

Created by: Niamh Williams

Date: 29.07.19

Business Owner: Daniela

Version History:

v0.1 – Drafted based on a) Input from Sara

b) Conor's knowledge of Syngrafii

V0.2 – updated based on review by Conor

V0.3 – updated based on business review

1. Confirmed T&C triggered by Auth Rep T&C acceptance

2. Included L2 Support (Conor)

3. Confirmed business want ink signature with a view to officially confirming this with lawyer

4. Confirmed only 1 full T&C doc sent via eSignature

5. Update to allow Syngrafii to notify Coordinator via email

V0.4 Updates made following call with David & Mark:

1. Included reference to T&Cs in Spanish

2. Removed reference to Syngrafii system failure as it could be BidX1 services failing too

3. Included send to CRM queue instead of email

V0.5 Updates made based on call with development team

- 1. Added new process2.0 "Change T&Cs Document"

V0.6 –

- tidied up process flow

- added Devops reference numbers

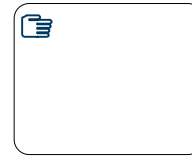
V0.7 – 02.09.19 Updates made based on walkthrough with David F, JMJ and Paul Dowman re delivery scope:

1. Removed CRM queue as a deliverable for Day 1 and replaced it with "CRM View". This will have to be monitored by the Sales Coordinator.

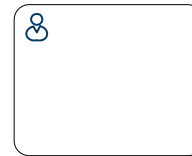
2. Added "capture language preference" of shareholders/directors

3. Tidied up processes based on removal of notifications being sent to a CRM queue

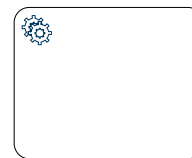
Legend:



= manual step



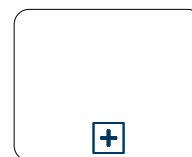
= user interacting with system



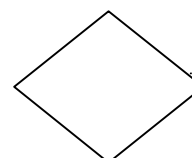
= Step performed by a system



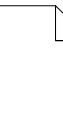
Received email/post



Click on this and it will bring you to other process



Decision point

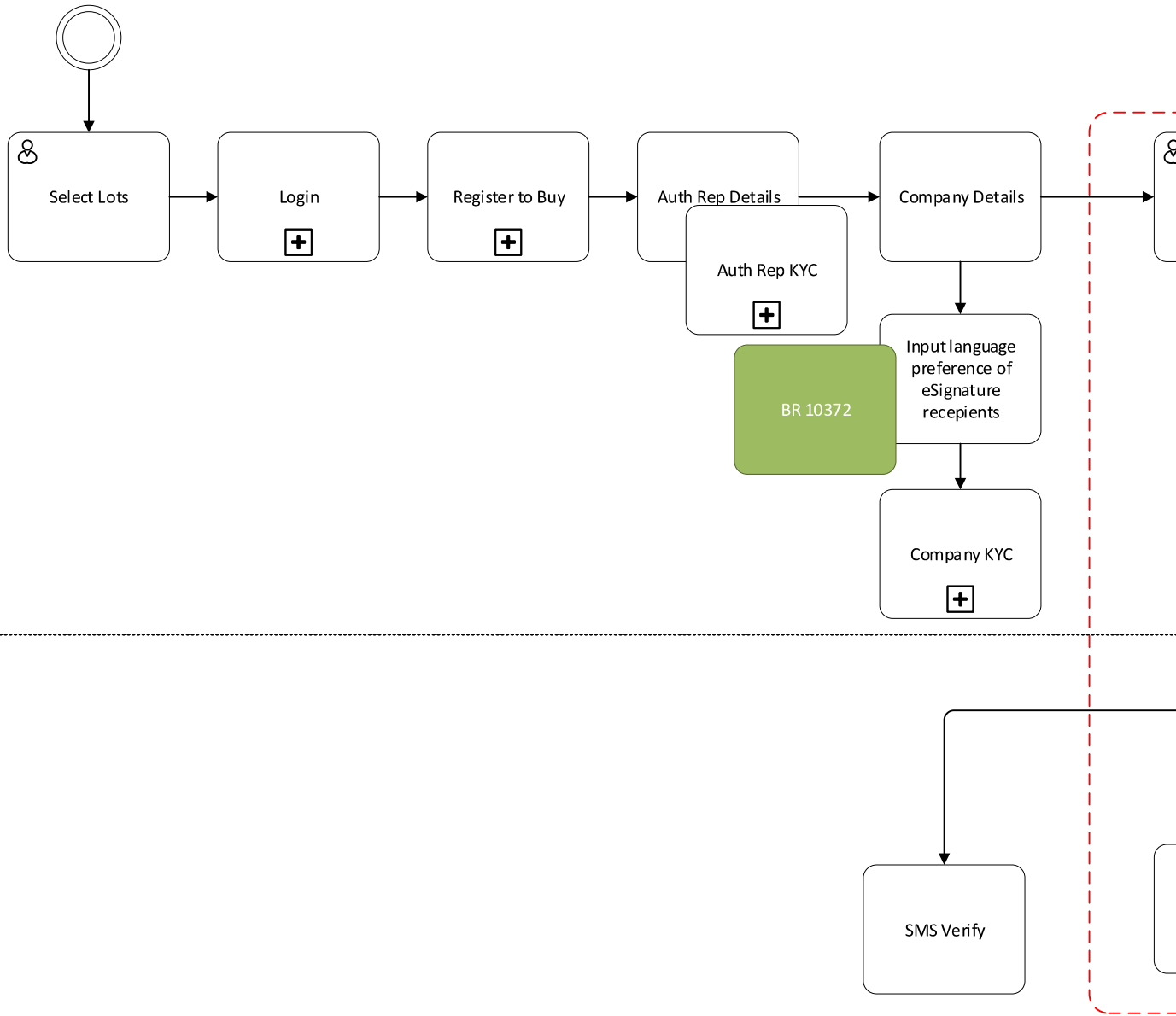


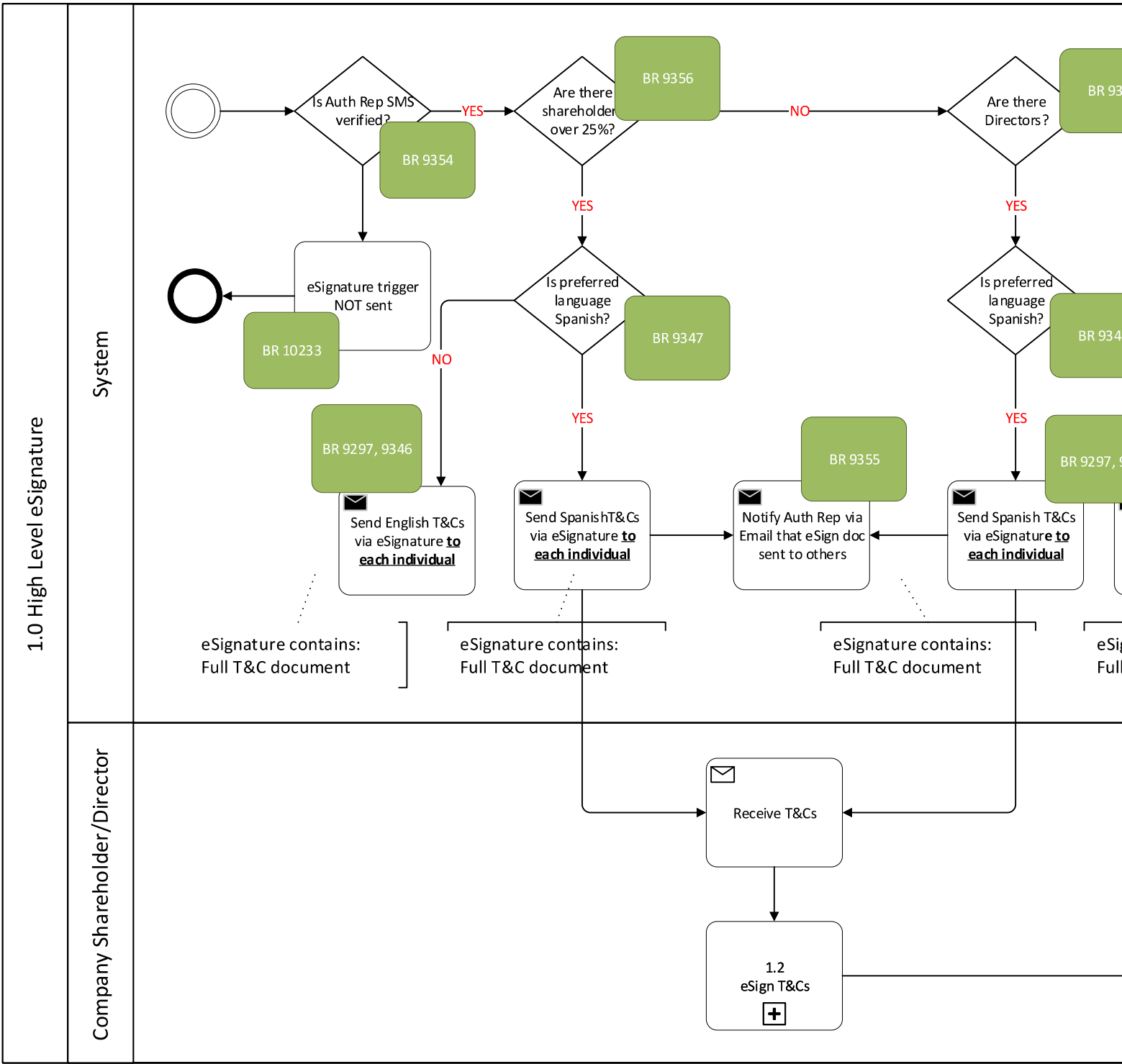
BR XXXX

0.0 High Level Registration

Authorised Rep

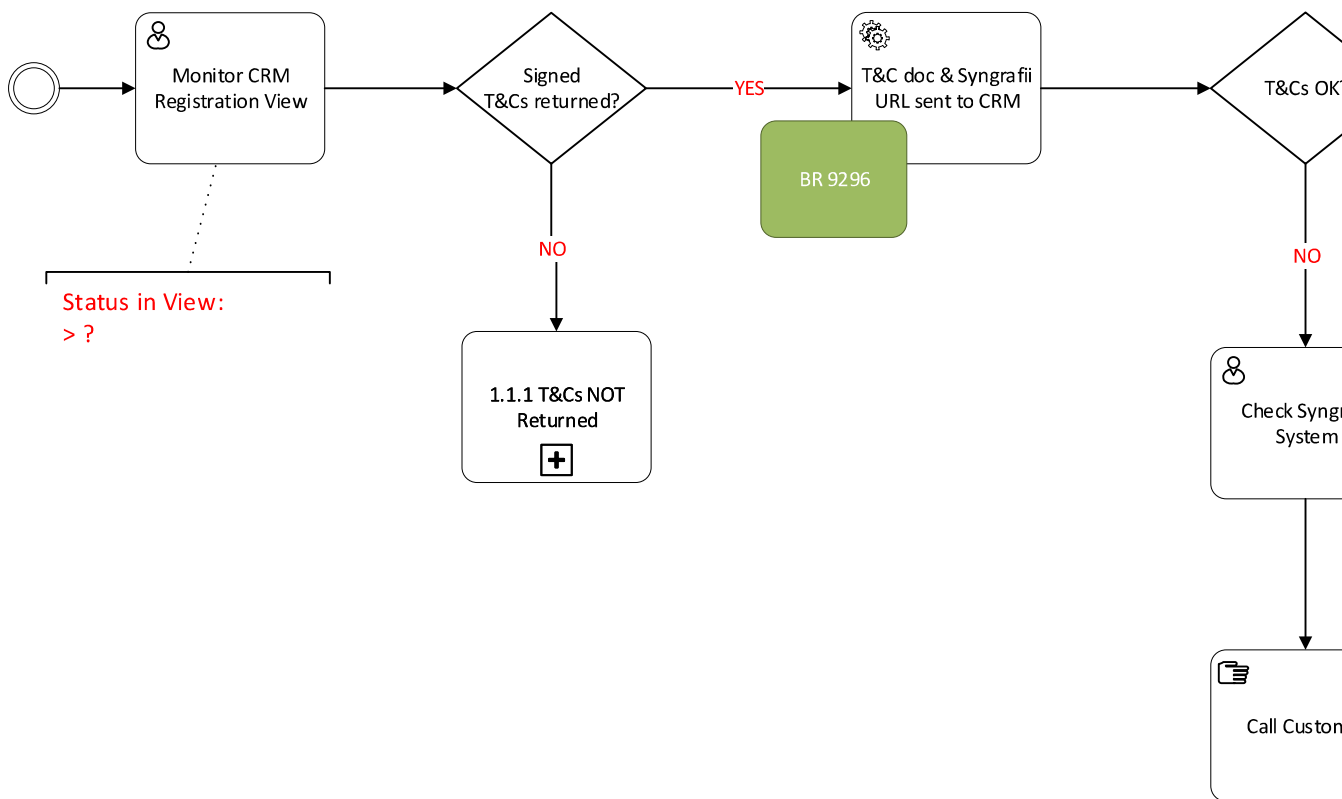
System





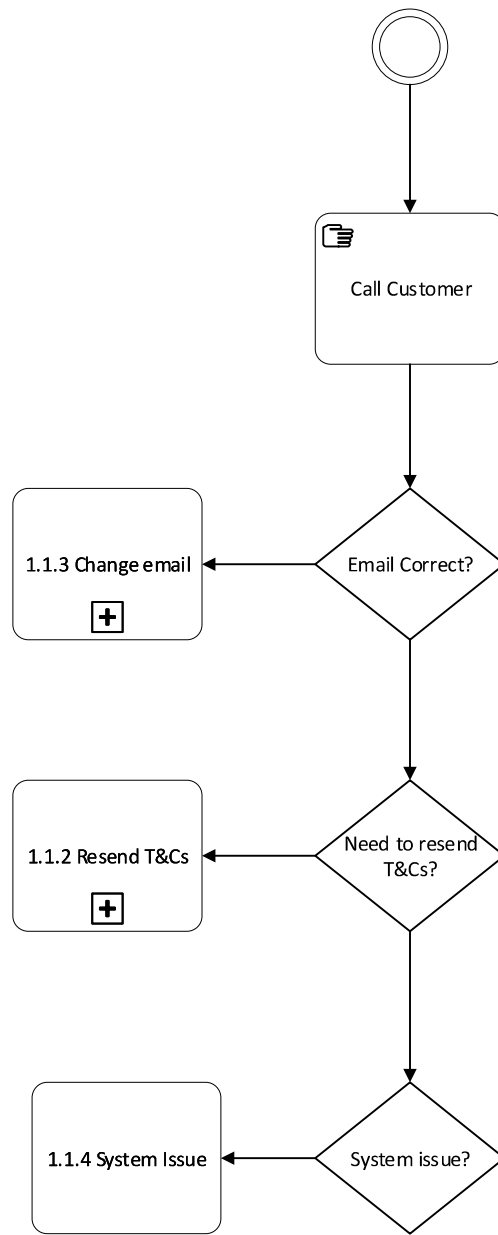
1.3 eSign T&Cs Returned

Sales Coordinator



1.3.1 T&Cs NOT Returned

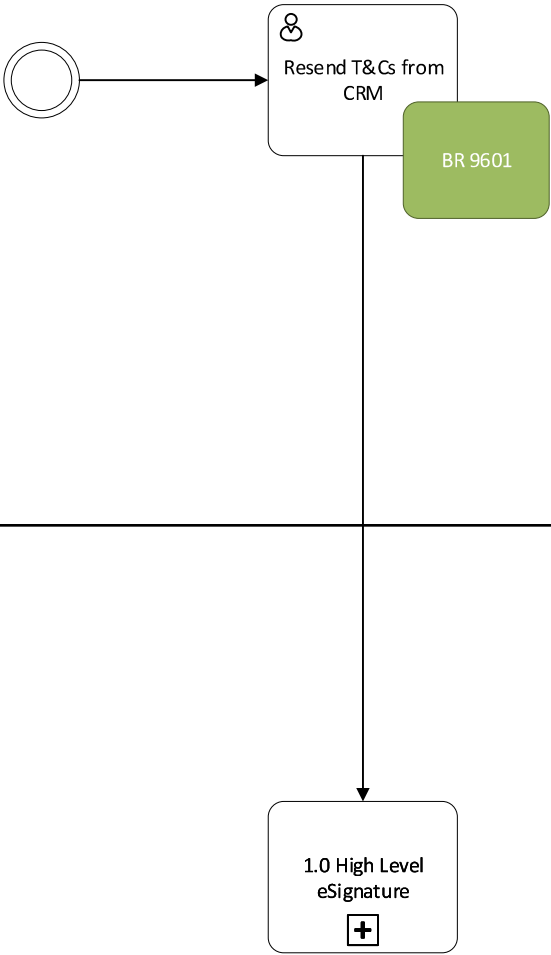
Sales Coordinator

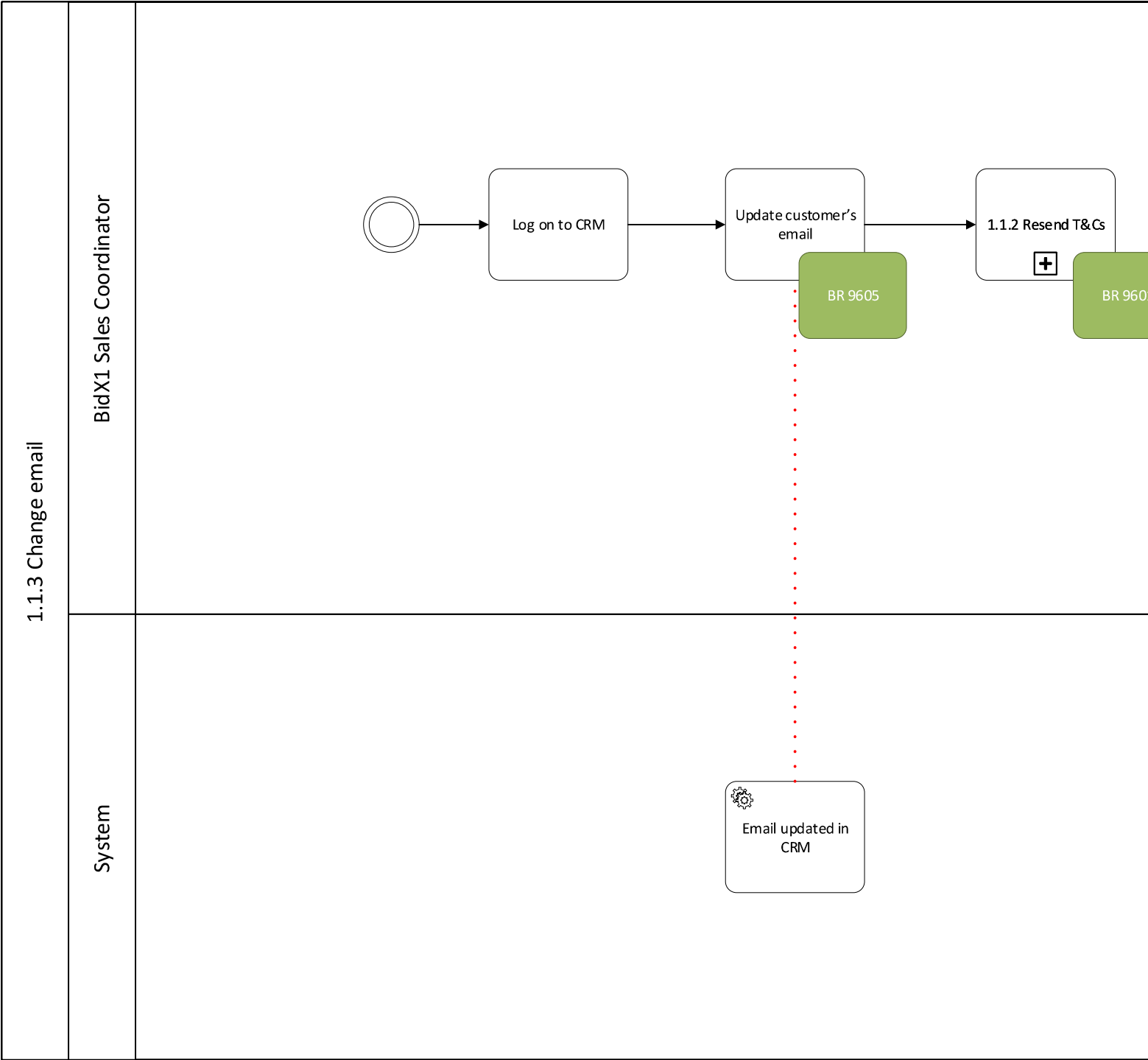


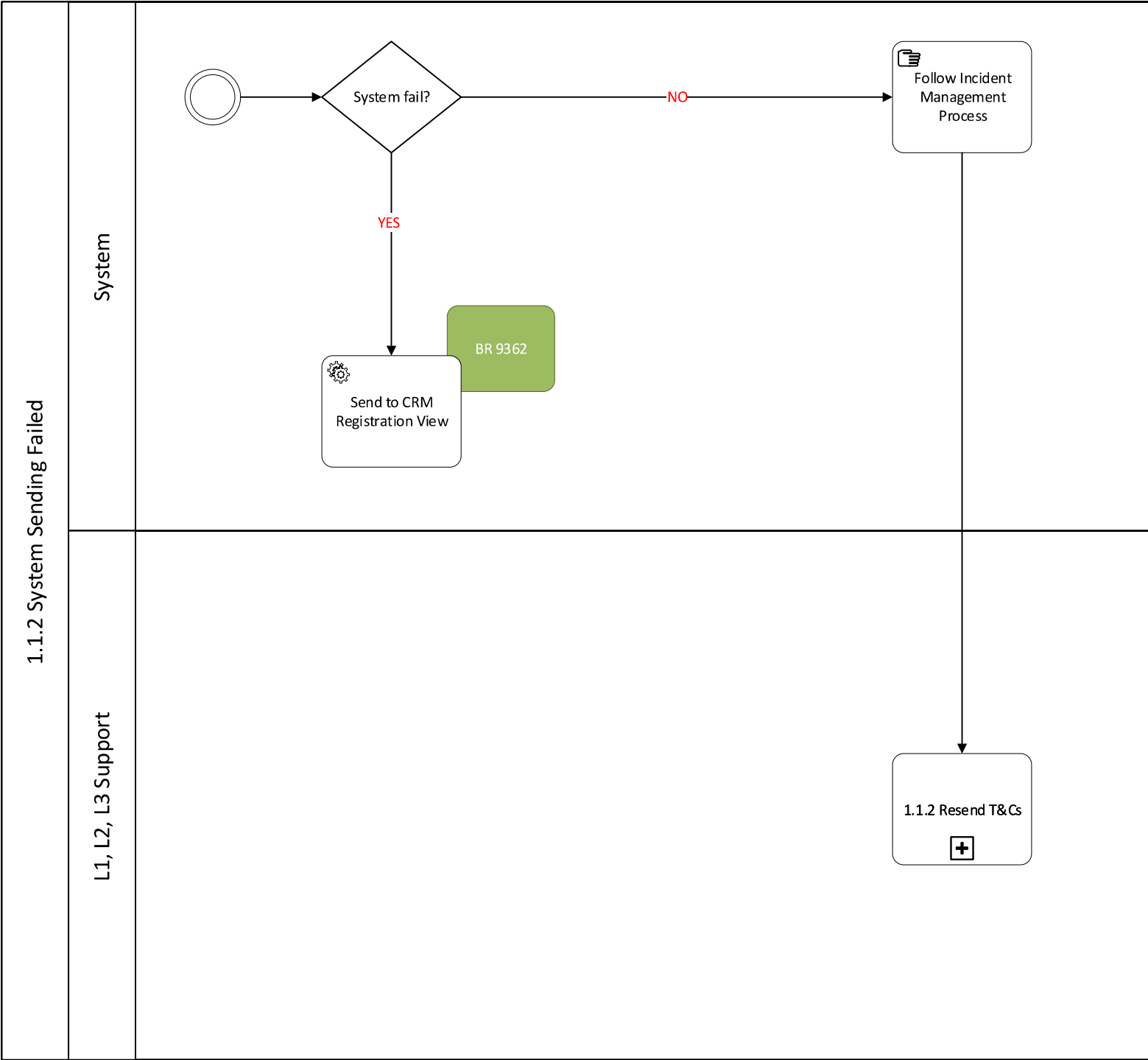
1.1.1 Resend T&Cs

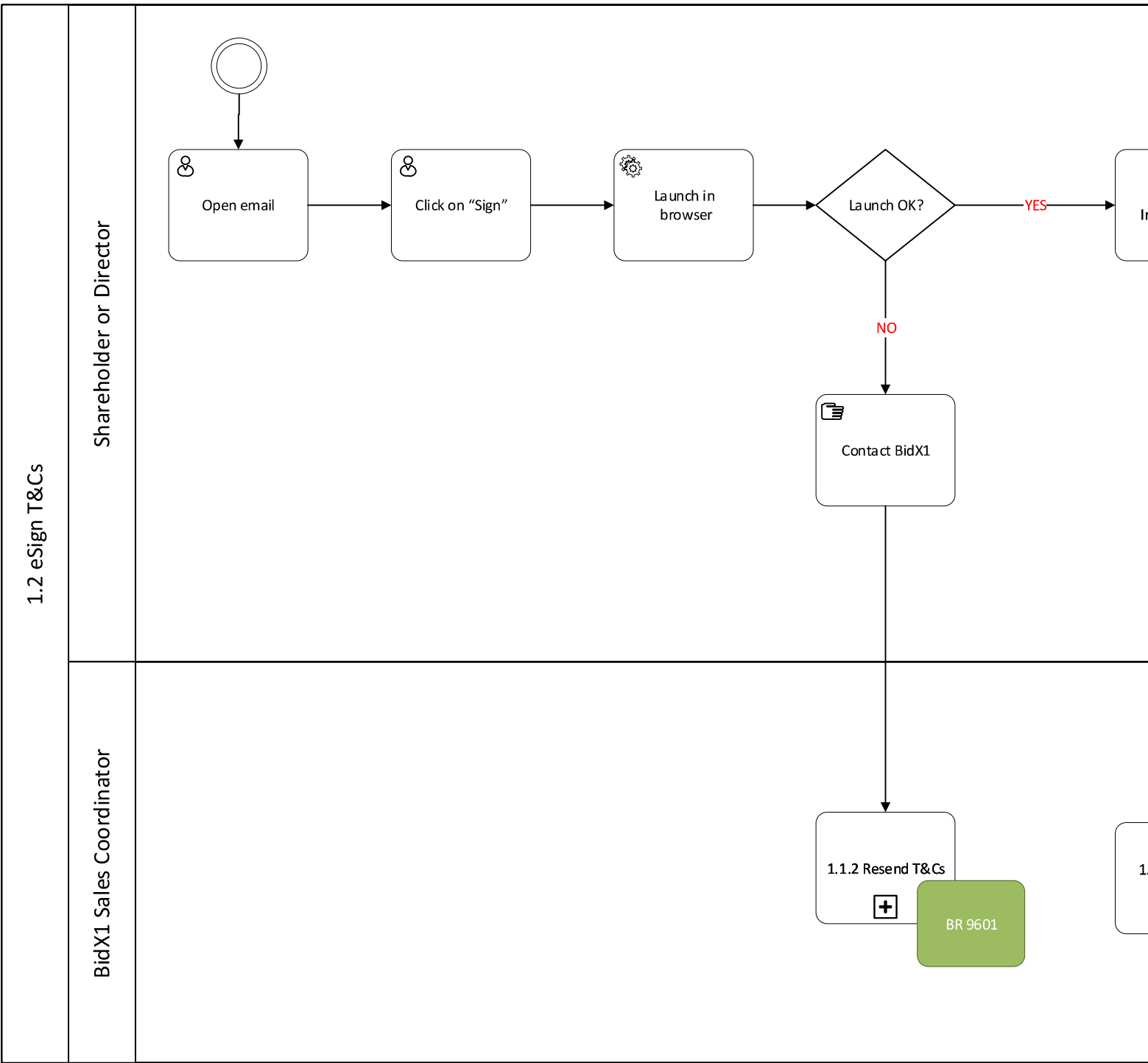
BidX1 Sales Coordinator/Manager

Shareholder or Director

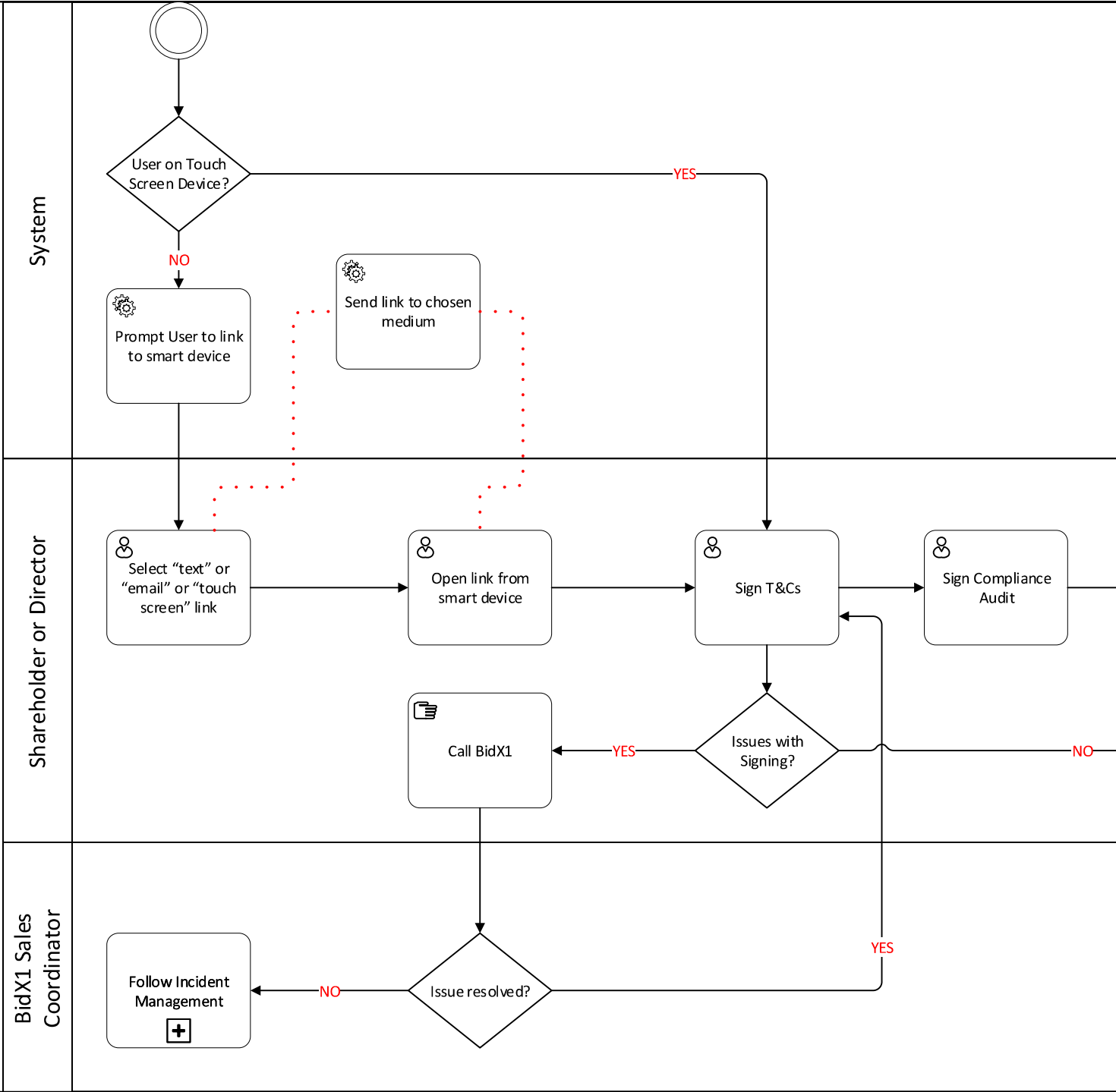






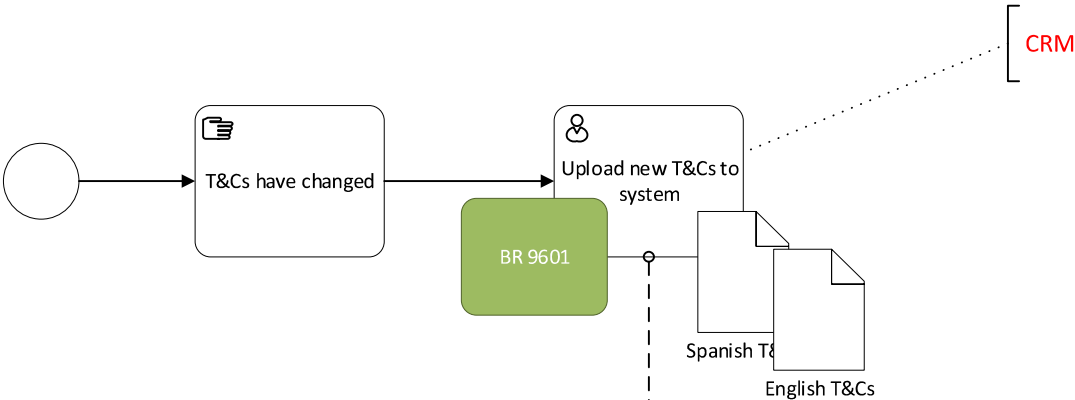


1.1.4 eSign T&Cs

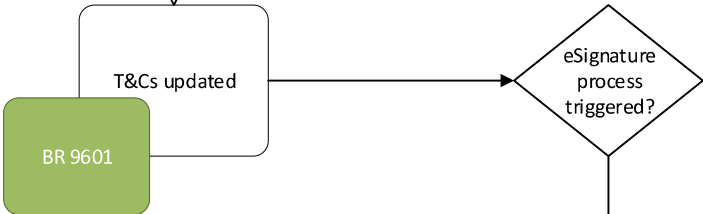


2.0 Change T&Cs

BidX1 Legal Person



System



Customer

