

# Manual Business Portal

Author

De Lijn

Date:

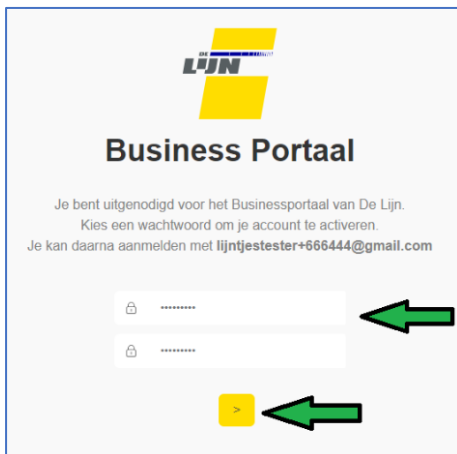
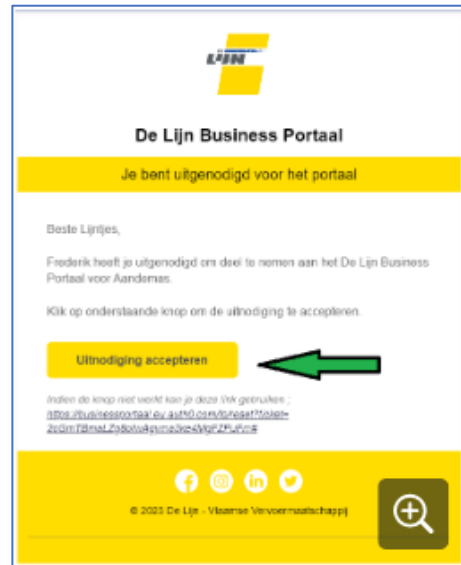
02/2024



## Onboarding Proces administrator Business Portaal

When you start your third-party payer agreement with De Lijn, you as an administrator will receive an invitation email from De Lijn.

You must accept this invitation to gain access to the portal as an 'administrator.'



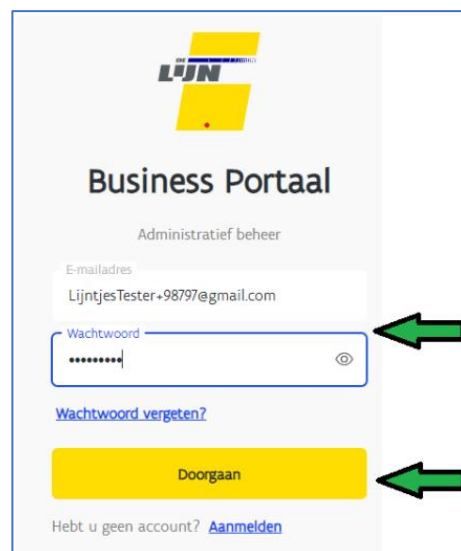
As soon as you, as the administrator of the partner involved, accept the invitation, you will see the following screen. Set your password, click on the arrow and you will then automatically be redirected to the login screen of the portal. (This can sometimes take a few seconds).

Please note that the password must be set within 5 calendar days and must comply with certain password rules. If the password does not match, you will see an error message.

Once your password has been set, you will arrive at the login screen of the Business Portal.

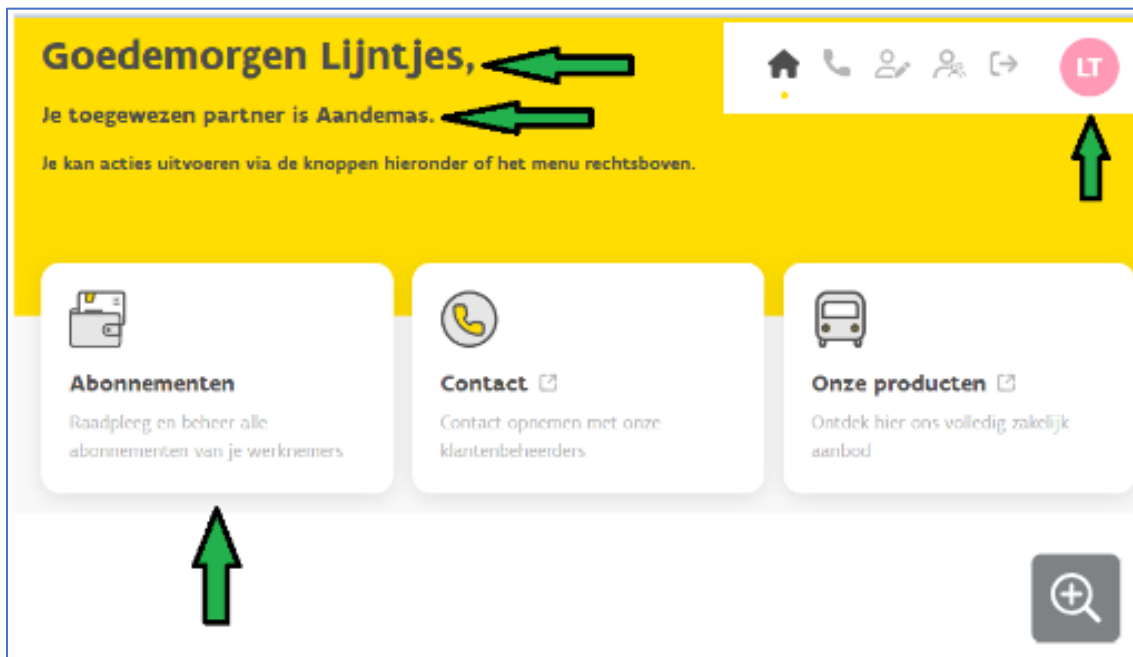
Enter your login details and click 'Continue' to go to the homepage of the Business Portal.

From then on you must log in via <https://zakelijk.delijn.be>.



When you arrive on the homepage, click on the 'subscriptions' button.

Please note: After the first registration, you must wait one day for the nightly synchronization with the De Lijn database. So you cannot manage subscriptions on the first day.

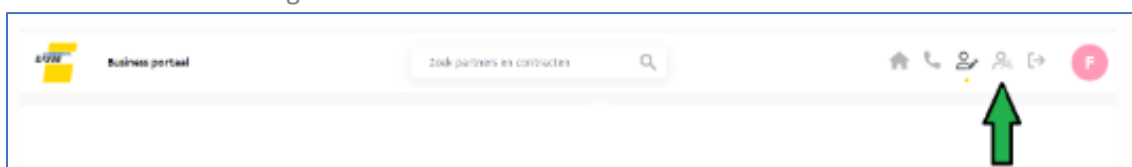


After clicking on 'Subscriptions' on the homepage, you will see the following screen (please note, for privacy reasons, the personal data has been deleted here):

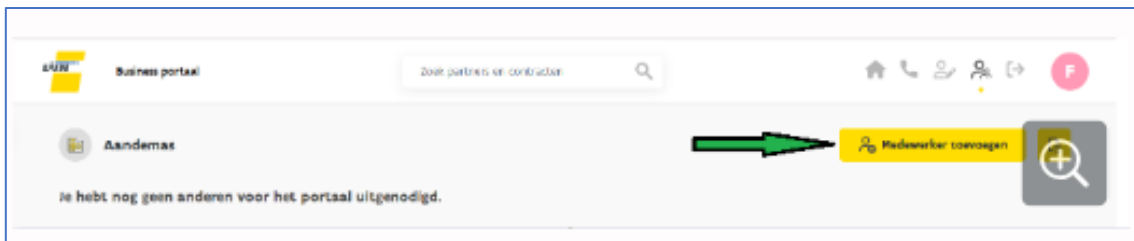
<input type="checkbox"/>	Voornaam	Naam	Klantreferentie	Startdatum	Einddatum	Duurtijd	Tussenkomst	Status	Acties
<input type="checkbox"/>	•			05/09/2023		1 Jaar	7	Nieuw	
<input type="checkbox"/>	•			06/01/2023	05/01/2024	1 Jaar	100%		
<input type="checkbox"/>	•						100%	!	
<input type="checkbox"/>	•						100%	!	
<input type="checkbox"/>	•			12/12/2022	11/12/2023	1 Jaar	100%		
<input type="checkbox"/>	•						100%	!	
<input type="checkbox"/>	•			01/09/2023	31/08/2024	1 Jaar	100%		
<input type="checkbox"/>	•			04/09/2023		3 Maanden	7	Nieuw	
<input type="checkbox"/>	•			01/01/2023	31/12/2023	1 Jaar	100%		
<input type="checkbox"/>	•			21/07/2023	20/07/2024	1 Jaar	100%		

How to manage users (create, permissions, delete)

Click on the 'User Management' button.



And then click 'Add employee.'



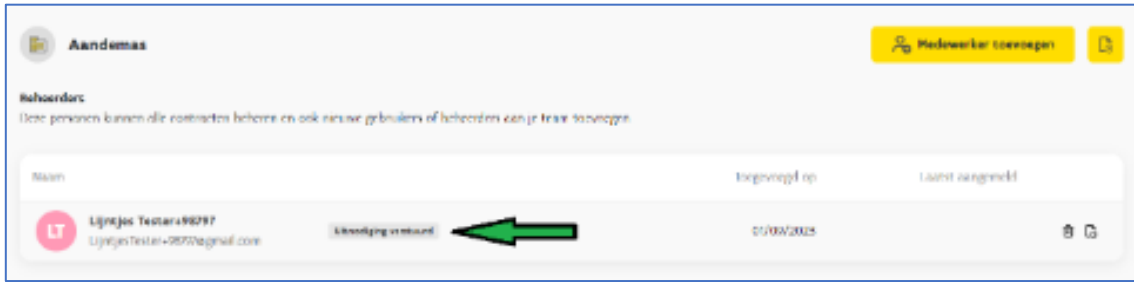
Fill in the requested information and click on the arrow.

The screenshot shows the 'Medewerker uitnodigen' form. The title is 'Medewerker uitnodigen' with a close button (X) in the top right corner. Below the title is the section 'Gegevens' with the text: 'Het e-mailadres dat je opgeeft zal gebruikt worden om de medewerker uit te nodigen voor het portaal. Het wordt ook gebruikt om aan te melden op het portaal.' There are three input fields: 'Voornaam' with the value 'Lijntjes', 'Achternaam' with the value 'Tester+98797', and 'E-mailadres' with the value 'LijntjesTester+98797@gmail.com'. To the right of the email field is a yellow button with a right-pointing arrow. A green arrow points to this button. Below the input fields are two buttons: 'Annuleren' and 'Medewerker uitnodigen' with a magnifying glass icon. A green arrow points to the 'Medewerker uitnodigen' button.

Here you can choose whether you add the employee as an 'Administrator' or 'User.' An administrator can invite other administrators and users, a user cannot. Furthermore, a user can only access the selected contracts. A user can manage other users within his contract(s) (in this case delete or grant this deletion right, inviting a user remains via administrator). An administrator has access to all contracts of a partner. It is up to the administrator to manage this himself.

The screenshot shows the 'Medewerker uitnodigen' form. The title is 'Medewerker uitnodigen' with a close button (X) in the top right corner. Below the title is the section 'Gegevens' with a card showing the user's name 'Lijntjes Tester+98797' and email 'LijntjesTester+98797@gmail.com'. Below the card are two radio button options: 'Beheerder' (selected) and 'Gebruiker'. A green arrow points to the 'Beheerder' option. Below the 'Beheerder' option is the text: 'Lijntjes zal alle rechten krijgen op alle geldige contracten voor Aandemas en andere gebruikers kunnen uitnodigen.' Below the 'Gebruiker' option is the text: 'Als je voor deze optie kiest, kan je hieronder selecteren welke rechten Lijntjes per contract zal krijgen.' At the bottom of the form are two buttons: 'Annuleren' and 'Medewerker uitnodigen' with a magnifying glass icon. A green arrow points to the 'Medewerker uitnodigen' button.

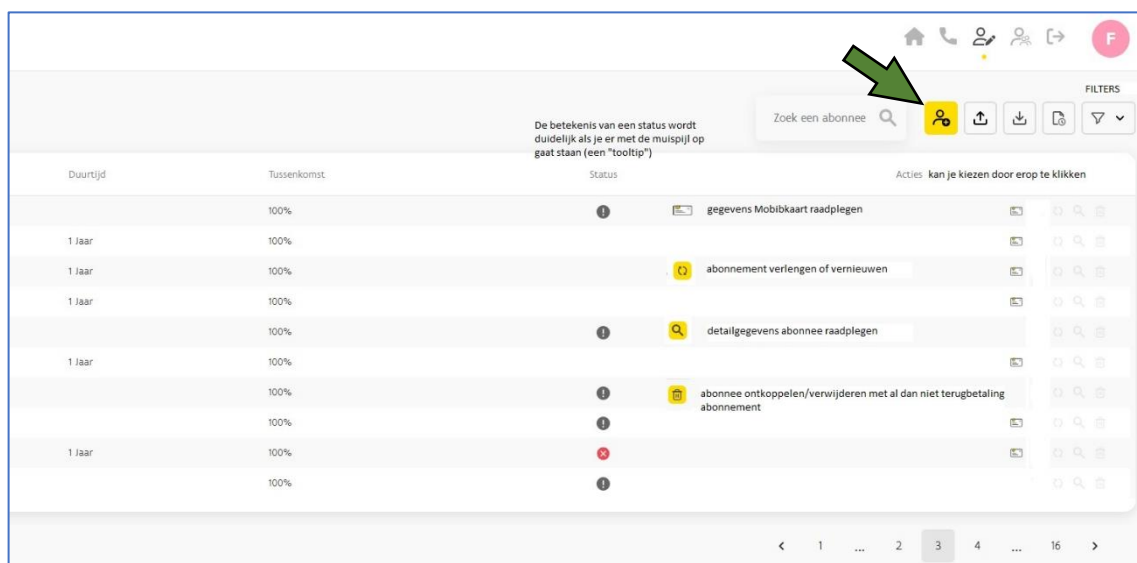
The employee will receive an invitation email to set his password and log in to the Business Portal.



## Managing subscribers

### How to add a subscriber

Click on the icon at the top right:



The following pop up screen appears. Here you must enter all the details of the employee for whom you wish to request a subscription.

The screenshot shows the 'Voeg een abonnee toe' (Add a subscriber) form. The form is titled 'Voeg een abonnee toe' and has a close button (X) in the top right corner. It is divided into two main sections: 'Persoonlijke gegevens' (Personal data) and 'Abonnement' (Subscription). The 'Persoonlijke gegevens' section includes fields for 'Voornaam' (First name), 'Naam' (Last name), 'Klantreferentie' (Client reference), 'E-mail adres' (Email address), 'Straat' (Street), 'Huisnummer' (House number), 'Bus' (Apt. no.), 'Postcode' (Postal code), 'Gemeente' (Municipality), and 'Land' (Country, set to 'België'). There is also a field for 'INSZ-nummer' (VAT number) and a checkbox for 'Correspondentie-adres toevoegen' (Add correspondence address). The 'Abonnement' section includes a checkbox for 'Nog een abonnee toevoegen' (Add another subscriber) and two buttons: 'Annuleren' (Cancel) and 'Toevoegen' (Add).

Does the employee already have a MOBIB card? Then you can register the number of the MOBIB card here.

The screenshot shows a form titled 'Abonnement' with the following fields: 'Startdatum' (with a calendar icon), 'Duurtijd' (with a dropdown menu labeled 'Selecteer duurtijd'), and 'MOBIB-nummer' (with a label 'Optioneel'). At the bottom, there is a checkbox 'Nog een abonnee toevoegen', and two buttons: 'Annuleren' and 'Toevoegen'.

### How to manage a subscription

For each subscriber you can see the following information at a glance:

- Yes (green dot) or no (red dot) linked subscription
- First name and name
- Customer reference (this is the internal reference within the company)
- Start date and end date of the subscription
- Duration of the subscription
- How much the intervention amounts to
- The status of the subscription

<input type="checkbox"/>	Voornaam	Naam	Klantreferentie	Startdatum	Einddatum	Duurtijd	Tussenkomst	Status	Acties
<input type="checkbox"/>	•			05/09/2023		1 Jaar	7	Nieuw	[Icons]
<input type="checkbox"/>	•			06/01/2023	05/01/2024	1 Jaar	100%		[Icons]
<input type="checkbox"/>	•						100%	!	[Icons]
<input type="checkbox"/>	•						100%	!	[Icons]
<input type="checkbox"/>	•			12/12/2022	11/12/2023	1 Jaar	100%		[Icons]
<input type="checkbox"/>	•						100%	!	[Icons]
<input type="checkbox"/>	•			01/09/2023	31/08/2024	1 Jaar	100%		[Icons]
<input type="checkbox"/>	•			04/09/2023		3 Maanden	7	Nieuw	[Icons]
<input type="checkbox"/>	•			01/01/2023	31/12/2023	1 Jaar	100%		[Icons]
<input type="checkbox"/>	•			21/07/2023	20/07/2024	1 Jaar	100%		[Icons]




The status of the subscription: If the status field is empty, this means that you do not need to take any action. If there is an icon listed in the status field, place the mouse pointer over the icon to see what action you need to take.

The 'Status' legend includes the following items:

- Actief abonnement
- Nieuw abonnement aangevraagd
- Ontbrekende gegevens
- Gekoppeld zonder abonnement
- Bijdrage nog te betalen
- Vervalt binnenkort
- Verlenging aangevraagd
- Stopzetting en ont koppeling aangevraagd
- Ontkoppeling aangevraagd
- Kan niet verwerkt worden

Each status is accompanied by an icon and a tooltip with details. For example, 'Nieuw abonnement aangevraagd' has a green checkmark icon and a tooltip: 'Nieuw abonnement aangevraagd vanaf 01/10/2023 voor een periode van 1 jaar'. 'Ontbrekende gegevens' has a red 'i' icon and tooltip: 'Ontbrekende gegevens'. 'Gekoppeld zonder abonnement' has a red exclamation mark icon and tooltip: 'Gekoppeld zonder abonnement'. 'Bijdrage nog te betalen' has a blue Euro icon and tooltip: 'Bijdrage nog te betalen'. 'Vervalt binnenkort' has a yellow clock icon and tooltip: 'Vervalt binnenkort'. 'Verlenging aangevraagd' has a green circular arrow icon and tooltip: 'Verlenging abonnement aangevraagd vanaf 04/11/2023 voor een periode van 1 jaar'. 'Stopzetting en ont koppeling aangevraagd' has a red 'x' icon and tooltip: 'Stopzetting en ont koppeling aangevraagd'. 'Ontkoppeling aangevraagd' has a red 'x' icon and tooltip: 'Ontkoppeling aangevraagd'. 'Kan niet verwerkt worden' has a red 'x' icon and tooltip: 'Kan niet verwerkt worden'.

You will also find the following action buttons to the right of each subscriber:

	Hier kan je het abonnement verlengen. Opgelet, doe dit tijdig aangezien je dient rekening te houden met een periode van 1 week tussen de aanvraag- en startdatum. Indien je meerdere abonnementen dient te verlengen, kan je deze verlengingen in bulk aanvragen.
	Hier kan je de persoonsgegevens van de abonnee nakijken.
	Hier kan je de abonnee verwijderen of het abonnement stopzetten en een eventuele terugbetaling aanvragen (de voorwaarden van termijn terugbetaling gelden).

If you click on the 'garbage bin,' you will see the following pop-up screen:

### Abonnee verwijderen ×

Weet je zeker dat je  wilt verwijderen?

De werknemer krijgt geen volgend abonnement meer met je tussenkomst en zal verwijderd worden uit de lijst

Verbreek de koppeling tussen de werknemer en het contract.

Zet het huidige abonnement stop en vraag een eventuele terugbetaling aan.

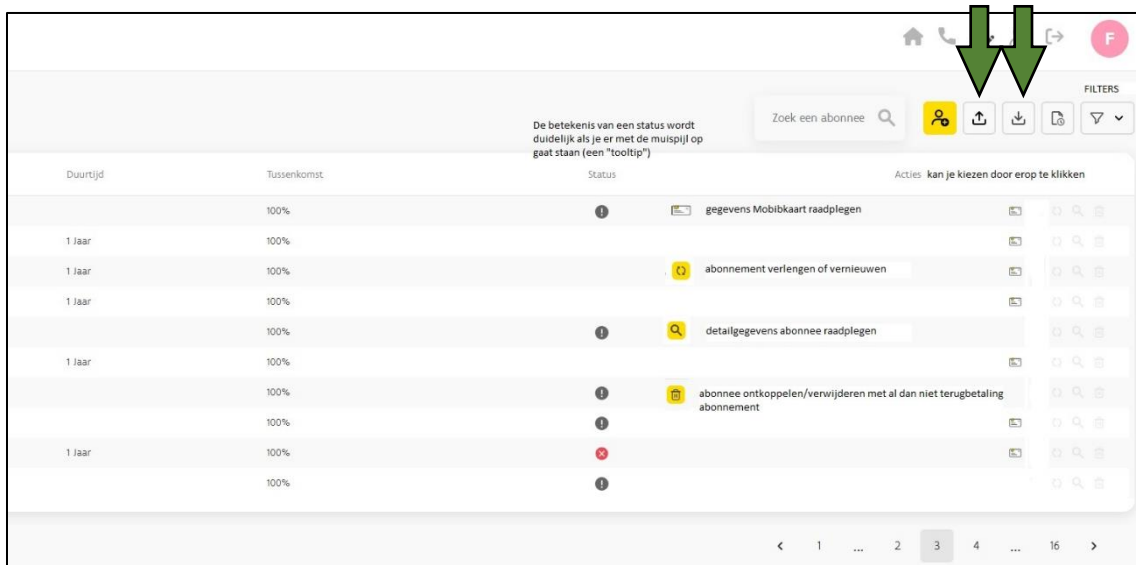
Datum van stopzetting abonnement

**Goed om weten**

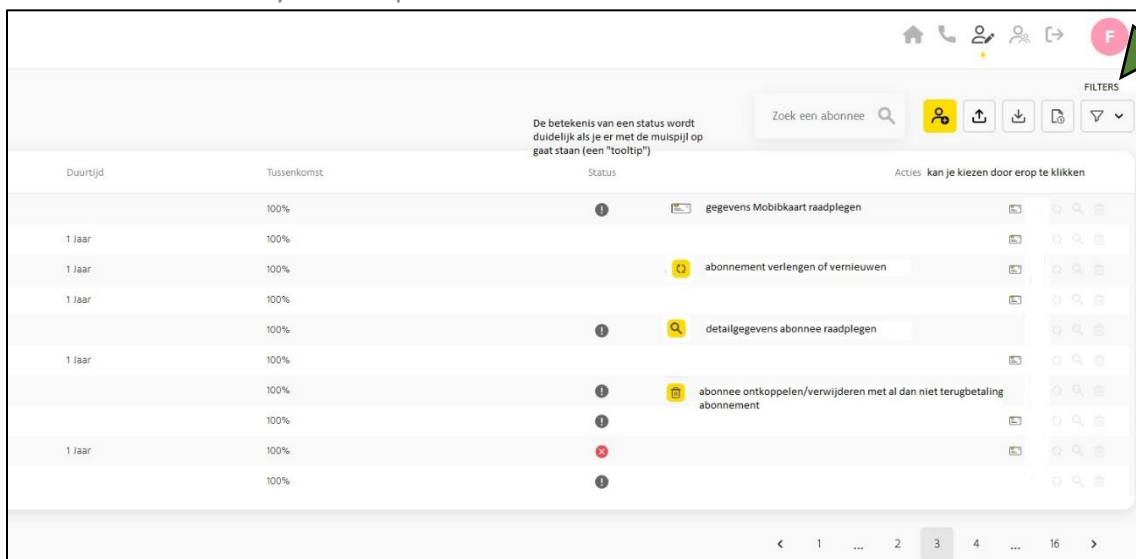
- De voorwaarden van termijn terugbetaling gelden.
- Het bedrag wordt berekend o.b.v. de datum van stopzetting abonnement.
- Je ontvangt een creditnota met daarop het bedrag waarop recht is.

## Upload or export multiple subscribers at once

You can upload or export subscribers via these icons. If you wish to add multiple subscribers to the portal at the same time, you can import them via the Excel template, which you can find as soon as you click on the 'upload subscribers' button. You must complete this completely and correctly to be able to upload subscribers. If not, you will get an error message.



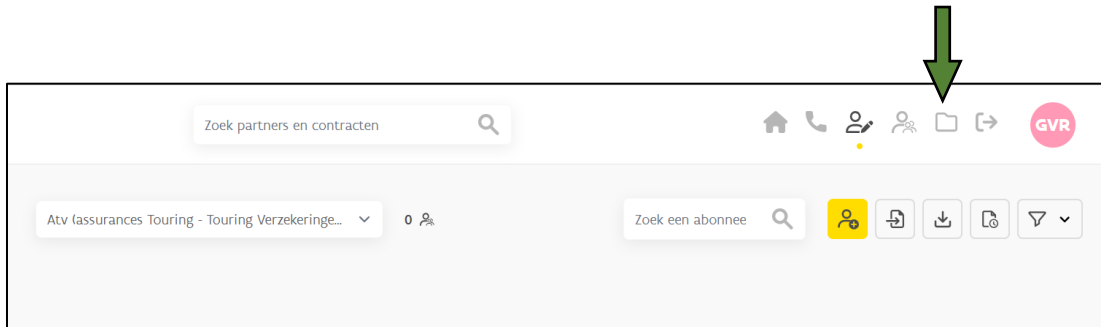
Finally, to easily find subscribers, you can set a filter. This way you can quickly find out which subscriptions will expire, whether data needs to be adjusted and whether an extension or termination has already been requested.





## Document management

Important documents (contract, addendum, tax form, etc.) will be uploaded by De Lijn in the document system on the portal. You can find these via the “documents” icon at the top right of the portal. As a customer, you can only consult and download documents in the document system, not upload documents. You can upload and forward files to De Lijn via the “Help button”.



### Tips:

When you place the mouse pointer over an icon, you will see a tool tip or informative text appear with more explanation.

Subscriptions will only appear once the full amount has been paid.