



ORI Training Flash

Account Creation Using Credit Card Information

To: Customer Service Representatives
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Please be advised:

The TAS tool has been updated with a functionality that allows customers to enroll in auto-refill and create an account based on the new credit card information registered.

When following the Enrollments flow, there will be a message prompt advising the customer that an account will be created based on his new credit card information registered. If the customer agrees, click **CONTINUE** and follow the enrollment process business as usual.



The email saved in the credit card information will be the email that displays on the account profile.









However, if the customer wants to create an account with different information, click <u>CANCEL</u>. Instead, go to **New Account Contact** and follow the account creation process business as usual.



NOTE: Remember that account creation is required in order to enroll in auto-refill.

Agent Support Key Words: Auto-Refill, Account Creation, Credit Card Information