

# Online Agreement FAQ

## **Q How do I train new reps to use the online agreement process?**

You are able to train your reps by creating an agreement using the last name Test, and using 453-13-1680 as the SSN (Note: It is important that you use this SSN. It is a designated test SSN)

## **Q I am at the credit application and it is saying I am required to put in a SSN but I don't have one.**

You will have to remove the co-app from the agreement. They can be added when the customer is setting up their account.

## **Q I ran the credit but I still do not have a Green Approved box or the Red DCS box.**

Sometimes there is a delay with the credit, keep moving forward. If the box pops up yellow and says Pending, be sure to check your email for the reason. The customer may have a freeze or fraud protection on their credit report.

- If you are at the last step of the agreement and have still not received a response either on the agreement or via email you can send an email to [credit@protectamerica.com](mailto:credit@protectamerica.com) with the customer name and agreement id

## **Q I ran credit and it came back Approved DCS. Now I can only select the Copper package.**

At this time our Agent 2.0 partners are not able to move forward with the agreement on Approved DCS customers.

## **Q I added video/gps and the customer changed their mind, now I cannot move forward with the agreement.**

You must click the button to disable video/gps service before you can move forward.

## **Q I am customizing the package and I have extra points. Can I use those for my next agreement?**

No. The points must be used at that time or they will be lost. Also you are not allowed to move forward if you are negative points.

## **Q I am trying to add smoke detectors but they are not showing up in Add Equipment. How do I add them?**

You must click on the Applicant info and select a floor plan before going to the next step.

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## **Q The customer did not want smoke detectors but they are seeing smoke waivers attached to their agreement.**

If you selected a floor plan, the smoke waivers will automatically be generated. The customer should just sign them with the understanding that they do not apply.

- If the customer will not sign them you must revert the agreement to draft and select no floor plan.

## **Q The customer wants the system shipped to a different address than what is on the agreement. How do I specify that?**

When you get to the shipping page you will be able to change the shipping address.

## **Q The customer doesn't want to share their email address. How do I publish the online agreement?**

You will not be able to publish the agreement. It is important to explain that we will only use the e-mail to send them a copy of the completed agreement and to share information about the system. We do not share their email with others.

## **Q I have published the agreement and I need to make a change. Do I need to create a new agreement?**

No. You will just need to go into the agreement and click Revert to Draft. The customer will have to log back into the agreement after the changes are made.

## **Q The customer has signed the agreement, but I need to make a change. How do I do that?**

You must go back into the agreement, at the bottom you can select "rewalk agreement" this is so we know that it is not an agreement for a second system. You should also email [shipping@protectamerica.com](mailto:shipping@protectamerica.com) and [dataprocessing@protectamerica.com](mailto:dataprocessing@protectamerica.com) with the customer name and agreement id number, along with the changes that were made.

## **Q The customer has signed the agreement, what is the next step?**

If the customer is getting a new system you must fill out the "sensor allocation form"

If the customer would like the Cellular Uplink device you will need to complete the "takeover solutions tool"

- Once these forms are completed you must send them to [shipping@protectamerica.com](mailto:shipping@protectamerica.com) and [dataprocessing@protectamerica.com](mailto:dataprocessing@protectamerica.com)