1. Account Creation in Salesforce Lightning

* If the account is not in salesforce classic, create the new business account in salesforce lightning.

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* Complete all the required field.

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* After completing all the steps. Share the address proof using file sharing.

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Graphical user interface

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1. Account Transfer to SFDC Classic

* After account approval the account will automatically transferred to salesforce classic.
* Please verify all the information with the legal document.

1. Account Update

* Set up the account before creating the opportunity.
* Raised the account update case if the account information needs to be updated.

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* Fill out the fields that needs to be updated and attach the proof to support that case.
* Submit the case.

1. TAG Requests

* Need to be approved by Andrew and processed upon approval.
* Account will be transferred by coping the DUNs and paste the DUNs under Tag tab.

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* Transfer the account to respective sales rep.

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1. Opportunity Created
   1. New
      1. TCV

* For every TCV opportunity. Create a standard new opportunity.
* Add opportunity team.

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* + 1. Wireless
* Create a standard new opportunity. In wireless opportunity we do not have to worry about opportunity team.
  + 1. IoT
* Under IoT we have select opportunity as a IoT opportunity.

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* 1. Renewal
* In renewal opportunity admin need to select Standard Renewal while creating the opportunity.

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* 1. PED/AAL
* We prepare PED opportunities only to activate add a line activation credit for existing accounts.

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1. Quote Creation

* Before creating the quote admin needs to create the proposal in salesforce with all the fields mentioned in the screenshot.

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* Restricted with number of line commitment, which must be exact.

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* After verifying all the proposal details. Click on configure product tab.

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* Configure the quote according to the requirement and was explained in the trainings.
* Submit the quote for approval.
* After approval generate the quote in PDF format.
* Then click on Synchronize with opportunity button. Then create agreement by clicking on create agreement tab.

1. Sending Agreements out to Credit Teams

* Susanna is the best person to send these out to.
* After creating the agreement. Click on send for document Generation button to send the agreement for credit check.
* Upload all the credit check document under opportunity notes and attachment.

Graphical user interface

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A screenshot of a computer

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* Please verify the approval history to check the status of the agreement.

1. Send out Contract for Signatures.

* After credit approval click on Ready for Signature button and upload 2 primary contact employment proof.
* Chatter contract team to send the agreement for signature with 2 proof of employment.

1. PED/Add a Line Credits
   1. Are the credits active on the account?
   2. After 90 days:
      1. Term: PED Opportunity needs to be created
      2. BYOD: AAL Opportunity needs to be created with Custom Product.

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