



GROUP:



ACTORS:



PROCESS FLOW:

Customer/Lead

- Lead**
- Potential customer
- Customer**
- Service consumer

Sales Residential

- Sales Representative**
- Sales representative
 - Collecting Lead information
- Sales Head/Manager**
- Assigning of Leads to sales rep
 - Customer onboarding project lead
 - Creating and Archiving of task

Customer Data Management Group

- CDMG-Admin**
- Verifying Lead information
 - Converting Lead to Customer
 - Internet service provisioning
 - Assigning of Lead to Sales rep (Territorial)
 - Doing followups for unpaid pre-payment

Billing & Collection Team

- B&C**
- Creates invoice/proforma invoice/one-time invoice
 - Creates recurring invoice
 - Billing configuration
 - Can convert Customer back to Lead
 - Uploading of OR to Customer portal

Inside Plant Engineers

- ISP-Engr**
- Configure and assigning of ONT/CPE to Customer
 - Installation of ONT/CPE
 - Updates service provisioning (updating service status to active)
 - Facilitates signing of Customer Acceptance Form (CAF)
 - Updating New customer status to Active

PROCESS OBJECTIVE

Process Customer application and service activation using the proper use of the platform's scheduling module

ASSUMPTION

The Customer's location is feasible for service activation

PROCESS FLOW LANGUAGE

- Rectangle**, process or activities done without system interaction
- Rounded Rectangle**, process or activities done with system interaction or input
- Diamond**, condition(s) in the process
- Oval**, Process flow terminal
- Circle**, process flow connector
- Process checklist**
- System notification - email**
- action **Underlined word**, actions indicator in the process

CRM PIPELINE



PROJECT WORKFLOW

New	Due: none
In progress	Due: 7 Days
• Verification	
• pre-payment	Due: 15 Days
• schedule for activation	Due: 3 Days
• billing configuration	Due: 3 Days
Done	Due: none

CHECKLIST

- Lead info complete
1. Quote accepted
 2. Required docs submitted
 3. Additional info from docs verified
 4. Lead converted to Customer
 5. Service provisioned, if not, convert back to Lead
 6. Proforma invoice sent
 7. Proforma Invoice paid, if not, convert back to Lead
 8. ONU pre-config and scheduled for installation
 9. Customer activated and startdate set
 10. ONU pre-config and scheduled for installation
 11. Billing and reminder config, and recurring invoice set
 12. Done > Archive task

Splynx Scheduling

Project Category: Customer onboarding
Project Type: Customer onboarding
Checklist: Customer onboarding
Workflow: Customer onboarding

