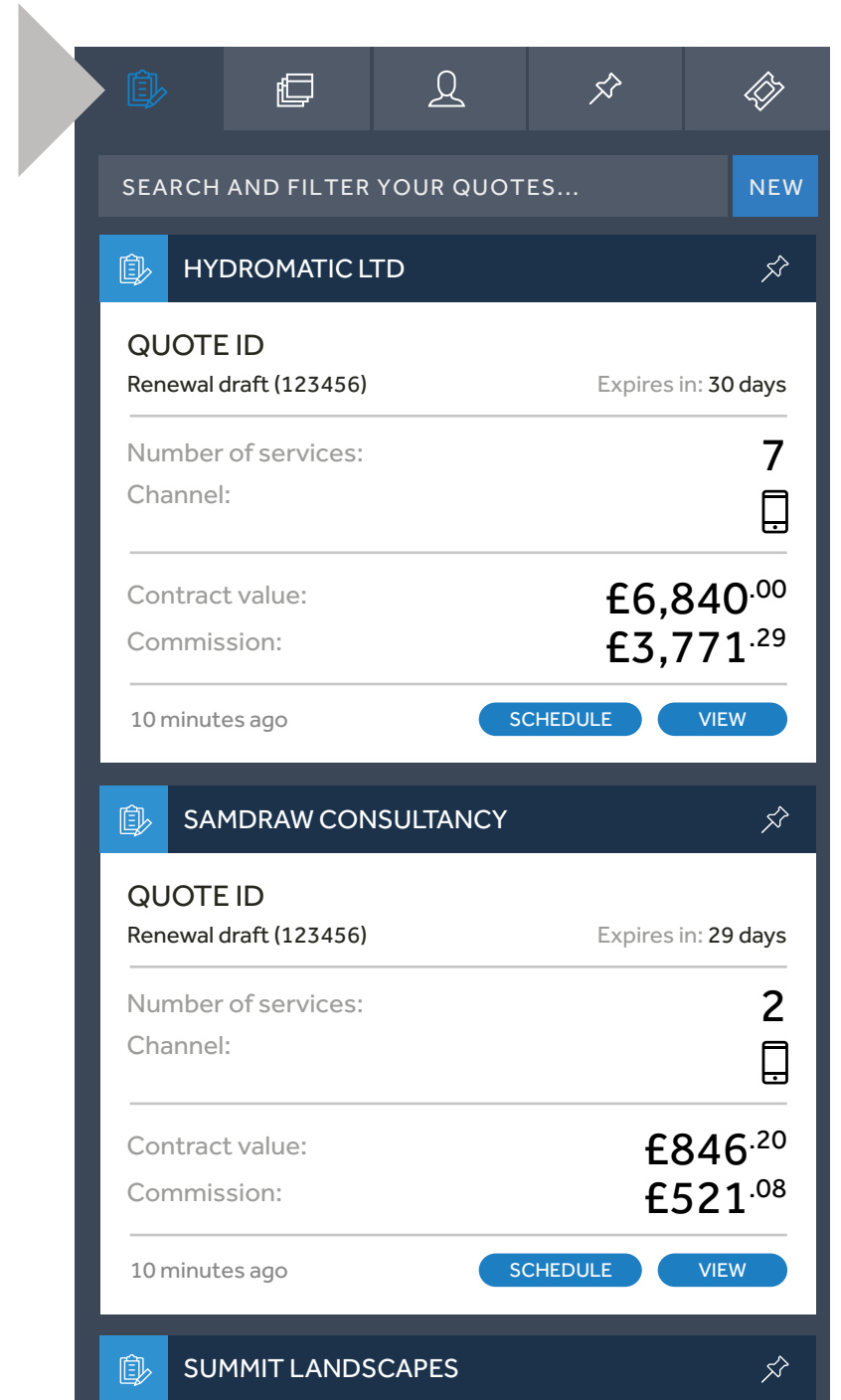
Schedule opens up the connection schedule associated with each quote.

You can search for individual quotes and filter the results using the search box.

SEARCH AND FILTER YOUR QUOTES...



Tip: Users with access to the Quotes Dashboard can view a full list of quotes there!



The screenshot displays the Quote Builder interface. At the top, there is a navigation bar with icons for home, list, user, search, and settings. Below this is a search bar with the text "SEARCH AND FILTER YOUR QUOTES..." and a "NEW" button. The main content area shows a list of quotes. The first quote is for "HYDROMATIC LTD" and includes the following details: QUOTE ID, Renewal draft (123456), Expires in: 30 days, Number of services: 7, Channel: (with a mobile phone icon), Contract value: £6,840.00, Commission: £3,771.29, and a timestamp of 10 minutes ago. Below the details are "SCHEDULE" and "VIEW" buttons. The second quote is for "SAMDRAW CONSULTANCY" and includes: QUOTE ID, Renewal draft (123456), Expires in: 29 days, Number of services: 2, Channel: (with a mobile phone icon), Contract value: £846.20, Commission: £521.08, and a timestamp of 10 minutes ago. Below the details are "SCHEDULE" and "VIEW" buttons. The third quote is for "SUMMIT LANDSCAPES" and is partially visible at the bottom of the screen.

NEW Building a New Quote

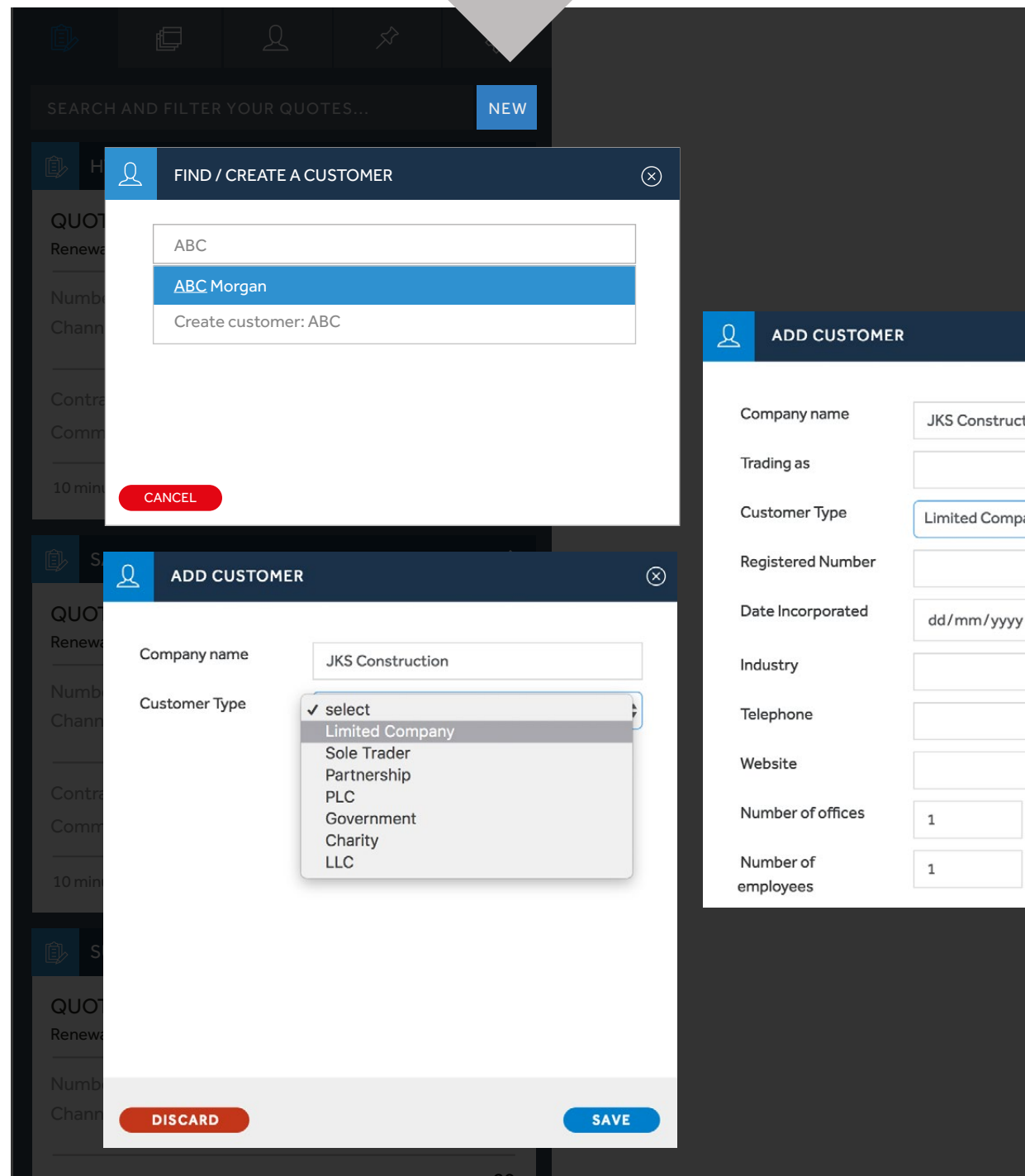
One-click quote creation for new and existing customers

NEW To create a new quote click the blue **New** button next to the search & filter bar.

Enter the customer name and either select an existing customer or create a new one.

Either add in the customer details before creating the quote or click save to go straight to the quote builder page.

CANCEL Press **Cancel** at any time to discard any changes.



Building a New Quote

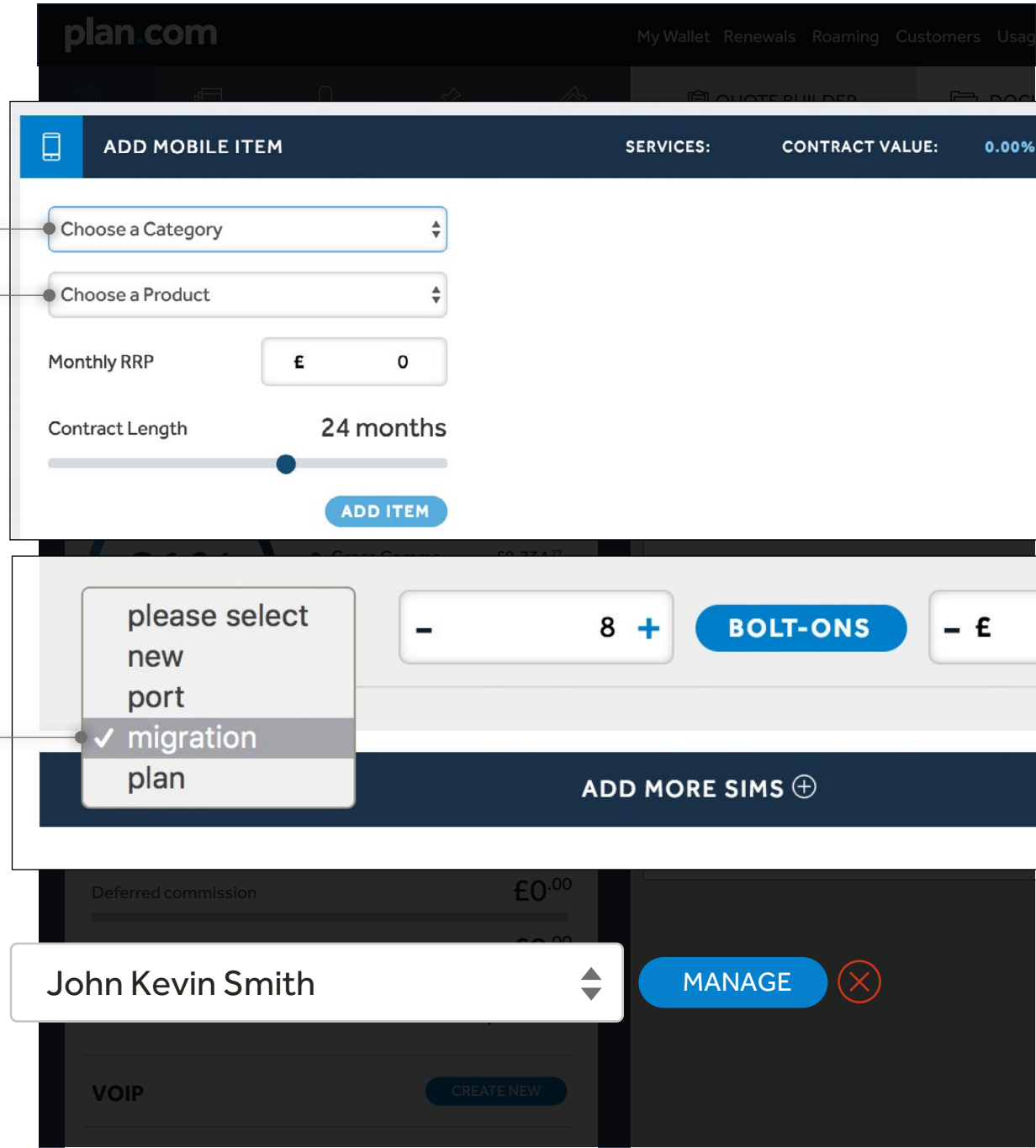
With v4, you now have even more control and visibility

From the Category dropdown choose the type of tariff – i.e. Single User or Sharer

From the Product dropdown choose the tariff

Select what type of SIM you want: New, Port, Migration or existing plan.com SIM.

 You can add and edit customer details at a later stage by clicking the **Manage** button within the Quote Builder



Quote Templates

You can create templates for the deals you sell frequently to save time – you won't have to stack them over and over!

CREATE NEW

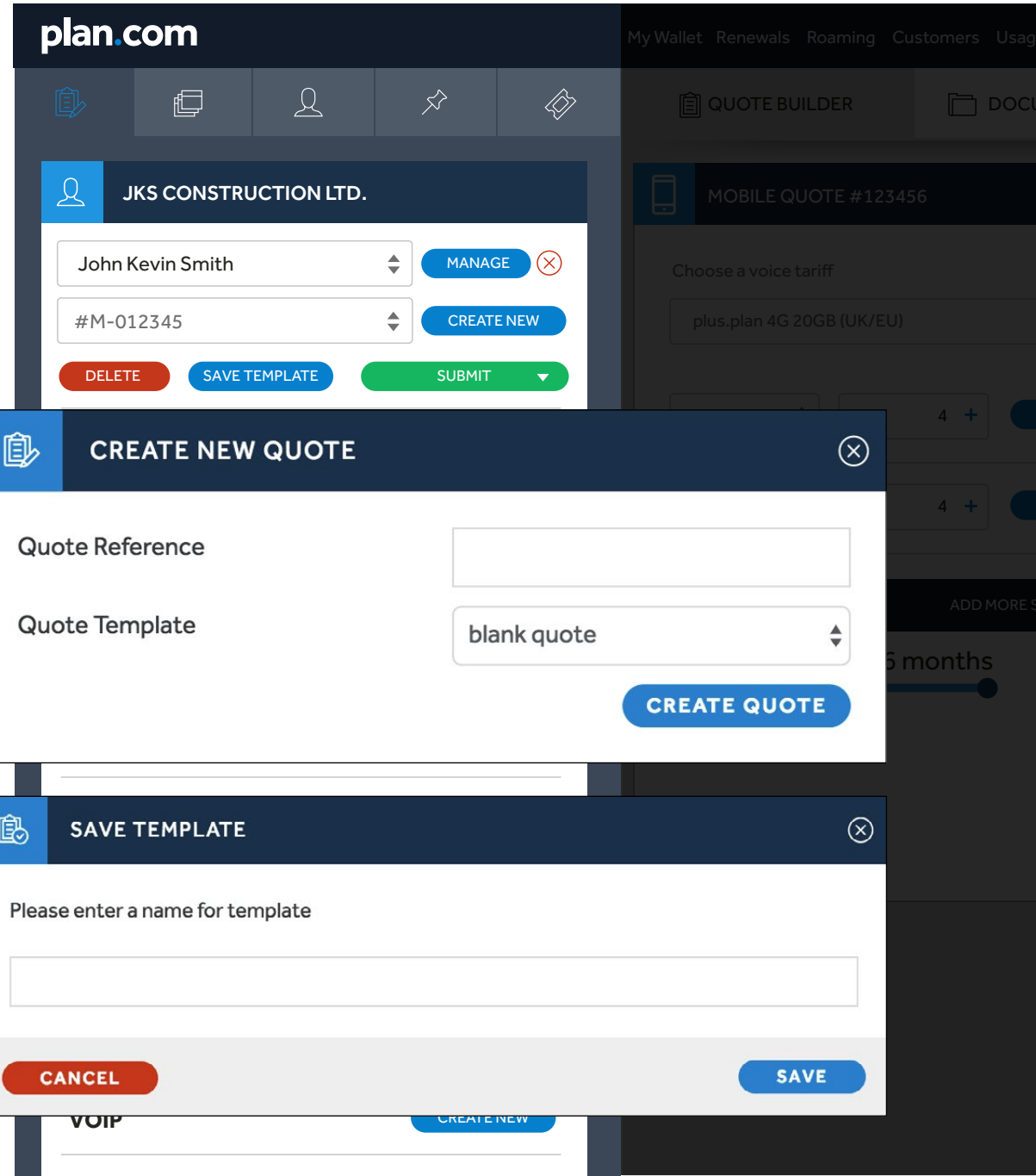
When creating a quote for an existing customer or newly created customer, click the **Create New** button on the left-hand side of the screen

Select either a blank quote or one of your saved templates

SAVE TEMPLATE

To save a template, build your deal using the Quote Builder and click **Save Template**


Name your template and click **Save**



Adding More Connections

You can now add mobile, MBB, VoIP and hardware to the same quote in a single screen

Add more SIMs on the same tariff by clicking **Add More SIMs**

ADD MORE SIMS 

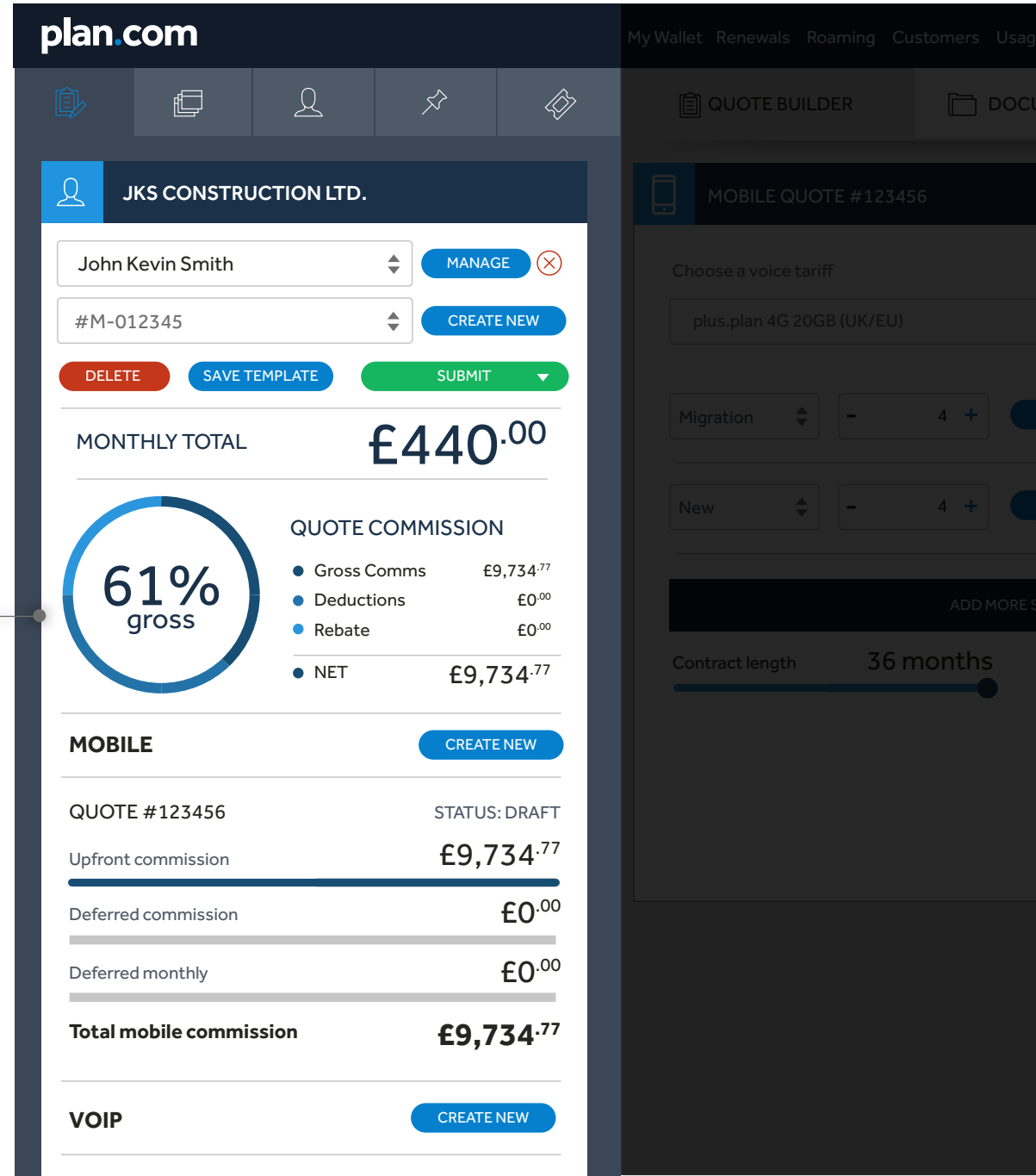
CREATE NEW

Add more connections on a different tariff by clicking **Create New** on the left-hand side

This creates a new Mobile Quote item to add into the deal.

The **Wallet** shows the **Monthly Total** as well as tracking the **Quote Commission**

 Selecting the different SIM types in the Quote Builder saves time at the Connection Schedule stage!



plan.com

My Wallet Renewals Roaming Customers Usa

QUOTE BUILDER

MOBILE QUOTE #123456

Choose a voice tariff

plus.plan 4G 20GB (UK/EU)


Migration - 4 +

New - 4 +

ADD MORE SIMS

Contract length 36 months

JKS CONSTRUCTION LTD.

John Kevin Smith **MANAGE** 

#M-012345 **CREATE NEW**

DELETE **SAVE TEMPLATE** **SUBMIT**

MONTHLY TOTAL **£440.00**

61% gross

QUOTE COMMISSION

- Gross Comms £9,734.77
- Deductions £0.00
- Rebate £0.00
- NET **£9,734.77**

MOBILE **CREATE NEW**

QUOTE #123456 STATUS: DRAFT

Upfront commission **£9,734.77**

Deferred commission **£0.00**

Deferred monthly **£0.00**

Total mobile commission £9,734.77

VOIP **CREATE NEW**

Adding Bolt-ons

Bolt-ons can now be assigned to SIM types in the Quote Builder

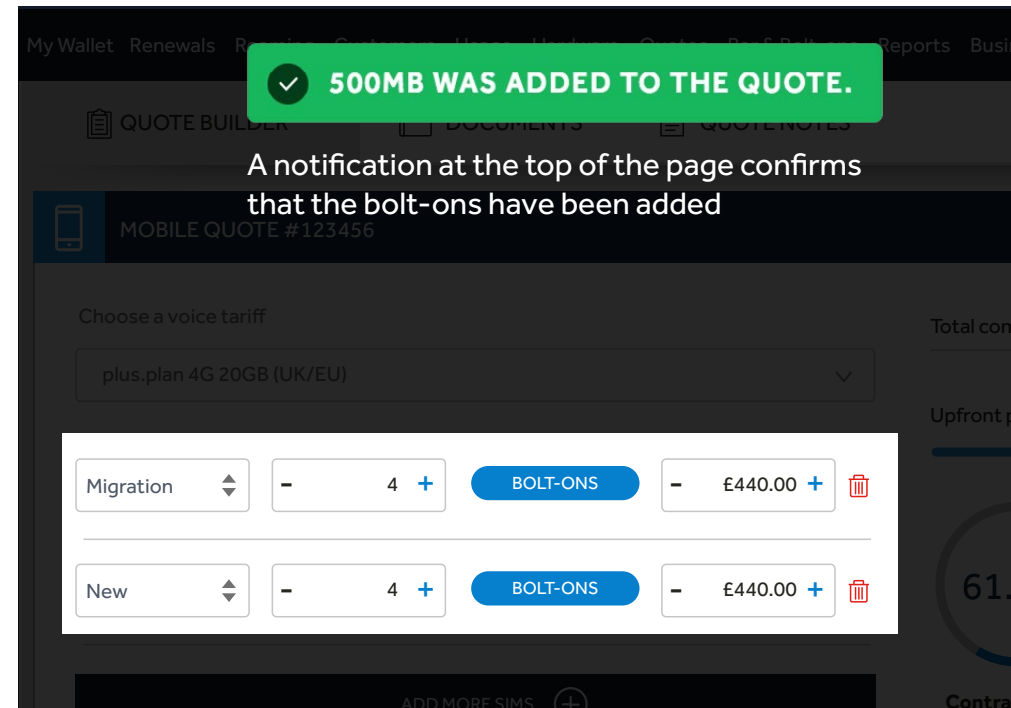
This saves you having to add them in the Connection Schedule

BOLT-ONS

Click the blue **Bolt-ons** button to add them into the deal

ADD BOLT-ONS




Select the required bolt-on from the window and click **Add bolt-ons**



Business Zone - Monthly Data

Our monthly roaming data bolt-ons are perfect for business people on the move who want to stay connected. These monthly data roaming packages are available in three zones, covering most of the globe, with different data allowances.

[VIEW GUIDE](#)

ROAMING 	ROAMING 	ROAMING 
£29	£59	£99
250MB	500MB	1GB

CANCEL

ADD BOLT-ONS

Adding Hardware

Adding hardware has never been so easy

Add Hardware into the quote by clicking **Create New** from the options on the left-hand side

HARDWARE

CREATE NEW

Select the model and colour from the drop-down menus

Live stock levels are indicated for both O2-locked and SIM-free hardware

The **Wallet** keeps track of deductions showing you the net profit in the deal



QUOTE COMMISSION

● Gross Comms	£9,734. ⁷⁷
● Deductions	£2,345. ⁴⁵
● Rebate	£0. ⁰⁰
● NET	£7,398. ³²

The screenshot shows the 'HARDWARE' section of the plan.com interface. It features two drop-down menus for model and color, stock level indicators, quantity input, and 'ADD' buttons. A 'RESET' button is at the bottom. A smartphone image is on the right. The background shows the user's profile and quote builder options.

plan.com My Wallet Renewals Roaming Custom

QUOTE BUILDER

MOBILE QUOTE #123456

Choose a voice tariff

JKS CONSTRUCTION LTD.

John Kevin Smith MANAGE

HARDWARE

Apple - iPhone 7 128GB

Jet Black

O2 locked £562.00

IN STOCK - 20-99

Quantity 1 + ADD

SIM Free £580.21

IN STOCK - 20-99

Quantity 1 + ADD

RESET

VOIP CREATE NEW

MBB CREATE NEW

HARDWARE CREATE NEW

Share the Quote

We've introduced a unique way for you to share quotes with your customers & get the contract signed using a live online proposal

SHARE

Click the green **Share** button in the top-right corner of your page

The pop up window allows you to enter a customer's existing costs so that you can highlight proposed savings should you want to (this is optional)

Share the live quote via either email, SMS or by copying the link – a confirmation message will tell you it has been sent

The customer then clicks a link to view the live quote online



Make sure you click **Save** when adding current costs!

	Current	Proposed
Mobile	– £ 900.00 +	£595.50
Mobile BB	– £ 0.00 +	£0.00
Fixed	– £ 0.00 +	£0.00
VoIP	– £ 0.00 +	£0.00
IoT	– £ 0.00 +	£0.00
Apps	– £ 0.00 +	£0.00
Total	£900.00	£595.50

estimated monthly cost at current rate

Mobile	£900.00
Monthly total	£900.00

monthly cost with plan.com

Mobile	£595.50
Monthly total	£595.50

projected savings over 24 months*

£3,654
33.84%

Live Quote Link


A dual-branded intro page outlines some of the benefits of being a plan.com customer

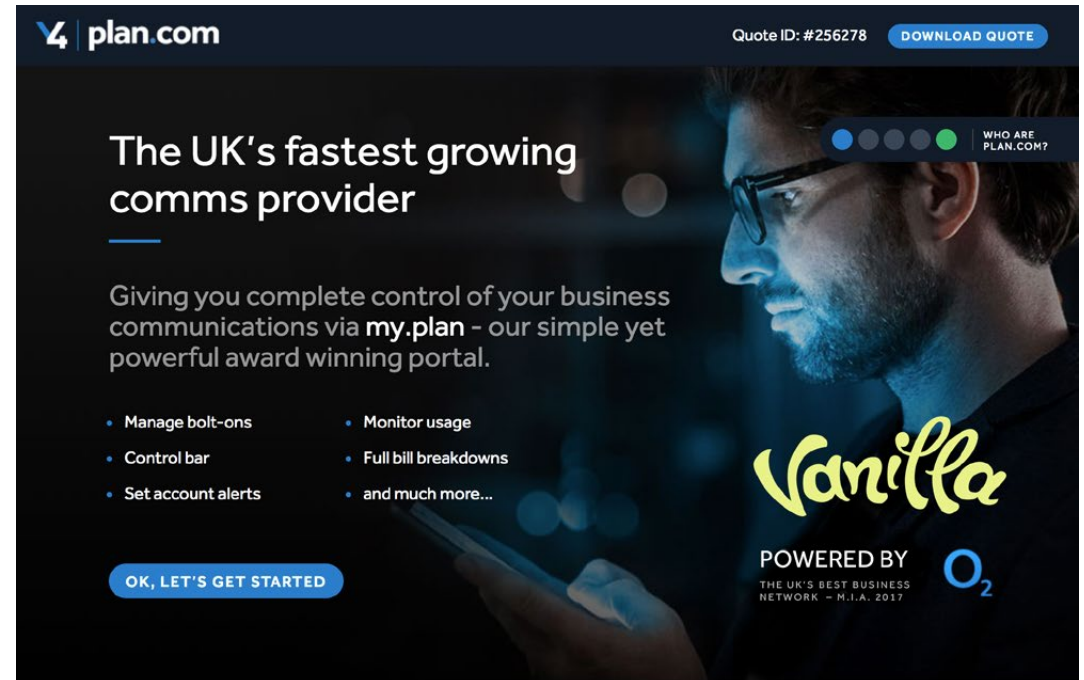
Quick links progress through the live quote document

If you've added them - an overview of current versus proposed costs highlight projected savings over the lifetime of the contract

A breakdown of tariffs & hardware provide the detail of the quote

The quote can be amended as you're talking to the customer, use the **Push Update** button to send any changes to them in real-time

 The tariff details are expandable, click each element to expand and see more detail!



plan.com Quote ID: #256278 [DOWNLOAD QUOTE](#)

The UK's fastest growing comms provider

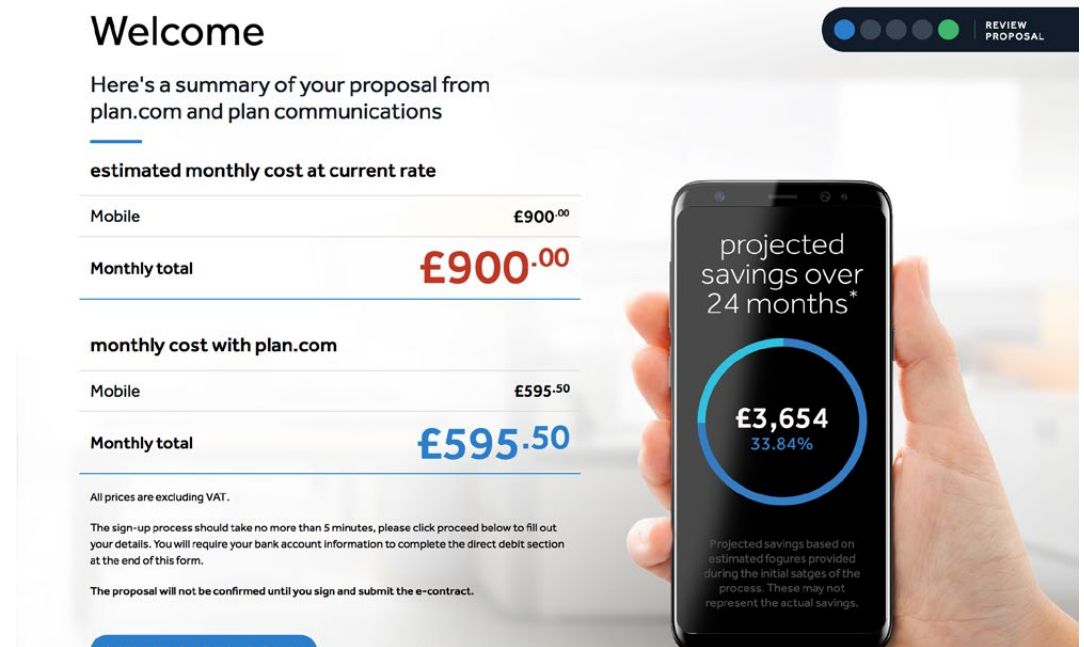
Giving you complete control of your business communications via **my.plan** - our simple yet powerful award winning portal.

- Manage bolt-ons
- Control bar
- Set account alerts
- Monitor usage
- Full bill breakdowns
- and much more...

Vanilla

POWERED BY THE UK'S BEST BUSINESS NETWORK - M.I.A. 2017 **O2**

[OK, LET'S GET STARTED](#)



Welcome

Here's a summary of your proposal from plan.com and plan communications

[REVIEW PROPOSAL](#)

estimated monthly cost at current rate

Mobile	£900.00
Monthly total	£900.00

monthly cost with plan.com

Mobile	£595.50
Monthly total	£595.50

All prices are excluding VAT.

The sign-up process should take no more than 5 minutes, please click proceed below to fill out your details. You will require your bank account information to complete the direct debit section at the end of this form.

The proposal will not be confirmed until you sign and submit the e-contract.

projected savings over 24 months*

£3,654
33.84%

Projected savings based on estimated figures provided during the initial stages of the process. These may not represent the actual savings.

Live Quote Link

Customers can pre-sign the e-contract before the deal goes to our Underwriting team, which speeds up the whole process allowing you to close more deals!

The customer confirms their details and verifies their email address before clicking Confirm and Continue to unlock the e-contract and Direct Debit Mandate.

Once completed by the customer, the quote goes straight to Underwriting for approval without you having to submit



You also no longer have to verify the customer, this is all done by them!

plan.com Quote ID: #256278

Confirm Details

Before we can issue an e-contract for signing, we need to confirm that we have the details for your business and verify your identity.

Please check that the details below are correct and make any amendments. When you are done, choose whether you want to be contacted by email or mobile number. When you receive the code enter it in the verification code box and click on Confirm to move to the next step.

Customer type Limited Company	Company number
Company name ABC Business	Your name Please select your name from the list below
Address line 1 2 Lunn Avenue	Address line 2
Address line 3 	Address line 4
City Kenilworth	County
Postcode CV8 1DS	

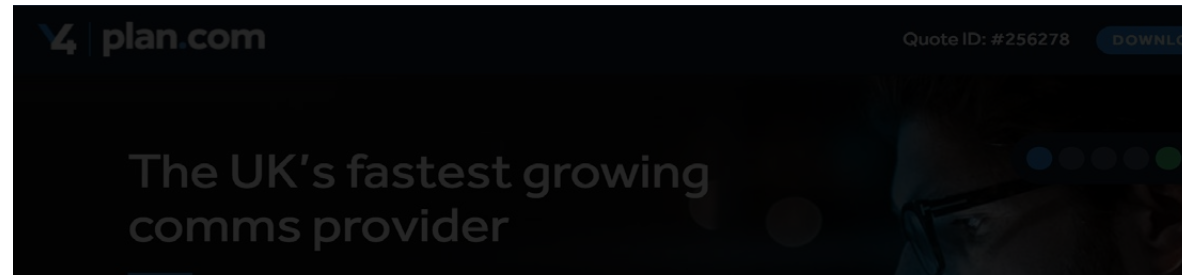
Monthly total **£595.50** **£3,654** 33.84%

The e-Contract

From proposal to signature, v4 introduces seamless customer onboarding

The customer can set their marketing preferences and choose how these are received

By scrolling down they will be able to review the terms of the contract – they need to tick to agree with the T&Cs



Marketing Preferences

Plan.com will use the personal data it collects from the Customer to provide the Customer with its products and services and to inform the Customer about various offers and promotions via email, post, SMS or telephone. Plan.com will process any personal data that it collects from the Customer in accordance with our Privacy Policy which is available on the Portal (<http://www.plan.com/policies/>).

By placing an Order you are consenting to us sending you marketing materials. However, if you do not wish to receive marketing from us:

- via email please tick this box
- via SMS please tick this box
- via post please tick this box
- via telephone please tick this box

CONTRACT AGREEMENT

Terms and Conditions

1.1. Unless stated to the contrary in this Order Form, the terms used in this Order Form shall have the same meaning as given to them in Business Customer Terms and Conditions.

1.2. The Business Customer Terms and Conditions and the Service Specific Conditions indicated below are each incorporated into, and form part of this Order Form:

MOBILE SERVICES CONDITIONS
(YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THIS E-CONTRACT TO PROCEED WITH THE SIGN-UP PROCESS)

1.3. This Order Form shall become a binding agreement only following the earlier of either the date on which Plan.com signs the Order Form or the date on which the provision of the relevant Service commences.

CONTRACT AGREEMENT

Mobile	£595.50
Monthly total	£595.50
	£3,654 33.84%

The e-Contract

They can review a high-level breakdown of all the contracted services

MOBILE SERVICES							
TARIFF	PRODUCT	SERVICE TERM	QTY	ITEM PRICE	MONTHLY TOTAL EXCL. VAT	VAT	MONTHLY TOTAL INCL. VAT
single user tariff	plus.plan 4G 12GB (UK/EU)	36	4	£50.00	£200.00	£40.00	£240.00
roaming voice	Roaming Voice £100	24	4	£80.00	£320.00	£64.00	£384.00
				Total:	£520.00	£104.00	£624.00

Service Term Number of months from the Service Commencement Date.
Installation Date The date your service becomes active on the network.
Service Commencement Date The date this Order Form is signed or if later the date on which the Service commence.

The details will automatically be populated, the customer just needs to agree the terms and click to Sign & Submit

SIGN YOUR DIRECT DEBIT

Sign contract

THIS ORDER is dated 30/06/2017 (the "Commencement Date")

BETWEEN:

<p>Print Name Robert Noname</p> <p>Email Address robertnoname@email.com</p> <p>Position Director</p> <p>Customer IP address 10.255.0.2</p> <p>Date 30/06/2017</p>	<p>Print Name</p> <p>Email Address</p> <p>Position</p> <p>Customer IP address</p> <p>Date 30/06/2017</p>
--	---

I confirm that I am a representative of the company sanctioned to authorise this contract, which I have read and agree to the terms in full.

SIGN & SUBMIT

Monthly total

£595.00

£320.00



The e-Contract

Finally the customer needs to complete the direct debit details and click **Submit**

Set up a Direct Debit

Instruction to your bank or building society to pay by Direct Debit

Account holder name

Branch sort code


Bank/building society account number

[CHECK](#)

Signee name

If two or more persons are required to authorise debits on the account, a paper instruction must be completed. Please select 'Download' below and return the form to us.

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit plan.com will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request plan.com to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by plan.com or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society - If you receive a refund you are not entitled to, you must pay it back when plan.com asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Instruction to your bank or building society

Please pay plan.com Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee.

I understand that this Instruction may remain with plan.com and, if so, details will be passed electronically to my bank/building society.

I confirm that I am the account holder, or a representative of the company sanctioned to authorise debits made from the account details above.

Banks and building societies may not accept Direct Debit Instructions for some types of account.

[DOWNLOAD](#) [SUBMIT](#)

A confirmation message lets them know that they have completed the process and outlines the next steps

estimated monthly cost at current rate

Thank you, we are nearly there!

Your contract is signed and payment has been set up.

Your plan.com partner will be in contact with you very shortly to discuss the next steps, including when you want your services to be connected.

Mobile	£595.50
Monthly total	£3,654 33.84%

Submitting a Quote

We've designed an even more efficient and effective way to submit quotes


Click the green **Submit** button and select **Send for Review**

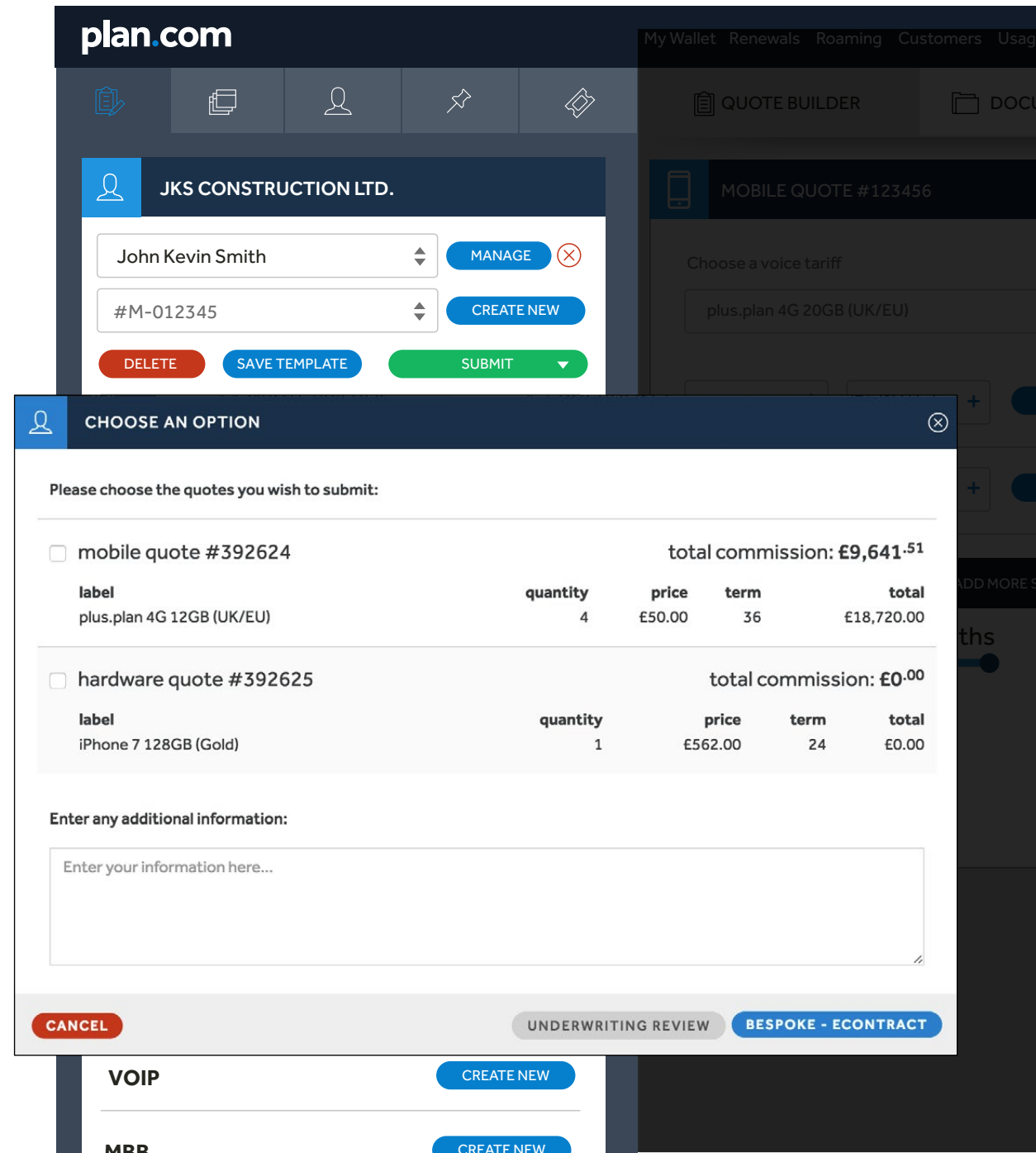
When submitting quotes you have two options:

1. Underwriting Review – to credit check the deal
2. Bespoke – for bespoke requests such as reduced tariff costs or additional funding

Tips:

- When submitting bespoke requests make sure to provide as much detail and supporting documents as possible
- The **Underwriting Review** button is inactive if any customer details are missing

 There is no e-contract link in v4 – all contracts are sent to the customer using the **Share** button



plan.com

My Wallet Renewals Roaming Customers Usage


QUOTE BUILDER DOCU

MOBILE QUOTE #123456

Choose a voice tariff


plus.plan 4G 20GB (UK/EU)

JKS CONSTRUCTION LTD.

John Kevin Smith **MANAGE** 

#M-012345 **CREATE NEW**

DELETE **SAVE TEMPLATE** **SUBMIT**

CHOOSE AN OPTION 

Please choose the quotes you wish to submit:

mobile quote #392624 **total commission: £9,641.51**

label	quantity	price	term	total
plus.plan 4G 12GB (UK/EU)	4	£50.00	36	£18,720.00

hardware quote #392625 **total commission: £0.00**

label	quantity	price	term	total
iPhone 7 128GB (Gold)	1	£562.00	24	£0.00

Enter any additional information:

Enter your information here...

CANCEL **UNDERWRITING REVIEW** **BESPOKE - E-CONTRACT**

VOIP **CREATE NEW**

MRR **CREATE NEW**

Connection Schedule

Once the deal has passed through Underwriting, the e-contract has been signed and the DD mandate completed, you'll need to complete the Connection Schedule and place the Hardware order

Click the green **Submit** button on the left and select Connection Schedule

There are two tabs in the top-right corner of the window:

- Mobile – complete the **Connection Schedule**
- Hardware – place your **Hardware order**

Complete the details:

- Name
- SIM card number
- Connection date
- PAC code



Before submitting, check that the Hardware order has been completed

The screenshot shows the plan.com interface. At the top, there's a navigation bar with 'plan.com' and links for 'My Wallet', 'Renewals', 'Roaming', 'Customers', 'Usage', 'Hardware', 'Quotes', and 'Bar & B'. Below this is a toolbar with icons for home, list, user, share, and search. The main content area is for 'JKS CONSTRUCTION LTD.' and includes fields for 'John Kevin Smith' (with a 'MANAGE' button), '#M-012345' (with a 'CREATE NEW' button), and buttons for 'DELETE', 'SAVE TEMPLATE', and 'SUBMIT'. A 'MONTHLY TOTAL' section has a 'CONNECTION SCHEDULE SEND FOR REVIEW' button. A 'QUOTE COMMISSION' section is partially visible. On the right, a 'QUOTE BUILDER' sidebar shows 'MOBILE QUOTE # 123456' and options for 'plus.plan 4G 20GB (UK/EU)' with 'Migration' and 'BOLT-ONS' buttons. Below this is a '123456 connection schedule' window with 'MOBILE' and 'HARDWARE' tabs. The 'MOBILE' tab shows a table with columns: Package, Name & type, Number & serial, and Connection date & PAC code. The table has four rows, each for 'plus.plan 4G 8GB (UK/EU) (NEW) World Explorer'. Each row has input fields for Name, Status (set to 'Configure'), Number (0123456789), SIM, PAC, and Connects (28/03/2017). At the bottom of the window are 'BACK TO QUOTES', 'APPLY CHANGES', and 'CONNECT SELECTED' buttons. Below the window, there are sections for 'HARDWARE', 'RECYCLING', 'FIXED/DATA', and 'IOT', each with a 'CREATE NEW' button.

Hardware Orders

Live pricing information, stock updates, device specs and guides, and images to make sure you get what you want, when you want it

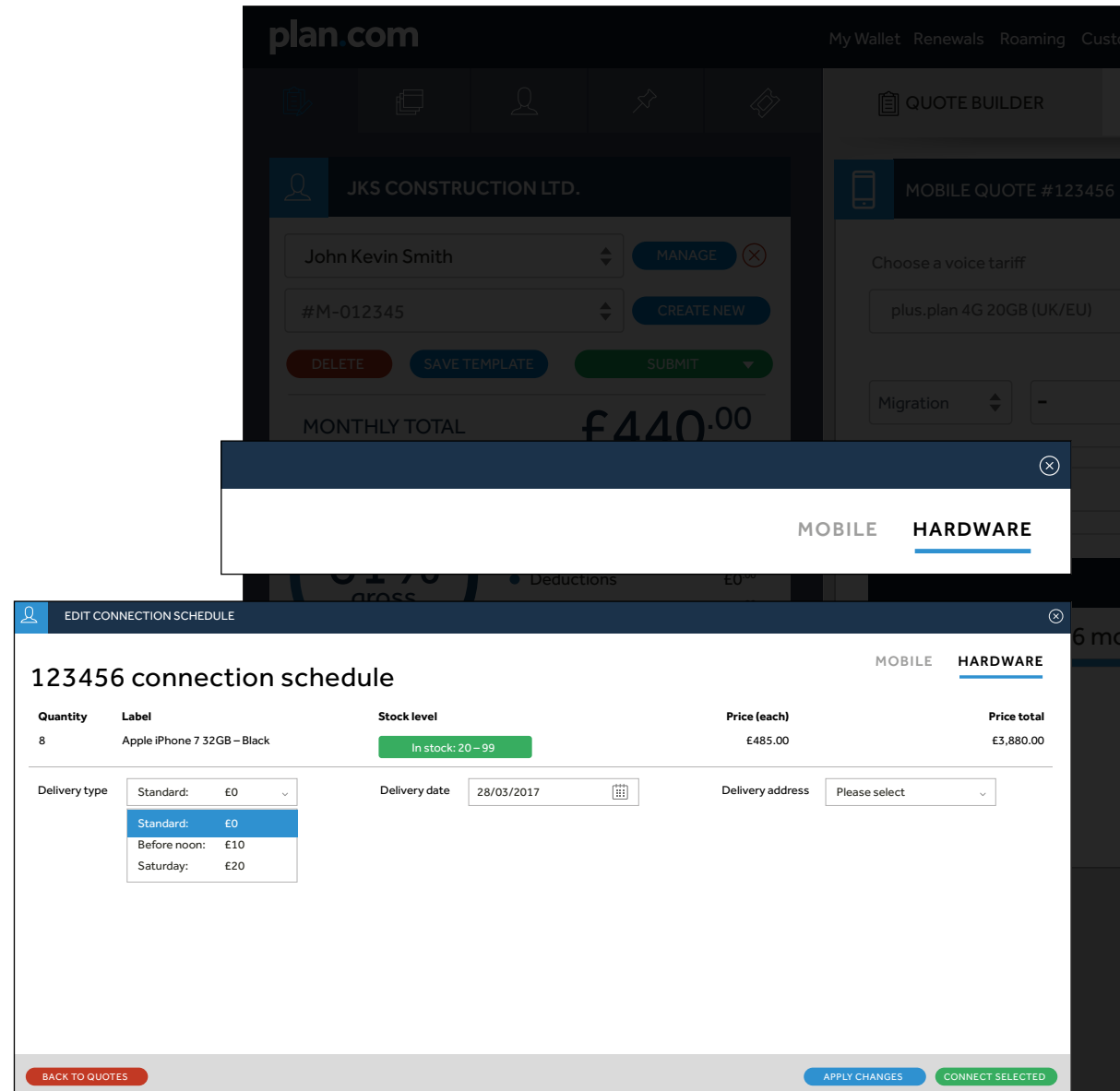
There are two tabs in the top-right corner of the window:

- Mobile – complete the Connection Schedule
- **Hardware** – place your Hardware order

Complete the details using the drop-down menus:

- Delivery type – select either standard, before noon or Saturday deliveries
- Delivery date – submit by 5.30pm for next day deliveries
- Delivery address – either to your office or directly to the customer

 When making any changes click **Apply Changes** and then **Connect Selected** to complete the process



The screenshot displays the plan.com mobile app interface. At the top, the user is logged in as 'John Kevin Smith' for 'JKS CONSTRUCTION LTD.' with account number '#M-012345'. The interface shows a 'QUOTE BUILDER' section with a 'MOBILE QUOTE #123456' and a 'plus.plan 4G 20GB (UK/EU)' tariff. A 'MONTHLY TOTAL' of £440.00 is displayed. A navigation bar at the top right has 'MOBILE' and 'HARDWARE' tabs, with 'HARDWARE' selected. Below this, the 'EDIT CONNECTION SCHEDULE' screen is shown for '123456 connection schedule'. It features a table with columns for Quantity, Label, Stock level, Price (each), and Price total. The table contains one row: 8 Apple iPhone 7 32GB - Black, with a stock level of 'In stock: 20-99' and a price of £485.00 each, totaling £3,880.00. Below the table, there are form fields for 'Delivery type' (Standard: £0, Before noon: £10, Saturday: £20), 'Delivery date' (28/03/2017), and 'Delivery address' (Please select). At the bottom, there are buttons for 'BACK TO QUOTES', 'APPLY CHANGES', and 'CONNECT SELECTED'.

Quantity	Label	Stock level	Price (each)	Price total
8	Apple iPhone 7 32GB - Black	In stock: 20-99	£485.00	£3,880.00

Delivery type: Standard: £0, Before noon: £10, Saturday: £20

Delivery date: 28/03/2017

Delivery address: Please select

More v4 training materials are available

Download PDF guides and videos by visiting
www.plan-guides.com

plan.com