TracFone Wireless, Inc.

MULTI LINE

Transactional Manual

Table of Contents

Activation

Activation is the entry point of every customer who wishes to use Walmart Family Mobile or Simple Mobile services. This should be done to program the customer's mobile phone in our system and to make the phone fully functional.

Common Customer Statements	"I would like to activate my phone." "I got a new phone and I want to get it started."

In order to activate a phone, you must ALWAYS ask the customer if they would like to:

- **Activate with a NEW Number.**
- **Activate with an existing number (Upgrade).**
- **Activate by transferring a number from another company (Portability).**

NOTE! Make sure that the customer's phone is registered to an account before you proceed with its service activation.

Activation Requisites	✓ Account Registration (Create a New or Add to Existing) ✓ Airtime Redemption (Purchase or Add)

Activation Registration

To get started, enter the customer's account into session. To do so, follow these steps below:

1 Select the Incoming Call tab.

2 Enter the ESN/IMEI/MEID (or SIM Number for BYOP) in the Serial Number field.

3 Select Search Service.

If the ESN is not associated to any account, proceed to create a NEW Contact Account, unless the customer proactively asks for their existing account.

Activation with Service Plan

After creating an account and/or once the account is in session, activate the serial number by following the instruction below using an Airtime PIN.

1 Select the Transaction tab and select Activation/Port option to activate the device.
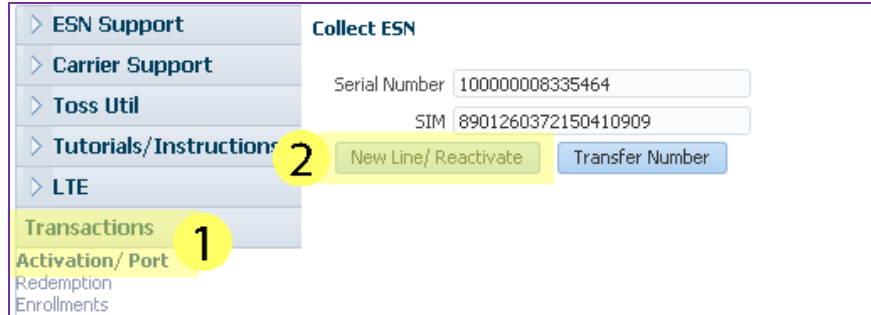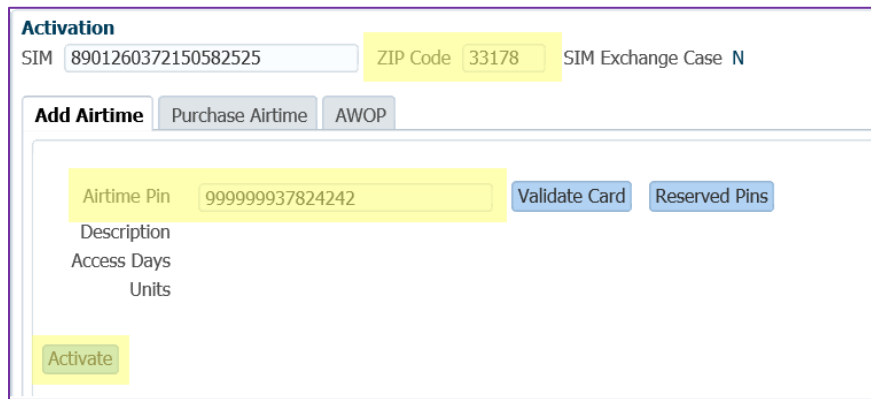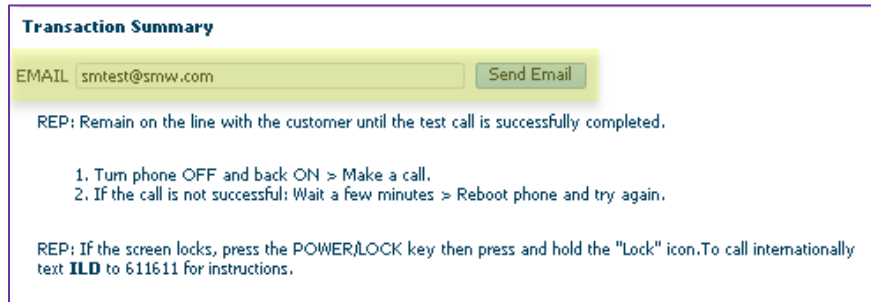
2 Select New Line/Reactivation.

3 Enter the Zip Code and Airtime PIN.

4 Select Activate.

NOTE! It is NOT allowed to enter the PIN anywhere except in TAS.

5 Once activation is complete, the Transaction Summary page will appear with additional instructions to be given to the customer.

ONLY select the Validate Card button when the Activate or Redeem button is grayed out or when you encounter an error with the Service Plan entered.

Activation via Purchase Airtime

This option to activate a service via Purchase Airtime requires the use of a credit or debit card to purchase Airtime Minutes. Follow these steps to complete the Activation via Purchase Airtime.

1 After entering the zip code, select Purchase Airtime tab. Select a Service Plan and select Add.

Redemption

Add Airtime | Purchase Airtime | Compensation/Replacement

Product Offering REDEMPTION

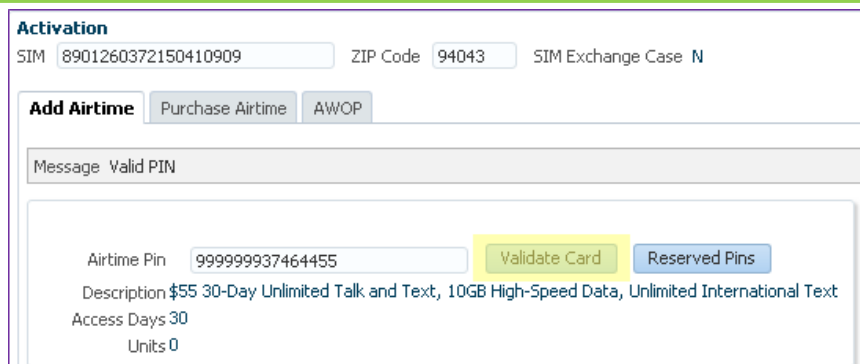| Name	Category	Description	Plan Id	Part Number	Price
$25, 3 GB HS Data, UNL Tlk/Txt, 3...	Nationwide Plans	$25 30-Day Unlimited Talk and...	235	SMNAPP0025TT	25.0
$30, 2GB HS Data, UNL Tlk/Txt, 3...	Nationwide Plans	30-Day Unlimited Talk and Tex...	461	SMNAPP40030ILD	30.0
$40, 6GB HS Data, UNL Tlk/Txt, 3...	Nationwide Plans	$40 30-Day Unlimited Internat...	238	SMNAPP0040UNL	40.0
$50, TRULY UNL, ILD, UNL Tlk/Txt...	Nationwide Plans	$50 30-Day Unlimited Talk and...	240	SMNAPP0050BUNL	50.0
$50, 2GB HS Data, ILD, UNL Tlk/T...	Phone Upgrade Plans	$50 30-Day Unlimited Talk/Tex...	358	SMNAPP20050ILDUP	50.0
$60, TRULY UNL, ILD, UNL Tlk/Txt...	Nationwide Plans	UNL Talk/Txt/Data at 4G LTE S...	416	SMNAPP30060	60.0
$60, 2GB HS Data, ILD, UNL Tlk/T...	Phone Upgrade Plans	$60 30-Day Unlimited Talk/Tex...	359	SMNAPP20060ILDUP	60.0
$70, 2GB HS Data, ILD, UNL Tlk/T...	Phone Upgrade Plans	$70 30-Day Unlimited Talk/Tex...	360	SMNAPP20070ILDUP	70.0

Add

2 The selected plan will display on the Selected Plan box. Select Checkout.

Esn: 100000008432790

Plan Selected: $30, 2GB HS Data, UNL Tlk/Txt, 30-Day, Plan ID:461 and Price:30.0

Max Lines Allowed **5**

Available Spots: **3**

Add Additional Line | Checkout

3 Select the Payment Source. Ask for the customer's last 4 digits of the credit/debit card, expiration date and the CVV number.

Payment Selection

Payment ***********6161 06/2024 MasterCard ▼ CVV 121

Update Payment | Add New Payment | Refresh Payment

4 The Estimated Charges updates automatically once you selected a plan.

5 Select Ready to Pay.

Charge Preview

Calculated Tax Zipcode	33178	Estimated Amount	60.00
Sales Tax Due	3.85	Total Discount	-5.00
E911 Tax due	0.80	Total Charges	55.0
USF Tax due	0.72	Total Taxes Due	5.48
Misc Tax due	0.11	Total Amount Due with Tax	60.48

Calculate / Refresh

Add Additional Line | Ready to Pay

6 Provide the Service End Date to the customer from the Transaction Summary.

7 You may send the Transaction Summary via email, ONLY if the customer requests a receipt of their transaction.

Transaction Summary

EMAIL smtest@smw.com | Send Email

REP: Remain on the line with the customer until the test call is successfully completed.

1. Turn phone OFF and back ON > Make a call.
2. If the call is not successful: Wait a few minutes > Reboot phone and try again.

REP: If the screen locks, press the POWER/LOCK key then press and hold the "Lock" icon.To call internationally text **ILD** to 611611 for instructions.

NOTE!

- ✓ If the Activate button is grayed out, select the Validate Card button and a description of the Airtime PIN to be added will display. Select the Activate button to proceed with the Activation.
- ✓ If the customer's phone is associated with a Bundle Phone promotion, the PIN will automatically populate during Activation. You are able to continue with the process even without asking for a PIN and/or purchasing a plan.
- ✓ The Activation zip code is pre-populated during reactivation. If the customer wishes to reactivate using a different zip code, ask for the updated one and inform the customer that the phone number is generated according to the zip code provided, therefore the current phone number may not be retained.
- ✓ Make sure the phone is successfully activated with the correct number of minutes. You may send the Transaction Summary via email ONLY if the customer requests to receive a receipt of their transaction.

Activation Scenarios

Activating Multiple Lines

1 After selecting a plan for the first ESN, select Add Additional Line.

Activation

SIM `8901260372150489952`   ZIP Code `33178`   SIM Exchange Case N

Add Airtime | **Purchase Airtime** | AWOP

Product Offering ACTIVATION   [Add]

Message Validation was successful. Continue with the transaction.

Name	Category	Description	Plan Id	Part Number	Price
$10 Global Card	Add-On	$10 Global Card	102	SMNAPP0010MILD	10.0
$25, 3 GB HS Data, UNL Tlk/Txt,...	30-Day Plans	$25 30-Day Unlimited Talk an...	235	SMNAPP0025TT	25.0
$30, 2GB HS Data, UNL Tlk/Txt, 3...	30-Day Plans	30-Day Unlimited Talk and Te...	461	SMNAPP40030ILD	30.0
$40, 6GB HS Data, UNL Tlk/Txt, 3...	30-Day Plans	$40 30-Day Unlimited Interna...	238	SMNAPP0040UNL	40.0
$50, TRULY UNL, ILD, UNL Tlk/Tx...	30-Day Plans	$50 30-Day Unlimited Talk an...	240	SMNAPP0050BBUNL	50.0
$60, TRULY UNL, ILD, UNL Tlk/Tx...	30-Day Plans	UNL Talk/Txt/Data at 4G LTE...	416	SMNAPP30060	60.0

Esn: 100000008432758

Plan Selected: $30, 2GB HS Data, UNL Tlk/Txt, 30-Day, Plan ID:461 and Price:30.0

Max Lines Allowed 5

Available Spots: 4

[Add Additional Line] [Checkout]

2 You will be redirected to the Collect ESN page. Enter the new ESN (and SIM), then select New Line Activation.

> ESN Support
> Carrier Support
> **Toss Util**
> Tutorials/Instructions
> LTE

Transactions

Activation/ Port

Collect ESN

Serial Number `100000008432790`

SIM `8901260372150489960`

[New Line/ Reactivate] [Transfer Number] [Back to Summary]

3 Select another plan for the second ESN and select Checkout.

If the customer has another ESN, then select Add Additional Line and do same steps over.

Activation

SIM 8901260372150489960   ZIP Code 33178   SIM Exchange Case N

Add Airtime | **Purchase Airtime** | AWOP

Product Offering ACTIVATION   Add

Message Validation was successful. Continue with the transaction.

Name	Category	Description	Plan Id	Part Number	Price
$10 Global Card	Add-On	$10 Global Card	102	SMNAPP0010MILD	10.0
$25, 3 GB HS Data, UNL Tlk/Txt,...	30-Day Plans	$25 30-Day Unlimited Talk an...	235	SMNAPP0025TT	25.0
$30, 2GB HS Data, UNL Tlk/Txt, 3...	30-Day Plans	30-Day Unlimited Talk and Te...	461	SMNAPP40030ILD	30.0
$40, 6GB HS Data, UNL Tlk/Txt, 3...	30-Day Plans	$40 30-Day Unlimited Interna...	238	SMNAPP0040UNL	40.0
$50, TRULY UNL, ILD, UNL Tlk/Tx...	30-Day Plans	$50 30-Day Unlimited Talk an...	240	SMNAPP0050BBUNL	50.0
$50, 2GB HS Data, ILD, UNL Tlk/...	Phone Upgrade Plans	$50 30-Day Unlimited Talk/Te...	358	SMNAPP20050ILDUP	50.0
$60, TRULY UNL, ILD, UNL Tlk/Tx...	30-Day Plans	UNL Talk/Txt/Data at 4G LTE...	416	SMNAPP30060	60.0
$60, 2GB HS Data, ILD, UNL Tlk/...	Phone Upgrade Plans	$60 30-Day Unlimited Talk/Te...	359	SMNAPP20060ILDUP	60.0
$70, 2GB HS Data, ILD, UNL Tlk/...	Phone Upgrade Plans	$70 30-Day Unlimited Talk/Te...	360	SMNAPP20070ILDUP	70.0

Esn: 100000008432790

Plan Selected: $30, 2GB HS Data, UNL Tlk/Txt, 30-Day, Plan ID:461 and Price:30.0

Max Lines Allowed **5**
Available Spots: **3**

Add Additional Line | Checkout

---

4 Select the Payment Source to be used.

Payment Selection

Payment ***********3506 12/2025 Visa ▾   CVV 123

Update Payment | Add New Payment | Refresh Payment

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5 Select Ready to Pay.

Notice that the Estimated Amount sums up the two plans purchased.

Charge Preview

Calculated Tax Zipcode 33178	Estimated Amount 60.00
Sales Tax Due 3.85	Total Discount -5.00
E911 Tax due 0.80	Total Charges 55.0
USF Tax due 0.72	Total Taxes Due 5.48
Misc Tax due 0.11	Total Amount Due with Tax 60.48

Calculate / Refresh

Add Additional Line | Ready to Pay

---

6 You will then see the Transaction Summary. You may send the Transaction Summary via email, ONLY if the customer requests a receipt of their transaction.

Also, the Transaction Details page will display all the serial numbers that were activated.

Transaction Summary

EMAIL 100000008432758@simplemobile.com   Send Email

REP: Remain on the line with the customer until the test call is successfully completed.

1. Insert new SIM card > Turn phone ON.
2. Make a call.
3. If the call does not connect, wait a few minutes > Reboot phone and try again.

Transaction Details

Account Number	Auto Pay	Payment Type	Order Id	Merchant Ref	Total Charged
***********3506	NO	CREDITCARD	126961-17256641-806051	2d3632383631303536373838323383732	60.67

ESN / SIM / MIN	Category	Service Plan Added	Plan Id	Plan Type	Service End Date	Days	Minutes	Text	Data (MB)	Plan Amount	Total Tax	Total Discount	Final Purchase Amount	Quantity
100000008432758	HANDSET	UNLIMITED TALK,...	461	30-Day Plans	07/21/2018	30	N/A	N/A	2048	30.00	3.09	0.0	33.09	1
100000008432790	HANDSET	UNLIMITED TALK,...	461	30-Day Plans	07/21/2018	30	N/A	N/A	2048	30.00	2.58	5.0	27.58	1

Tax Summary

ESN / SIM / MIN	Sales Tax	USF Tax	RCRF Tax	E911 Tax	Total Tax	Total Discount
100000008432758	0	0.39	0.06	2.64	3.09	0.0
100000008432790	0	0.33	0.05	2.20	2.58	5.0

Activation for BYOP

The activation process for BYOP account is the same with regular GSM accounts.

Only the Transaction Summary page will display different steps to complete the activation.

NOTE! Make sure to follow the steps to complete the activation.

Transaction Summary

EMAIL: 260372150436987@simplemobile.com [Send Email]

REP: Remain on the line with the customer until the test call is successfully completed and data is working. If either of these fails, transfer the call according to guidelines.

1. **Insert NEW SIM > Turn phone OFF and back ON > Make a call.**
   - If the call does not connect, wait a few minutes > Reboot phone and try again.

REP: **Update the data settings by following the steps below.** Advise the customer that updating data settings does not guarantee that picture messaging (MMS) will work.

Android:

1. Text APN to 611611 and wait until acknowledgement is received (up to 2 minutes):
   - If customer receives a phone settings update notification, ask to accept the update.
   - If customer receives a text with the APN settings or does not receive anything, manual programming is needed:
     - Use the APN settings tool to guide the customer through the APN programming process based on the phone model.
     - If customer prefers to program settings on their own, advise to use the settings received on the text or go to the Programing Guide at Simplemobile.com for instructions.
2. Have the customer test that data works (Wi-Fi must be OFF).

iPhone 4s:

- Your data settings should update automatically.

iPhone 4:

1. Go to Settings > General > Profile
   - If you have a Data profile set, select it and delete it. You may need to enter your Passcode.

REP: If the phone does NOT have a Data profile set, proceed to the next step.

2. Go to Cellular Data Network by following the instruction that applies to your iOS:
   - Tap Settings > Cellular > Cellular Data Network OR
   - Tap Settings > General > Network > Cellular Data Network
3. Enter the following values in all applicable fields. (Do not change any of the other fields):
   - **APN:** SIMPLE
   - **MMSC:** http://smpl.mms.msg.eng.t-mobile.com/mms/wapenc
4. Tap Home or Cellular to save.
5. Re-boot your device.
6. Make sure Wi-Fi is turned OFF > Open Safari to test that data works.

To call internationally text **ILD** to 611611 for instructions.

Activating Replacement BYOP SIMs

Customers will now have the option to activate their replacement BYOP SIMs using the existing keyword, Transfer, to 611611.

1 The customer texts Transfer to 611611.

2 They will receive an SMS with instructions on how to activate the replacement BYOP SIM.

NOTE!

✓ After creating a replacement BYOP SIM ticket, educate the customer they can activate the replacement SIM by texting Transfer to 611611.

✓ As a security measure, 611611 will ask for the last 4 digits of the original SIM before proceeding with the transaction.

✓ The keyword Transfer is still use to perform upgrades between brands.
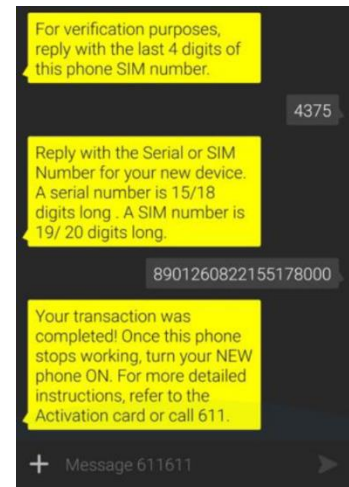
Updated Activation Process

When activating a device, you will no longer need to remain on the line to test the phone for activation, reactivation, port-in, or an upgrade. Instead, you will schedule a callback to confirm that the phone is working as expected. Let the customer know that you will activate the device and schedule a callback within the next 30 minutes. If you are scheduling a callback, do not offer the survey at this time. It should only be sent to the customer on the callback once you have confirmed that the phone is working as expected. Instruct the customer to complete the phone setup and test the phone during that time.

What if the customer does not have a callback number?
Advise the customer to test everything and call back if any issues were found. If the customer has an unlimited plan, we can schedule a callback to the MIN.

> Follow Training Flash #124 Updated Activation Process ORI 2018 for more details on how to schedule a call back.

Initial Phone Set Up

In an effort to expedite the troubleshooting process after activations, you are now REQUIRED to advise the customer to start the initial phone setup at the beginning of all Activation, Port, and Upgrade calls.

For Android Customers:
To activate an android device and has not completed the initial setup, simply ask the customer to select the Skip option on their screen. Let the customer know that they will be able to revisit these options at a later time.

> The Skip option placement varies depending on the phone make/model.

For iPhone Customers:
To activate an iPhone, confirm that they have completed the initial setup:
- ☑ If so, continue with the activation process.
- ☒ Otherwise, advise the customer to connect to Wi-Fi and start the initial phone setup while you continue with the activation process.

> If the customer is unable to connect to Wi-Fi, advise them that they will have to wait until their services are active to initiate the phone setup.

ESN Belongs to an Active Account Error in TAS (WFM Only)

If you encounter the error message "ESN belongs to an active account" while attempting to activate or reactivate an account in TAS, create an IT TOSS System Error ticket in TAS.

After creating the ticket, schedule a callback to confirm if everything is working correctly. Make sure to follow the callback guidelines.

KonnectOne Mobile Hotspot Activation Issue (for Simple Mobile Only)

You may receive transferred calls from IVR due to customers entering their IMEI instead of the SIM number when activating a Simple Mobile KonnectOne Hotspot (SMKOK779HSDL) device in the IVR channel.

NOTE!

The IVR channel ONLY accepts SIM number for activation transaction. The Simple Mobile red activation card is instructing to provide the IMEI instead of SIM. Please see image below for a better understanding.

If the call is transferred to you, assist the customer by activating the device using either the IMEI or SIM in TAS. However, if the customer insisted to do it again in the IVR, educate the customer to enter the SIM number instead of the IMEI as the IVR only accepts SIM value for activation.

A new red activation card have been rolled out with the correct information to enter the SIM number.

Reactivation

If NO airtime is added on or before the phone's Service End Date, the phone will go PAST DUE. Customers will need to reactivate using a Service PIN or a credit/debit card. The reactivation procedure is similar to the Activation procedure.

Follow these steps to reactivate the phone.

1 Enter the MIN.

2 Select Search Service.

3 Select the Transaction tab and then select Activation/Port.

4 Select New Line/Reactivation.

5 Enter the Airtime PIN and select Activate.

6 Provide the instruction to complete the reactivation found in the Transaction Summary.

NOTE! Provide the Service End Date to the customer if you are reactivating the account with Credit Card.

Activation without Payment

The Activation without Payment transaction should ONLY be used when an Activation, Port or Refill failed. This transaction will allow you to Activate, Port or Refill a phone by:

✓ **Reference ESN**   A Serial Number can only be used once as a reference payment source. If the reference ESN is active, it will be deactivated.

✓ **Reference PIN**   A PIN that has been added can only be used once as a reference payment source.

✓ **Supervisor's Approval**   Supervisor approval is always required for this option. Usage will be monitored.

To complete an Activation without Payment transaction, follow these steps below.

1 Enter the MIN.

2 Select Search Service.

3 Select the Transaction tab and then select Activation/Port.

4 Select New Line/Reactivation.

AWOP using Reference ESN

5 Select the AWOP tab. Select Reference ESN as option.

Activation
SIM 8901260372150410909   ZIP Code 94043   SIM Exchange Case N

Add Airtime   Purchase Airtime   **AWOP**

AWOP Action

Select an Option
- Reference Esn
- Reference Pin
- Supervisor Approval

6 Select the Reason from the dropdown list.

Reason * Port Request Cancellation (Requested a Port and is now requesting a new number) ▼

7 Enter important notes in the Notes field.

Notes
7 Notes

8 Enter the Reference ESN and select Validate ESN.

Reference ESN Info

Reference Esn 103000008335043

Validate ESN   Reference ESN's Service Plan

9 Select Refresh for the TAS to display the available buckets.

Reference ESN Info
Reference Esn 103000008335043
Reference ESN's due date is in 18 days. The maximum AWOP days to be issued for the selected Reason is 18

Reference ESN's Service Plan $55 30-Day Unlimited Talk and Text, 10GB High-Speed Data, Unlimited International Text

Validate ESN   Refresh   **Note:** Please press the button **Refresh** until the system display the available buckets.

10 Enter the amount of buckets required and then select Activate.

Buckets Info

Service Days
Units
SMS
Data (Gb) 16 ▼

Activate

11 Enter your User Login and select Accept.

Activate

Confirmation
Please confirm entering your login information that you want to provide these benefits to the customer.
User login
Cancel   Accept

12 The Transaction Summary will confirm activation of service.

Transaction Summary

EMAIL smtest@smw.com   Send Email

REP: Remain on the line with the customer until the test call is successfully completed.

1. Turn phone OFF and back ON > Make a call.
2. If the call is not successful: Wait a few minutes > Reboot phone and try again.

REP: If the screen locks, press the POWER/LOCK key then press and hold the "Lock" icon. To call internationally text **ILD** to 611611 for instructions.

AWOP using Reference PIN

5 Select the AWOP tab. Select Reference PIN as option.

6 Select the Reason from the dropdown list.

7 Enter important notes in the Notes field.

Activation
SIM 8901260372150410909   ZIP Code 94043   SIM Exchange Case N

Add Airtime   Purchase Airtime   **AWOP**

AWOP Action

Select an Option
○ Reference Esn
◉ Reference Pin
○ Supervisor Approval

Reason * Port Request Cancellation (Requested a Port and is now requesting a new number) ▼

Notes

Notes

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8 Enter the Reference ESN and select Validate PIN.

Reference Pin Info
Reference Pin 999999937172516

Validate PIN   Reference PIN's Service Plan

---

9 Select Activate.

Buckets Info
Service Days
Units
SMS
Data (Mb)

Activate

---

10 Enter your User Login and select Accept.

Activate

Confirmation
Please confirm entering your login information that you want to provide these benefits to the customer.
User login [redacted]
Cancel   Accept

---

11 The Transaction Summary will confirm activation of service.

Transaction Summary

EMAIL smtest@smw.com   Send Email

REP: Remain on the line with the customer until the test call is successfully completed.

    1. Turn phone OFF and back ON > Make a call.
    2. If the call is not successful: Wait a few minutes > Reboot phone and try again.

REP: If the screen locks, press the POWER/LOCK key then press and hold the "Lock" icon. To call internationally text **ILD** to 611611 for instructions.

AWOP using Supervisor's Approval

5 Select the AWOP tab. Select Supervisor Approval as option.

6 Select the Reason from the dropdown list.

7 Enter important notes in the Notes field.

Activation
SIM 8901260372150410909   ZIP Code 94043   SIM Exchange Case N

Add Airtime | Purchase Airtime | **AWOP**

AWOP Action

Select an Option
- ○ Reference Esn
- ○ Reference Pin
- ● Supervisor Approval

6 Reason * Port Request Cancellation (Requested a Port and is now requesting a new number) ▼

7 Notes [Notes]

8 Select the type of service plan to be provide then select Validate Plan and Activate.

Buckets Info
Service Days
Units
SMS
Data (Mb)

Supervisor Approval Required
Service Plan $25 30-Day Unlimited Talk and Text, 3GB High-Speed Data, Unlimited International Text ▼
Validate Plan

Activate

9 Enter your User Login and select Accept.

Supervisor Approval Required
Service Plan $25 30-Day Unlimited Talk and Text, 3GB High-Speed Data, Unlimited International Text ▼
Validate Plan

Activate

Confirmation
Please confirm entering your login information that you want to provide these benefits to the customer.
User login
Cancel   Accept

10 The Transaction Summary will confirm activation of service.

Transaction Summary

EMAIL smtest@smw.com   Send Email

REP: Remain on the line with the customer until the test call is successfully completed.

1. Turn phone OFF and back ON > Make a call.
2. If the call is not successful: Wait a few minutes > Reboot phone and try again.

REP: If the screen locks, press the POWER/LOCK key then press and hold the "Lock" icon. To call internationally text **ILD** to 611611 for instructions.

Transaction Details

Order Id
85681-13043051-904109

Serial Number	100000008335464	Plan Id	235	Text	Unlimited
Service End Date	06/10/2018	Service Plan	$25 30-Day Unlimited Talk and Text, 3GB High-Speed Data,	Data (MB)	3072
Category	HANDSET	Added	Unlimited International Text		
		Minutes Added	Unlimited		

NOTE!

- ✓ When the reference ESN is a Smartphone (Android/iPhone), you will see the SMS and Data fields enabled under "Bucket Info" section. If the device is PPE, you will also have to enter the amount of minutes to be issued in the Units field.

- ✓ The flow allows the same ESN in session as Reference ESN as long as there were service days unused. For example, the ESN is deactivated and customer wants to be reactivated. Check if there were unused minutes and then follow the AWOP flow.

- ✓ The "Supervisor Approval" should be used as a last resort. You will need supervisor approval before using this option. The transaction will NOT request the approval in order to continue.

- ✓ If the User Login gives an error, contact your supervisor for assistance.

Number Portability

Number Portability is a service that provides customers the ability to keep the same phone number when switching between wireless carriers or between wirelesses or from a landline carrier within their local calling area.

Common Customer Statements	"I want to transfer my number to (brand)." "I would like to use my current number with (brand)." "I want to transfer my number to another company."

Portability Requisites	✓ Phone number should be working and active with the current service provider.

Port In

This process should be followed when a customer wishes to transfer their phone number from another company (including other TracFone brands) to Simple Mobile or Walmart Family Mobile. Follow these steps to port a number.

1 To create an account, enter the Serial Number and select New Contact Account.

TAS | Ticker | Console | Incoming Call | Support

Search Contact

Serial Number 103000008355256   Email
SIM   MIN
Customer Id   Airtime Pin

Search Service | New Contact Account | Search Contact | Search Ebay Order

2 Enter New Contact information and select Create Contact.

New Contact ✕

Basic

Brand GET BRAND FROM ESN ▼
* Serial Number 103000008355256
* Zip 94043
Email null@cybersource.com   ☐ No Email Provided
* 4 Digits Security PIN 1234
Date of Birth 9/29/1995

▷ **Consent to Contact Via**

Create Contact | Clear | Cancel

3 Select Transaction tab and then Activation/Port.

4 Select Transfer Number.

> ESN Support
> Carrier Support
> Toss Util
> Tutorials/Instructions
> LTE
Transactions
Activation/ Port **3**
Redemption
Enrollments

Collect ESN

Serial Number 100000008335464
SIM 89012603721504410909
New Line/ Reactivate | Transfer Number **4**

5 Enter the Current Service Provider information.

- ✓ Min to transfer
- ✓ SIM Number NEW phone
- ✓ Activation Zip Code
- ✓ Carrier Name
- ✓ Phone Type
- ✓ Current Service Provider Registered Information

Current Service Provider

MIN to Transfer 2064567890

SIM Number NEW phone 89012603721504425980   Activation Zip Code 94043

Carrier Name ACS WIRELESS ▼   Phone Type Wireless ▼

Information Registered with your Current Service Provider

Account Number 123456789   Address
First Name Cyber   Line 2
Last Name Source   Zipcode
Contact Phone 3050000000   City
Number   State
Email null@cybersource.com   Enter/Update Address

6 Select Enter/Update Address to enter Address information and select Validate DPV.

Validate Address

Update/Validate Address Info

Zip 94043
Address 1 1295 CHARLESTON RD   Type the address to select from auto suggested values.
Address 2   Use ONLY for additional address like Apt, Room, Dorm, Unit, Suite, etc
City MOUNTAIN VIEW
State CA
Country USA
Validate DPV | Override DPV And Save | Cancel

Port In using Add Airtime Card

7 Select Add Airtime Card. Enter the service plan PIN and select OK.

Add Airtime Card

Airtime PIN 999999937463345

OK Cancel

Information Registered with your Current Service Provider

Account Number 123456789   Address 1295 CHARLESTON RD
First Name Cyber   Line 2
Last Name Source   Zipcode 94043
Contact Phone 3050000000   City MOUNTAIN VIEW
Number   State CA
Email null@cybersource.com   Enter/Update Address

Add Airtime Card | Reserved Pins | Purchase Airtime | Get Workforce PIN

8 Select Process and you will see Message Success.

Message SUCCESS

Current Service Provider

MIN to Transfer 2064567890

SIM Number NEW phone 8901260372150425980   Activation Zip Code 94043

Carrier Name ACS WIRELESS ▼   Phone Type Wireless ▼

PIN ***********3345

Information Registered with your Current Service Provider

Account Number 123456789   Address 1295 CHARLESTON RD

First Name Cyber   Line 2

Last Name Source   Zipcode 94043

Contact Phone Number 3050000000   City MOUNTAIN VIEW

State CA

Email null@cybersource.com   Enter/Update Address

Process

9 Provide the instructions from the Transaction Summary page to complete the port process. You may send the Transaction Summary via email, ONLY if the customer requests a receipt of their transaction.

Transaction Summary

EMAIL 103000008355256@simplemobile.com   Send Email

We are almost done! There are just a few more steps you need to follow to get your device(s) working.

For phone number transfers, the process may take up to 2 business days. When your current phone stops working:

1. Please make sure your **NEW** SIM card is inserted into your phone.
2. Turn your phone **OFF** and back **ON**.
3. Make a call.
4. If the call does not connect, wait a few minutes, reboot your phone, and try again.
5. Once your new phone is active, you may receive a text message to update your data settings. If your data does not work, text **APN** to 611611.

Note: In some instances, the data may take up to 30 minutes to work properly.

Port In using Reserved Pins

7 Select Add Airtime Card.

Information Registered with your Current Service Provider

Account Number 123456789   Address 1295 CHARLESTON RD

First Name Cyber   Line 2

Last Name Source   Zipcode 94043

Contact Phone Number 3050000000   City MOUNTAIN VIEW

State CA

Email null@cybersource.com   Enter/Update Address

Add Airtime Card   Reserved Pins   Purchase Airtime   Get Workforce PIN

8 Select the Red Code. Then select Redeem.

Reserved Pins

Cancel

Red Code	SNP	Part Number	Description	Red Units	Status	Status Description
***********1077	37461077	SMN20025	Simple Mobile $25 Unlimited	0	400	RESERVED QUEUED

9 Select Redeem.

10 Select Process and you will see Message Success.

11 Provide the instructions from the Transaction Summary page to complete the port process. You may send the Transaction Summary via email, ONLY if the customer requests a receipt of their transaction.

Port In using Purchase Airtime

7 Select Add Airtime Card. Select Redeem.

8 Select a Service Plan, Add then Checkout.

9 Select Payment Method and enter CVV.

10 Select Redeem All.

11 Select Process and you will see Message Success.

12 Provide the instructions from the Transaction Summary page to complete the port process. You may send the Transaction Summary via email, ONLY if the customer requests a receipt of their transaction.

Transaction Summary

EMAIL 103000008355256@simplemobile.com   Send Email

We are almost done! There are just a few more steps you need to follow to get your device(s) working.

For phone number transfers, the process may take up to 2 business days. When your current phone stops working:

1. Please make sure your **NEW** SIM card is inserted into your phone.
2. Turn your phone **OFF** and back **ON**.
3. Make a call.
4. If the call does not connect, wait a few minutes, reboot your phone, and try again.
5. Once your new phone is active, you may receive a text message to update your data settings. If your data does not work, text **APN** to 611611.

Note: In some instances, the data may take up to 30 minutes to work properly.

Port In using Get Workforce PIN

7 Select Add Airtime Card. Select Redeem.

Information Registered with your Current Service Provider

Account Number	123456789	Address	1295 CHARLESTON RD
First Name	Cyber	Line 2	
Last Name	Source	Zipcode	94043
Contact Phone Number	3050000000	City	MOUNTAIN VIEW
Email	null@cybersource.com	State	CA

Enter/Update Address

Add Airtime Card   Reserved Pins   Purchase Airtime   Get Workforce PIN

8 Select the Service Plan. Select the Reason and add Notes. Then select Get Pin.

Workforce Pins

Airtime

SpObjid	Description	Part Number
242	UNL PLAN, 8GB Data at 4G LTE	REPLASMS050UNL
239	$40 30-Day Unlimited International Talk and Text (up to …	REPLASMS050UNLILD
416	UNL Talk/Txt/Data at 4G LTE Speed - No data throttling …	REPLASMS060BBUNLILD
246	$60 30-Day Unlimited International Talk and Text (up to …	REPLASMS060UNLILD
416	UNL Talk/Txt/Data at 4G LTE Speed - No data throttling …	SMNREPLA30060
508	$10 1.5GB Add-On Data. No service days.	SMREPLAMB0010DID
507	$5 500MB Add-On Data. No service days.	SMREPLAMB005DID
391	$20 7-Day Unlimited International Talk and Text (up to 1…	SMSREPLA0020
237	750MB Data at 4G LTE	SMSREPLA0025BRDB

Service Plan Objid	242
Service Plan Description	UNL PLAN, 8GB Data at 4G LTE
Part Number	REPLASMS050UNL
* Reason	Redemption Failure ▼
Invalidate Card#	
Old ESN (if applicable)	
Current ESN	260372150337417
PIN/Merchant	
Ticket (if applicable)	
Issue (Max length 500)	
Action Taken (Max length 500)	
Notes	Notes
Workforce Pin	***********7558

Get Pin

9 Select the Red Code.

Reserved Pins

Cancel

Red Code	SNP	Part Number	Description	Red Units	Status	Status Description
***********1077	37461077	SMN20025	Simple Mobile $25 Unlimited	0	400	RESERVED QUEUED

10 Select Redeem.

11 Select Process and you will see Message Success.

12 Provide the instructions from the Transaction Summary page to complete the port process. You may send the Transaction Summary via email, ONLY if the customer requests a receipt of their transaction.

NOTE!

✓ Make sure that you first create a new contact with the new ESN, and put it into session.
✓ When OTHER is selected in the Carrier Name Field, you MUST ask the customer for the name of the OLD Service provider.
✓ You must only spell and verify the Account Number, PIN/Password, Name and Address to make sure that the information is accurate.
✓ Provide the Ticket Number generated by the system after following the Portability flow.

Port Out

This process allows an existing customer to transfer their current active number from one of our brands to another service provider. If you receive a Port Out request inform the customer they must contact the new service provider to initiate the Port-Out request.

Port Out PIN

Carriers will begin requesting customers to provide their 4-5 digit PIN from their account in order for us to approve the port out. Follow the steps below, if the customer calls to ask for their PIN.

1 From the Service Profile select Contact Profile.

2 Validate the security questions.

3 Provide the customer with the main account PIN once validated.

NOTE!

If the customer does not already have a Security PIN, ensure you are on the main account and add it so that the customer can provide it to the receiving carrier in order for the port out to be approved. Ensure that when adding a new PIN, it should be 4 digits long.

Redemption

Adding Service Plans is the most frequent type of call you will receive. So you will need to be ready to take the call and listen closely to what the customer is saying.

Common Customer Statements	"I would like to add airtime." "I would like to add a plan or service plan for my phone."

Redemption refers to adding a service plan to an active phone. Customer can process redemption via these channels:

- ✓ **TAS**
  - • **Add Airtime** – customer will need to provide a Service Plan PIN.
  - • **Purchase Airtime** – customer will need to use a credit/debit card.
- ✓ **Brand Website** – customer can purchase a service plan by going to the website.
- ✓ **ADD or BUY to 611611** – customer either add a PIN or purchase a service plan by texting the keyword ADD or BUY to 611611.

Redemption with Service Plan

Once the customer mentions they would like to add a plan, ask if they will be doing so with a PIN or a credit/debit card. If the customer has a Service Plan PIN, please ask for the following information ONLY:

✓	**MIN**	Ask the customer for their MIN.
✓	**PIN**	Ask the customer for the PIN they will be using to Redeem.
✓	**Offer Survey**	Invite the customer to participate in a brief survey regarding our service.
✓	**Thank You**	Confirm the Redemption was completed and thank the customer for calling.

Follow these steps when adding a service plan to the customer's account.

1 Enter MIN and select Search Service.

2 From the Transactions tab, select Redemption.

3 Enter the Airtime PIN, then select Redeem.

4 Once the PIN is validated, select Add Now.

NOTE!

✓ Add Now is selected, the minutes will be added automatically to the customer's phone following the Sweep and Add functionality.

✓ If Add to Reserve is selected, the PIN will go to the phone's reserve and it can be added anytime by selecting the Add Now button.

5 Provide the Service End Date to the customer from the Transaction Summary page.

Redemption by Purchase Airtime

This section will walk you through the process of helping the customer buy service using a credit/debit card.

1 Enter MIN and select Search Service.

2 From the Transactions tab select Redemption.

3 Select Purchase Airtime tab.

› ESN Support	**Redemption**
› Carrier Support	Add Ai**3** Purchase Airtime Compensation/Replacement
› Toss Util	
› Tutorials/Instructions	Airtime Pin [ ] Redeem Airtime Pin Reserved Pins
› LTE	Description
Transactions	Access Days
Activation/ Port	Units
Redemption **2**	
Enrollments	
Value Plan Services	
Family Plans	
MIN Change	
SIM Change	
Deactivation	
Complete Ports	

4 Select Change Plan only if the customer requests to change the plan. If the customer does not request to change the plan you may skip step 4 and 5.

Redemption

Add Airtime | **Purchase Airtime** | Compensation/Replacement

With Auto ReUp, the customer's current service plan will ALWAYS renew automatically. If the customer decides to change service plans in the future, Auto ReUp will take effect with the new plan.

Criteria: ☐ Add-Ons Only   Total Account Credit: **$ 0.00**

Order Summary (Preview)

Esn	Sim	Zipcode	Min	Previous Plan	Plan Name	From Date	To Date	Amount with Tax	Action	Plan Action
100000008335464					$25 30-Day Unlimited Talk and...				REDEMPTION	ChangePlan
100000008351123	8901260372150422524	33178	2066706484		$25 30-Day Unlimited Talk and...				REDEMPTION	ChangePlan

5 Select a Service Plan, Add then Checkout.

✓ The selected plan will show in the Plan Selected section.

Redemption

Add Airtime | **Purchase Airtime** | Compensation/Replacement

Product Offering REDEMPTION   Add

Name	Category	Description	Plan Id	Part Number	Price
$25, 3 GB HS Data, UNL Tlk/Txt, 3...	Nationwide Plans	$25 30-Day Unlimited Talk and...	235	SMNAPP002STT	25.0
$30, 2GB, UNL Tlk/Txt, 3...	Nationwide Plans	30-Day Unlimited Talk and Tex...	461	SMNAPP40030ILD	30.0
$40, 6GB HS Data, UNL Tlk/Txt, 3...	Nationwide Plans	$40 30-Day Unlimited Internat...	238	SMNAPP0040UNL	40.0
$50, TRULY UNL, ILD, UNL Tlk/Txt...	Nationwide Plans	$50 30-Day Unlimited Talk and...	240	SMNAPP0050BBUNL	50.0
$50, 2GB HS Data, ILD, UNL Tlk/T...	Phone Upgrade Plans	$50 30-Day Unlimited Talk/Tex...	358	SMNAPP20050ILDUP	50.0
$60, TRULY UNL, ILD, UNL Tlk/Txt...	Nationwide Plans	UNL Talk/Txt/Data at 4G LTE S...	416	SMNAPP30060	60.0
$60, 2GB HS Data, ILD, UNL Tlk/T...	Phone Upgrade Plans	$60 30-Day Unlimited Talk/Tex...	359	SMNAPP20060ILDUP	60.0
$70, 2GB HS Data, ILD, UNL Tlk/T...	Phone Upgrade Plans	$70 30-Day Unlimited Talk/Tex...	360	SMNAPP20070ILDUP	70.0

Esn: 100000008351123

Plan Selected: $40, 6GB HS Data, UNL Tlk/Txt, 30-Day, Plan ID:238 and Price:40.0

Add Additional Line | Checkout

6 Select Payment Method and collect the following:
- Last 4 digits of the credit/debit card
- Expiration Date
- CVV Number

Payment Selection

Payment ***********6161 06/2024 MasterCard ▼ CVV [121]

Update Payment | Add New Payment | Refresh Payment

Enrollment

☐ Setup Auto Refill

✓ The Charge Preview shows automatically once you selected a plan.

7 Select Redeem All.

Charge Preview

Calculated Tax Zipcode	33178	Estimated Amount	40.00
Sales Tax Due	2.80	Total Discount	0.00
E911 Tax due	0.40	Total Charges	40.0
USF Tax due	0.52	Total Taxes Due	3.80
Misc Tax due	0.08	Total Amount Due with Tax	43.80

Calculate / Refresh

Add Additional Line | Redeem All

NOTE!

✓ Taxes and fees are based on the zip code where the credit/debit card was registered. The TAX Details in Purchase History will provide additional information about taxes.

✓ You may repeat back to the customer the last 4 digits of the credit/debit card and the CVV code to make sure you get the information accurately.

✓ If the customer does not have credit/debit cards added to the account, you will need to add one in order to purchase airtime.

8 Provide the Service End Date to the customer from the Transaction Summary page.

Transaction Summary

EMAIL smtest@smw.com   [Send Email]

Thank you for adding benefits to your device!

You may need to turn your device OFF and back ON to reset and restore your benefits.

Please remember to refill your service before your Service End Date. As a reminder, we will send you a text message or email before this date.
To call internationally text **ILD** to 611611 for instructions.

• If you receive an error message when you click the Redeem All button, before processing the transaction again you must verify on the Purchase History if the transaction went through. This must be done to avoid a double charge.

• If the purchase is declined, click the Update Payment to check if there is any information that needs to be updated. Once the Update Payment is clicked, you will see the Identity Challenge page.

• If you encounter error code 481 while making a purchase and the customer insists on getting more information as to why the transaction is being declined, transfer the call by following the instructions in Agent Support / Transfer guidelines under Credit Card Decline scenario.

Add Airtime using 611611

This service allows our customers to add their airtime PIN using their phone. Provide these steps to the customer if asked.

1 Text Add/Agregar to the short code 611611.

2 They will receive an SMS with instructions on how to add their service PIN.

NOTE!

When you assist the customer with their redemption, always educate them that adding airtime and checking the balance are available via 611611.
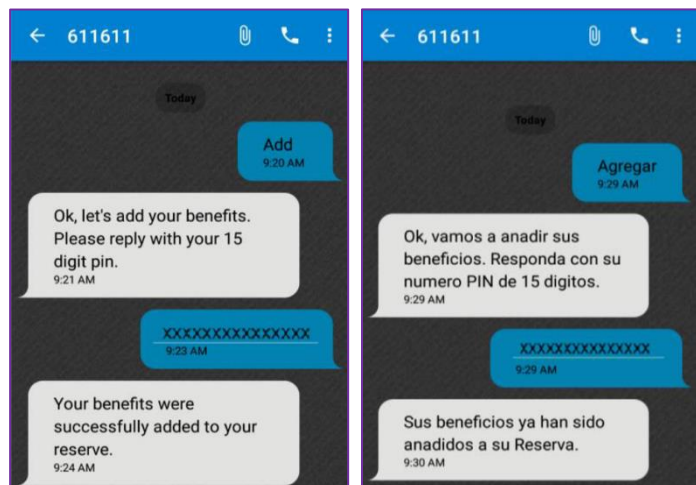
Redemption Scenarios

Multi-line Redemption

1 After opening the account, select Redemption then Purchase Airtime.

2 You will be redirected to the Redemption page where you will see all the serial numbers in the account.

! Select Change Plan only if the customer requests to change the plan. If the customer does not request to change the plan you may skip this step.

3 Select the Payment Source to be used.

Payment Selection
Payment ************3506 12/2025 Visa ☑ CVV 123
Update Payment | Add New Payment | Refresh Payment

4 Select Redeem All

Notice that the Estimated Amount sums up all the plans being purchased.

You will also see the Total Discount for the rest of the other lines added.

Charge Preview

Calculated Tax Zipcode	33178	Estimated Amount	125.00
Sales Tax Due	7.35	Total Discount	-20.00
E911 Tax due	2.00	Total Charges	105.0
USF Tax due	1.37	Total Taxes Due	10.93
Misc Tax due	0.21	Total Amount Due with Tax	115.93

Calculate / Refresh

Add Additional Line | Redeem All

5 You will see the details of the payment in the Transaction Summary page with Transaction Details and Tax Summary sections.

Add Now or Add to Stash/Reserve

Add Now (Redeem)
- Adding of service plan during the call.
- The plan will be added automatically after processing the redemption.

Add to Stash/Reserve (Reserved Pins)
- Adding of service plan to the Reserve.
- The plan will be added automatically on the Service End Date.
- Plans in Reserve can also be added any time before the Service End Date. This replaces the current benefits the customer has on the phone.

Changes to Manage Reserve

Workforce PINs generated for Walmart Family Mobile will now be in reserved queue status; however, the add-ons generated for Simple Mobile will be redeemed automatically in the system and will not display as reserved queue.

✏️ **NOTE!**

You can validate if the transaction was successful in the Redemption History or Transaction History in TAS.

❗ For Add-ons scenario, DO NOT generate another pin.

Add-Ons

Add-Ons will always display above the Order Summary (Preview) section.

You can offer add-ons only when the customer initially asks about it.

Message Success					
With Auto ReUp, the customer's current service plan will ALWAYS renew automatically. If t					
Criteria: ☐ Add-Ons Only					Total Account Cr

Order Summary (Preview)

Select Phone (s)	Esn	Sim	Zipcode	Min	Plan Nam
☑	100000008367913	8901260372150436029	33178	2065484264	$25 30-D

NOTE!

FOR SIMPLE MOBILE: If the customer is requesting to purchase a data ADD-ON card and the option is not available in TAS. Proceed to assist the customer with the purchase on the Simple Mobile website.

DO NOT perform Fix ESN or create an IT Toss ticket.

Pending Card Redemption Error

If you encounter an error message "CARD PENDING REDEMPTION" when processing a redemption in TAS, you need to create an IT TOSS System Errors ticket

Redemption

Message CARD PENDING REDEMPTION

Add Airtime | Purchase Airtime | Compensation/Replacement

Airtime Pin [575131408646565] Description CARD PENDING REDEMPTION [Verify Airtime Pin]

[+] Add Airtime Pin

NOTE!

Advise the customer for a 24-hour turnaround time.

Add Now Transaction Summary Issue (for WFM only)

The Add Now option in the Transaction Summary is not working properly.

Transaction Summary

EMAIL [   ] × [Send Email] [Add Now]

Thank you for adding benefits to your phone!
To receive your benefits, please keep your phone ON

Please remember to refill your service before your Service End Date. As a reminder, we will send you a text message or email before this date.

REMINDER: DO NOT USE THIS FUNCTIONALITY UNTIL FURTHER NOTICE!

Redemption Error (for Simple Mobile ONLY)

An error message may appear during a redemption process on the web or TAS to inform customers that the transaction will take longer because of a maintenance, outages or downtime issue.

The system will automatically detects the zip code being used when there are maintenance, outages or downtime issues in the area upon processing the redemption. Below are the examples of error messages you will encounter in the web or TAS.

Redemption using PIN:

Order Confirmation

Thank you for your business! Your service plans were successfully added to your Stash!

Remember to ReUp your service before your Service End Date to avoid loss of benefits.

Service End Date 04/16/2018
A plan from your Stash will be added on: 02/15/2018

⚠ We are experiencing some delays; your trasnaction will take longer than the expected.

Transaction Summary

Outage Message REP: Inform the customer that the transaction will take longer than expected.

EMAIL sm_yas@sitf.com   Send Email

Thank you for adding benefits to your device![RID 7360038]
To receive your benefits, please keep your phone ON.

Please remember to refill your service before your Service End Date. As a reminder, we will send you a text message or email before this date.
To call internationally text **ILD** to 611611 for instructions.[RID 7516237]

Redemption through Purchase:

Order Confirmation

Thank you for your business! Your service plans were successfully added to your Stash!

Remember to ReUp your service before your Service End Date to avoid loss of benefits.

Service End Date 03/06/2018
A plan from your Stash will be added on: 01/05/2018

⚠ We are experiencing some delays; your trasnaction will take longer than the expected.

Transaction Summary

Outage Message REP: Inform the customer that the transaction will take longer than expected.

EMAIL sm_yas@sitf.com   Send Email

Thank you for your purchase![RID 7379006]
To receive your benefits, please keep your phone ON.

Please remember to refill your service before your Service End Date. As a reminder, we will send you a text message or email before this date.
To call internationally text **ILD** to 611611 for instructions.[RID 7516237]

NOTE!

For "ReUp My Service" transaction which involves more than one phone, the zip code to be compared should be the one from the primary phone in the account.

Idenfying Workforce PIN in TAS

You must not un-reserve a WF PIN in TAS. If a WF PIN was generated on the incorrect phone, please invalidate the PIN and generate a WF PIN on the correct account.

> You should be able to identify what kind of PIN (WF PIN/Airtime PIN) was generated in the customer's account by checking on the card description. If a WF PIN was generated in the account, you will see the code: REPLA after the brand. Please see below screenshot.
>
> **Card Information**
>
> | CardNumber | Redemption Info | Card Information | Status Info |
> |---|---|---|---|
> | 207591860470365 | Result
Access Days 365
Card Units 0
SNP 1751502712
ESN
Redemption Sys
MIN | STSMPREPLA00045Y1
Straight Talk $495 Yearly Plan - UNLIM
Part Number STSMPREPLA00045Y1
Description Straight Talk $495 Yearly | Status 42
Description NOT
Agent Notes |

For scenarios wherein a WF PIN was generated twice, multiple pins or wrong denomination and not in use, please make sure to invalidate the PIN.

Below are the valid reasons to issue a Workforce PIN:
- ☑ AWOP Failure
- ☑ PIN Redeemed to the Wrong Handset
- ☑ Port Request (Active with a new number and now requesting a Port)
- ☑ Port Request Cancellation (Requested a Port and is now requesting a new number)
- ☑ Redemption Failure
- ☑ Scratch off airtime card replacement

> To mark an airtime card invalid, please follow the Solutions in TAS.

NOTE!

Before ending the call, make sure that the additional or incorrect denomination Workforce PIN is marked invalid.

Adding Reserved PINS for CC Purchase

If customer purchased an airtime card using a credit card but they did not receive the benefits, follow the steps listed below:

1 Check the purchase history to assure the transaction was approved.

2 Under Transaction History; confirm that the minutes were not added.

3 Go to the Redemption Tab to add the Reserved PINs.

PayPal Payment Method

Simple Mobile and Walmart Family Mobile customers can purchase service plans using their PayPal account on our Simple Mobile website or through their mobile app.

The customer will go through the same purchase process in the website (or mobile app) by entering their phone number and selecting the service plan they want to purchase. Once they reach the payment source section, they will see PayPal as one of the options.

If you receive a call from customers stating that they paid their service thru PayPal and they did not receive the benefits, please transfer the call to VAS Team.

NOTE!

Always check the Transfer Guidelines in Agent Support for the updated extension number.

KEY POINTS TO REMEMBER:

- ☑ This is applicable to Straight Talk, Simple Mobile, Walmart Family Mobile and Total Wireless customers.
- ☑ The PayPal transaction is only available on the website.
- ☑ If the customer use PayPal with a Retailer, refer the customer back to the retailer.

Multiline Account Scenario

Customers can join in a Multiline account up to 5 active lines, 1 line pays full price any additional line pays the discounted price.

Service End Date Alignment and Proration

The system will align the service end dates by prorating the amount of days for lines that have a different service end date than that of the primary account renewal date.

NOTE!

> Proration will never happen at the moment the line is added/activated. Whenever adding a line, customers will always be charged for a full month of service and they could get the Multiline discount if applicable. Proration and service end date alignment will happen on the next Service Renewal/Charge date after a line has been added.

Let's look at an example.

- Line 1 service ends on 12/1. The next Charge Date is 12/1 for line 1.
- Line 2 joined on 11/10 with a due date of 12/10. The amount due on 12/1 is $66.60 which includes $50 for line 1 plus $16.60 for the days prorated for line 2.
- On the next Charge date on 1/1, both accounts are aligned and the amount due is $50 for line 1 and $25 for Line 2 for a total of $75 for both lines. Any future payments as long as both accounts are aligned will pay $75 on the same date.
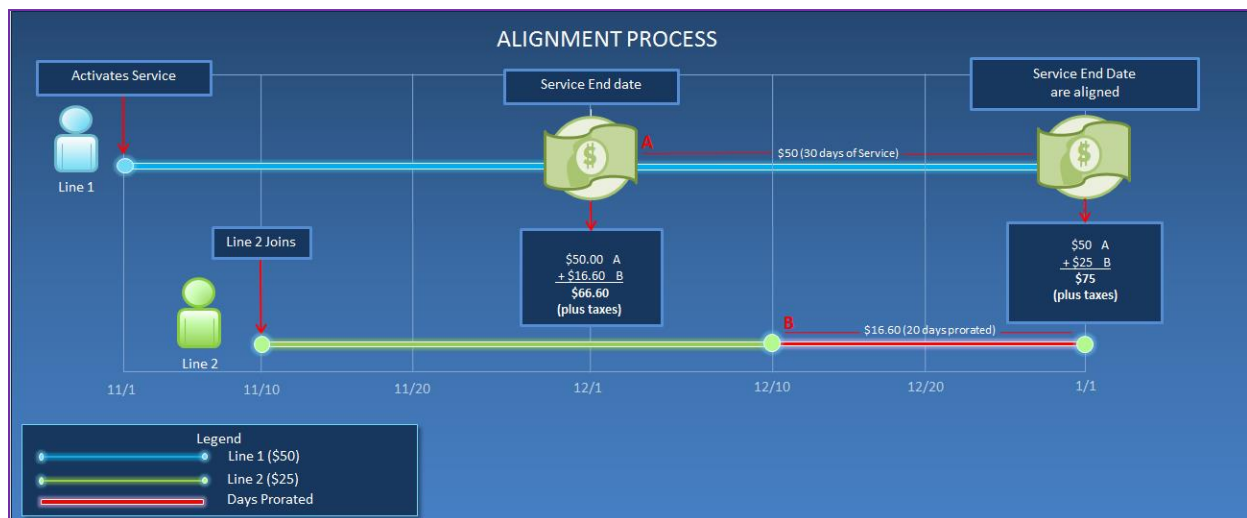
| 1st Month	2nd Month
Accounts Not Aligned	Accounts Aligned
$50 Line 1	$50 Line 1
+$16.60 Line2 (prorated amount)	+$25 Line 2
$66.60 (plus taxes)	$75 (plus taxes)

Virtual Airtime Card (Simple Mobile Only)

Currently, customers at select Best Buy stores will be able to purchase a Virtual Airtime Card at the register using their mobile device.

At the Store

The brand advertisement will provide instructions to the customer to text keyword "BBAIR" to 611-611. A link will then be sent to the customer (see below) that will direct them to the Plan selection landing page.

Link to Plan Selection page
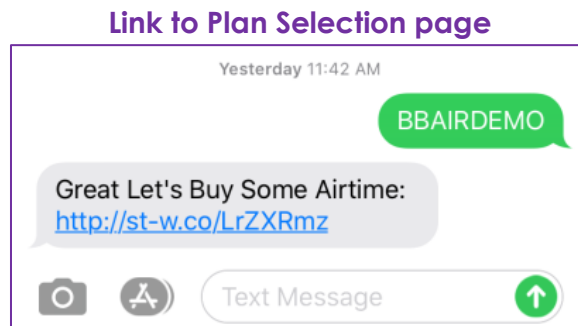
Choosing and Purchasing Virtual Airtime Card at the Register

Once in the landing page is accessed from their mobile device the customer will complete the Plan selection and proceed to make the purchase at the register. The cashier will scan the two UPCs to complete the purchase. The steps are as follows.

1. Select the Brand.

2. Select the Plan then select "Get Your PIN".
   a. Select the 🐢 (flip icon) to reveal the T&Cs on the back of the card.

3. Go to the cashier to scan virtual UPCs.

4. Select Get Your PIN to virtually scratch off and reveal PIN.
   a. If issues with the scratch off, select "Click Here" link under the scratch off to reveal PIN.

5. Finally, the customer will have the option to;
   a. **Save to Phone**; option to download the PIN as a PNG.
   b. **Buy New Plan**; the customer needs to repeat the steps for every additional plan purchase.
   c. **Add Now**; customer can add PIN via 611-611.

Updating Credit Card Information in TAS

If a customer made a service plan purchase in the past using a credit card via IVR and is now calling to make another purchase with a CSR (service plan purchase via TAS), and if the transaction gets declined, follow the process below:

1 Verify the billing information is correct
- ➤ If yes, proceed to process the transaction again.
- ➤ If no, update the billing information and try again.

2 If the transaction still gets declined, transfer the call to Refund Team. If the customer wants to use a new credit card, transfer the call to Credit Card Skill extension.

Replacement

Replacement Minutes/Days are issued in order to replace what the customer paid for; or entitled to receive but lost due to system issues and customer/representative error, or while waiting for the Exchange process to complete.

✓ **Reference ESN**   This option is selected when replacing benefits left from the old phone to the current phone.

✓ **Reference PIN**   This option is selected when replacing benefits to an account from a redeemed PIN.

✓ **Open Access**   This option is use to issue more than the allotted number of minutes and service days to the customer.

> You must replace the number of days from the date they reported the issue, up to the date they received their replacement phone or SIM.

1 Enter MIN and select Search Service.

2 From the Transactions tab, select Redemption.

3 Select Compensation or Replacement tab.

4 Select Replacement as Action Type, then choose the Reason from the dropdown.

Issue Replacement using Reference ESN

5 Select Reference ESN.

Redemption

Add Airtime | Purchase Airtime | **Compensation/Replacement**

Action

Type | Replacement ▼

Reason | Port Request(Active with new number and now requesting a Port) ▼

*Select either Reference Esn or Reference Pin (Mandatory for Non OPEN ACCESS agents)
- ● Reference Esn
- ○ Reference Pin
- ○ Open Access

6 Enter the Reference ESN and select Validate ESN.

Reference ESN Info

Reference Esn | 103000008335043

Validate ESN | Reference ESN's Service Plan

7 Add reasons in the Notes field and select Process.

Buckets Info / Max Threshold Limits by User

Units
SMS
Data (MB)
Service Days

Notes

--------------------Notes--------------------

Process | Cancel

8 A Ticket Number will appear to confirm that the process is successful.

Id Number **1075690880**	ICCID 8901260642110560799	Last Name 1129613803
ESN 100000007683179	MSID T10000180619	Queue
MIN T10000180619	Model SMZEZ930G3P5	Status Closed
Carrier Id 1113385	Phone SM ZTE Z930G GSM HANDSET SIM 5	Due Date 4/29/2018
Carrier Name T-MOBILE SIMPLE	Model	Owner ASARMIENTO
Ticket Type Units	Retailer TRACFONE-BRIGHTPOINT-DIST.	Issue Not Able to Make or Receive Calls
Title Replacement Service Plan	Priority High	Org ID SIMPLE_MOBILE
Creation Time 5/8/18 11:31 AM	Condition Closed	
Activation Zip 33178	WipBin	
	First Name copy_1	

Cancel | Re Open | Tech Exchange

✎ **NOTE!**

Reference ESN is valid if:
- ✓ The phone has NOT been used as Reference ESN to any Compensation/Replacement Transaction.
- ✓ The phone is still active and has service minutes and days left.
- ✓ Benefits left on the old phone are compatible with the current phone in session.

Issue Replacement using Reference PIN

5 Select Reference PIN.

> **Redemption**
>
> Add Airtime | Purchase Airtime | **Compensation/Replacement**
>
> **Action**
>
> Type   Replacement ▼
>
> Reason   Port Request(Active with new number and now requesting a Port) ▼
>
> *Select either Reference Esn or Reference Pin (Mandatory for Non OPEN ACCESS agents)
> ○ Reference Esn
> ● Reference Pin
> ○ Open Access

6 Enter the Reference PIN and select Validate PIN.

> **Reference Pin Info**
>
> Reference Pin   999999937172516
>
> Validate PIN   Reference PIN's Service Plan

7 Add reasons in the Notes field and select Process.

> **Buckets Info / Max Threshold Limits by User**
>
> Units
> SMS
> Data (MB)
> Service Days
>
> **Notes**
>
> --------------------Notes--------------------
>
> Process   Cancel

8 A Ticket Number will appear to confirm that the process is successful.

> Id Number **1075690880**   ICCID 8901260642110560799   Last Name 1129613803
> ESN 100000007683179   MSID T10000180619   Queue
> MIN T10000180619   Model SMZEZ930G3P5   Status Closed
> Carrier Id 1113385   Phone SM ZTE Z930G GSM HANDSET SIM 5   Due Date 4/29/2018
> Carrier Name T-MOBILE SIMPLE   Model   Owner ASARMIENTO
> Ticket Type Units   Retailer TRACFONE-BRIGHTPOINT-DIST.   Issue Not Able to Make or Receive Calls
> Title Replacement Service Plan   Priority High   Org ID SIMPLE_MOBILE
> Creation Time 5/8/18 11:31 AM   Condition Closed
> Activation Zip 33178   WipBin
>   First Name copy 1
>
> Cancel   Re Open   Tech Exchange

🖊 NOTE!

Reference PIN is valid for use if:
- ✓ It has never been used before as Reference PIN.
- ✓ The PIN added to specific phone is not yet expired.
- ✓ The type of service plan is compatible to the phone in session.
- ✓ The phone where the PIN was added to has never been used as Reference ESN in any compensation/replacement transaction.

Issue Replacement using Open Access

5 Select Open Access.

Redemption

Add Airtime | Purchase Airtime | **Compensation/Replacement**

Action

Type [Replacement ▼]

Reason [Port Request(Active with new number and now requesting a Port) ▼]

*Select either Reference Esn or Reference Pin (Mandatory for Non OPEN ACCESS agents)
○ Reference Esn
○ Reference Pin
◉ Open Access

6 Select Service Plan from the dropdown list. Add reasons in the Notes field and select Process.

Buckets Info / Max Threshold Limits by User

Service Plan [$25 30-Day Unlimited Talk and Text, 3GB High-Speed Data, Unlimited International Text ▼]
Units
SMS
Data (MB)
Service Days

Notes

--------------------Notes--------------------

[Process] [Cancel]

7 A Ticket Number will appear to confirm that the process is successful.

Id Number	**1075690880**	ICCID	8901260642110560799	Last Name 1129613803
ESN	100000007683179	MSID	T10000180619	Queue
MIN	T10000180619	Model	SMZEZ930G3P5	Status Closed
Carrier Id	1113385	Phone Model	SM ZTE Z930G GSM HANDSET SIM 5	Due Date 4/29/2018
Carrier Name	T-MOBILE SIMPLE	Retailer	TRACFONE-BRIGHTPOINT-DIST.	Owner ASARMIENTO
Ticket Type	Units	Priority	High	Issue Not Able to Make or Receive Calls
Title	Replacement Service Plan	Condition	Closed	Org ID SIMPLE_MOBILE
Creation Time	5/8/18 11:31 AM	WipBin		
Activation Zip	33178	First Name	copy 1	

[Cancel] [Re Open] [Tech Exchange]

Compensation

Compensation Minutes/Days are issued in order to compensate or give additional minutes/days (more than what they originally purchased) due to inconvenience.

1 Enter MIN and select Search Service.

2 From the Transactions tab select Redemption.

3 Select Compensation or Replacement tab.

4 Select Replacement as Action Type, then choose the Reason from the dropdown.

5 Select the amount of buckets to be added and add notes. Select Process.

6 A Ticket Number will appear to confirm that the process is successful.

Auto-ReUp

Auto-ReUp is a plan that charges the customer's credit/debit card a set dollar amount for the desired Service Plan every thirty (30) days. The system updates the MIN's status on the carrier's billing platform and resets the benefits. A text message and email (if an email address was provided) are sent informing the customer of the charge.

This section will allow you to enroll the customer in the Monthly Auto-ReUp plan if the phone is active.

NOTE!

✓ The monthly plan will renew, and be charged to the customer's credit card, on the next cycle date.
✓ The customer will be enrolled in the same plan the phone is currently active with.
✓ If the customer would like to enroll in a different plan, they will need to Add/Buy the Service Plan they would like to enroll in. The card will need to be added to the reserve and the customer will need to wait until the end of the period to see the plan changed.
✓ If the customer calls to purchase airtime and request to enroll in Auto ReUp, there is no need to ask for the security question. However if the customer is calling just to enroll in Auto Refill with a new credit/debit card; ask the security question.

1 Select Enrollments from the Transactions tab.

2 Select Change Plan only if the customer requests to change the plan. If not, skip to step 3.

Auto-ReUp with Credit Card on File

3 Select the Payment Source and check the Setup Auto Refill box.

Payment Selection

Payment ***********6161 06/2024 MasterCard ▼ CVV 123

[Update Payment] [Add New Payment] [Refresh Payment]

Enrollment

☑ Setup Auto Refill   Account Enrolled: NO

4 Select Enroll All.

Charge Preview

Calculated Tax Zipcode	33178	Estimated Amount	50.00
Sales Tax Due	2.80	Total Discount	-10.00
E911 Tax due	0.80	Total Charges	40.0
USF Tax due	0.52	Total Taxes Due	4.20
Misc Tax due	0.08	Total Amount Due with Tax	44.20

[Calculate / Refresh]

[Add Additional Line] [Enroll All] [De-Enrollment]

5 You will then see the Transaction and Billing Summary and will have the option to send the customer an email with their receipt or update their email address, if needed.

Transaction Summary

Message Email sent to SMWB@TEST.COM

EMAIL SMWB@TEST.COM   [Send Email]

Thank you for Enrolling in Auto ReUp!

Transaction Details

Account Number	Auto Pay	Payment Type	Order Id
***********1396	YES	CREDITCARD	89121-15249622-796230

Auto-ReUp with No Credit Card on File

3 Check the Setup Auto Refill box. Select the Add New Payment.

Payment Selection

Payment Please select payment method ▼ CVV 123

[Update Payment] [Add New Payment] [Refresh Payment]

Enrollment

☑ Setup Auto Refill   Account Enrolled: NO

4 Select Credit Card and enter the credit card information.

Payment Method Info

◉ Credit Card ○ ACH

* Credit Card Number [   ]

* Credit Card Type **Visa**

* Expiration Month [▼]

* Expiration Year [▼]

5 Enter the billing information of the customer or you can check the Use my Contact Information box to populate the customer's contact information.

6 Select Register Payment.

7 Select Refresh Payment then select the Payment Source.

8 Select Enroll All.

9 You will then see the Transaction and Billing Summary and will have the option to send the customer an email with their receipt or update their email address, if needed.

Auto-ReUp Cancellation

If a customer decides to cancel their enrollment in Auto Re-Up, follow the steps below.

1 Select Enrollments from the Transactions tab.

2 Select De-Enrollment

3 Select De-Enroll once the confirmation message appears.

4 You will then see the Transaction and will have the option to send the customer an email with their receipt or update their email address, if needed.

NOTE!

Auto-ReUp for accounts with multiline will enroll all active devices. The same rule applies to cancel enrollment.

Auto-ReUp Scenarios

Auto-ReUp Enrollment

The option Setup Auto-Refill (or Auto Re-Up) is available when purchasing a service plan.

If the customer agrees to enroll in the program, check the box for Setup Auto-Refill.

Payment Selection

Payment [▼] CVV [ ]

[Update Payment] [Add New Payment] [Refresh Payment]

Enrollment

☐ Setup Auto Refill

Data Add-on Bonus with Auto-ReUp Enrollment

If a customer has been throttled and they are not currently enrolled in Auto-Refill, the following message will appear in Jacada:

> This customer is currently throttled, within their last 10 days left in their cycle. Please check TAS, if not enrolled in Auto-Refill, offer a free Data Add-on card if he/she enrolls today.

If the customer agrees, complete the Auto-Refill enrollment and generate a Workforce PIN for a data add-on plan (select the lowest denomination available).

NOTE!

Please keep in mind that this offer is a ONE TIME COURTESY. Review the case and interaction history to see if someone made a similar offer to the customer. If the customer previously received a complimentary data add-on plan as an incentive to enroll in Auto-Refill, DO NOT issue another data add-on plan. However, if the customer requests to purchase a data add-on plan, proceed with the sale.

REMINDER: You must enroll the customer in Auto-Refill BEFORE generating a Workforce PIN for the complimentary data add-on plan. **If the customer is currently enrolled in Auto-Refill, DO NOT offer or issue a free data add-on plan.**

You must address all the customer's concerns if they are calling for any other reason (besides being throttled).

Auto-ReUp Charges via SmartPay (for Simple Mobile Only)

If the customers call in claiming that they are paying for a phone plus airtime via SmartPay and also being charged with Auto-ReUp by SmartPay, follow the process below.

1. Create a Sales Support Miami Escalation/Refund Escalation Ticket.
2. De-enroll the customer from Auto-ReUp.
3. Inform the customer that he will be notified within 48 hours.

> **IMPORTANT:** There is no way you can check and verify the customer's claim(s) using your tools. By creating a refund ticket, an SME will investigate the customer's account via SmartPay.

Automated Customer Survey

All customers will receive an automated survey via SMS after every call. Agents are no longer required to ask or send the survey to the customer. As always, provide Excellent Customer Service on every call.