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)**

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.

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 with the customer name and agreement id.

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

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

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 the time or they will be lost. Also you are not allowed to move forward if you are negative points.

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.

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

If you selected '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'.

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.

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 the we will only use the e-mail to send them a copy of the completed agreement and to share the information about the system. We do not share their email with others.

I have to publish the agreement and I need to make a change. Do I 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.

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 and dataprocessing@protectamerica.com with the customer name and agreement I.D. number, along with changes that were made.

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 and dataprocessing@protectamerica.com