



How to submit an order through your back office (in 3 simple steps):

1. Once you have a SIGNED Contract, you must upload the contract in your back office on the Customer Info page. There is a heading on the left labeled 'Attached Documents.' Click the ADD link and upload the signed Agreement there.

A screenshot of a web browser displaying the 'Customer Information' page in a partner back office. The browser's address bar shows the URL 'www.partnerbackoffice.com/agent/customer_info.cfm?CustomerID=1315731'. The page content is organized into several sections on the left and a central area. On the left, sections include 'Tasks for Customer' (no tasks found), 'Agent Notes' (no notes), 'Private Agent Notes' (no notes), 'Attached Documents' (no documents), 'Customer History' (with two entries: '08/28/14 08:39 PM Customer Record Created' and '08/29/14 04:58 PM Master Record Updated by Closer whitlow in Edit Customer'), 'Commission History' (no commissions), and 'LPS Reasoning'. The central area contains sections for 'Proposals' (no proposals), 'Customer Contacts' (one contact: 'Chibu akukwe 9:03 AM (Added: 08/28/2014)'), 'Order Info' (no orders), 'Email Templates' (one template: 'View Your Footer'), and 'Outgoing Email' (no e-mails). On the right side, there are sections for 'Today's Tasks' (no scheduled tasks) and 'Quick Tasks' (a list of links: 'create new customer', 'lead management', 'geoquote', 'your profile', 'commission reports', 'marketing', 'agent support'). The Windows taskbar at the bottom shows the system tray with the date '9/2/2014' and time '9:10 AM', and several open applications including 'Customer Info...', 'Document...', 'East End Revis...', and 'Bob Carpenter...'.

2. On the Customer Info Page there is a heading on the right labeled 'Order Info.' Click the ADD link to add the order. You will need to fill in the drop down boxes accordingly with the carrier info, type of service (example: DSL, T1, Business Cable).
 - Skip Vendor Account Number, Account Status, and Status from Vendor. These can be left blank.
 - Add Monthly Recurring Charge (example: \$295.90). This is the monthly fee the customer is paying.
 - Add Installation fee if applicable
 - Estimate a requested start date for service
 - Enter contract terms in months (example: a 3 year term is 36 months)
 - Add notes if any
 - Click ADD NEW ORDER

www.partnerbackoffice.com/agent/customer_order_add.cfm?customerid=1315731

Add a new order for the customer using the form below:

Add a New Order for Asset Capitol Group

Record ID: 1315731 [Return to Customer Record](#)

Carrier Name:

Type of Service:

Vendor Account Number:

Account Status:

Status From Vendor:

Monthly Recurring Charge: \$

Installation Fee (NRC): \$

Contact Start Date: MM/DD/YYYY

Contact Term: months (Enter "M" for Month to Month Contract)

Additional Notes for this Order:

Select Location for this Order:

Promo Code (optional):

[Return to Customer Record](#)

INBOX (0)
ACCEPTED LEADS (1)
ATTEMPTED CONTACT (0)
CONTACTED (0)
SENT PROPOSAL (0)

Active Customer Funnel

ACCEPTED PROPOSAL (0)
PAPERWORK SUBMITTED (0)
PROVISIONING (0)
ACTIVATED (0)

Inactive Lead Funnel

CANCELLED (0)
CALL BACK LATER (0)
RESIDENTIAL LEADS (0)
JUNK LEADS (0)

Today's Tasks

YOU HAVE NO SCHEDULED TASKS

Quick Tasks

[create new customer](#)

3. ALWAYS email signed contracts to:
orders@mitechpartners.com