

## Getting the best results.....!

**Obviously, credit limits imposed by the various suppliers can affect your attempt to sign up a new or customer renewal.**

- If you provide a LOA (based on the provided LOA template confirming the customers agreement to carry out a credit check), we will carry out a credit check on EXPERIAN and CREDITSAFE.

***Other criteria that could affect (or help) the sale include..***

- Details provided of any other sites currently live with the new supplier
- In the case of Sole Traders, ensure you check that the customers full name and DOB matches their passport.
- Check if they are on the Electoral Roll
- Ensure the home address on the contract matches exactly the details on the Electoral Roll.
- Obtaining a recent/ current utility bill (This could assist in the credit checking process)

## Renewal Contracts

**Many rejection/query issues on renewal contracts are because the entered details on the new contract do not match the details held by the supplier. These include...**

- Business name or Address not matching
- Incorrect Start Date
- Debt
- Incorrect EAC or AQ

We suggest that you check, possibly by way of a current bill, that the information corresponds with the current supplier details. Check that the supply IS eligible for renewal.

## Incorrect MPANs or MPRN

We can check meter details for you prior to submission. Ensure you attach a LOA with your request.

## COTS / Termination

If a change of Tenancy has happened at an address, or if a business has changed from a sole trader to a Limited Company, or the customer has moved into vacant premises, it is probable that a COT needs to be raised.

Always contact the current supplier to log termination and confirm the site is free to leave prior to agreeing a new contract. Ensure that you obtain all necessary supporting information to ensure the T/F completes without an objection. This may include new lease and Bank details, Business rate notifications etc.

## Information Sheets

It is critical that you complete fully the Information sheet. We have to enter the requested fields on to the supplier portal when submitting a contract. Missing fields mean that we cannot process. At best this will mean a delay, which could invalidate the contract.

## Related MPANs

If the Electricity meter top line MTC (centre) includes 3 digits between 500-799, the meter is classed as 'related' . This means that there is another MPAN for the supply. This will also have a MTC between 500-799. Both MPANs will need to be contracted to the same supplier, on the same day and for the same term.

If there is no second MPAN, or the second MPAN is de-energised, the first MPAN will need to have the top line updated by the current supplier before a new contract can be agreed.

It should be noted that the processes involved in the above are often problematic, and the agent should be aware that issues usually arise.

Note that Scottish Power will not accept related MPANs in the usual manner. Check with us prior to agreeing a related MPAN with a customer.

## Company Details on Contracts...

Most suppliers stipulate that the company details shown on a contract must match with Companies House data. You can check that the info you are using is correct by logging on to the Companies House website. You need to verify..

- Business Registered Address
- Director/s details
- Date of Incorporation
- Status of Company (Active or Dormant)
- Status of Accounts

If the Company is dormant, or the accounts are overdue, the new supplier will not accept them.

Go to.... <https://beta.companieshouse.gov.uk/>

If it is a Charity, the Charity name must match the details on the Charity Commissioners website.....

<http://apps.charitycommission.gov.uk/showcharity/registerofcharities/registerhomepage.aspx>

Many suppliers check that all supplied addresses (site address / registered address / billing address) match with Royal Mail data. You can check the information on Royal Mail by going to

<https://www.royalmail.com/find-a-postcode>

## Verbal Contract Validation

It is important that you use the latest supplier script when carrying out a verbal sale. Ensure you have the correct prices and customer details to hand. The script must be read out clearly word for word, including all terms and conditions as shown on the script.

If the recording is indistinct, any details are incorrect or the recording is incomplete in any way, the contract will be returned to you and not processed. Please review the recording before submitting.

## Price Changes

We are aware that a small proportion of contract submissions fail because of incorrect rates.

We send out daily updates of price changes and collate those onto the Weekend Update Report that is sent to every agent. In addition now they are now downloaded onto the NEW Agent portal. (Please ensure you have registered).

Certain suppliers like Eon and Scottish Power have banded prices based on usage. Please ensure you make every effort to verify usage and place in correct band.

Incorrectly priced contracts will have to be resold.