Next Steps

Setting up Mabdeck couldn't be easier.

In here you'll find a checklist of the information we need from you to get started, as well as what the Mabdeck training will involve and what will happen afterwards.

The checklist details the order in which you should add each section of information. Completing all this information will allow the user to raise utility statements where an appropriate statement template has been added. Where there aren't bespoke templates, the default template will be used.

It's essential you complete all the steps before your training session to ensure you get the most out of the Sycous service!

Checklist

Follow these steps to **make your Mabdeck journey much easier!**

- [ ] **Step 1:** Add a client *(this has usually already been done for you)*

- [ ] **Step 2:** Add a network (Setup > Network > Add Network)

- [ ] **Step 3:** Add property bands *(used to specify variations between properties e.g. 1 or 2 bedroom)* (Setup > Tariffs and Bands > Add Band)

- [ ] **Step 4:** Add one or more tariffs to each property band (Setup > Tariffs and Bands > Add Tariff)

- [ ] **Step 5:** Add unit and standing charges to each tariff if applicable. You may also add admin charges if applicable (Setup > Tariffs and Bands > Add Tariff > Add Unit and Standing Charges as appropriate)

- [ ] **Step 6:** Add properties (Setup > Properties > Add Property) or for bulk (Imports > Properties)

- [ ] **Step 7:** Add supply points to properties (Setup > Hardware and Supplies > Add Supply Point) or for bulk (Imports > Supply Points)

Step 8: Add meters to supply points (Setup > Hardware and Supplies > Add Meter) or for bulk (Imports > Meters)

Step 9: Check that there are meter readings for each day of the billing period. At a minimum there should be meter readings for the start and end dates of the billing period. If there are no meter readings these should be imported manually

Step 10: Run a meter read report *(to check that all meter readings have been inputted correctly, and that there aren't any missing)*

Step 11: Add statement templates *(for both a normal statement and a final statement)* (Setup > Communication Template)

Step 12: Add accounts *(for both owners and tenants)* – there is no difference between an owner and a tenant account until an account is allocated to a property as the owners account. (Setup > Accounts > Add Account) or for bulk (Imports > Accounts)

You're nearly there! Steps 13-17…

Step 13a: Allocate an owner to each property. *(This constitutes the billable person, who would be responsible for utility bills should the property be unoccupied by a tenant)* (Property Owners > Locate Property > Edit Property Info [Pencil Icon]) or for bulk (Imports > Property Owners)

Step 13b: If applicable - Move a tenant into a property *(a final statement will be automatically generated for the previous billable person, whether this the tenant or owner)* (Accounts > Locate Account > Properties > Move in)

Please note that steps 13a and 13b can be done at the same time through bulk import of 'Initial Property Owners'.

Step 14: Generate a statement (Statements > Generate Statement) Note, ensure you select the billing up to date

Step 15: Approve or reject a statement in manual review (Statements > Manual Review)

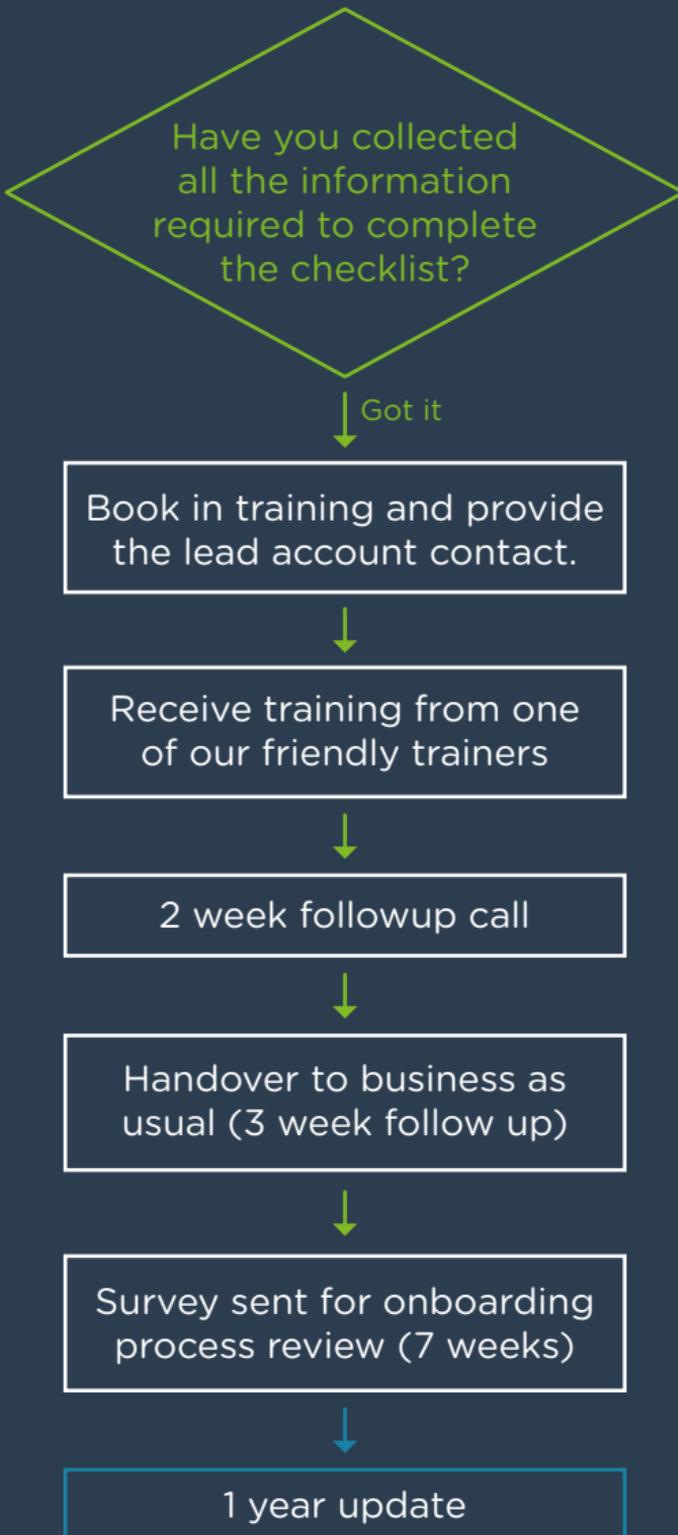**Step 16:** Download or reverse a statement from "View Statements" (Statements > View Statements)

Step 17: If applicable - Download a statement from "Archived Statements". (The statement would then be published and may only be reversed using a credit note)

You've done it!

The process

You've received your welcome pack,
so **here's the next part of the process.**

Have you collected all the information required to complete the checklist?

↓ Got it

Book in training and provide the lead account contact.

↓

Receive training from one of our friendly trainers

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2 week followup call

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Handover to business as usual (3 week follow up)

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Survey sent for onboarding process review (7 weeks)

↓

1 year update

Before your training

Preparing for your training

- Once you have supplied us with all the relevant information, our team will visit your organisation to conduct a training session, to get you up to speed with how everything works. Before the training session make sure you have done the following:

- Notified us of any difficulties collecting the information required for the checklist.

- Thought about who will be using the Mabdeck software and for what type of roles. It's important to make sure the right people can attend!

- Contact help@mabdeck.com to request a training session. One of our friendly team will book this in for you and we can discuss what to expect on the day.

The training session

During the session, our team will create logins for your staff and set up your networks and accounts. Our experts will then walk your staff through the process of raising a bill and importing meter readings.

What you'll need

We will setup your primary login to the system and will supply the training manuals. All you need to do is ensure you have access to the internet and laptops/computers plus a projector or a large screen to use for the training.

After your training

After you've received your training you'll be ready to go! But don't worry, we'll stay in touch to see how you're getting on. Two weeks after your training session, we'll give you a call to check your progress and answer any queries you may have about the software. If all is well, we will then handover Mabdeck so you can begin using it for your day-to-day business. Following this, you'll receive a survey from us about how you found the onboarding process. Finally, we'll check in with you again a year later to ensure everything is still running smoothly.

And of course, our team are always on the end of the phone throughout the process to help you with any queries you may have.

Enjoy Mabdeck!

If you have any questions or queries then please contact us. We are open weekdays from 8.30am until 5.30pm. Calling outside these hours for emergencies will direct you to a member of the team.

✉ help@mabdeck.com

📞 0113 457 5536

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