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NOTEPAD

REFERENCE GUIDE

TracFone Wireless Inc.

Introduction

We are making it easier to notate a customer's interaction in order to service our customers more efficiently with an improved Agent Support Notepad. In Notepad, you will be making selections and in very few areas entering brief notes. The purpose of the Notepad is to ensure that the next representative taking over the call has the information required to continue assisting the customer. All TAS Interactions will be updated with the information you will be copying and pasting from the Notepad. No interaction work is to be done in Jacada.

IMPORTANT: In scenarios where the call has been blind transferred, use the allotted 20 seconds after call time (ACW) to complete the transfer of only the information from the Notepad to TAS Interaction.

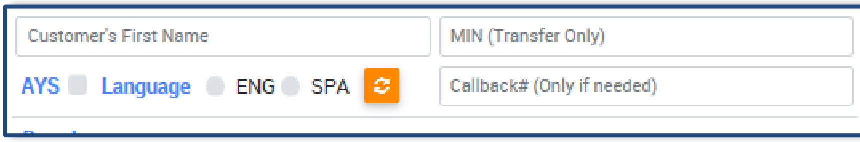
NOTE: If during the call, the call is disconnected, go ahead and create an interaction. After this, continue with the call back. Once the call back is done, you must create another interaction with selections based on the final resolution of the call.

How It Works

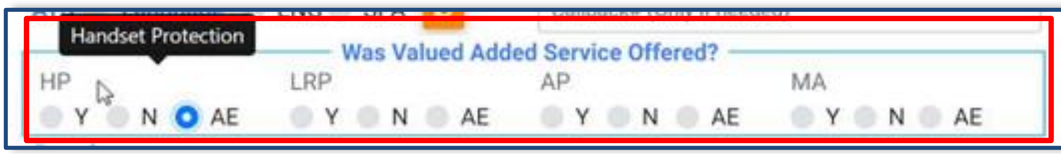
1.Once you access the Notepad in Agent Support, fill out the following:

- First Name
- MIN (if transferring the call)
- Callback number (only if needed)
- The orange icon is a Refresh button to be used once the information has been transferred to the Interaction and you are ready for the next call.
- Language- Select the appropriate button to identify if the call is in English or Spanish.
- AYS- Survey Team Representatives will be selecting the AYS (At Your Service) button. After you have selected the AYS button, Continue to next steps.

NOTE: Only the Survey Team should be selecting the AYS button.

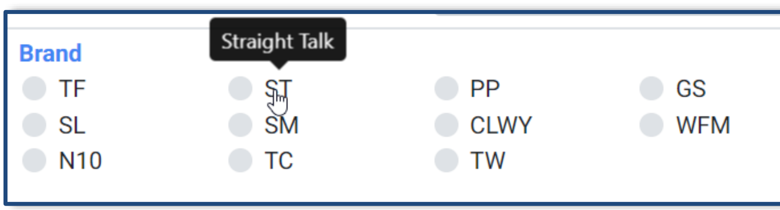


- Enrollments- This new section will ask if the customer was offered any Value-Added Services like Handset Protection (New VAS added), Loyalty Rewards, Autopay, or My Account. If during the call you offered any of these options, select Yes. If the customer is already enrolled, select AE (already enrolled).



2.**Brand** - here you will select the brand the customer is activated with.

If you hover over any word abbreviation, you will see the full title. See example below.

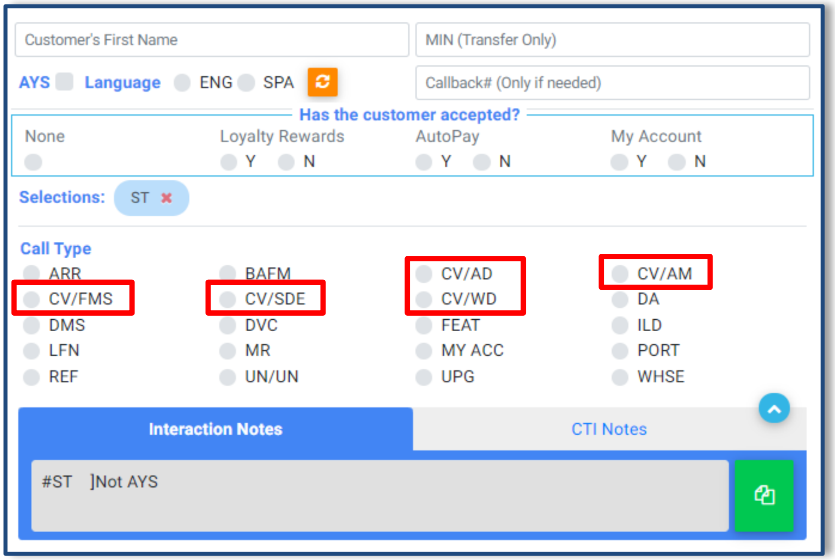


3. **Call Type** - These Call Type options to select from are the ones that have been reported the most. You will select the best option that identifies the issue the customer is having.

NOTE: All Call types now have Call Reasons to select from, including those of which had the option for only Main Steps Taken.

For example: Activation- Customer usually calls to activate or reactivate their handset either with an Airtime Pin ready to add or to purchase an Airtime Plan with you. In this scenario, you will select ARR (Activation/Reactivation /Redemption) from the Call type list.

NOTE: We have added 5 new Call Types due to Coronavirus. See below for type and abbreviation. You will select Successful under Disposition for all these new call types. Do not create a ticket or transfer the call.



CV/SDE (Service Days Extension): Use for calls pertaining to customers asking for their service days to be extended.

CV/AM (Additional Minutes): Use when a customer is asking for additional minutes due to the COVID-19 situation.

CV/AD (Additional Data): Use when a customer is asking for additional data in relation to COVID-19.
CV/FMS (Free Month of Service): Use when on a COVID-19 call and the customer is asking if the company is providing an additional month of service.
CV/WD (Wants Discount): Use when a customer is requesting a discount or asking questions if we are providing discounts.

3.a **New Call Reasons have been added to some Call Types.**

1. New Call Reason "**Dealer call**" has been added to the following call types; **Activation/Reactivation/Redemption, Data, Features, Loss Prevention, Port, Refund, Unable/Unable, Upgrade.** (This reason should only be selected by reps who handle dealer calls).
2. New Call Reason "**Carrier call**" has been added to Port Call Type.
3. New Call Reasons "**Frequently Asked Question, SIM Exchange, Refused Offer/ Assistance**" have been added to Migration Required Call Type.

Note: New call types added with one being moved. Changes made are as followed:

1. New call reason under **Call Type** Activation Reactivation Redemption – **AWS Activation with SIM**
2. One **Call Reason** moved to **Call Type** Activation Reactivation Redemption- **SVP Service Plan**
3. **Phone Instructions** was removed.
4. For all other changes, see chart below.

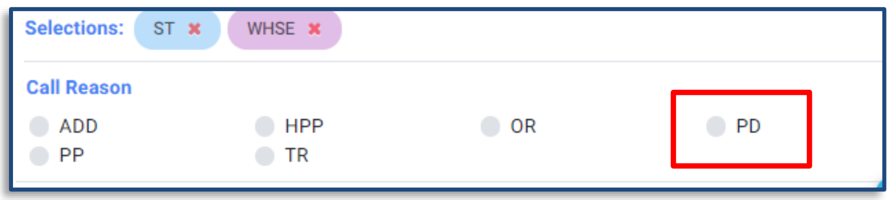
Short Code	Call Type	Short Code	Call Reason	Remarks
ARR	Activation/ Reactivation/ Redemption	AWS	Activation with SIM	*Add*
		BC	BYOP Compatibility	*Add*
		PSU	Phone Set Up Instruction	*Add*
		LRP	Loyalty Rewards Instruction	*Add*
		SVP	Service Plans	*Move from Device to ARR*
		HP	Handset Protection Instruction	*Add*
DMS	Data/MMS	MMS	MMS Instructions	*Add*
		EDI	Enable Data Instruction	*Add*
		ABI	Access browser Instruction	*Add*
DVC	Device	PHI	Phone Instructions	*Remove*
		SVP	Service Plans	*Move to ARR*
		EHI	Enable Hotspot Instruction	*Add*
FEAT	Features	VMI	Voicemail Instruction	*Add*
		SMS	SMS Instruction	*Add*

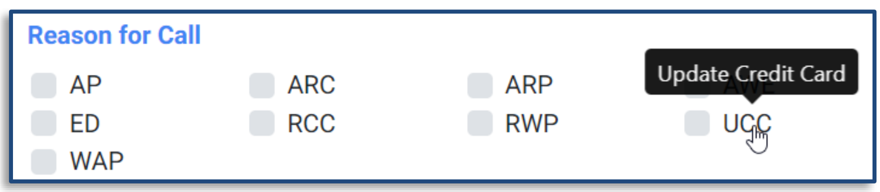
4.Depending on the Call Type selected, you will see either: Reason for Call or Main Steps Taken.

a. **Reason for Call:** Here you will select the reason you have identified the customer is calling for. If you identified more than one issue, select the main reason.

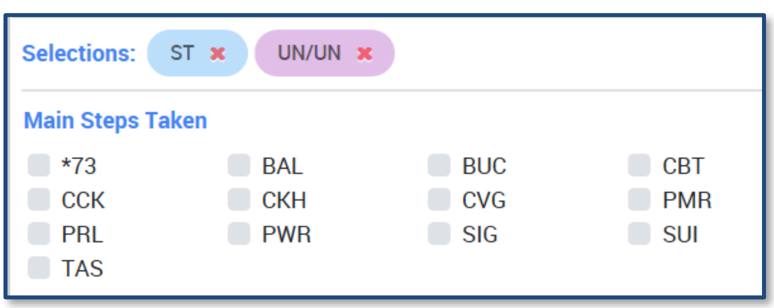
NOTE: If the customer calls for a reason and once this is addressed the customer mentions something else, you will select the main reason the customer called for.

- There is a new call reason under **Warehouse** called **Purchase Device**. This should only be selected by a CC skill agent. See below.
- Call reason **Upgrade Completed** (UC) is now added under **Upgrade** (UPG) call type.



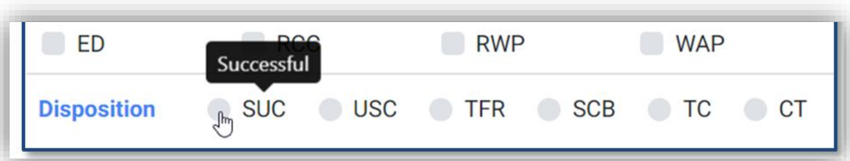


b. **Main Steps Taken:** Here you will only select the steps that you took to attempt to fix the customers issue and were completed successfully. Keep in mind this is NOT a mandatory checklist.



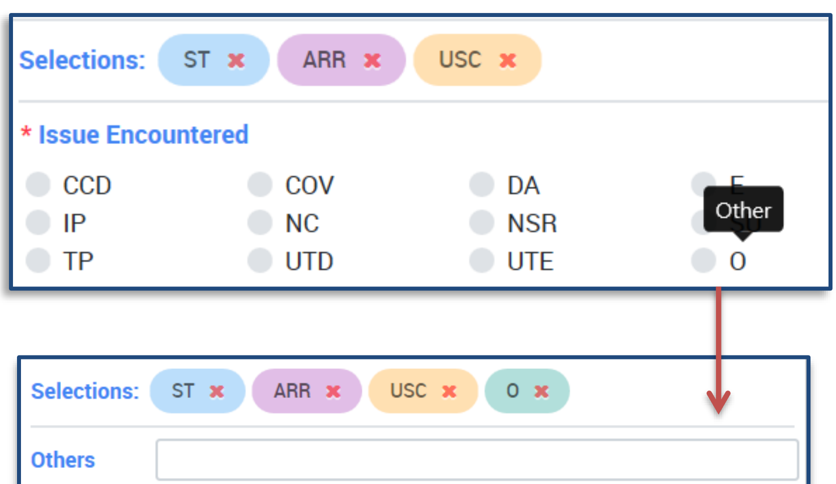
Note: The selection of **Main Steps Taken** will help the next CSR determine where to continue and avoid repeating the same troubleshooting steps. If you receive a call from a scheduled callback or the customer was transferred, review the steps taken by the previous CSR documented on the Interaction. **Do not** repeat the previous troubleshooting done with the customer.

4. Disposition: Here you will select how you finished the call (end result). Please be advised; If you're a Tier 3 CSR and received a call back from a customer calling from the phone, you must select SCB as Disposition and then select "Other". In other, write "No Alternate Number".



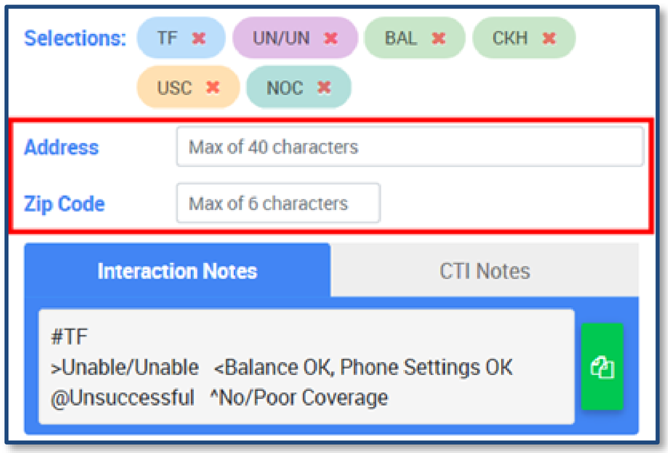
Note: Only selecting Successful will complete the notes. All other selections will take you to the next step.

If you select anything other than Successful, you will see **Issue Encountered** section. Here you will select the issue that identifies the reason why the call was not successful. If the issue encountered is not listed, you can select "O" for Other and type the reason within 80 characters or less.

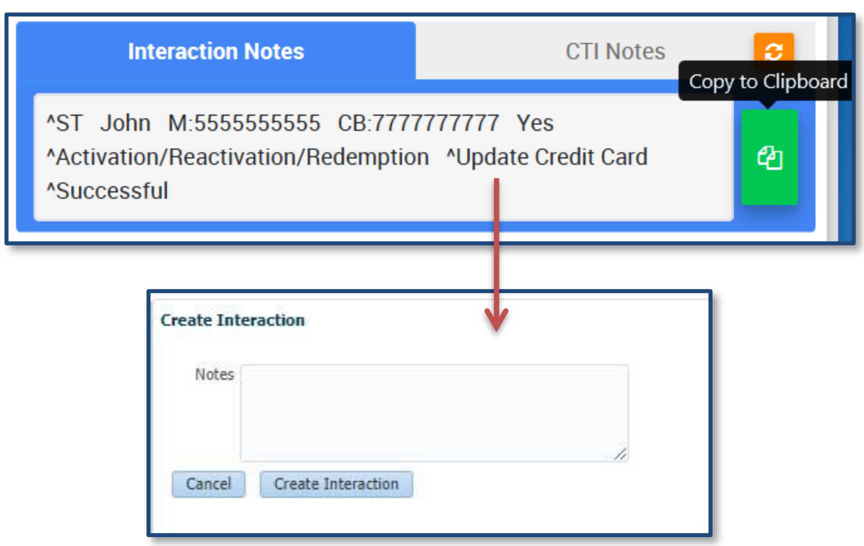


There are some Reasons for Call that will prompt you to enter the customer's address and zip code in an open box field.

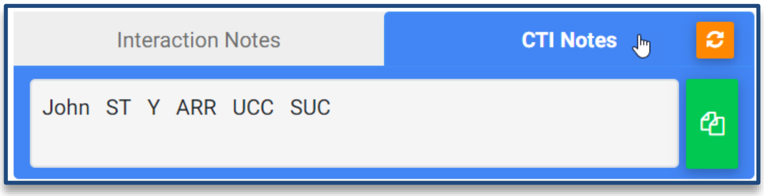
Example: **No/Poor Coverage (NOC)** option under Issues Encountered.

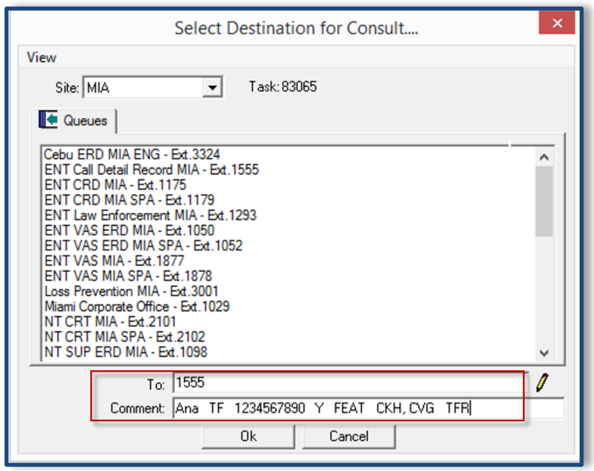


6. Copy to Clip Board: Once you have filled all information, selected the Call Type, Reason for Call or Main Steps Taken, Disposition and Issues Encountered, you will click on the green button to Copy the results and paste onto the Notes section in the TAS Interaction within your allotted after call time of 20 seconds.

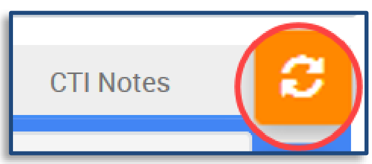


IMPORTANT: If the call needs to be blind transferred, Click on CTI Notes, click on the green button to copy the information from the CTI Notes section and paste it into the Comment section of the CTI tool:



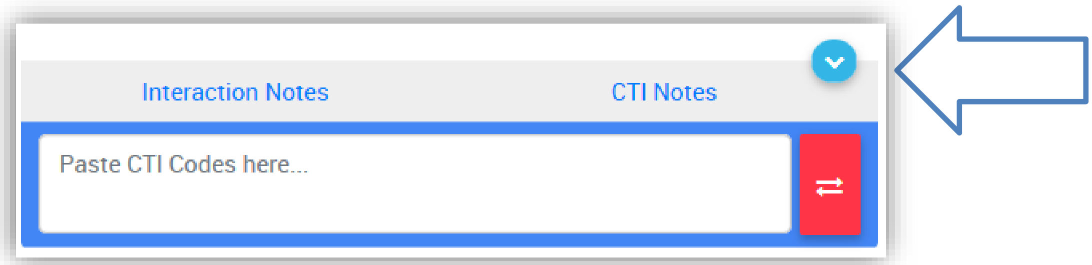


Reminder: When you are ready to begin a new call select the orange Refresh button.



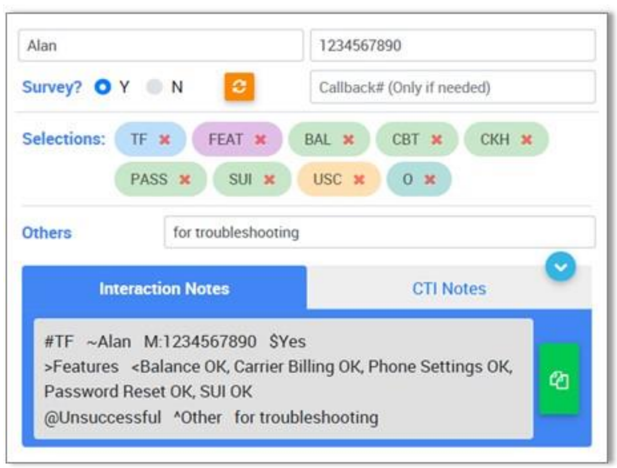
As the receiving representative, follow these steps:

1. Copy comments from CTI and open Notepad.
2. Click on **Toggle Up** (Blue) button to hide the form and proceed to the decoder.



3. Paste the received CTI codes and click the Decode CTI button to proceed.

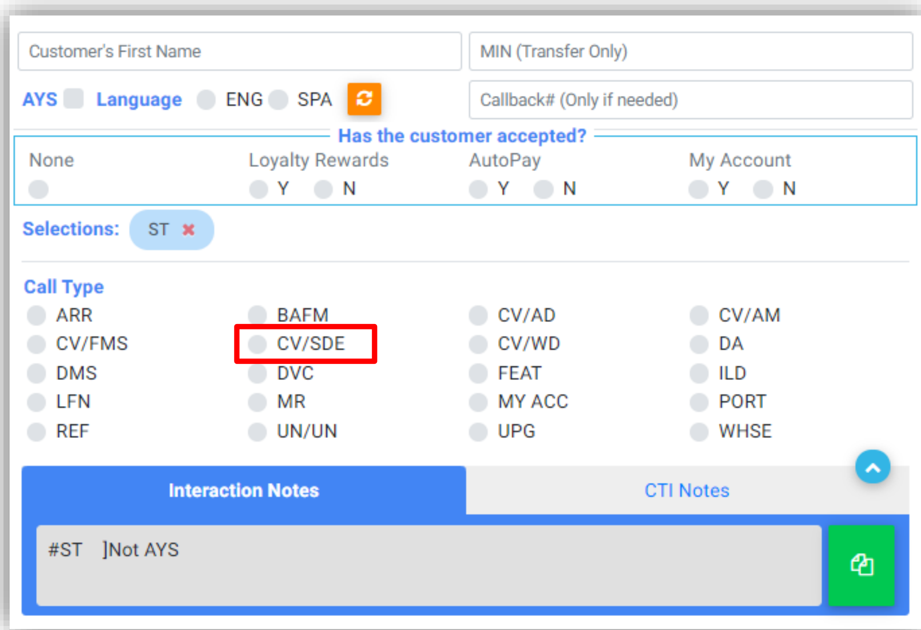
4. The form is displayed again, now pre-populated with the submitted values. As the receiving representatives, you may unselect all populated by the previous representative to where you want to begin your interaction notes. No need to refresh and start all over.



Corp ERD Bridge Representatives

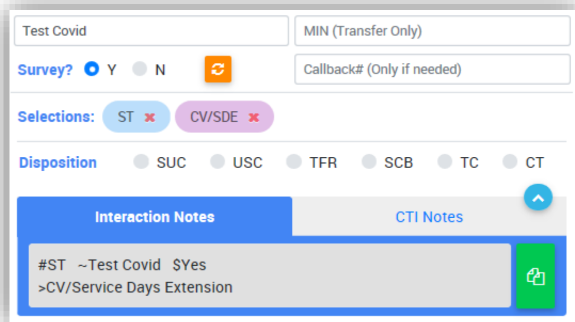
The following is for the Corp ERD Bridge Reps. You now can write down a brief message about what the customer is calling in for related to covid19. Follow the steps below to get to the "Others" tab to write this message.

1. You will select the CV/Service Days Extensions under call type. See below

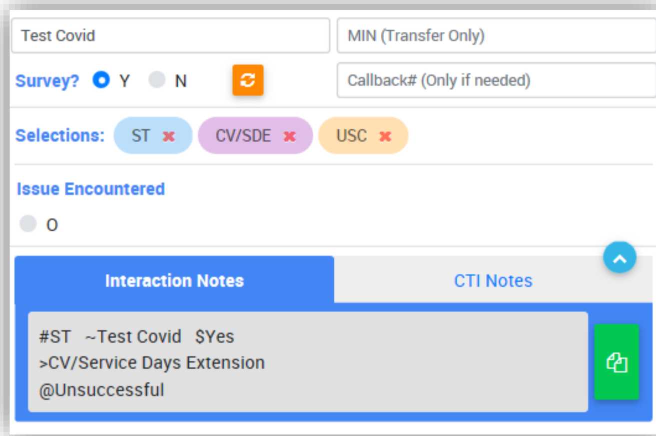


2. You will be presented with the disposition.

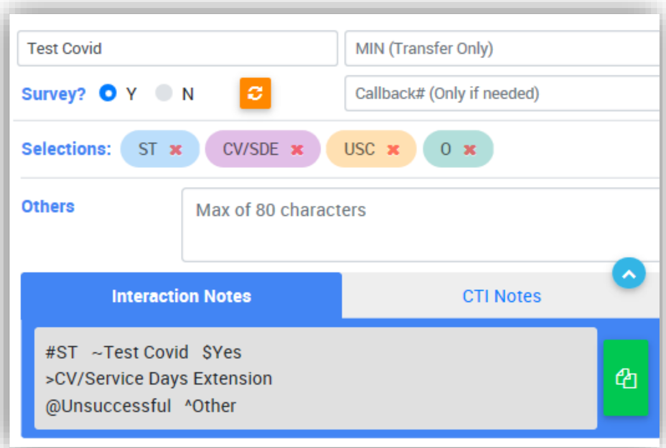
   Note: Only when selecting this Call type (CV/Service Days Extensions) is when you will be presented with all the dispositions to select from.



3. If you select a disposition other than successful, you will be presented with the Issues encountered field where you can select "Other ". See below



4. Once "Other" is selected, you will have an open box to enter a brief message of what the customer asked for.



Agent Support Keywords: Notepad, Notes, CTI, Copy notes, reason for call, bridge, AYS.