



# NEW HIRE **INTRODUCTION**

## Training Manual

Tracfone Wireless, Inc.

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# Table of Contents

Chapter 1: .....	4
Introduction to Tools and System .....	4
Citrix.....	5
Application Folder .....	5
Change Citrix Password .....	6
Avaya one-X .....	6
Logging into Avaya one-X.....	7
Computer Telephone Interface (CTI) – International Center (IC).....	7
Logging into Avaya IC Client.....	8
Opening Spiel .....	9
IC Client Control Panel .....	10
Taking Calls.....	11
Transfer Calls.....	12
Outbound Calls.....	13
Impact 360 .....	13
Logging into Impact360 .....	13
Agent Assist Tool.....	14
Schedule a Call Back .....	14
Agent Support.....	16
Search Engine Functionality.....	16
Agent Support Notepad.....	18
Customer Support SME Tool.....	22
611611 Servies .....	22
Tax Reference Tool .....	23
Rocket Chat.....	24
Chapter 2 .....	28
Tracfone Agent System (TAS).....	28
Ticket Page.....	29
Console Page.....	30
Left-hand Side Menu .....	31
Incoming Call Page .....	32

Contact Actions Menu .....	32
ESN Support Menu .....	39
Carrier Support Menu.....	43
TOSS Util Menu .....	44
Tutorials/Instructions Menu .....	45
Transactions Menu.....	46
History Menu.....	49
Support Page.....	52
Carrier Support Menu.....	55
Toss Util Menu .....	55
Admin Page .....	56
Chapter 3: Call Management .....	57
Tracfone Metrics and Goals .....	58
Standard Call Handling Procedures.....	59
Welcome Calls.....	60
CTI Call Greetings .....	60
Transfer Guidelines.....	61
Escalation Guidelines.....	61
Identifying Call Types.....	62
Keeping the Customer Updated.....	62
Outbound Call Script.....	63
Procedure for Disconnected Calls .....	63
Chapter 4: Introduction to Customer Transactions .....	64
Putting an Account into Session.....	65
Creating a New Contact Account .....	65
Add an ESN to another Account.....	67
Security Questions.....	68
Identity Challenge.....	68
Customer Verification Guidelines.....	69
Main and Member Account Contact .....	70
Main Account Contact .....	70
Member Contact .....	71
Updating The Main Account Contact (Primary) .....	72

Opt-In Communication Preference .....	73
Sales Order Research.....	73
Ingram Micro Mobility.....	74
Search Merchant Reference Number.....	78
Service Profile Page .....	79
TAS Scripts.....	82
Reviewing Flash Announcements in TAS .....	83

# Chapter 1:

## Introduction to Tools and System



Now that you have learned about the different products and services available, let's take a look at the various tools, systems, and processes that you will use. As a TracFone CSR, you will use a variety of systems that will be presented and explained throughout this manual. The processes and procedures outlined in this training manual applies to the following company brands: TracFone, Net10, Straight Talk, SafeLink, Total, Simple Mobile, and Telcel.

## Citrix



Also known as DP\_Portal, Allows you to easily access all of the tools needed to process customer transactions. To access the Citrix/DP\_Portal, click on the shortcut found on your desktop and login.

To access your Citrix, click the DP\_Portal icon, and follow the steps below:

- 1 Enter your username and password.

A screenshot of a Citrix login interface. It shows two input fields: 'User name:' with 'baq1plublanco' and 'Password:' with a masked password. Below the fields is a large blue 'Log On' button.

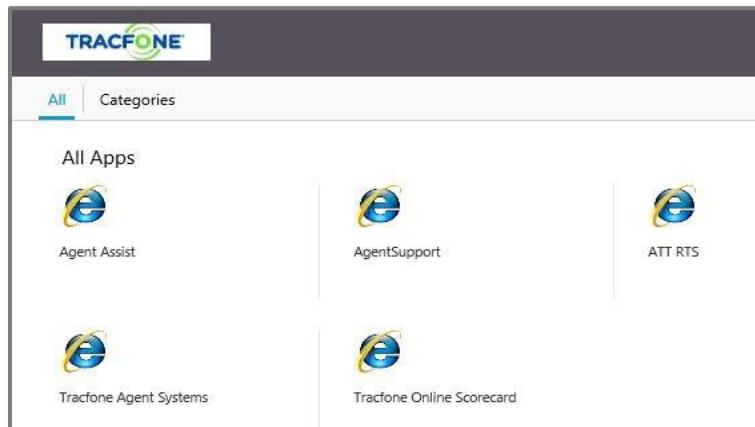
- 2 Select Log On.

## Application Folder

You must register every application prior to initial use within Citrix.

To register an application, follow these steps.

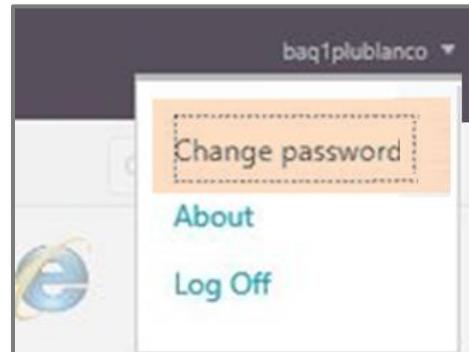
- 1 Select the application.
- 2 Answer each security question
- 3 Submit your answers



## Change Citrix Password

To change your Citrix Password:

- 1 Click on the dropdown arrow next to your Citrix username (in the top right corner) and select Change password.



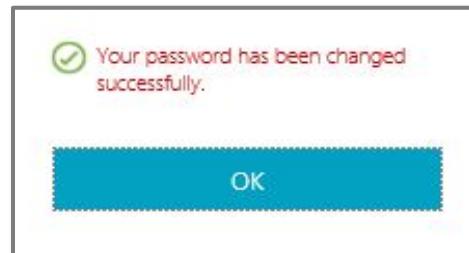
- 2 Enter your old password, along with the new password (twice). Select OK.

User name:	tfcitrix.com\baq1plublanco
Old password:	*****
New password:	*****
Confirm password:	*****

OK Cancel

- 3 You will receive confirmation that the password has been changed successfully. Select OK to continue.

If you are locked out, call ext 1200 for assistance.



## Avaya one-X

The Avaya IP Agent System can be used to:

Make/receive calls

Transfer Calls

Place a customer on hold

Keep track of your breaks and attendance

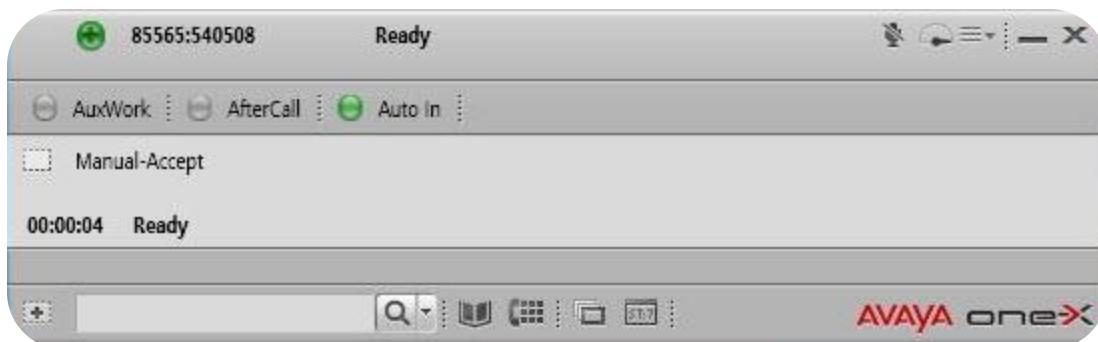
## Logging into Avaya one-X

Within Citrix, select the Avaya one-X Application.

- 1 Enter your Agent ID and password.
- 2 Select Log In.



The Avaya one-X Control Center:



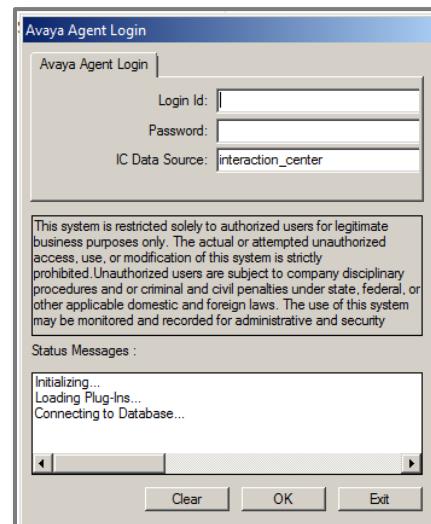
## Computer Telephone Interface (CTI) – International Center (IC)

In addition to your normal login procedure for Avaya one-X, you will also need to log into the Avaya IC client. You will have a separate login ID for the IC Client. When you receive calls, the customer's information (*if available*) will come through the Avaya IC Client and then place the account into session in TAS.

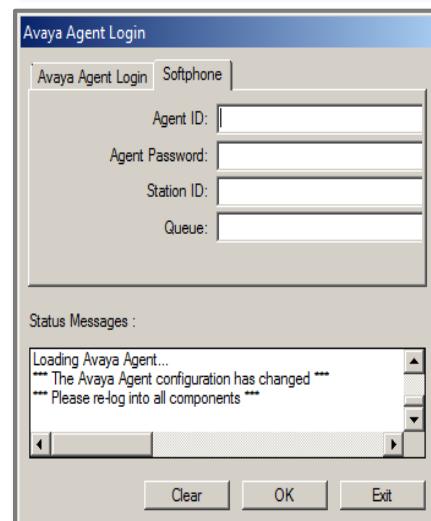


## Logging into Avaya IC Client

- 1 Log into Avaya one-X.
- 2 From the Citrix window, open the IC – Interaction Center application and select OK on the Legal Notice Pop-up
- 3 Enter your assigned Login ID and Password and select OK.



- 4 The login popup window will appear again. Switch to the Softphone tab and enter your Avaya login information. Select Ok.



An error message may appear: *Softphone Login Failed: Bad object state. Do you want to retry?*  
Select Yes to continue.



The IC Client toolbar will appear at the bottom of your screen. You are now ready to take calls.



- !** If you experience trouble logging in or if you enter your username/password incorrectly more than three times, the IC Client toolbar will appear but you are NOT logged in.

Try to log in again:

- 1 Right-click on Contacts.
- 2 Select Softphone-Login.



- 3 Enter your Login ID and Password.
- 4 Select OK. You are now ready to take calls. TAS will pop up once you successfully log into the IC Client.



## Opening Spiel

### With CTI Information

*"Thank you for calling (**brand name**), my name is (XXX). Are you calling in reference to the number ending in XXXX?"*

*"May I please have your name?"*

### With No CTI Information

*"Thank you for calling (**brand name**), this is (your name). How may I assist you today?"*

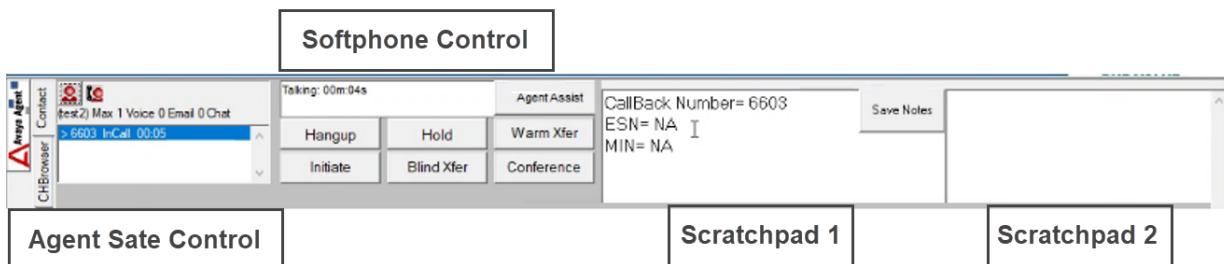
*"May I please have your name?"*



- If TAS does not populate the customer's account, use the last 4 digits that are displayed in CTI.
- If AVAYA does not show a specific brand, or if the brand is undetermined, answer the call with your name.

## IC Client Control Panel

The IC Client control panel provides a snapshot of the customer's account details. Now let's take a closer look at each section.



### Agent State Control

When ready to take calls, you will select the AUX button to "Auto-In". You will also use the AUX button for breaks, lunch, meetings, call backs, training, system trouble, etc. An updated list of the AUX reason codes can be found in Agent Support.

#### Change Aux Reason

If you are not taking incoming calls, you must follow this process to reflect the reason in Avaya:

1. Right click on the Aux button and select Change Aux Reason
2. Select a reason code and press OK

### Softphone Control

You can use any of the Softphone Controls while on an active call.

Screen Pop

Hang Up

Hold

Warm Transfer

Blind Transfer

Conference

Initiate (an Outbound Call)

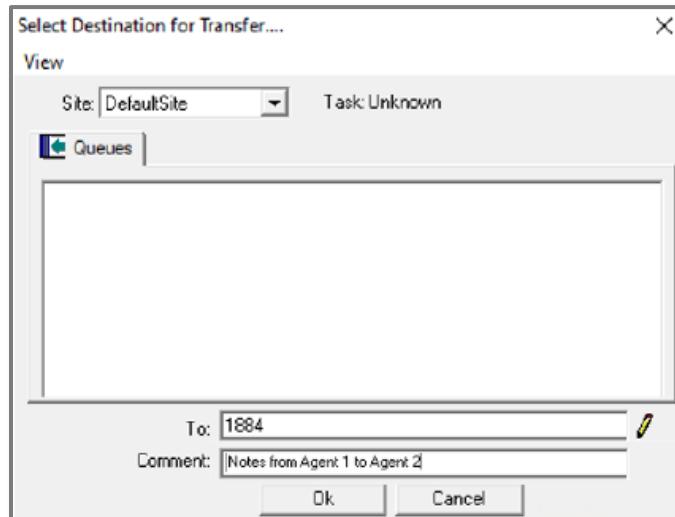


## Scratch Pad Panels

- Scratch Pad 1 will display the customer's information
- Scratch Pad 2 allows you to add notes. It will also display the notes coming from the Agent Assist Tool (additional comments sections) and the Comment field when transferring a call.

## Save Notes Button

- This button must be selected after adding notes on the scratch pad.
- If you need to transfer a call and you added notes on the scratch pad, always make sure to select Save Notes before transferring the call. This allows your notes to be transferred to the next assisting agent.
- You can also add notes on the comment field before transferring the call.



## Taking Calls

- 1 To begin taking calls, press the AUX button  on the IC client toolbar. You must keep the CTI Toolbar visible on your screen at all times.
- 2 If CTI information is available, the toolbar should auto-populate the call details. The customer's account information should also appear in the Profile section in TAS.
  - If TAS is blank or any other scenario in which the number does not display properly, even if Avaya or the CallBack number displays a valid phone number, you must use the opening script.
- 3 When the call has completed, you will enter After Call Work. **DO NOT keep the customer on the line in order to create an interaction. There are 20 seconds allotted after every call that allows you to create an interaction on the customer's account.** After the appropriate time has elapsed (20 secs), the IC client will Auto-in automatically.
  - EDU Values and TAS Profile will remain in session until you receive another call. Copy/Paste from the EDU Viewer as needed.
  - Sample situational scripts and department greetings/closings can be found in Agent Support.

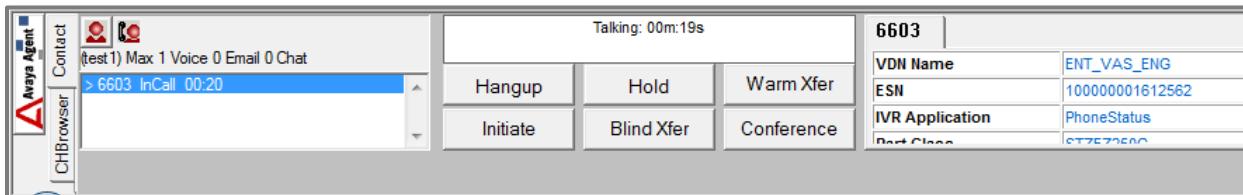
## Transfer Calls

Always start with a blind transfer, unless otherwise indicated in the Transfer Guidelines located in Agent Support.

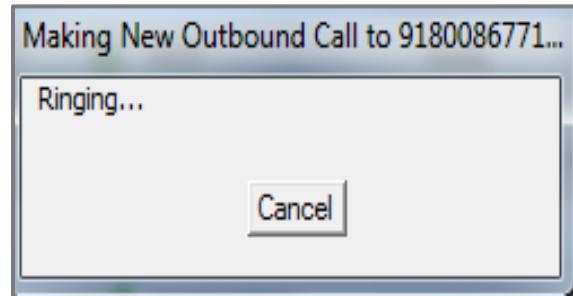
**Exception:** When contacting the carrier, you must use the Conference feature. DO NOT blind transfer a call the carrier.

### To transfer calls:

- 1 When transferring a call, DO NOT go onto AUX 4. The system will automatically place you into ACW when transferring the call.
- 2 From the Softphone Control section, press the designated button.
  - To Transfer, select Blind Xfer or Warm Xfer.
  - To place an outbound call, select Initiate.
- 3 Enter the appropriate extension or customer's contact number in the "To" field and press OK. If necessary, enter notes in the Comment field. Keep the comments short and concise to assist the next agent.



- 4 A dialog popup window will appear in the upper left-hand corner. It will display "dialing" then "ringing". Wait until the call connects.

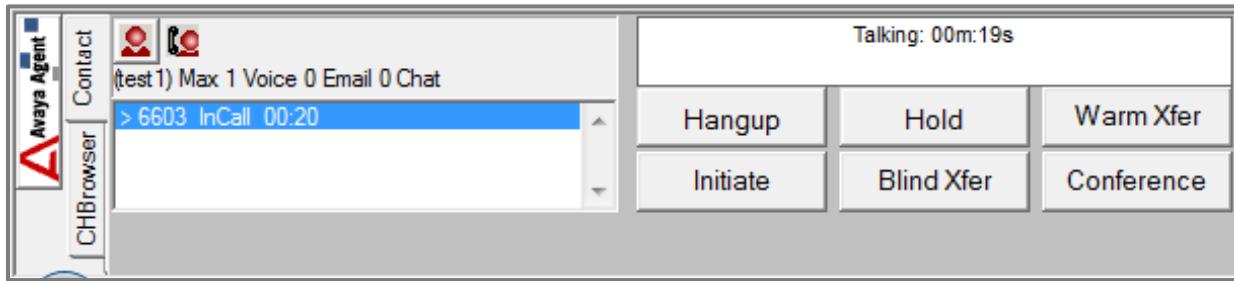


For warm transfers, you will see 3 options available:

- **Switch** – to interact (switch back/forth) between multiple parties on the phone
- **Complete** – to complete the transfer
- **Cancel** – to cancel the transfer

## Outbound Calls

To make an outbound call (call back):



- 1 Place yourself on AUX (use the appropriate AUX code).
  - 2 Press initiate and follow the call flow accordingly.
  - 3 Once the call is completed, remain in AUX to document the call. REMEMBER: you only have 20 seconds.
  - 4 When finished, Auto-in to be ready to take the next call.
- Make sure to always use the 1-digit code when going into AUX. An updated list of the AUX reason codes can be found in Agent Support.

## Impact 360

Customer Care Representatives use **Impact 360** to:

- ✓ View their weekly work schedules
- ✓ View and request exceptions (adjustments) to their schedules
- ✓ View days off and break schedules
- ✓ Review quality monitoring

## Logging into Impact360

- 1 Selectg the Impact360 Application within Citrix.



- 2 Enter your Username and Password



- 3 Select Logon.

**Things to remember:**

Please take the following into consideration when working with CTI IC.

- Aftercall work (ACW) CANNOT be altered manually. Once the call ends, you will have 20 seconds before the system switches to Auto-in. **DO NOT keep the customer on the line in order to create an interaction. There are 20 seconds allotted after every call that allows you to create an interaction on the customer's account.**
- New calls will automatically refresh on the Incoming Call page. For example, if you are on the Support page when the call ended (in ACW), TAS will redirect to the Incoming tab with the CTI information when another call comes in, when applicable.
- Remember to periodically check in the Ticker page in TAS to check for latest updates.
- If CTI IC client goes down and you are unable to log in, you can continue to work using Avaya one-X.
- There are instances when the CTI IC toolbar will refresh without information, depending upon if any information was entered in the PBX/IVR flow(s). If the VDN name is populated in the EDU Viewer (e.g. "ENT\_VAS\_ENG") then it is working as expected.
- Do not open a separate TAS window using Citrix. The information will not be in sync with the IC client. If on an extended call, select Refresh in the Service Profile.

## Agent Assist Tool

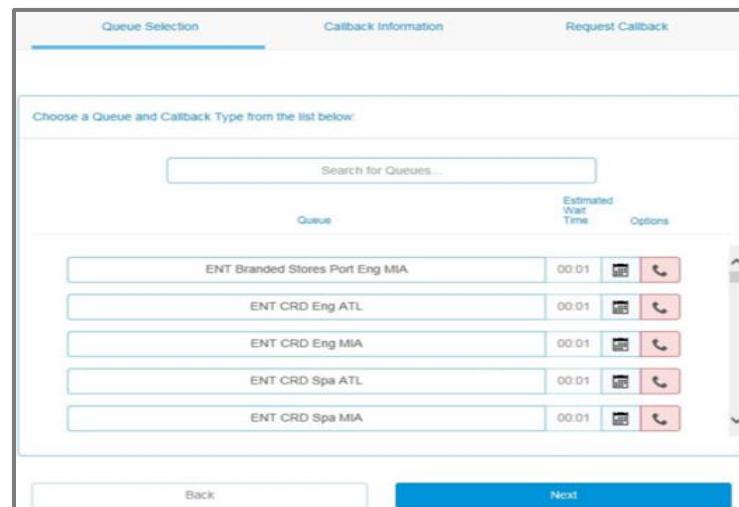
The Agent Assist Tool allows you to schedule a call back, when necessary. This must be done for both English and Spanish skills. If the customer is calling from the phone or cannot remain on the line while troubleshooting, schedule a call back to ensure everything is working as expected.

### Schedule a Call Back

1 From your Citrix window, select the Agent Assist icon.

2 Select the queue and callback type based on the brand and organization you are working in.

3 Select Next.



- 4** Select an appropriate time for callback:

- **Time Zone** – Always select Eastern Time (US & Canada)
- **Scheduled Callback Date** – Select the desired date
- **Schedule Callback Time** – Select the desired time
- Select Confirm

Select an appropriate time for the Callback

**Time Zone:** (GMT-05:00) Indiana (East)

**Scheduled Callback Date:** 5/16/2018

**Scheduled Callback Time:** 1:15 PM

**Cancel** **Confirm**

- 5** **Callback Number** – Enter the customer's callback number

- 6** **Additional Comments** – copy the interaction notes from the notepad and paste it here.

- 7** Select Next.

Please fill in the required Callback details below:

**Callback Number:** 5678567822

**Additional Comments (optional):** Call for test

**Back** **Next**

- 8** Review the callback details and select Request Callback.

- If you need to make any edits, press Back and update accordingly

Please verify customer information before placing Callback

**Queue:** ENT Branded Stores Port Eng MIA

**Callback Type:** Scheduled

**Scheduled Callback Time:** 5/23/2018 8:00 AM (GMT-05:00) Indiana (East)

**Callback Number:** 5678567822

**Additional Comments:** Call for test

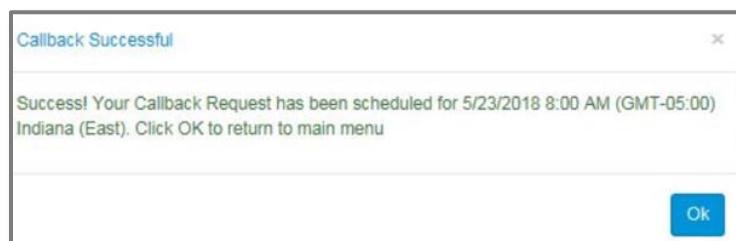
**Back** **Request Callback!**

9

A confirmation message will appear when completed. Select Ok.



Create an interaction in TAS, making sure to document the reason for the callback and any other information that may help the next agent.



## Agent Support

Agent Support is an internal knowledge base tool with helpful information such as:

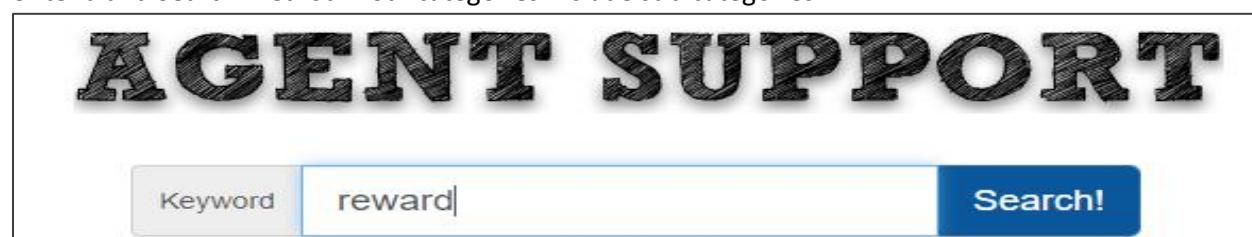
- ✓ The latest training materials
- ✓ How-to steps and troubleshooting guides
- ✓ Airtime and phone model details and promotional offers
- ✓ Various tools, loggers, and much more

Agent Support allows you to conduct a keyword search to quickly access the information you are looking for. Agent Support is embedded into TAS. You can access it from the External Links under ESN Support Menu.



## Search Engine Functionality

The Agent Support Tool has updated its Search Engine adding 2 new categories. These are Match Criteria and Search Method. Both categories include sub-categories.



Category	Value
Match Criteria	Match All
Search Method	Default

Sort By: Last Modified Relevance

**Match Criteria**

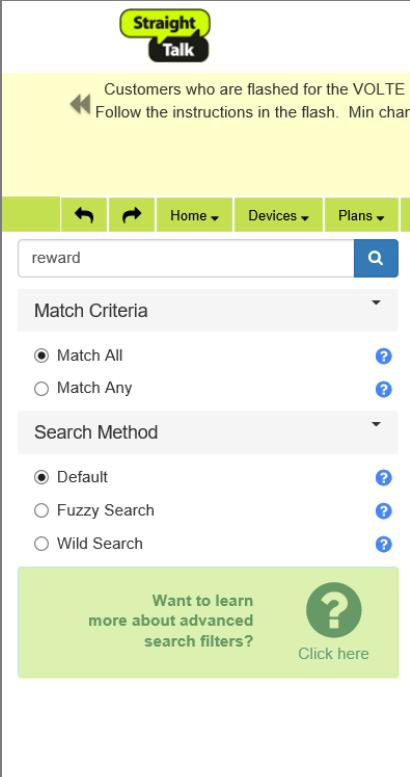
- **Match All** – it searches for documents that contain ALL of the inputted words.
  - For instance, inputting Value Plans would locate documents containing “Value” and “Plans”.
  - To search for the exact phrase, enclose the phrase in quotation marks, as in “Value Plans”.
- **Match Any** – it searches for documents that contain EITHER of the inputted words.
  - For instance, inputting Value Plans would locate documents containing “Value” or “Plans”.
  - To search for the exact phrase, enclose the phrase in quotation marks, as in “Value Plans”.

**Search Method**

- **Default** – it locates articles with exact matches to the inputted keyword or keywords.
  - When searching keywords in exact match in the article e.g. voicemail.
  - Search Result: Voicemail
- **Fuzzy** – it searches discover terms that are similar to a specific term without necessarily being an exact match.
  - For example, to search for a term similar in spelling to roam, use the fuzzy search: roam.
  - This search will match terms like roams, foam, and foams. It will also match the word roam itself.
  - Another example: Typed word is harassment and the match result will be harassment.
- **Wildcard** – for single character search, use the special character “?” e.g. The search string te?t would match both test and text.
  - For Multiple characters search, use the special character \*.
    - Aila would match available
    - Tes\* would match test, testing, and tester.
  - You can also use wildcard characters in the middle of a term.
    - te\*st would match test and text
    - \*est would match pest and test
  - To search for the exact phrase, enclose the phrase in quotation marks, as in “Value Plans”.

**Click Here**

- **Click Here** will provide you the quick summary of the Agent Support Search Functionalities.



**QUICK SUMMARY TO AGENT SUPPORT SEARCH FUNCTIONALITIES**

Category	Search Method	Operator (If applicable)	What It Does	Where to Use	Example	Searched Keywords
Match Criteria	Match All	AND	matches all of the inputted keywords	when searching keywords that both need to be present in the article	activation troubleshooting	"activation" AND "troubleshooting"
		"	both or all strings have to appear together in an article, with no other keyword in between	beginning, end	"activation steps"	"activation steps"
	Match Any	OR	matches any or at least one of the inputted keywords	when searching keywords that may have zero or minimal relevance to each other, and at least one keyword needs to be present	handset survey contact	"handset" OR "survey" OR "contact"
	Default		locates articles with exact matches to the inputted keyword or keywords	when searching keywords with exact match in the article	voicemail	voicemail
	Fuzzy Search		searches for words similar to other terms, also searches incorrectly spelled keywords	when terms don't have to be exact matches but with close relevance to the actual keywords	roam	roam, roams, foam, foams
	?		single character	anywhere within the article	harasment	harassment
				te?t	test, text	

## Agent Support Notepad

We are making it easier to notate a customer's account in order to service our customers more efficiently with an improved Agent Support Notepad. This notepad is replacing the current one in Agent Support. All interactions are to be done in this new notepad and in TAS. No interaction work is to be done in Jacada.



In scenarios where the call has been blind transferred, use the allotted 20 seconds after call time to complete the transfer of information from the Notepad to TAS.

Let's take a look at how it works:

- 1 Once you access the new Notepad, fill out the customer's first name, MIN (if transferring the call), and Callback number (only if needed).
- 2 Select if the customer has agreed to receive a survey or declined.

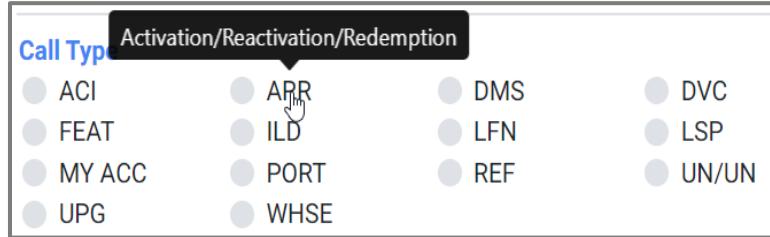
Customer's First Name	MIN (Transfer Only)
Survey? <input type="radio"/> Y <input checked="" type="radio"/> N	Callback# (Only if needed)

**3**

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

**4**

Select Call Type

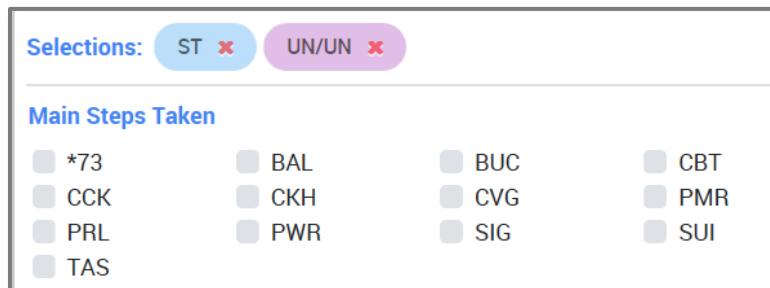
**5**

Depending on the Call Type selected, you will have two options: Reason for the call or Main steps taken.

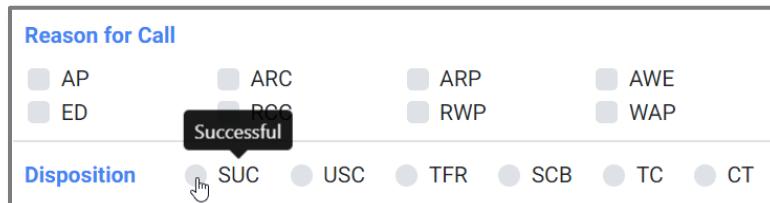
**Reason for the call:** If calling for more than one issue, select the main reason.



**Main Steps Taken:** Only the steps that were completed successfully. Keep in mind this is NOT a mandatory checklist.

**6**

Select the Disposition (end result).



- If you select anything other than Successful, you will need to select the issue encountered. If not listed, you can select “O” for other and type the reason within 20 characters or less.

**Selections:** ST ✖ ARR ✖ USC ✖

**\* Issue Encountered**

<input type="radio"/> CCD	<input type="radio"/> COV	<input type="radio"/> DA
<input type="radio"/> IP	<input type="radio"/> NC	<input type="radio"/> NSR
<input type="radio"/> TP	<input type="radio"/> UTD	<input type="radio"/> UTE
<input type="radio"/> Other		
<input type="radio"/> O		

- Depending on the selections, you will be prompted to enter the customer's address and zip code. The open box will populate when selecting No/Poor Coverage (NOC) option under Issues Encounter.

**Selections:** TF ✖ UN/UN ✖ BAL ✖ CKH ✖ USC ✖ NOC ✖

**Address** Max of 40 characters

**Zip Code** Max of 6 characters

**Interaction Notes** CTI Notes

```
#TF
>Unable/Unable <Balance OK, Phone Settings OK
@Unsuccessful ^No/Poor Coverage
```

- 7 Copy the results and paste onto the Notes section in the TAS interaction within your allotted after call time of 20 seconds.

**Interaction Notes** CTI Notes

```
^ST John M:5555555555 CB:7777777777 Yes
^Activation/Reactivation/Redemption ^Update Credit Card
^Successful
```

**Copy to Clipboard**

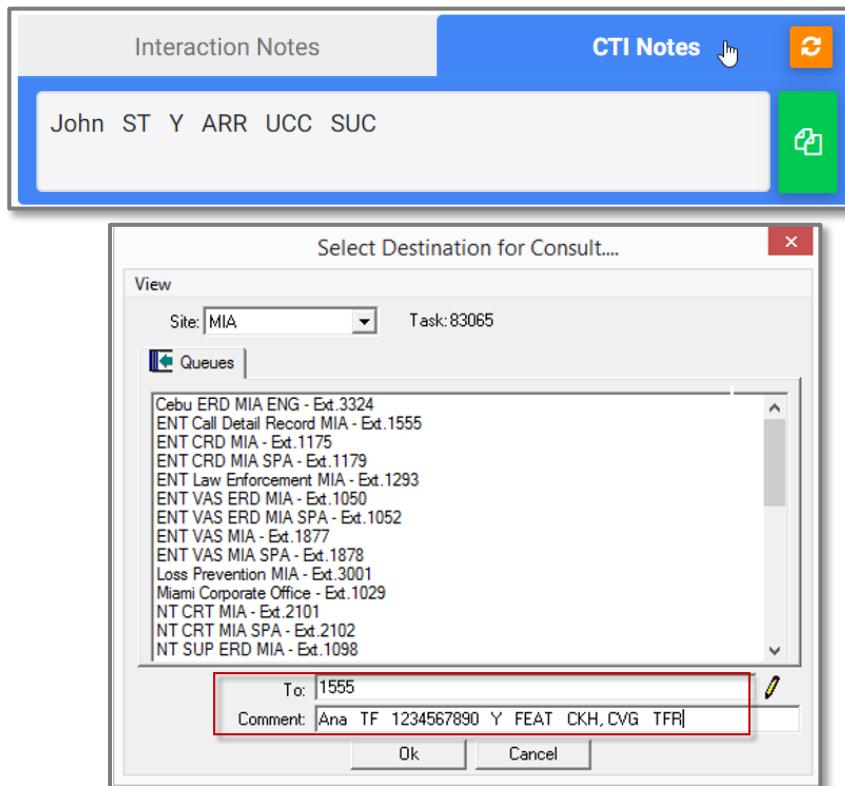
**Create Interaction**

**Notes**

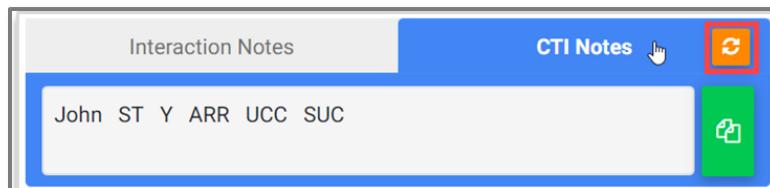
**Cancel** **Create Interaction**



If the call needs to be blind transferred, copy the information in the CTI Notes section and paste it into the Comment section of the CTI Tool:

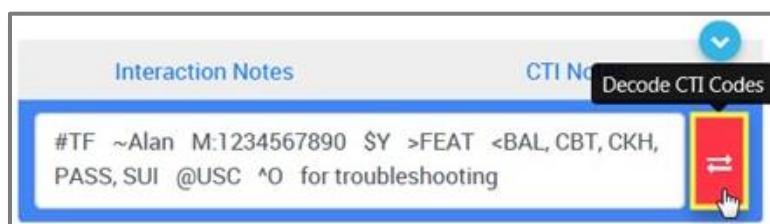


To begin a new call, select the orange refresh button.



As the receiving representative, follow these steps:

- 1** Copy comments from CTI and open Notepad.
- 2** Click on Toggle Up 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.

The screenshot shows a form with the following populated fields:

- Name: Alan
- Callback# (Only if needed): 1234567890
- Survey? Y
- Selections: TF (X), FEAT (X), BAL (X), CBT (X), CKH (X), PASS (X), SUI (X), USC (X), O (X)
- Others: for troubleshooting
- Interaction Notes: #TF ~Alan M:1234567890 \$Yes  
>Features <Balance OK, Carrier Billing OK, Phone Settings OK, Password Reset OK, SUI OK  
@Unsuccessful ^Other for troubleshooting
- CTI Notes: (empty)

## Customer Support SME Tool

You can send a video tutorial link to WFM and TF customers on “Understanding WFM Bill” and Transferring Contacts to a TF Smartphone”.

They are located under the Tools section in Agent Support.

To send the video tutorial link, enter the customer’s TAS ID, the customer’s MIN and then click Send SMS

**Understanding WFM Bill SMS Tool**

TAS ID: [Input field]  
MIN: [Input field]  
Message: https://www.youtube.com/watch?v=QahwWCAGqY  
\* - required fields

**Transferring Contacts to a TF Smartphone SMS Tool**

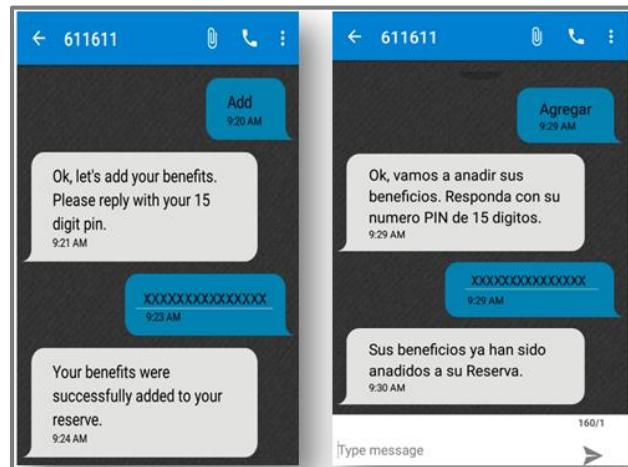
TAS ID: [Input field]  
MIN: [Input field]  
Message: https://www.youtube.com/watch?v=rkjlMAELyUg&t=1s  
\* - required fields

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## 611611 Services

Customers can text a specific keyword to 611611 on their handset to receive valuable information. Additional keywords can be found in the **How To** drop down in Agent Support called **611611 Services**. Always refer to Agent Support for the latest list of keywords as more will be added.

In this example, the customer is able to add airtime through 611611 by texting the word “Add” and sending their pin.



## Tax Reference Tool

The Sales Tax tool has now been renamed to "Tax Reference Tool" and can be found in Agent Support.

The tool will also have a new "Comments" column. This section will provide any comments necessary about the state regulated taxes. For example, New Hampshire does not charge a Sales Tax, but it does have a Communications Tax. See below:



State: NEW HAMPSHIRE												Updated on 12/18/2020	
State	Tax on Airtime?	Average Sales Tax Rate	Maximum Sales Tax Rate	E911 RATE or \$FEE	Fed USF	Reg Cost Recovery	Avg. Combined Taxes and Fees	+	Plus this	Comments	USF	RCR	
NEW HAMPSHIRE	YES - CST (Communication Service Tax)	7.00% CST (Not a sales tax and now Point of Sale)	7.00% CST (Not a sales tax and now Point of Sale)	\$0.75	0.8%	0.2%	5.15%	+	\$0.75	New POS CST eff 1/1/2020. ** This is not a sales tax, this is a communications services tax.***			
<small>* = No Sales Tax on Airtime ++ = CA Local Charge, CPUC User Fee and PPP Surcharges +++ = CA 911</small>													

## Rocket Chat

Rocket Chat application allows you to communicate real-time with your Supervisor, CX/QA or IT for assistance. ONLY use this tool for the following reasons.

### Screen Pop

- Pre/Post Shift
- Calibration

### Communications

- Team Reminders or Instructions
- Updates and Announcements

### Workforce

- Real Time Call Outs
- Real Time Escalations
- Offenders
- Server Assignments

### Workforce

- System/Tools
- Hardward Issues

### Coaching Session

### Performance Review

- One-on-One Review

## Chat Guidelines

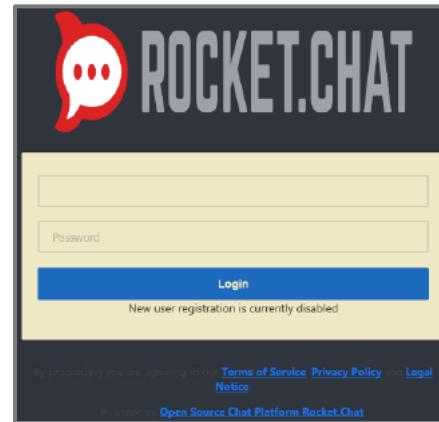
- You cannot initiate a chat to your supervisor or manager. Only your supervisor and manager can initiate a chat to any team members.
- If you need to have a private conversation with the supervisor, you may send a message in the team channel and the supervisor will reach out to you privately.
- CX/QA Analyst and Sup can initiate a chat to their agents for coaching purposes.
- IT and Workforce can also initiate a direct message to an agent for specific issue, concern or instructions.
- Perform basic troubleshooting prior asking IT for Support. FAQs guide is available as reference via the Intranet portal.
- The supervisor and manager can add or remove any team members to update the list based on the team composition.
- All Staff will have access to create groups.
- If the immediate supervisor is on day off or vacation, the partner Supervisor, CX Analyst, CX Sup, and Shift Manager can assist.



This is exclusively for all business-related items. All chat history will be tracked and private groups will be audited.

## How to Login:

- 1** Use Microsoft Edge and enter the URL  
<https://app.rocketchat.tracfone.com/>
- 2** Enter your Username and Password then select Login.



- 3** When logging in for the first time, you will be routed to the General channel which contains all users.

- 4** To get your Center Specific Channels, select the Directory icon and then select your center.
- 5** Select Join. Use this channel to request or receive IT or Supervisor assistance.

## Channels/Private Groups:

### General Channels

Site Specific Channels to report real-time incidents related to IT & WF.

## Private Groups

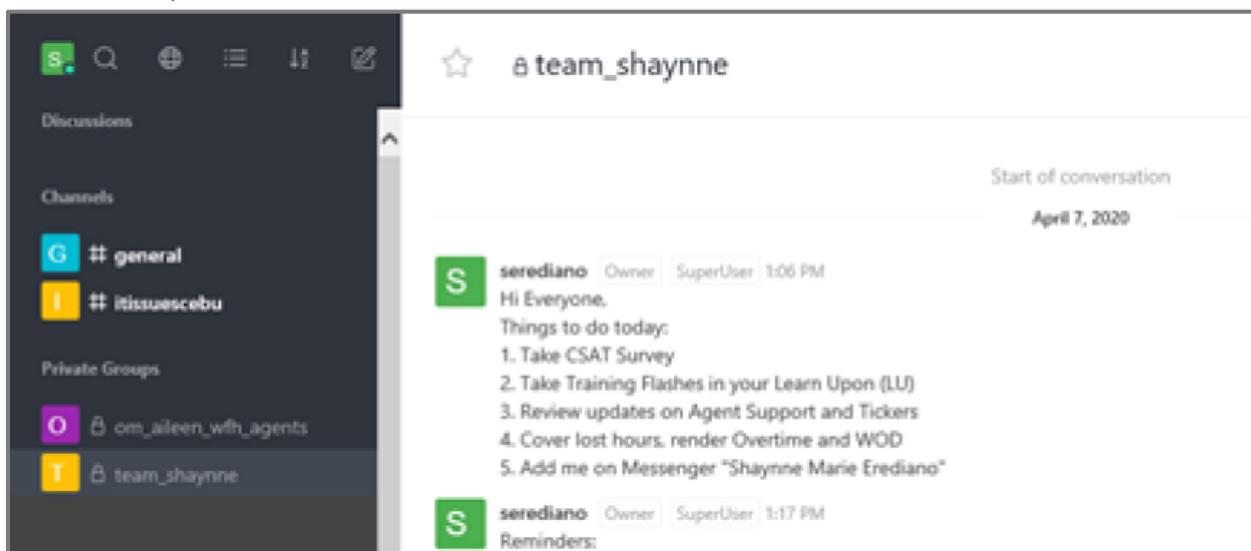
- 1 Business Unit Group (OM, SM, SUP & CSR)
  - Updates, Incident Reports and Announcements
- 2 Leadership (SM and SUP)
  - Team-specific group for shift manager and supervisors used for: reminders, updates and announcements.
- 3 My Team (SUP/Trainer & CSR)
  - Team-specific group for supervisor and agent used for daily reminders, updates and announcements.

## Private/Direct Message (one-on-one conversation)

Manager, supervisor, trainers, CXA, Workforce and IT can initiate Private or Direct message to specific agent.

### Agent View:

- General IT and WF Channel
- Private Group
  - Business Unit
  - My Team



## How to Create Private Groups:

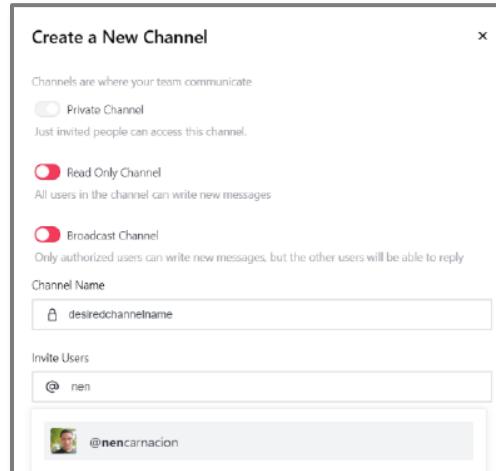
- Private groups are closed chat channels that a team or organization can create. This will only be available/visible to its members.
- Only Sups, Trainers, SMs, OMs and Staff can create this group.

1 Select the  button then select Channel.

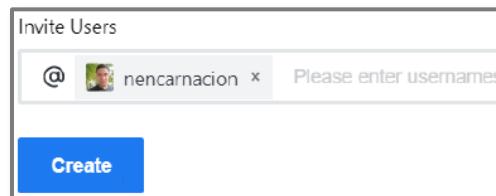
2 On the Create a New Channel page, follow the below instructions.

Set all 3 Radio buttons as shown in the sample image.

- Channel Name: Type your desired Group Name (your Org name, department, etc.).
- Enter the NT login of the user you want to add to the Private Group. Type the first few letters and the app will show a summary of possible users then select the right user.



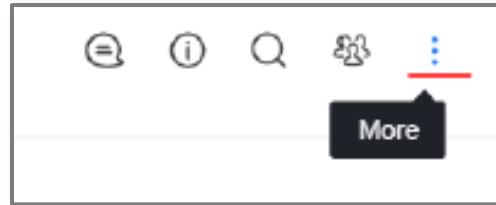
3 Select Create.



## Add more users:

You can add more users at a later time to a Private Group.

To add, select the name of the group, sle



# Chapter 2

## Tracfone Agent System (TAS)



# Tracfone Agent System (TAS)

A tool used by Customer Care Representatives to assist customers.

To login to TAS, enter your assigned username and password.



You can quickly access the main pages in TAS by selecting the buttons displayed across the top of the screen.



There are some sections in the manual that are only applicable to a specific group of Customer Care Representatives. These are noted throughout the manual. If you do not have access to a particular section in TAS, it will state **Access Restricted**.

## Ticket Page

This is the first page you see once you login. The Ticker page displays important issues and announcements.

If a SafeLink customer is calling because they have received a communication advising them that they can purchase an upgraded phone via a link, but they do not have access to a computer. Please provide them with 407-856-2717 to purchase the phone with an agent at Quality One.  
- 05.21.18 - EA

TF/SL : Please make sure you are following the new process for (Assigning SafeLink Enrollment Number in TAS) instead of creating a SL Missing/ Wrong EID # ticket.  
- 05.16.18 - AA

Approximately 50k SL customers will be hotlined starting 05/16/2018 with a June 1, 2018 Annual Verification due date. Customer accounts have already been flashed in TAS. For any further questions please refer to Training Flash #36 UPDATED SafeLink Annual Verification Policy Update, Training Flash #119 SafeLink Hotline SOC Removal 6.29.2017.  
- 05.16.18 - JL

If a customer calls stating that they were charged multiple times please transfer them to the Refund team. Refund Group please provide a refund for any customers that show multiple charges in Cyber Source.  
- 05.12.18 - AA

Effective immediately, T-Mobile SIMs card that have been activated will no longer Expire. If a customer calls in, follow the process to reactivate the phone, DO NOT create a SIM exchange case for a T-Mobile SIM.  
- 05.10.18 - AA

## Console Page

Displays all the tickets you are currently working on. Once you login, you will be able to access tickets found in your Queue and WIPbin. To view the ticket details, select the hyperlink for the ticket Id Number.

Id Number	Title	Age Days	Carrier Id	Carrier Name
1063377348	Equipment Not Re...	1937 7:45:31.0	133333	AT&T SAFELINK (TELEGENCE)
1064559513	ST Defective Phone	1932 5:1:30.0	122794	VERIZON_PP

**Open Ticket by ID** - Allows you direct access to a specific ticket by a specific ID number.

- 1 Select Open Ticket.
- 2 Enter the ticket ID Number.
- 3 Select Open Ticket.

## Sample Ticket

Id Number	1066516354	ICCID	Last	Daneyi5045
ESN		MSID	Name	
MIN		Model	Queue	direct sales III
Carrier Id		Phone Model	Status	Pending
Carrier Name		Retailer	Due Date	
Ticket Type	Do Not Contact	Priority	Owner	train101
Title	2G Migration	Condition	Issue	Customer Already Migrated to another phone
Creation Time	12/21/16 5:46 PM	WipBin	Org ID	
Activation Zip		First Name		

**Ticket Notes**

\*\*\*\*\* NOTES 12/21/2016 05:46:04 PM train101 Action Type: Agent Added Notes :  
the customer has a new phone active already so he does not want to receive the 2g migration messages anymore

# Left-hand Side Menu

The TAS menu that appears on the left-hand side of the Incoming Call and Support page, contains many valuable resources that can be used to assist the customer in resolving any issue.

Let's review some of the menu options.



If a menu item is grayed out, this means it does not apply to the ESN or access is restricted.

<b>ESN Support</b>	<b>Support</b>
Accessory Ticket APN Settings Assign Safelink Id Assign Lifeline Id (non-SL) Balance Inquiry Change Ownership (Sprint) Create Ticket Device Management Handset Protection External Links Master Subsidy Lock Personality Register iPhone Exchange Reserved Pins Reward Points SIM Info SIM Marriage Solutions Universal Branding Unthrottle Workforce Pins Generate Benefits Metering Sources Data Optimizer GoSmart Cash Balance Phone Model Parameters Customer calling from handset Customer Port Out Winback International Roaming	Action Item Maintenance Ticket Maintenance Dealer Password Reset ESN MIN History External Links Line Management Promotions Real Time Redemption Throttle Report Ticker Management SafeLink Service History Complete Ports Dealer Lookup SIM Out Registration Solutions Unlock Request History BYOP Eligibility FOTA Campaign Details Resend VUDU Voucher WFM SIM Registration BOGO Promotions Refund Requests Report Device Change Inquiry History WFM Promo Codes IMSI Lookup Tool
▷ Carrier Support ▷ Toss Util ▷ Tutorials/Instructions ▷ LTE ▷ Transactions ▷ History ▷ Loss Prevention	▷ Carrier Support ▷ Toss Util ▷ Logistics ▷ LUTS ▷ Loss Prevention

# Incoming Call Page

Incoming Call page allows you to create a new contact account (i.e. name, address, phone, etc.) or search for an existing one. On the Incoming Call page, you will see the Search Contact section. To search for a specific account, enter the customer's information (MIN, ESN, SIM, or email address) in the fields provided and select Search Service. This will place the ESN in session and will direct you to the customer's Service Profile, where you will find important account details. You can enter the ESN, MIN, or SIM in the Search field in the top right-hand corner.



You can also look up an account using the Address + zip, or Address. You can also search for orders made on Ebay, using the order number or the credit card that was used.

## Contact Actions Menu

The Contact Actions Menu can only be accessed from the Contact Profile on the Incoming Call Page.



You **MUST** complete the Identity Challenge and ask the security questions prior making any changes to an account.

## Account Summary

- List of all Serial Numbers (ESN) associated to the account
- Add ESN to Account
- Edit Nickname
- Update Contact Details

Account Summary												
Add ESN to Account:												
Brand	Serial Number	Primary MIN	Security Pin	Nick Name	Part Number	Technology	Status Name	Customer Id	First Name	Last Name	Billing Program	Service Plan
TELCEL	100000001933356	1		Default	TC2EZ768GP5	GSM	PASTDUE	1157336433	TwistFirstName	TwistLastName		
TELCEL	100000001933430	0	2224089415		TC2EZ667GR	GSM	ACTIVE	1157336442	TwistFirstName ...	TwistLastName		Unlimited International Talk and Text, 500MB Data at high...

Brand: TELCEL	Nick Name: Default	Customer Id: 1157336433	Status Name: PASTDUE	Primary: 1
Serial Number: 100000001933356	Part Number: TC2EZ768GP5	First Name: TwistFirstName	Billing Program:	Security Pin:
MIN:	Technology: GSM	Last Name: TwistLastName	Service Plan:	

[Remove from Account](#) [Edit Nick Name](#) [Contact Details](#) [Refresh](#) [Make Primary](#)

## Add ESN to Account

**Account Summary**

Add ESN to Account

Brand	Serial Number	Primary MIN	Security Pin	Nick Name
TELCEL	100000001933356	1		Default
TELCEL	100000001933430	0	2224089415	

**Add ESN to Account**

Serial Number

Nick Name

Security Pin

Overwrite Restriction

Add Cancel

Customer Details:

Brand TELCEL	Nick Name Default	Customer Id 1157336433
Serial Number 100000001933356	Part Number TCZEZ768GP5	First Name TwistFirstName
MIN	Technology GSM	Last Name TwistLastName

Buttons: Remove from Account, Edit Nick Name, Contact Details, Refresh, Make Primary

- 1 Select Add ESN to Account
  - 2 Enter Serial Number (ES)
  - 3 The Nickname and Security PIN are optional
  - 4 Select Add
- Check the Overwrite Restriction box if ESN to be added already has an existing account.

## Edit Nickname

- 1 Select Edit Nick Name
- 2 Enter new nick name
- 3 Select update

**Edit Nick Name**

Current Nick Name Default

New Nick Name

Update Cancel

Customer Details:

Brand TELCEL	Nick Name Default	Customer Id 1157336433
Serial Number 100000001933356	Part Number TCZEZ768GP5	First Name TwistFirstName
MIN	Technology GSM	Last Name TwistLastName

Buttons: Remove from Account, Edit Nick Name, Contact Details, Refresh, Make Primary

## Action Item History

Log of transactions processed by the carrier. Primarily used by Carrier Analyst Team.

Action Item History							
Task Id	Serial Number	Age	End Date	Type	Title	Status	Carrier Market
172645...	100000001933356	889	11/25/2...	Activation	T-MOBILE PREPAY PLATFORM A...	Succeed...	T-MOBILE PREPAY PLATFORM
172645...	100000001933430	889	11/25/2...	ESN Change	T-MOBILE PREPAY PLATFORM E...	Succeed...	T-MOBILE PREPAY PLATFORM
172645...	100000001933430	889	11/25/2...	Deactivation	T-MOBILE PREPAY PLATFORM D...	Succeed...	T-MOBILE PREPAY PLATFORM
172645...	100000001933430	889	11/25/2...	Activation	T-MOBILE PREPAY PLATFORM A...	Succeed...	T-MOBILE PREPAY PLATFORM

## BYOP Registration

A history of all tickets created for the customer. Select the ticket ID Number link to view the ticket details.

### Ticket History

Id Number	Status	Serial Number	Creation Time	Ticket Type	Title	Issue
1095427235	Closed	100000001933...	11/25/2015	Phone Upgrade	ST Phone Upgr...	

## Contact Details

Used to edit account details such as name, address, security questions and answers, PIN, and methods of communication.

### Edit Contact Details:

- 1 Select Contact Details
- 2 Enter new information
- 3 Select Update

**Contact Details**

**Basic**

<b>Main Account Contact</b>	<b>Select to Opt In</b>
Brand TELCEL	Mobile Ads <input type="checkbox"/>
Account Id 4bebcdme0@tracfone.com	Pre-Recorded Consent <input type="checkbox"/>
Customer Id 1157336433	Email Consent <input type="checkbox"/>
Lid	Home Phone Consent <input type="checkbox"/>
Phone 4382715848	SMS Consent <input type="checkbox"/>
Phone Extension / Fax	Mail Consent <input type="checkbox"/>
Email 4BEBDMEO@TRACFONE.COM	
Date of Birth	

**Additional Info**

First TwistFirstName	State / FL		
Name	Province		
Middle	Zip 33178		
Initial	Secret Question		
Last TwistLastName	Secret Answer		
Name	PIN		
Address 1295 Charleston Road			
Suite / 1157336433			
Apt			
City MIAMI			
Country USA			
<b>Update</b>	<b>Cancel</b>	<b>Unlink Social Media</b>	<b>Reset Password</b>

### Request Password:

- 1 Select Reset Password



Default password will be sent to email address on file. If an account has multiple serial numbers, with multiple email addresses, the Main Account Contact is the ONLY one allowed to reset the account password. You can shift to the Main Account Contact by selecting Switch to Main Account Contact.

## Credit Cards

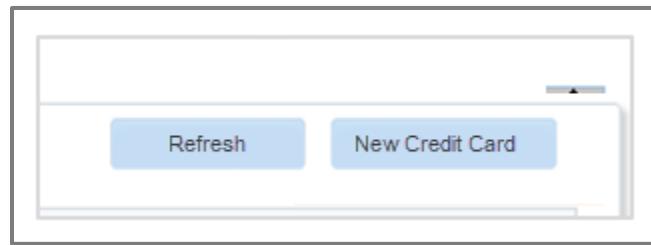
The customer must have a credit card on file in order to make a purchase or enroll in any plans. You can add, edit, or set a credit card to an inactive status.

**Credit Cards by Contact**

CreditCard	Type	ExpDate	FirstName	LastName	Status	Edit
No data to display.						

## Add a New Credit Card

- 1 Select New Credit Card



- 2 Select Credit Card

- 3 Enter the customer's credit card information and billing address.

- 4 Select Register Payment

**Payment Method Info**

Credit Card

\* Credit Card Number

\* Credit Card Type

\* Expiration Month

\* Expiration Year

Use my Contact Information

\* First Name

\* Last Name

\* Country USA

\* Address 1  Enter the street address, up to 30 characters

Address 2  Use ONLY for additional address like Apt, Room, Dorm, Unit, Suite, etc

\* Zipcode

\* City

\* State

Phone #

Save Payment Source for (future or recurring payment)

Save as my Contact Information

## Update a Credit Card or Set to Inactive

### To update a credit card:

- 1 Select the Edit link
- 2 Update the payment information and save

### To set the card inactive:

- 1 Click the Edit link
- 2 Change the status to INACTIVE and click Save.  
**Set to Inactive** is typically used when a customer does not want the card on file to be charged for any purchases.

**Contact Actions**

- Account Summary
- Action Item History
- BYOP Registration
- Ticket History
- Contact Details
- Credit Cards
- ACH Details
- Flash Contact
- Programming Status
- B2B Purchase History
- Ebay Orders
- B2B/B2C Orders
- Purchase History
- Recent Interactions
- Create Ticket
- SafeLink Service History
- Loyalty Rewards

**Credit Cards by Contact**

CreditCard	Type	ExpDate	FirstName	LastName	Status	Edit	Manage Enrollments
*****7336	VISA	05/2022	cyber	source	ACTIVE	Edit	Manage Enrollments

**Credit Card Maintenance**

**Credit Card Information**

Credit Card Number: \*\*\*\*7336  
Credit Card Type: Visa  
Expiration Month: 05  
Expiration Year: 2022  
Status: ACTIVE

**Credit Card Holder Information**

Customer First Name: cyber  
Customer Last Name: source  
Country: USA  
Address: 1295 Charleston Road  
Zip Code: 94043  
City: Mountain View  
State: CA  
Phone Number:

**Credit Card Current Max Values**

\$/30 Day Max: 0  
Trans/30 Day Max: 0  
\$/Trans Max: 0

**Credit Card New Max Values**

\$/30 Day Max: 0  
Trans/30 Day Max: 0  
\$/Trans Max: 0

**Credit Card Notes**

Add Comment:   
Comments:

Clear Save

## Programming Status

Displays the current status of the phone.

Programming Status								
Service	Serial Number	MIN	Start Date	End Date	Exp Date	Status	Reason	
Wireless	100000001927...	2226929297	11/24/2015		1/13/2016	Active		

## B2B Purchase History

B2B Purchase History																		
Order Id	Rqst Source	Order Type	Rqst Type	Rqst Date	Ics Apps	Merchant Ref Number	Ics Rcode	Ics Rflag	Request Id	Bill Trans Ref No	Status	Auth Rqst Id	Amount	Tax Amount	Sales Tax Amount	GRN Tax Amount	USF Tax Amount	RCRF Tax Amount
1525859	IVR	ORDER	CREDITICA	1/26/2017	ics_auth...	B2C017021657...	100	ACCEPT	48544205691685...	99443603ZYU20CE	SUCCESS	48544205691685...	20	2.35	1.4	0.61	0.3	0.04
1919598	IVR	ORDER	CREDITICA	2/26/2017	ics_auth...	B2C0170226593...	100	ACCEPT	488120953279685...	45655224GZP27TRF	SUCCESS	488120953279685...	20	2.35	1.4	0.61	0.3	0.04
2283555	IVR	ORDER	CREDITICA	3/29/2017	ics_auth...	B2C0170329610...	100	ACCEPT	490788923359674...	93459434507266DV	SUCCESS	490788923359674...	20	2.35	1.4	0.61	0.3	0.04
2574174	IVR	ORDER	CREDITICA	4/29/2017	ics_auth...	B2C0170429627...	100	ACCEPT	493486341251617...	98167932121UCATY	SUCCESS	493486341251617...	20	2.35	1.4	0.61	0.3	0.04
2864392	IVR	ORDER	CREDITICA	5/25/2017	ics_auth...	B2C0170525642...	100	ACCEPT	495768169711647...	7502928772VXH...	SUCCESS	495768169711647...	20	2.35	1.4	0.61	0.3	0.04
3257435	IVR	ORDER	CREDITICA	6/29/2017	ics_auth...	B2C0170629661...	100	ACCEPT	49873777496676...	964634924IAUAN	SUCCESS	49873777496676...	20	2.35	1.4	0.61	0.3	0.04
3653067	IVR	ORDER	CREDITICA	7/30/2017	ics_auth...	B2C0170730681...	100	ACCEPT	501415919193693...	90151434CSNFCPV	SUCCESS	501415919193693...	20	2.37	1.4	0.63	0.3	0.04
4127854	IVR	ORDER	CREDITICA	8/31/2017	ics_auth...	B2C0170831702...	203	REJECT	504202118650612...		FAILED	504202118650612...	20	2.37	1.4	0.63	0.3	0.04
4693754	IVR	ORDER	CREDITICA	10/2/2017	ics_auth...	B2C0171002727...	100	ACCEPT	506982914546330...	41383373883ZTB12	SUCCESS	506982914546330...	20	2.33	1.4	0.63	0.26	0.04
6452395	IVR	ORDER	CREDITICA	1/1/2018	ics_auth...	B2C0180101797...	100	ACCEPT	514860374465653...	438893853AV1KPN	SUCCESS	514860374465653...	20	2.33	1.4	0.63	0.26	0.04
7077108	IVR	ORDER	CREDITICA	1/31/2018	ics_auth...	B2C0180131820...	100	ACCEPT	517453091491698...	48342038QD20M	SUCCESS	517453091491698...	20	2.33	1.4	0.63	0.26	0.04
7795869	IVR	ORDER	CREDITICA	3/5/2018	ics_auth...	B2C0180303850...	100	ACCEPT	52009688219607...	92120494AE9GV...	SUCCESS	52009688219607...	20	2.33	1.4	0.63	0.26	0.04
8512902	IVR	ORDER	CREDITICA	4/7/2018	ics_auth...	B2C018043882...	100	ACCEPT	522795970188688...	971548120FETZV2E	SUCCESS	522795970188688...	15	1.75	1.05	0.47	0.2	0.03

## eBay Orders

TracFone Wireless airtime and phones are sold on Ebay ([www.ebay.com](http://www.ebay.com)). To search for an order, press Ebay Orders in the Contact Actions menu. You can search from the Incoming Call Page in the Search Contact section.

- 1 Enter the email address used to place the order on eBay.
- 2 Select eBay Order to view the order details.

The screenshot shows the TAS software interface. At the top, there are tabs for Ticker, Console, Incoming Call (which is selected and highlighted in blue), Support, and Admin. Below the tabs is a search bar labeled 'Search'. Under the search bar, there is a 'Search Contact' section with various input fields: Serial Number, Email (highlighted in orange), Interaction Id, Contact Phone, Lifeline Id; SIM, MIN, First Name, Address 1, Order Id; Customer Id, Airtime Pin, Last Name, Zip, BAN. Below these fields are several buttons: Search Service, New Contact Account, Search Contact, Search eBay Order (highlighted in orange), Search Credit Card, Search Merchant Ref No, Search B2B/B2C Order, and Clear. At the bottom of the search contact section is a table with columns: OrgId, Customer Id, First Name, Last Name, Phone, Address, City, State, Zip, Email. One row is visible: STRAIGHT\_TALK, 1117355548, TwistsFirstName, TwistsLastName, 3667991497, 1117355548, MIAMI, FL, 33178, 13e9uudi@tracfone.com.

The order details typically appear in TAS within 2 hours of placing the order.

The screenshot shows the TAS software interface with an order detail view. At the top left, it says 'Order 110178223642-27870454001'. Below this are two tables: 'Order Header' and 'Order & Ship Details'. The 'Order Header' table has columns: ObjId, Source, Channel, Order Type, Order Id, Type, Account Id, Auth Request Id, Request Type, Request Date, Merchant Id, Merch Ref No., Quantity, Bill Amount, Auth Amount, Amount, Request Id, First Name, Last Name, Phone. Two rows are shown: 15053671 ETL B2C ORDER 110178223642-27... AUTH 312630519 11017822364... ALTSOURCE... 5/16/2016 eBay B2C20160516... 1 14.99 14.99 14.99 11017822364... Adarsh Patibandla 18L and 15053822 ETL B2C ORDER 110178223642-27... SETTLEMENT 312630519 11017822364... ALTSOURCE... 5/16/2016 eBay B2C20160516... 1 14.99 14.99 14.99 11017822364... Adarsh Patibandla 18C. The 'Order & Ship Details' table has columns: Part Number, Amount, Line No., Quantity, ESN, Sales Tax Amount, E911 Amount, USF Amount, Rrof Amount, Discount Amount, Total Tax, Total Amount, Smp. One row is shown: TPLG4H1GDMP4 14.99 1 1 0 0 0 0 0 0 0 14.99.

## Purchase History

Lists all airtime purchases made via the website, Customer Care, or IVR. You will find vital information such as the ESN the airtime was applied to, the total amount paid, and the purchase date.

The screenshot shows the TAS software interface with a 'Purchase History by Contact/Account' report. The table has columns: ESN, CC Last 4, CC Type, Transaction Id, Price, Discounts, Sales Tax, E911 Fee, USF, RCRF, Amount, Purch Date, Status, Prom. Four transactions are listed: 100000000013251945 (2413, Master Card, BP2014010667361..., 50, 0, 3.5, 0, 0.75, 0.1, 54.35, 2014-01-06 05:32:22, Pending R...); 100000000013251170 (2413, Master Card, BP2013111567357..., 15, 0, 1.05, 0, 0.225, 0.03, 16.305, 2013-11-15 04:59:23, Declined); 100000000013247363 (3213, Master Card, BP2013110967356..., 60, 0, 4.2, 0, 0.9, 0.12, 65.22, 2013-11-09 11:54:28, Declined); and 100000000013251945 (2413, Master Card, BP2013102267355..., 0, 0, 0, 0, 0, 0, 0, 2013-10-22 09:32:48, Approved).

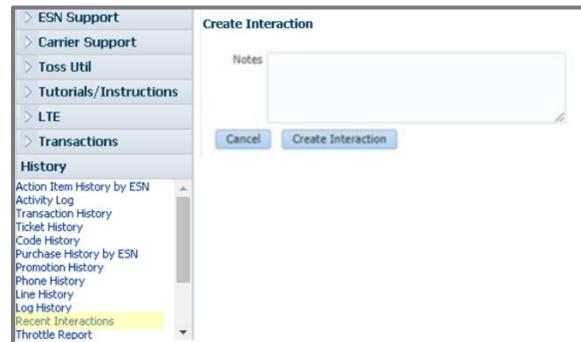
## Recent Interactions

Lists all recent interactions and allows you to create an interaction.

The screenshot shows a web-based application interface. At the top, there's a header bar with the title 'TAS New Hire Introduction' and a 'All Brands' button. Below the header is a section titled 'Recent Interactions'. This section includes a 'Create Interaction' button (which is highlighted with an orange border) and an 'Export to Excel' button. The main area displays a table of recent interactions with columns for Date, Min, Esn, Nick Name, Points, Action, Reason, Provider, Available Date, and Point Status. A specific row is selected, showing details like '2018-06-04 11:20:04.0' and 'Redemption Successful'. There's also a 'Notes' column and a 'Show Details' button. The entire interface has a clean, modern look with a light blue and white color scheme.

## Create Interaction

- 1 Go to History.
- 2 Copy the notes from notepad and paste in the interaction notes box.



## Create Ticket

Used to manually create an escalation ticket.

There are two Create Ticket options in TAS (one found in Contact Actions menu and the other found in ESN Support).

This screenshot shows a 'Contact Ticket' creation form. It includes fields for Ticket Type (set to 'Direct Sales'), Title (set to 'Manual Refund Request'), Priority (set to 'Low'), Status (set to 'Pending'), Point of Contact (set to 'Call'), Source (set to 'Customer'), Issue (an empty text field), and Notes (an empty text field). At the bottom is a 'Save & Continue' button.

## Loyalty Rewards

The Loyalty Rewards Program (LRP) is exclusive to Straight Talk, NET10, Total Wireless, and Simple Mobile customers. You must offer the LRP during activation, reactivation, redemption, and port-in transactions. The customer must agree to the LRP terms and conditions before you can enroll them.

This screenshot shows the 'Enrollment and Status' page for the Loyalty Rewards Program. It starts with a note: 'This account is not currently enrolled in the Loyalty Rewards Program. Upon customer request, please select the option below to enroll.' Below this is a note: 'Note: In order to enroll, a customer must:' followed by two steps: '1- At least have an e-mail and security PIN or security question on file. If required, please go to "Contact Details" (on the left hand side menu) and update customer's information before enrolling in the program.' and '2- Accept the Loyalty Rewards Program's [Terms and Conditions](#)'. There are 'Enroll' and 'View Points Catalog' buttons. The 'History' section is empty, stating 'There is no previous Loyalty Rewards history for this account.'

## ESN Support Menu

You can only access the ESN Support Menu from the Incoming Call page

### Accessory Ticket

Create an accessory ticket if the equipment was not received or is defective and still under warranty.

**Accessory Ticket**

Ticket Type / Title  Warehouse Equipment Not Received  Warranty Defective Accessory

Select Accessories  AIRBILL NET10-AIRBILL AIRBILL FOR NET10  
 BATTERY CAB31P0000C1 BATTERY  
 CHARGER CBA3000AG0C1 CHARGER  
 OWNERMANUAL CJ6081KFAGA MANUAL  
 PHYSICAL AIRBILL NT-EX-SHIPAIRBILL NT EXCHANGE AIR BILL

**Save & Continue**

### APN Settings

Send APN Settings information to the customer via SMS or email if the data is not working.

**Get Phone APN Instructions**

**Select by Operating System**  
Operating System **Select One ▾**

**Select by Handset Manufacturer**  
Handset Manufacturer **Select One ▾**

**Send APN info**  
 Send APN Settings Information  
 Send APN Settings link

**Send SMS**  
MIN **Send SMS**

**Send Email**  
Email **Send Email**

### Assign Safelink ID

If the SafeLink ID is missing or if the wrong ID was assigned, you have the option to assign the SafeLink ID. A video tutorial detailing this process can be found in Agent Support.

**Search SafeLink ID**

\* Zip Code  \* Address

**Search** **Assign**

SafeLink ID	Full Name	Address
No data to display.		

### Balance Inquiry

View the existing balance for the following benefits:

- ✓ Voice
- ✓ SMS
- ✓ Data
- ✓ Global Card
- ✓ ILD

You can send the results via SMS to the customer's phone.

**Balance Inquiry**

**Balance Inquiry Results**

Message See the balance for the given Transaction Id.

Voice Balance 3463  
SMS Balance 4119  
Data Balance 44.01 MB  
Global Card Balance  
ILD Balance

**Get Balance** **Send SMS** **Done**

**Instructions**  
N/A

## Create Ticket

Another option that allows you to create a ticket with more ticket types and titles than the Create Ticket option in the Contact Actions menu.

## Device Management

Send APN settings to eligible phones if the data is not working.

### Device Management - Send APN settings to Phone

Current Min 2226929297

**Send**

## Handset Protection

View Handset Protection enrollments and claims filed.

Other Services						
Other Services Details		Claims				
Program Name	Program Description	Status	Program Price	Creation Date	Enrollment Date	Next Charge Date
No data to display.						

## Personality Codes

Provides programming codes that can be sent OTA (over-the-air) or entered manually into the customer's phone. These codes give the phone "personality" and programs it to work with the carrier.

Personality Gencodes		All Codes			
<input type="text" value="Message Transaction Executed Successfully"/> <input type="button" value="View Available Codes"/>		Code	Delivery	Code Type	Sequence
<input type="text" value="012109004735507"/>		00012:472393564353670	Manual	RED_MENU_OFF	12
<input type="checkbox"/> Carrier Data Switch <input type="checkbox"/> Clicks Local <input type="checkbox"/> Clicks Long Distance <input type="checkbox"/> Clicks Inbound <input type="checkbox"/> Clicks International <input type="checkbox"/> Clicks SMS <input type="checkbox"/> Free Browsing <input type="checkbox"/> Free Outbound MMS <input type="checkbox"/> Free Inbound MMS <input type="checkbox"/> Home Page Update (OTA Only) <input type="checkbox"/> Alpha APN (OTA Only) <input type="checkbox"/> MasterSid and Min <input type="checkbox"/> Pms Address <input type="checkbox"/> Product Selection <input type="checkbox"/> Pms Unlock (Manual Only) <input checked="" type="checkbox"/> Redemption Menu Off <input type="checkbox"/> Redemption Menu On <input type="checkbox"/> Restrictions <input type="checkbox"/> Due Date		<input type="button" value="Accept Codes"/> <input type="button" value="Reject Codes"/>			
<input type="button" value="Generate OTA"/> <input type="button" value="Generate Manual"/>					

## Reserved PINs

When a customer redeems a monthly airtime service plan, they have the option to "Add Now" or "Add to Reserve". In this section, you can view the airtime cards that were added to the Reserve. The cards in the Reserve will automatically be added to the account on the service end date.

Reserved Pins							
Red Code	SNP	Part Number	Description	Red Units	Access Days	Status	
*****1879	558640963	NTNMP00045	STRAIGHT TALK \$45 (Monthly Plan) A... 0	30	400		
*****8165	558641135	NTNMP00045	STRAIGHT TALK \$45 (Monthly Plan) A... 0	30	400		

## SIM Info

Allows you to view the SIM card Information.

This section lists:

- Whether or not the SIM is LTE Capable
- SIM Profile
- Status of SIM
- PIN/PUK Code(s) used to unlock the phone
- The ESN that the SIM is married (or attached to)

**SIM Info**

SIM Serial Number 8901260710040813909  
 LTE Capable YES  
 SIM Profile TF64SIMT5  
 Status 254 SIM ACTIVE  
 PIN 1 1234  
 PIN 2 5678  
 PUK 1 33032084  
 PUK 2 40975238  
 Married To 100000000682400

> New Search

## Solutions

Provides a series of troubleshooting steps for the Parent Solutions listed. The Solution provides a series of instructions to follow, along with additional resources in the Tool Box.

**Solutions List**

**Solutions List**

Parent Solutions	Solution Id	Solution Name	Description
Agent Assist Tool Procedure	Solution: 18501	Airtime Added to Wrong Phone	Troubleshoot customers that have added airtime to wrong...
Airtime	Solution: 9802	Create Inactive POSA Tickets	Steps to Create POSA Inactive Tickets for phones, Home Ph...
CASE DEBUG	Solution: 11810	Missing Airtime Card from an Online Purchase	Steps to follow when customer claims they are Missing Airt...
Data Content	Solution: 3906	Redemption Failure	Assess and corrects any problems with a Redemption

**Solution**

**Solution Details** Airtime Added to Wrong Phone Troubleshooting Steps

**Solution** Id 18501  
 Solution Airtime Added to Wrong Phone  
 Description Troubleshoot customers that have added airtime to wrong phone.  
 Keywords Airtime, ticket, transfer, added, redeemed, purchased, credit, ticket, airtime, reserve, wrong

**Solution Instructions**  
 If a customer is calling claiming he added airtime to the wrong phone, follow the steps below:  
 For screenshots of the process to be followed, please refer to the [Airtime Added to Wrong Phone Troubleshooting Steps](#) tab.  
 Identify if the kind of Airtime PIN added is a Workforce PIN by checking the card description. The Workforce PIN will show the code: REPLA after the brand.

- If it is a Workforce PIN, do not un-reserve the PIN in TAS. Instead, invalidate the PIN and generate another Workforce PIN with the correct account.
- If it isn't a Workforce PIN, continue with the next steps.

Review [Ticket History](#) to verify if either ticket [Airtime Redemption to Wrong Phone](#) or [Units Replacement Units](#) has been created.

**Tool Box**

Change Expiration Date  
 Activation  
 Redemption  
 Transaction History  
 Ticket: Airtime Redemption to Wrong Phone  
 Ticket History  
 Workforce Pins

## Workforce Pins

Generate a Workforce (WF) PIN to compensate for various reasons (listed in the dropdown menu):

- ✓ PIN Redeemed to Wrong Handset
- ✓ Redemption Failure
- ✓ Airtime Conversion
- ✓ AWOP Failure
- ✓ Port Request (active with new number and now requesting a Port)
- ✓ Port Request Cancellation  
(requested a port and is now requesting a new number)

SpObjid	Description	Part Number
21	\$45 30-Day UNL TALK/TXT/DATA, first 10GB at High Speed...	STAPPMB00015FREE
437	20-Day UNL TALK/TXT/DATA, first 6.66 GB at High Speeds ...	STREPLAOPV20D
21	\$45 30-Day UNL TALK/TXT/DATA, first 10GB at High Speed...	STSMRPLA00045
41	\$130 3-Month UNL TALK/TXT/DATA, first 10GB at High Spe...	STSMRPLA00045M3
42	\$255 6-Month UNL TALK/TXT/DATA, first 10GB at High Spe...	STSMRPLA00045M6
43	\$495 1-Year UNL TALK/TXT/DATA, first 10GB at High Spe...	STSMRPLA00045Y1
213	\$60 30-Day UNL INTL TALK/TXT/DATA, first 10GB at High ...	STSMRPLA0060ILD
336	Unlimited Talk and Text, ILD, additional Mexico minutes, wi...	STSMRPLA0060ILD
489	\$35 30-Day UNL TALK/TXT/DATA, first 2 GB at High Speed...	STSREPLA00035

Service Plan Objid: 21  
Service Plan Description: \$45 30-Day UNL TALK/TXT/DATA, first 10GB at High Speeds then at 2G\*  
Part Number: STAPPMB00015FREE  
\* Reason: AWOP Failure

Invalidate Card#

Old ESN (if applicable)  Current ESN  Current ESN value should be numbers only.

PIN/Merchant

Ticket (if applicable)

Issue (Max length 500)

Action Taken (Max length 500)

Notes

**Workforce Pin**

**Get Pin**

## Generate Benefits

Clear out any pending redemption benefits to be added.

Applicable only to PPE type phones.

### Generate Benefits

Click the following button to redeem the pending benefits.

**Generate Benefits**

## Carrier Support Menu

### Carrier Inquiry/SUI

Query a MIN (phone number) or ESN (serial number) to validate the carrier status instead of having to search in the carrier billing system.

**Carrier Inquiry / SUI**

Timeout - Request is taking longer than expected Please try again later Click to Refresh Manually Refresh

**Search**

ESN 100000000013731607    MIN 6507358908    SIM [ ]    Inquiry

**Specify Title**

Carrier Name VERIZON PREPAY PLATFORM    Carrier Market Name VERIZON\_PP

Actions		Inquiry Results			Auto Fix
Available Actions		Clarify Value	Carrier Value	Differences	
Deactivate		ACTIVE		<span style="color: red;">⚠</span>	
Change Sim		100000000013731607		<span style="color: blue;"> ⓘ</span>	
Reset Voicemail		389ACAA00D18717		<span style="color: red;">⚠</span>	
Reset Vm Password		6507358908		<span style="color: red;">⚠</span>	
Fix Service (Resend Ota)		6507358908		<span style="color: green;">✓</span>	
Remove Hotline - 2G		STRAIGHT_TALK		<span style="color: blue;"> ⓘ</span>	
Remove Hotline - SafeLink		All You Need		<span style="color: blue;"> ⓘ</span>	
APN Update		TFREVBULKTIER_D		<span style="color: red;">⚠</span>	
Features		Features	Features	<span style="color: green;">✓</span>	
Throttle State		NOT THROTTLED		<span style="color: red;">⚠</span>	

### NAP Verify

View the carrier information for that zip code and verify what line is assigned or available for the ESN/IMEI/MEID.

**Nap for New Line**

Serial Number 100000004011127  
Zip Code 33178  
SIM 8901260642102429136  
Nap Clear

**Enter Zip Code**

Zip Code 33122 Search    County MIAMI-DADE  
Market Miami State FL

**Carrier Information**

**Available Carriers**

Carrier Id	Carrier Parent	Carrier Side A	NPA/ NXX Total
100049	OMNILINK	SID 00410 GSM	111 222 0
104152			
106129			
122794			
122795			
122796			

## TOSS Util Menu

As a Customer Care Representative with TOSS access, you will have access to specific tools that can be used to research and resolve reoccurring customer and/or system related issues.

### Change Expiration Date

Update the customer's phone due date manually if the system fails to provide the correct Service End Date of the phone. This is only applicable for PPE phones with a PAYGO plan or TracFone Androids.

The screenshot shows a 'Change Expiration Date' dialog box. It includes fields for 'Serial Number' (100000008040791), 'Expiration Date' (with a calendar icon), and 'Reason'. Below the calendar is a grid of dates from June 2018. Buttons at the bottom include 'Change Expiration Date' (highlighted in orange) and 'Clear'.

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

### Fix ESN

Fix system errors that appear in TAS real-time.

Common errors include:

- ✓ Activation Loop
- ✓ Redemption Loop
- ✓ Reactivation Error
- ✓ Upgrade Error

The screenshot shows a 'Fix ESN' dialog box. It includes fields for 'Serial Number' (014052007102465) and 'Error' (Activation Failure). A 'Fix ESN' button is present.

### PPE Phone Programming

Used when an airtime card or phone has an OTA issue. Select Send Codes OTA to see if the system can fix it before creating a ticket.

The screenshot shows a 'PPE Phone Programming' dialog box. It includes fields for 'Serial Number' (014052007102465), 'Handset Sequence' (3), and 'Sequence Instructions'. Buttons include 'Refresh', 'Send Codes OTA', and 'Code Accepted'. Below is a 'Code Hist List' table:

Code Type	Gen Code	Sequence	Accepted
BUY_MENU_ON_ON_ON	00003:231216470960680	3	YES
Time_Code	00004:9396728717679205229233045584	4	YES
BUY_MENU_ON_ON_ON	00005:07083668335827859189	5	YES
Time_Code	00006:1999423594373717200888393868	6	YES
Time_Code	00007:895933864668646942397182946	7	YES
Time_Code	00008:1051536064778714324924007555	8	YES
BUY_MENU_ON_ON_ON	00009:889261277575921128099	9	YES
MO_Address	00010:25470249839926795	10	YES
Time_Code	00011:426256508489999008388899670968	11	YES
Time_Code	00012:8367398046583211017994303758	12	YES
Time_Code	00013:9651045886126465012950584634	13	YES
BUY_MENU_ON_ON_ON	00014:29226408000552479789	14	YES

## Reset Counter

Used when you encounter a customer's phone with a lower sequence than what is in our TOSS system.



**Tier 1 Customer Care**  
Representatives can only lower the sequence. To raise a sequence, follow the Transfer Guidelines.

### Update Counter

Message Sequence has been raised. New value (9)

Serial Number 100000008040791 Refresh

Current Sequence 9

\* Enter New Sequence 9

\* Reason Redemption Failure.

**Update Counter**

## Time Tank Verify

Verify the minutes on a customer's phone. This will be used for PPE phones only.

You can send the results via SMS or provide the customer with instructions on how to find the benefits on the phone.

**Balance Inquiry**  
**Balance Inquiry Results**

Message See the balance for the given Transaction Id.

Voice Balance 5712.0  
Global Card Balance  
ILD Balance

Get Balance Send SMS Done

**Instructions**

1. Press Menu > Press Select > Prepaid menu will appear.
2. Go to My Airtime Info > Press OK >The remaining benefits will be displayed.

## Tutorials/Instructions Menu

### Tutorials and User Manuals

Interactive phone tutorials

You can access Tutorials and User Manuals from TAS, Agent Support, or directly from the [branded website](#).

SAMSUNG S506DL SUPPORT CENTER OVERVIEW TUTORIALS FAQ GUIDES

Samsung S506DL

**Features**

25 MP Rear Camera/Video Recorder	Android 9.0 (Pie)
25 MP Front Camera	4G LTE/Wi-Fi® Connectivity
Expandable Storage/microSD Slot	Touch Screen
2 Home Screens	Color Screen
GPS Enabled	Bluetooth®
Multimedia Messaging	MP3 Player
Email	Face Recognition
Voicemail	Fingerprint Reader
Bixby Assistant	Multitasking
Handsfree Speaker	Hearing Aid Compatible/HAC Compatible
Accelerometer	Alarm Clock
Proximity Sensor	Calendar

User Manual

## Voice Mail Instructions

This provides voicemail instructions specific to the phone model.

**Voice Mail Instructions**

Items in **RED** should be entered on your wireless phone.

**Voice Mail Setup**  
On your mobile phone, press \*86 then press **CALL** or **SEND** depending on the phone model. When you hear the greeting, select the language preference, then press #. Follow the instructions for setting up your voice mailbox.

**Voice Mail Retrieval**  
On your mobile phone, press \*86 then press **CALL** or **SEND** depending on the phone model. When you hear the greeting, enter your **password**, then press #, and follow the instructions. Press 4 for personal options. Press 2 for administrative options. Press 1 to establish or change general options, then press 1 to your change password.

**To Change Voicemail Password**  
On your mobile phone, press \*86 then press **CALL** or **SEND** depending on the phone model. When you hear the greeting, enter your **password**, then press #, and follow the instructions. Press 4 for personal options. Press 2 for administrative options. Press 1 to establish or change general options, then press 1 to your change password.

## Transactions Menu

The Transactions Menu is home to some of the main transactions you will be able to complete for the customer. If the option is grayed out, you will not be able to process the transaction.

### Activation (Reactivation)

Occurs when ESN/MIN goes from inactive to active status with the redemption of an airtime service plan.

**Activation**

ZIP Code 33178

Add Airtime Purchase Airtime AWOP

Message Valid PIN

Airtime Pin 999999937801646 Validate Card Reserved Pins

Promo Code

Description TracFone 60 Minute / 90 Access Days

Access Days 90  
Units 60

Activate

### Redemption

The process of adding airtime to an active phone. The customer can add airtime purchased from one of our authorized retailers or purchase over the phone with a Customer Care Representative. You can also issue compensation or replacement airtime from this section in TAS.

**Redemption**

Add Airtime Purchase Airtime Compensation/Replacement

Airtime Pin Validate Reserved Pins Airtime Pin

Promo Code

Description

Access Days

Units

Redeem

## Enrollments

Enroll the customer in a plan that automatically refills on the service end date. Some of these plans include: Service Protection, Global ILD, Value Plans, etc.

Enrollments																																									
<b>Currently enrolled in:</b> <table border="1"> <thead> <tr> <th>Objid</th> <th>Program Name</th> <th>Description</th> <th>Price</th> <th>Status</th> <th>Action</th> <th>Payment Method</th> <th>Buy Now</th> </tr> </thead> <tbody> <tr> <td colspan="8">No data to display.</td> </tr> </tbody> </table>						Objid	Program Name	Description	Price	Status	Action	Payment Method	Buy Now	No data to display.																											
Objid	Program Name	Description	Price	Status	Action	Payment Method	Buy Now																																		
No data to display.																																									
<b>Available Auto-Refill Plans</b> <table border="1"> <thead> <tr> <th>Objid</th> <th>Program Name</th> <th>Description</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Buy Now</td> <td>This program allows handset Purchases</td> <td>0</td> </tr> <tr> <td>5800060</td> <td>TraFone Service Protection</td> <td>This plan extends your service 30 days every time you go p...</td> <td>5.99</td> </tr> <tr> <td>5802696</td> <td>Auto-Refill 30 Minutes Value...</td> <td>Auto-Refill 30 Minutes Value Plan</td> <td>8.99</td> </tr> <tr> <td>5800020</td> <td>50 Minutes Value Plan</td> <td>This plan offers you every month 50 minutes, and keeps yo...</td> <td>9.99</td> </tr> <tr> <td>5802836</td> <td>\$10 Global Card Instant Low...</td> <td>Instant Low Balance Refill will automatically purchase a ne...</td> <td>10</td> </tr> <tr> <td>5803132</td> <td>\$15 Smartphone Only 30-Day</td> <td>200 Voice, 500 Text, 200MB, 30 Service Days</td> <td>15</td> </tr> <tr> <td>5802695</td> <td>Auto-Refill 60 Minutes Value...</td> <td>Auto-Refill 60 Minutes Value Plan</td> <td>17.99</td> </tr> <tr> <td>5800561</td> <td>175 Minutes Value Plan</td> <td>This plan offers you 175 minutes and active service even...</td> <td>19.99</td> </tr> </tbody> </table>						Objid	Program Name	Description	Price	0	Buy Now	This program allows handset Purchases	0	5800060	TraFone Service Protection	This plan extends your service 30 days every time you go p...	5.99	5802696	Auto-Refill 30 Minutes Value...	Auto-Refill 30 Minutes Value Plan	8.99	5800020	50 Minutes Value Plan	This plan offers you every month 50 minutes, and keeps yo...	9.99	5802836	\$10 Global Card Instant Low...	Instant Low Balance Refill will automatically purchase a ne...	10	5803132	\$15 Smartphone Only 30-Day	200 Voice, 500 Text, 200MB, 30 Service Days	15	5802695	Auto-Refill 60 Minutes Value...	Auto-Refill 60 Minutes Value Plan	17.99	5800561	175 Minutes Value Plan	This plan offers you 175 minutes and active service even...	19.99
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<b>Estimated Charges for Zip code and special offers</b> <table> <tr> <td>Calculated Zipcode</td> <td>Total Misc Tax Due:</td> </tr> <tr> <td>Enrollment Fee</td> <td>Total USF Tax Due:</td> </tr> <tr> <td>Total Tax Due:</td> <td>Total All Taxes Due:</td> </tr> <tr> <td>Total Discount:</td> <td>Total Charges for Today:</td> </tr> <tr> <td>Total E911 Tax Due:</td> <td>Total Amount with Tax:</td> </tr> </table>						Calculated Zipcode	Total Misc Tax Due:	Enrollment Fee	Total USF Tax Due:	Total Tax Due:	Total All Taxes Due:	Total Discount:	Total Charges for Today:	Total E911 Tax Due:	Total Amount with Tax:																										
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Total Discount:	Total Charges for Today:																																								
Total E911 Tax Due:	Total Amount with Tax:																																								
<b>Payment Sources</b> Select Payment: Please select payment method <input type="button" value="Ov"/> <input type="button" value="Edit Payment"/> <input type="button" value="Add New Payment"/> <input type="button" value="Refresh Payment"/>																																									
<input type="button" value="Apply Now"/> <input type="button" value="Apply on Due Date"/> - <b>"Apply Now"</b> will enroll the phone in plan selected, charge the credit card, and deliver benefits to the phone immediately. <b>"Apply on Due Date"</b> button does not apply to TraFone.																																									

## Family Plans (Tracfone Account)

Enroll the customer in the TracFone Family Value Plan using a credit card

Family Plan						Account				
Plan Id	Description	Price	Ph Count	Famil	ESN	Brand	Model	Status	Nick Name	Min
0	Select Plan	0	0	0	35699888000042	TRACFONE	TFLG430GP	52		305
5800005	Family Value Plan	9.99	0	5.99						
<input type="button" value=" "/> <input type="button" value=" "/>						<input type="button" value=" "/> <input type="button" value=" "/>				
<b>Plan Phones</b> Family Plan 0 Select Plan Serial Number Zip Status MIN Nick Name Enrollment No data to display.						<b>Add to Account/Family Plan</b> Serial Number <input type="text"/> SIM <input type="text"/> Zip Code <input type="text"/> Nick Name <input type="text"/> <input type="button" value="Add"/> <input type="button" value="Clear"/>				
<b>Estimated charges for Zip Code</b> Calculated Tax Zipcode Total Misc Tax due Enrollment Fee Total Sales Tax due Total Combs Tax due Total USF Tax due Total Discount Total Charges for Today Total E911 Tax due Total Amount Due with Tax						<b>Payment Source</b> Select Credit Card Please select CC <input type="button" value=""/> CV <input type="text"/> <input type="button" value="Update Credit Card"/> <input type="button" value="Add Credit Card"/> <input type="button" value="Refresh Credit Cards"/> <input type="button" value="Process"/>				

## MIN Change

When the customer requests to change their phone number. MIN change thru 611611 is now available. This service allows our customers to change their phone number by texting the keyword MINC to 611611.

**MIN Change**

Current MIN: 7866405288

Activation Zip Code: 33178

**Process Min Change**   **Cancel**

## SIM Change

If the transaction requires a new SIM.

**SIM Change**

Current SIM: 8901260642102383903   New SIM: [ ]   SIM Exchange: N

Service  New Number  
 Same Number

Activation Zip Code: 33178

**Cancel**   **Process**

## Deactivation

If the customer requests to deactivate their phone number

**Deactivation**

Reason **CUSTOMER REQD Line Status : RESERVED USED** ▾

**CUSTOMER REQD Line Status : RESERVED USED**

- DEFECTIVE Line Status : RESERVED USED
- NO NEED OF PHONE Line Status : RESERVED USED
- NON TOPP LINE Line Status : RETURNED
- PASTDUE Line Status : RESERVED USED
- PORT CANCEL Line Status : RETURNED
- PORTED NO A/I Line Status : RETURNED
- REFURBISHED Line Status : RETURNED
- SIM DAMAGED Line Status : RESERVED USED
- SIM EXCHANGE Line Status : RESERVED USED
- SL PHONE NEVER RCVD Line Status : RESERVED USED
- STOLEN Line Status : RESERVED USED
- UPGRADE Line Status : RESERVED USED
- WN-SYSTEM ISSUED Line Status : RETURNED

**Deactivate**

## Port-In and Port-Out

If the customer requests to transfer their phone number from another company to the new phone.

**Current Service Provider**

MIN to Transfer 5153211000

Activation Zip Code 33122

Carrier Name AT&T ▾ Phone Type Wireless ▾

**Information Registered with your Current Service Provider**

Copy Information from Contact

Account Number	Address	House #
Password PIN	Line 2	Direction
First Name TwistFirstName	Zipcode	Unit
Last Name TwistLastName	City	Street
Contact Phone Number 3518265746	State	Name
Email lmxmidea@tracfone.com	Enter/Update Address	

## Upgrade

Transfer the phone number and benefits from one phone and/or SIM to another

Upgrade	
New ESN (to)	<input type="text"/> <input type="checkbox"/> Customer is calling from the phone they are upgrading
New SIM (to)	SIM Exchange Case
New PIN (to)	<input type="button" value="Purchase Airtime"/>
Transfer Min	<input checked="" type="radio"/> Yes <input type="radio"/> No
New Min (to)	<input type="text"/> *Enter only if upgrading to an active phone
<input type="button" value="Create Ticket"/> <input type="button" value="Continue"/>	

## History Menu

### Action Item History by ESN

Action Items are system transaction IDs that include, but is not limited to: activations, reactivations, deactivations and serial number changes. Action items are sent automatically and these are used for processing transactions on the carrier billing system.

Action Item History by ESN							
Task Id	Age	End Date	Type	Title	Status	Carrier Market	Activation Timeframe
1548222798	176	10/10/2013	Activation	VERIZON_PP ACTIVATION	Succeeded	VERIZON_PP	

### Activity Log

View all activities done on the customer's account

Activity Log Report by ESN						
Agent	LogDate	FlowName	FlowDescription	Status	Smp	Reason
WSOPKO	8/3/17 3:06 PM	Activity Log History by ESN	Accessing	Success		Authorization Passed. Page has been accessed.
WSOPKO	8/1/17 5:37 PM	Activity Log History by ESN	Accessing	Success		Authorization Passed. Page has been accessed.
WSOPKO	8/1/17 5:08 PM	Activity Log History by ESN	Accessing	Success		Authorization Passed. Page has been accessed.

### Transaction History

View all transactions processed on the customer's account

Transaction History																								
Transaction Id	Cust ID	ESN	Date/Time	User	Action	Result	Reason	U																
848746937	1131177645	100000000013247...	10/10/13 9:03 AM	CBO	ACTIVATION	Completed		0																
<input type="button" value="Red Cards"/> <input type="button" value="Promotions"/> <input type="button" value="Codes"/>																								
<table border="1"> <thead> <tr> <th>Transaction Id</th> <th>Red Card #</th> <th>SMP</th> <th>Units</th> <th>Days</th> <th>Part Number</th> <th>Description</th> <th>Part Class</th> </tr> </thead> <tbody> <tr> <td>848746937</td> <td>999999936978501</td> <td>36978501</td> <td>0</td> <td>30</td> <td>TCAPPUNL45</td> <td>TelCel Unlimited A...</td> <td>TCULCARD</td> </tr> </tbody> </table>									Transaction Id	Red Card #	SMP	Units	Days	Part Number	Description	Part Class	848746937	999999936978501	36978501	0	30	TCAPPUNL45	TelCel Unlimited A...	TCULCARD
Transaction Id	Red Card #	SMP	Units	Days	Part Number	Description	Part Class																	
848746937	999999936978501	36978501	0	30	TCAPPUNL45	TelCel Unlimited A...	TCULCARD																	

## Ticket History

History of all cases created for an account. To manage each case individually, select the [Ticket ID Number](#).

Ticket History								
ID Number	Code Type	Title	Condition	Status	Date/Time	User	MIN	Issue
1077676895	Line Activation	Unable to Make /...	Open-Dispatch	Pending	5/5/2014	CEB1HNIEVES	3058886014	Unregistered SIM/...
1077676900	Features	Voicemail	Open-Dispatch	Pending	5/5/2014	CEB1HNIEVES	3058886014	Unregistered SIM/...
1077691725	Warranty	Defective Phone	Closed	Closed	11/19/2014	CEB1HNIEVES	3058886014	Physical Damage
1077692133	Warranty	Defective Phone	Open	Pending	11/24/2014	CEB1HNIEVES	3058886014	HS Purchase

## Code History

Lists all the codes initiated by the system for an account

Code History							
ESN	Date/Time	User	Action	Sequence	Code	Accepted	Code Type
100000000013258737	11/18/13 12:00 AM	OACOSTA	Activation	0	00000:01609068168...	YES	Time_Code
100000000013258737	11/18/13 12:00 AM	OACOSTA	Activation	1	00001:95335127977...	OTAPENDING	PRL_SID
100000000013258737	11/18/13 12:00 AM	OACOSTA	Activation	2	00002:53873119376...	OTAPENDING	HomeMaster_SID
100000000013258737	11/18/13 12:00 AM	OACOSTA	Activation	3	00003:52083531999...	OTAPENDING	Local_SID
100000000013258737	11/18/13 12:00 AM	OACOSTA	Activation	4	00004:27868256548...	OTAPENDING	Local_SID

## Purchase History by ESN

Lists all airtime purchases made using a credit card the Website, Customer Service or IVR

Purchase History by ESN												
ESN	CC Last 4	CC Type	Transaction Id	Price	Discounts	Sales Tax	E911 Fee	USF	RCRF	Amount	Purch Date	Status
100000000013247363	3213	Master Card	BP2013110967356...	60	0	4.2	0	0.9	0.12	65.22	2013-11-09 11:54:28	Declined
100000000013247363	3213	Master Card	BP2013101067354...	0	0	0	0	0	0	0	2013-10-10 09:40:36	Approved

## Promotion History

A complete history of the promotional and bonus minutes added to the phone. You will be able to determine minutes delivered through Auto-pay in this section.

Promotion History								
Serial Number	Date/Time	Result	Promo Code	Promo Type	Source	Days	Units	Description
100000001045797	5/14/14 9:20 AM	Completed	DEFDIG02	Activation	TAS	60	10	Inform the customer that he will receive 10 units o...

## Phone History

Provides a complete history of the ESN

Phone History								
Serial Number	Change Reason	Date/Time	Status	Sequence	User	SIM	Dealer Id	Dealer Name
100000000013292405	DEACTIVATE	4/16/14 12:00 AM	54	7	CBO		9621	TRACFONE-BRIGHTPOINT-DIST.

## Line History

View the phone number attached to the phone

**Line History**

**Search**

\* Required

Transaction Type	<b>ACTIVATE</b>							
Msid								
* MIN	7868693915							
<input type="button" value="Search"/> <input type="button" value="Reset"/>								
MIN	MSID	Transaction Type	Date/Time	Status	User	Carrier	Carrier Id	Market
7868693915	7868693915	ACTIVATE	2/19/15 6:08 PM	37	sa	VERIZON WIRELESS	100040	VERIZON (San Francisco,CA)

## Recent Interactions

List all recent interactions associated to a specific contact record. You will also have the ability to create an interaction.

**Recent Interactions**

**Interaction Details**

2017-03-02 12:20:17.0 1217579353 Buy Airtime Successful CEB1HNIEVES 10000000013253986  
Customer successfully purchased 400 minutes with 1 year of service.

2017-02-21 14:05:29.0 1217578133 Technical Unable Make/Rec Call Successful CEB1HNIEVES 10000000013253986  
-customer asks to fix unable to make and receive calls issue  
-fix the line via SUI, phone works

[Create Interaction](#) [Export to Excel](#)

## Compensation and Replacement History

Summary of all Replacement and Compensation units or plans issued to the customer

**Compensation Replacement History**

Id Number	Creation Date	Case Type	Title	User	Type	Service Plan	Voice	SMS	Data	Da
1075132555	6/4/14 3:48 PM	Units	Replacement Units	HNIEVES	REPLACEMENT	UNL No data		0		

## Safelink Service History

Lists all SafeLink transactions including the Lifelink Ticket Number, Serial Numbers associated to the LifeLine service and the benefits provided to the phone.

**Search Criteria**

Select One  LID  ESN  
 ESN  
 LID

**Safe Link Service History**

Date	ESN	LID	Event	Plan	Minutes	Source	Status	Event Detail
4/1/15 2:04 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	389022242/1466197731
4/1/15 2:04 AM	012870005887668	9683419	Minutes sent		250	WEB	236	389022242/
3/1/15 1:33 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	380311188/1428876381
3/1/15 1:33 AM	012870005887668	9683419	Minutes sent		250	WEB	236	380311188/
2/1/15 1:38 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	373550819/1394190847
2/1/15 1:38 AM	012870005887668	9683419	Minutes sent		250	WEB	236	373550819/
1/1/15 1:42 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	366533030/1358487964
1/1/15 1:42 AM	012870005887668	9683419	Minutes sent		250	WEB	236	366533030/
12/1/14 2:14 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	361560981/1323246181
12/1/14 2:14 AM	012870005887668	9683419	Minutes sent		250	WEB	236	361560981/
11/1/14 2:07 AM	012870005887668	9683419	Minutes sent		250	WEB	236	354564373/
11/1/14 2:07 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	354564373/1288186394
10/1/14 1:47 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	345636438/1251394365
10/1/14 1:47 AM	012870005887668	9683419	Minutes sent		250	WEB	236	345636438/
9/1/14 1:44 AM	012870005887668	9683419	Minutes sent		250	WEB	236	338792102/
9/1/14 1:44 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	338792102/1216883903
8/1/14 1:28 AM	012870005887668	9683419	Minutes delivered		250	WEB	236	331653100/1181607342

## Safelink Requested Plan

Lists the current SafeLink Plan assigned to the customer. The system auto-assigns the plan depending on the technology requested during enrollment.

Safelink Requested Plan History			
Lifeline Id	Batch Date	Requested Plan	Plan To Be Applied 26th
38812582	4/16/15 4:49 PM	Lifeline - FL - 2	Lifeline - FL - 2
38812582	4/15/15 11:18 AM	Lifeline - FL - 1	Lifeline - FL - 2
38812582	4/10/15 3:56 PM	Lifeline - FL - 3	Lifeline - FL - 2
38812582	4/1/15 3:34 PM	Lifeline - FL - 4	Lifeline - FL - 2
38812582	3/31/15 12:48 PM	Lifeline - FL - 1	Lifeline - FL - 2

## Support Page

The next set of menus can only be accessed from the Support page. Access to certain menus is limited to certain groups.

### Action Item Maintenance

Used for research purposes (Carrier Analysts only)

### ESN MIN History

Allows you to conduct a search for the following:

**Phone History** – complete history of the ESN.

ESN MIN History								
<a href="#">Phone History</a> <a href="#">Line History</a> <a href="#">Activation Deactivation</a> <a href="#">Redemption History</a> <a href="#">Promotion History</a>								
Phone History								
<input type="text" value="Serial Number"/> 100000000013731607								
<input type="button" value="Search"/>								
Serial Number	Change Reason	Date/Time	Status	Sequence	User	SIM	Dealer Id	Dealer Name
10000000001373...	REACTIVATE	6/28/17 10:49 AM	52	5	ASARMIENTO		9621	TRACFONE-BRIGHTPOINT-DIST.
10000000001373...	DEACTIVATE	10/4/17 3:52 PM	54	13	CBO		9621	TRACFONE-BRIGHTPOINT-DIST.
10000000001373...	REACTIVATE	1/12/18 4:40 PM	52	15	ASARMIENTO		9621	TRACFONE-BRIGHTPOINT-DIST.

**Line History** – the Phone number attached to the phone

ESN MIN History								
<a href="#">Phone History</a> <a href="#">Line History</a> <a href="#">Activation Deactivation</a> <a href="#">Redemption History</a> <a href="#">Promotion History</a>								
Line History								
<input type="button" value="Search"/>								
<small>* Required</small>								
Transaction Type <input type="text"/>								
Msid <input type="text"/>								
* MIN <input type="text" value="6507358908"/>								
<input type="button" value="Search"/> <input type="button" value="Reset"/>								
MIN	MSID	Transaction Type	Date/Time	Status	User	Carrier	Carrier Id	Market
6507358908	6507358908	LINE_BATCH	1/12/18 11:03 AM	13	sa	VERIZON PREPAY PL...	122794	VERIZON_PP
6507358908	6507358908	MSID UPDATE	1/12/18 11:03 AM	13	sa	VERIZON PREPAY PL...	122794	VERIZON_PP
6507358908	6507358908	MSID UPDATE	1/12/18 11:03 AM	13	sa	VERIZON PREPAY PL...	122794	VERIZON_PP
6507358908	6507358908	ACTIVATE	1/12/18 11:03 AM	13	sa	VERIZON PREPAY PL...	122794	VERIZON_PP
6507358908	6507358908	MSID UPDATE	1/15/18 9:54 AM	13	sa	VERIZON PREPAY PL...	122794	VERIZON_PP

**Activation Deactivation** – when the phone was activated, deactivated or reactivated and other transactions such as redemption and programming codes sent to the phone

ESN MIN History

Phone History Line History Activation Deactivation Redemption History Promotion History

**Activation Deactivation**

Search (Use % for All) \* Required

ActionType  
\* Serial Number %  
\* MIN 6507358908

Search Reset

Call Trans Objid	Action Type	Date/Time	Customer Id	Market	Serial Number	SIM	MIN	Technology	Dealer Name	Result
2178592554	REDSWEEPALL	1/17/18 10:12 AM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178592556	QUEUED	1/17/18 10:12 AM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178588728	REDSWEEPALL	1/12/18 4:52 PM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178588729	QUEUED	1/12/18 4:52 PM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178588730	QUEUED	1/12/18 4:52 PM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178587967	REACTIVATION	1/12/18 11:01 AM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178725977	SUS INQUIRY	5/30/18 3:11 PM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed
2178592553	REDSWEEPALL	1/17/18 10:12 AM	1132455823	VERIZON_PP	100000000013731...		6507358908	CDMA	TRACFONE-BRIGHTPOINT...	Completed

**Redemption History** – all paid airtime minutes added to the phone.

ESN MIN History

Phone History Line History Activation Deactivation Redemption History

**Redemption History**

Search \* Required

MIN  
Red Code  
SMP  
\* Serial Number 100000000013731607

Search Reset

**Promotion History** – all promotional minutes added to the account (by promo codes, activation, or Customer Care Representative). This is only applicable to TracFone, NET10 and SafeLink customers.

ESN MIN History

Phone History Line History Activation Deactivation Redemption History Promotion History

**Promotion History**

Search \* Required

MIN  
\* Serial Number 014052007102465

Search Reset

## Real-Time Redemption

Transactions processed at our authorized retailers.

Real Time Redemption

Search Criteria

MIN  
TF Trans ID / SNP  
Red Code

Search Clear

TF Trans ID / SNP	Red Code	Pin Status Code	Trans Date	Trans Type	MIN
1229412021	195321762919483	-400	1/16/2014	ADD	9313399203
1229402184	209011749541058	-40	1/16/2014	ADD	9392171857
1229402183	158362126175960	-400	1/16/2014	ADD	9479778029

## Dealer Lookup

Search for available dealers by entering the Zip Code.

**Dealer Lookup**

**Search**

Search:

LOGIN NAME	SMART USER ID	SPIFF CONFIRM CODE	FIRST NAME	LAST NAME	ADDRESS	CITY
24hrwireless@bellsouth.net	22163	SM751276412247	Elias	Daher	2704 N.W 72nd ave	Mian ▾
mikejunco@aol.com	10269	SM171619605883	Michael	junco	7500 NW 25 Street #106	Mian
leo@goldencellstore.com	458806	SM719206437749	Leonardo	Lizarazu	7248 nw 31 st	mian
luisamaq@hotmail.com	277673	SM813312208161				
cellphonedoctor1@yahoo.com	39237	SM964087216934	alex	ramirez	7640 nw 25 st.	mian
zulima@olicell.com	132066	SM828717359566	Horacio	Bustos	7825 NW 29th street Suite 105 A	Mian
johel_arias@yahoo.com	1240087	SM640371865907	johel	arias	3004 NW 72nd ave	Mian
info@calyani.com	2576182	SM642019075972	Calixto	Hernandez	3108 nw 72 av	mian
ansteroma@gmail.com	2576219	SM491050680651	Angle	Rodriguez	3000 nw 72 av	mian
xpresstrading02@aol.com	2244538	SM477556912412	Dean	Patel	3560 nw 72nd ave	mian
pegasus1@gmail.com	1971857	SM756189431574	David	Torres	7234 Nw 31 st	mian
adil@asl-interamerica.com	3316221	SM737751181645	Adil	Ali	3152 NW 72 Avenue	Mian
sales@kaiduonline.com	3678215	SM378288212369	QingXia	Wang	7224 nw 31 street	mian

## Safelink Service History

Provides SafeLink History of the customer such as Plan Type, Serial Number of the Phone, Minutes Delivered and etc. This may be checked through LifeLine ID or ESN.

**Search Criteria**

Select One  LID  
 ESN

LID

**Safe Link Service History**

Date	ESN	LID	Event	Plan	Minutes	Source	Status	Event Detail
1/12/16 6:45 AM		24773886	Ticket Assigned			WEB		1128860322/

## Solutions Link

Similar to Solutions found in ESN Support Menu on the Incoming Call Page.

## BYOP Eligibility Check

Verify if the device is compatible with our BYOP program.

**Register BYOP**

**Information about your device**

Select Carrier

Serial Number

Zip Code

Select a Carrier  
 Sprint  
 Verizon

## Carrier Support Menu

Similar to the Carrier Support found in the Income Call Page.

## Toss Util Menu

### Activity Log

View all activities done on the customer's account.

Activity Log Report by ESN					
Agent	LogDate	FlowName	FlowDescription	Status	Smp Reason
WSOPKO	8/3/17 3:06 PM	Activity Log History by ESN	Accessing	Success	Authorization Passed. Page has been accessed.
WSOPKO	8/1/17 5:37 PM	Activity Log History by ESN	Accessing	Success	Authorization Passed. Page has been accessed.
WSOPKO	8/1/17 5:08 PM	Activity Log History by ESN	Accessing	Success	Authorization Passed. Page has been accessed.
WSOPKO	7/21/17 3:46 PM	Activity Log History by ESN	Accessing	Success	Authorization Passed. Page has been accessed.
WSOPKO	7/21/17 3:46 PM	Update Contact Details	Update Contact Details	Success	Contact Updated First Name :1132046520~ Middle Initial :~ Last Name :1132046520~ Address :~ Suit / Apt :~ City :No C...

### Airtime (Cards)

Verify the status of an airtime card (i.e. Card type, day added, which ESN it was added to). There are different statuses the Airtime card can have. Once you enter the PIN, you can view if the card is new, redeemed, void or reserved.

To view the status of a Service Card:

- 1 Enter the SNP, airtime card number, or ESN
- 2 Select Search

The airtime card number will be masked in the search results.

Airtime		Selected Box				
SNP or Card#	ESN 353350072	ESN 353350072	SNP 25190			
Group ID	Date/Time 2020-01-20 00:49:22.0	Dealer Id 7882	Dealer Name TRACFONE INBOUND CREDIT CARD SALES			
<input type="button" value="Search"/>	<input type="button" value="Reset"/>					
Card Information						
CardNumber	Redemption Info	Card Information	Status Info	Dealer Info	Reserved for ESN	Date/Time
*****	Result Completed Access Days 30 Card Units 0 SNP 25190 ESN 353350072 Redemption Sys WEB MIN 786626	NTAPPM00045 STRAIGHT TALK \$45 (Monthly Plan) Airtime Card - UNLIMITED Mins and Text M... Part Number NTAPPM00045 Description STRAIGHT TALK \$45 (Monthly Plan) Airtime Card - UNLIMITED Mins an	Status 41 Description REDEEMED Agent Notes	Dealer Id 7882 Dealer Name TRACFONE INBO		12/21/2019

## Fix ESN

**Fix ESN (Form 1052)** allows Customer Care Representatives to fix system errors real-time for errors such as:

- Activation Loop
- Enrollment Issues
- Redemption Loop, etc.

The screenshot shows a 'Fix ESN' interface. At the top, it says 'Fix ESN'. Below that is a 'Serial Number' field containing '100000000013461179'. Underneath is an 'Error' field containing 'Activation Loop'. At the bottom is a blue 'Fix ESN' button.

Whenever you encounter any of these errors, you are required to use the Fix ESN functionality. Should you encounter the same error after fixing the ESN, create a system error case. Otherwise, continue with the troubleshooting. Do not create a system error case without following the FIX ESN procedure.

## Admin Page

The Admin Page is restricted to Tier 1 level. This page is intended to be utilized ONLY by TracFone Miami.

The screenshot shows the Admin Page interface. At the top is a navigation bar with tabs: Ticker, Console, Incoming Call, Support, and Admin (which is highlighted). On the left is a sidebar titled 'Admin' containing a list of options: Activity Log - Priv Class Changes, Activity Log - Permission Changes, Create Solution, Modify Parent Solution, Modify Solution, Permissions, Task Scripts, User Priviledge Classes, Message to Exch Case Config, Manage Solution Files, ARPU Subsidy Cost, Interaction Drop Downs, Manage External Links, and Exchange Shipping Options Config. The main content area displays a message: 'Menu Selection Required' with the sub-message 'Message Please select an option from the left hand side menu.' and 'Flow Init Menu Flow'.

## Chapter 3: Call Management



## Tracfone Metrics and Goals

TracFone has set METRICS and GOALS that need to be achieved to positively contribute to the success of TracFone Wireless. We need to deliver quality service in order to keep our customers happy. Let's review some of the **Key Performance Indicators**:



### Schedule Adherence

- Complying with the assigned schedule.



### Quality Assurance

- Adhere to quality standards and provide solutions that will ensure a positive customer experience.



### NPS (Net Promoter Score)

- Customers are randomly surveyed and asked "**On a scale of 1-10 with 10 being the most positive, how likely are you to recommend our service to others?**"
- For NPS, the ratings are categorized as follows:
  - Promoters: 9-10
  - Neutrals: 7-8
  - Detractors: 1-6
- To calculate the NPS, the number of detractors is subtracted from the number of promoters and divided by the total number of surveys.



### RFT (Right First Time)

- Customers are randomly surveyed and asked "**Was your issue resolved to your satisfaction?**" The customer has the option to answer "yes" or "no".
- To calculate the RFT, the total "yes" responses are divided by the total number of surveys.

## Standard Call Handling Procedures



As a Customer Care Representative, you will be monitored by the Quality Assurance (QA) Department for compliance to TracFone standards for greetings, communication/problem solving skills, product knowledge, and call closings. By adhering to the guidelines below, you should consistently earn passing scores.

### General Interactions

- ✓ Speak clearly, without terminology/jargon the customer might not know.
- ✓ Listen attentively, focusing on what the customer is saying, not on what is going on around you.
- ✓ Do not interrupt the customer.
- ✓ Acknowledge and accept responsibility for the customer's question(s) and/or request(s).
- ✓ Avoid unexplained silence by informing the customer of your actions.
- ✓ Utilize appropriate hold procedure.

### Opening Spiel

- ✓ Answer each call that comes in within one to three seconds.
- ✓ Thank the caller for calling and provide your name and offer assistance on how you could help them.
- ✓ Promptly ask for the serial number or phone number and for information on the account and the customer's needs.
- ✓ Ask probing questions if the customer is not clear about what is needed.
- ✓ Offer the Survey (if applicable)

### Selecting the Correct Flow and Offering Assistance

- ✓ Identify the reason for the call and select the appropriate TAS flow to resolve the customer's issue.

### Spell/Verify

- ✓ Spell/verify only the customer's shipping and credit/debit card information.
- ✓ Only spell/verify other information if it is not clearly stated.

### Closing

- ✓ Inform customer that the transaction was completed and Thank the customer.  
**"Your transaction has been processed. Thank you for calling (Brand)."**



When you are transferring a call, do not offer additional assistance. Instead, transfer the call to the department that is able to assist the customer.

**End calls in a professional manner that makes customers feel valued.**

## Welcome Calls

The following process applies to welcome calls for all activations, reactivations, upgrades, and ports. For these transactions, always remember to extend a warm welcome to the customer and thank them for choosing us as their service provider. There is no script to be read verbatim. The goal is to simply show the customer that we appreciate their business. The following example of a welcome greeting can be used after the customer states that they would like to activate a phone:

"Thank you for choosing [Brand] Wireless as your service provider! Can you please provide the serial number on the red activation card?"

## CTI Call Greetings

With CTI Information	<p><i>"Thank you for calling (<b>brand name</b>), my name is (XXX). Are you calling in reference to the number ending in XXXX?"</i></p> <p><i>"May I please have your name?"</i></p>
With No CTI Information	<p><i>"Thank you for calling (<b>brand name</b>), this is (your name). How may I assist you today?"</i></p> <p><i>"May I please have your name?"</i></p>
Onboarding Team	<p><i>"Thank you for calling (<b>brand name</b>), this is (your name). Are you calling to transfer your number from another company?"</i></p> <p><i>"May I please have your name?"</i></p>

## Transfer Guidelines

The Transfer Guidelines found in Agent Support is categorized by brand, organization, and scenario. It will help you determine when, where, and how to transfer a call. Customer satisfaction is greatly impacted by how calls are transferred. At TracFone, we typically transfer call in two ways:

### Blind Transfer

Transfer the call to a different extension or department without first providing the other extension or department with any details about the incoming call.

### Warm Transfer

Place the customer on hold and contact the other person/department and provide details of the customer's issue(s) prior to transferring the call.

Escalations	3324 - ENG 1123 - SPA	Warm Transfer	Corp ERD
<ul style="list-style-type: none"> <li>Customers mentioning BBB, FCC, Attorney General, or Press</li> <li>Customers making Legal Threats</li> </ul>			
<ul style="list-style-type: none"> <li>Customer requesting Corporate Office, America Movil, President or CEO</li> </ul>	3324 - ENG 1123 - SPA	Warm Transfer	Corp ERD
<ul style="list-style-type: none"> <li>Customers who are threatening with killing or bomb threats</li> </ul>	1830 - ENG 1123 - SPA	Warm Transfer	Corp ERD

## Escalation Guidelines

TracFone strives for one-call resolution. In order to resolve customer issues quickly, increase retention, and decrease escalations to Miami, Customer Care Representative should adhere to the Escalation Guidelines below. Failure to do so will result in an auto fail in your Quality Assurance (QA) score.



When you receive a call, you **MUST** do everything possible to resolve the customer's problem.



If you are unable to resolve the issue, you must follow the instructions outlined in the Transfer Guidelines.

Please note that you are required to review interactions and tickets of any call that is NOT an Activation, Reactivation, or Redemption to make sure that the customer has not called multiple times for the same issue. If the customer has called more than 3 times in 7 days for the same issue, then the Customer Care Representative must escalate the call to their SUP ERD team.

The Transfer Guidelines in Agent Support is constantly being updated to reflect the Team which handles certain call issues.

## Identifying Call Types

To handle calls in a timely manner, begin by asking some fact finding questions when customers are calling to Activate, Reactivate, Upgrade, perform device or data troubleshooting steps to their phone. Below are some examples to help you identify your call:

Ask the customer what type of phone they are trying to activate. (i.e. iPhone 8, Galaxy S8, etc.)

Ask the customer if they purchased a SIM card.

Ask the customer where the phone was purchased. (i.e. TracFone website, Walmart, etc.)

Ask the customer for the serial number/ESN. The serial number is also known as IMEI or MEID.

## Keeping the Customer Updated

In a situation where it is taking you a long time to resolve the issue, update the customer by giving a narration of what is happening and what you are doing. This helps the customer to feel secure that you are on top of the situation.

Should it take you more time to complete the solution, update your customer every **2 (two) minutes** while processing the request(s) or performing system processes.

1

Inform the customer of the actions you are taking.

2

Set their expectations that they may hear silence while you are processing the solutions (s).

3

Keep the customer updated on the status of the process or follow up with them every **2 minutes** thereafter.

Two minutes is the maximum time. **Do not** update the customer on every single thing that you are doing. You may use the script below:

*"Sir/ Ma'am, I am still working on your account. Feel free to ask or comment on anything you feel appropriate or necessary while I quietly work on your concern"*

Remember that excellent customer service is delivering results in a timely manner.

## Outbound Call Script

For the latest scripts, please visit the Situational Scripts section in Agent Support.

### Outbound Spiel

*(Agents must read the Outbound Spiel whenever making an outbound call and speaking to the customer)*

**2G Migration Customer:**

"Hi this is (name). This call may be recorded for Quality Assurance purposes. Are you the person I was speaking with a while ago?"

**IMPORTANT:** EVERY person you speak to during the call needs to be read the disclaimer with the exception of the Survey team and Calling from the Handset. In this case, they will have heard the script prior to you taking the call.

In the event the call is handed-over to a different person, read this script:

Please be informed that this call may be recorded for Quality Assurance purposes.

## Procedure for Disconnected Calls

When dealing with an irate customer, you must remain calm. If the customer is upset and using profanity, don't take it personally. If the call is disconnected (for any reason), take a deep breath and call the customer back.

**Opening:** *"Hello, this is (Brand) Wireless calling. Please be informed that this call may be recorded for Quality Assurance purposes. We were disconnected and I am calling back to finish assisting you. I can understand your frustration and I would like for us to work together to get this issue resolved for you."*

Listen carefully to what the customer is saying to make sure you have a clear understanding of the problem. Sympathize with the customer and apologize. *"I'm sorry you're not happy with our product or service. Let's see what we can do to make things right."*

Let's review the disconnected call procedure:

- 1 If the call is disconnected, you have 20 seconds to go into Aux 4 and begin calling the customer back.
- 2 If you reach a company switchboard operator and have the customer's name, ask for the customer. If there is no one by that name then create an interaction including the number dialed.
- 3 If you are unable to reach the customer and have the option to leave a message, use the following script:

*"Hello, this is [Brand] Wireless calling. We were disconnected and I was calling back to finish assisting you. Please give us a call back at (company phone number) at your earliest convenience".*

- 4 Create an interaction including: phone number dialed, if you left a message and all relevant notes pertaining to the call.

**DO NOT CALL** the customer back if Avaya shows the customer's number as a toll free number such as a 1-800, 1-866, 1-888 or 1-877. Instead, create an interaction noting that no call back number is available.

**ISSUE RESOLVED?** For any resolved issue and the customer does not agree with the resolution and disconnects the call, there is no need for the agent to call the customer back.

# Chapter 4: Introduction to Customer Transactions



## Putting an Account into Session

To get started, first enter their account into session. If the customer already has a contact account, follow the steps below to search for the customer's account.

- Enter the customer's information and select Search Service. If using the customer's email address and select Search Contact instead of Search Service.

**Need help finding the serial number?**

- Dial \*#06#; or
- Check the Settings menu

- The Service Profile screen will display with the customer's account in session.

## Creating a New Contact Account

If no contact information was found or if the ESN is New, most of the fields in the Service Profile will be blank. The Transactions menu will not appear on the LHS until an account is in session. Proceed to create a new contact account.

## Create a New Contact Account

In the Search Contact section, select New Contact Account.

The screenshot shows the TAS software interface with the 'Incoming Call' tab selected. In the 'Search Contact' section, there are several input fields: Serial Number, Email, Interaction Id, Contact Phone, SIM, MIN, First Name, Address 1, Customer Id, Airtime Pin, Last Name, Zip, and a checkbox for 'No Email Provided'. Below these fields are several buttons: 'Search Service', 'New Contact Account' (which is highlighted in orange), 'Search Contact', 'Search Ebay Order', 'Search Credit Card', 'Search Merchant Ref No', 'Search B2B/B2C Order', and 'Clear'.

The screenshot shows the 'New Contact' dialog box with the 'Basic' tab selected. The 'Brand' field is set to 'GET BRAND FROM ESN'. Other fields include 'Serial Number', '\* Zip', 'Email', '\* 4 Digits Security PIN', and 'Date of Birth'. At the bottom are 'Create Contact', 'Clear', and 'Cancel' buttons.

**1** Select the Brand (if the part class of the ESN is generic, such as a non-branded iPhone, select the specific brand you are activating with).

- 2** Enter the required information:
- ✓ IMEI/ESN/Serial Number \*
  - ✓ zip code \*
  - ✓ Email Address
  - ✓ 4 Digits Security PIN\*
  - ✓ Date of Birth

Make sure to spell and verify the information

**3** Select Create Contact



You must request all of the information; however, the customer is only required to provide the IMEI/ESN/Serial Number, Zip Code and a 4 Digits Security PIN. Instruct the customer to provide a PIN that is easy to remember. This is for security purposes only and to expedite their transactions going forward. The customer can change their PIN on the website and you can also update the PIN in TAS once it's created. For BYOP, you must create the new contact without the IMEI/ESN/Serial number.

The Service Profile and Transaction menu will appear. You are now ready to proceed with servicing the account.

The screenshot shows the TAS software interface with the 'Incoming Call' tab selected. In the 'Service Profile' section, there are various fields for a device profile. In the 'ESN Support' section, there is a 'Menu Selection Required' message and a list of support options. The 'Carrier Support' menu is open, showing options like 'Accessory Ticket', 'SIM Settings', 'Assign Seflink Id', 'Balance Inquiry', 'Check Activation Status (Sprint)', 'Create Ticket', 'Device Management', 'Easy Exchange', 'Email Support', 'Master Subscriber Lock', 'Personality', 'Register iPhone Exchange', 'Report Device Problems', 'Reward Points', 'Carrier Support', 'Toss Util', 'Tutorials/Instructions', and 'Transactions'. At the top right, there are links for 'CLFISTI1', 'celstrives', 'Language', and 'Logout'.

## Add an ESN to another Account

Go to the account you want to add the ESN to.

**1** Select Contact Profile

**2** Complete the Identity Challenge

**Identity Challenge**

Challenge	Response	Selected
Security PIN Account	1234	<input checked="" type="checkbox"/>
Date of Birth	09/29/1995	<input type="checkbox"/>
Zip Code	94043	<input type="checkbox"/>
Email	tf@tfb.com	<input type="checkbox"/>

**Decline** **Continue**

**3** Select Add ESN to Account and enter the ESN and Nick Name (optional).

- If you are moving an ESN with an existing account, an error message will inform you that the ESN is ACTIVE in another account. In this scenario, you MUST VERIFY the security questions for both accounts.

**Add ESN to Account**

Serial Number	100000000013809769
Nick Name	Test
Security Pin	1234
Overwrite Restriction	<input type="checkbox"/>

**Add** **Cancel**

**Account Summary**

Message ERROR-00007 ADFCRM\_ESN\_ACCOUNT.ADD\_ESN\_TO\_ACCOUNT : Movement between accounts is not allowed for active ESN

Add ESN to Account						
Brand	Serial Number	Primary	MIN	Security Pin	Nick Name	Part Number
NET10	100000000013392728	0	2223532180			NTMTXT830CP
NET10	100000000013402657	0	2226063567			NTMTXT830CP
NET10	100000000013472091	1	2226655593		Default	NTMTXT830CP
NET10	100000000013473557	0	2229248093			NTMTXT830CP

- Go back to the account where the ESN will be added and select Add ESN to Account and check the Overwrite Restriction box.

**Add ESN to Account**

Serial Number	100000000013809769
Nick Name	Test
Security Pin	1234
Overwrite Restriction	<input checked="" type="checkbox"/>

**Add** **Cancel**

**4** Select Add. A confirmation message will display. The Serial Number has been added to the account

Message ESN added to account, Successfully

# Security Questions

When updating contact information for a customer, it is important to verify the security questions. These questions will be verified when the customer calls in and wants to complete certain transactions on their account. Without the security PIN information, the customer can still validate their identity through the alternative information already on file. If the customer fails to provide all pertinent information asked to confirm their account ownership, then you should not proceed with any of the requested transactions.



Never provide to the customer any confidential information used for validation.

## Identity Challenge

The Identity Challenge will appear whenever the action requires account verification.

Identity Challenge		
Challenge	Response	Selected
Security PIN Account	1234	<input checked="" type="checkbox"/>
Date of Birth	09/29/1995	<input type="checkbox"/>
Zip Code	94043	<input type="checkbox"/>
Email	tf@tfb.com	<input type="checkbox"/>

**Buttons:** Decline (disabled), Continue (highlighted)

The first verification is to validate the Security PIN. If there is no PIN on file or the customer was unable to provide it, you MUST attempt to set up a PIN before continuing the transaction. Instruct the customer to provide a PIN that is easy to remember. This is for security purposes only and to expedite their transactions going forward.

If they decline setting up a PIN, don't insist and continue with the call.

## Customer Verification Guidelines

Follow the guidelines below to verify the customer's account.

#1	#2	#3	#4
<b>Account has Security PIN</b>	<b>Unable to verify PIN or does not have one</b>	<b>Unable to verify Security Questions; in possession of phone</b>	<b>Unable to receive SMS or not in possession of phone</b>
<b>Ask the Security PIN. Once verified, continue with the call</b>	Ask Security Questions Once verified, reset/set up their PIN then continue with the call.	Send SMS via Security Code Tool. Ask the customer to read back the code.  Once verified, reset/set up their PIN and/or security questions.	Verify the Serial Number/MIN <b>and</b> one of the following: <ul style="list-style-type: none"><li>✓ Zip Code</li><li>✓ DOB</li><li>✓ Email</li><li>✓ Last 4 SS# (SL only)</li></ul>
No – Proceed to #2	No – Proceed to #3	No – Proceed to #4	Once verified, reset/set up their PIN and/or security questions.



### Always Remember

- ✓ Verification is not necessary for general question or when creating a new account/contact or for Migration customers, when creating a Migration Ticket.
- ✓ ALWAYS set up a PIN for a first time activation.
- ✓ If the customer fails to provide all pertinent information asked to confirm his/her ownership of the account then kindly inform the customer that you are unable to proceed with any of the requested transactions.

To find the Serial Number, provide one of the following instructions:

- ✓ Press \*#06#
- ✓ Text "Four" to 611611
- ✓ Go to Phone Settings or Prepaid Menu

GSM BYOP ESN's are the last 15 digits of the SIM – Verify the last 4 digits ONLY.

Service Profile	
Serial Number	100000000013810225
Hex Serial Number	
Part Number	TFBYOPC
Technology	CDMA (BYOD)
Brand	TRACFONE
Sequence	0
Dealer	9621 TRACFONE-BRIGHTPO...
Phone Status	ACTIVE
SIM	SIM Status
	MIN 8135187239
	MSID 8135187239
	MIN Status ACTIVE
	Zip 33178
	Carrier 104152 VERIZON (M...
	Customer Id 1129593782
Contact Name	CYBER_copy_5 SOURCE
Lid	
Group Id	660604
Activation Date	07/14/2017
Deact Date	
Cards In Reserve	0
Service End Date	02/09/2018
Next Charge Date	
Rate Plan	TFREVBULK_BYOP_ANDR
Service Plan	252
ObjId	
Service Type	Paygo
Auto-Refill	
Next Refill Date	
Warranty	
Handset Protection	
Current Throttle Status	
Device Type	BYOP
Leased to Finance	No
Phone Gen	BYOD
Latest Transaction	L
Recent History	

# Main and Member Account Contact

When changing customer's account information, it is a must to determine if you are changing account information from the Main Account Contact or the Member Contact. You must select the specific serial number from the Account Summary section and select Contact Details to proceed with the change. There are certain restrictions that only the Main Account Contact can update and modify if customer wants to make changes in the account. See details below.

## Main Account Contact

The Main Account Contact is labeled to the customer's Account Information upon registration of service. You can update all fields under Basic and Additional Info, including the confidential information.

By default, the first ESN registered in the account will be the Main Account Contact. In case the customer requests to remove the ESN under the Main Account Contact, then only the Phone's Profile will be removed but the customer ID with the customer's account information will remain in the account.

You can also access the Main Account Information by selecting Contact Details from the Contact Action menu.



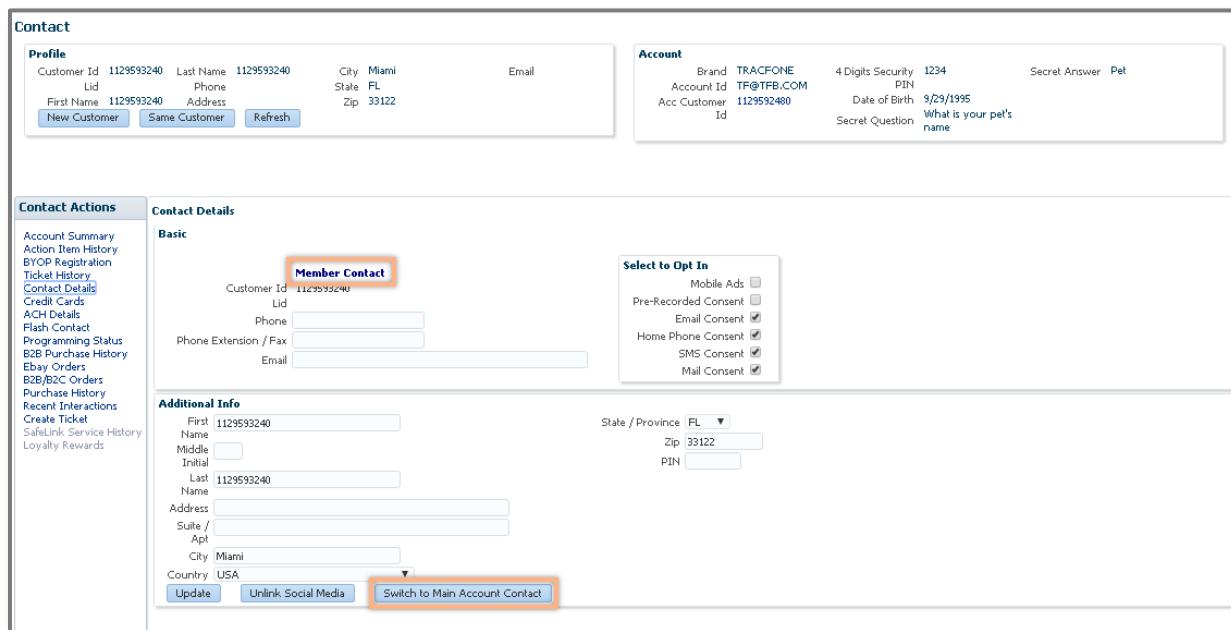
- The Main Account Contact must be in session in order to update the date of birth, security questions, and reset password.
- If the customer provides a Phone Extension/Fax number for callback, you can enter the information under Phone Extension/Fax.

## Member Contact

The Member Contact type is labeled to the information of all associated phones in the account. Only the fields available under the Basic and Additional Info can be changed.

-  The Main Account may not necessarily be the Primary Phone in the account. An ESN can be made primary by selecting Make Primary, but this will not change the Main Account information in any way.
-  Changes in the Main Account email address will also change the customer's My Account login to the new email entered.
-  Make sure to validate customer's account when changing any of the account information on file..
-  Spell and verify the information given by the customer when updating the Contact Information and/or Email Address.

If the customer wants to update other information that are only available in the Main Account Contact, then you must select Switch to Main Account Contact to do so.



**Contact**

<b>Profile</b>	<b>Account</b>
Customer Id 1129593240 Lid 1129593240 First Name 1129593240 New Customer	Brand TRACFONE Account Id TFB@TFB.COM Acc Customer Id 1129592480 4 Digits Security PIN 1234 Date of Birth 9/29/1995 Secret Question What is your pet's name Secret Answer Pet

**Contact Actions**

**Contact Details**

**Basic**

Customer Id 1129593240  
Lid  
Phone  
Phone Extension / Fax  
Email

**Select to Opt In**

Mobile Ads   
Pre-Recorded Consent   
Email Consent   
Home Phone Consent   
SMS Consent   
Mail Consent

**Additional Info**

First 1129593240  
Name  
Middle  
Initial  
Last 1129593240  
Name  
Address  
Suite / Apt  
City Miami  
Country USA

State / Province FL  
Zip 33122  
PIN

**Buttons**

Update Unlink Social Media Switch to Main Account Contact

## Updating The Main Account Contact (Primary)

When two or more phones are registered under one account, the customer must choose which phone will serve as the Primary ESN. By default, the first ESN registered in the account is the Primary, but if the customer wants to set a different Primary ESN in the account, then you may assist the customer by following these steps.

- 1 Select Contact Details from the LHSM.
- 2 Select the ESN that the customer wishes to be the primary and select Make Primary to make it as the Main Account Contact.

Brand	Serial Number	Primary	MIN	Security Pin	Nick Name	Part Number	Technology	Status Name
TRACFONE	100000000013809769	0	3436608926			TFSAS738C	CDMA	ACTIVE
TRACFONE	100000000013810229	0	8135187239		byop	TFBYOPC	CDMA	ACTIVE
TRACFONE	100000000013886789	0				TFLG236C	CDMA	NEW
TRACFONE	100000000013891189	0				TFSAS738C	CDMA	NEW
TRACFONE	1000000007645939	0				PHTF128PSIMT5DD	GSM	NEW
TRACFONE	1000000008040791	0	6508701834		PPE 3G	TFALA383GP	GSM	ACTIVE
TRACFONE	1000000008285784	0				PHTF128PSIMT5DD	GSM	NEW
TRACFONE	1000000008285818	0				PHTF128PSIMT5DD	GSM	NEW
TRACFONE	1000000008368861	1			Test	TFZE2667G	GSM	NEW

The number 1 indicates the primary ESN phone, and the number 0 is the secondary phone or account member.

The Make Primary button is enabled when the ESN in session is an account member.



Make sure to validate the customer's account when changing any of the account information on file.

## Opt-In Communication Preference

If a customer complains about not receiving text or email on their upcoming Service End Date, Auto-Refill charge or declined Auto-Refill payment, you MUST check the customer's communications preference in the Select to Opt In section found in the Contact Details page.

The screenshot shows the 'Contact Details' page under the 'Basic' tab. On the right, there is a 'Select to Opt In' section containing checkboxes for various communication types: Mobile Ads (unchecked), Pre-Recorded Consent (unchecked), Email Consent (checked), Home Phone Consent (checked), SMS Consent (checked), and Mail Consent (checked). An orange box highlights this section.



- You need to validate the customer's identity prior to making any changes in the Opt-in section.
- You need to ask the customer which type of communications they wish to receive and check the corresponding boxes. The customer MUST opt-in to receive these communications; otherwise they will not be notified.
- If the customer does not want to receive any communications, uncheck the boxes.
- An **Opt-In Communication Preference Solution** is available in the Solutions link instructions. You should not update the Opt-in section in the customer's Contact Profile without referring to the instructions outlined in the Solution.

## Sales Order Research

To search for orders placed online (brand websites or e-store), follow these steps:

- 1 Enter the customer's order number in the Order ID field.
- 2 Press Search B2B/B2C Order
- 3 Select the Order ID link from the search results.

The screenshot shows the 'Search Contact' page. At the bottom, there is a search bar with several buttons: 'Search Service', 'New Contact Account', 'Search Contact', 'Search Ebay Order', 'Search Credit Card', 'Search Merchant Ref No', 'Search B2B/B2C Order' (which is highlighted with an orange box), and 'Clear'. Below the search bar is a table with columns: Order Id, Customer Id, Request Date, Email, First Name, Last Name, Phone, Address, City, State. The first row of the table has an orange box around the 'Order Id' column value '1011613'.

**4** Select B2B/B2C Orders from the Contact Actions menu.

**5** The Order and Shipment details will appear.

The screenshot shows the TAS software interface. At the top, there's a header bar with the title 'TAS New Hire Introduction' and 'All Brands'. Below the header, there are two numbered steps: '4 Select B2B/B2C Orders from the Contact Actions menu.' and '5 The Order and Shipment details will appear.'. The main area displays the 'Contact' screen. On the left, there's a 'Profile' section with customer information: Customer Id 1132219343, Last Name MIAMI, Email anst12016@gmail.com, and a phone number 3057156500. Below this are buttons for 'New Customer', 'Same Customer', and 'Refresh'. To the right is an 'Account' section with fields for Brand (DEL), Account Id (DEL\_anst12016@gmail.com), 4 Digits Security PIN (1132), Date of Birth (MM/DD/YY), Customer Id (1132219343), Secret Question (What is your father's middle name?), and Secret Answer (Anita). At the bottom of the contact screen, the 'Contact Actions' menu is open, showing options like 'Account Summary', 'Action Item History', 'BYOP Registration', 'Ticket History', 'Contact Details', 'Credit Cards', 'ACH Details', 'Flash Contact', 'Programming Status', 'B2B Purchase History' (which is highlighted with a red box), 'Ebay Orders', 'B2B/B2C Orders', 'Purchase History', 'Recent Interactions', 'Create Ticket', 'SafeLink Service History', and 'Loyalty Rewards'. The right side of the interface shows the 'Order 1011613' details, including the 'Order Header' with Order Id 1011613, Request Date 10/27/2016, Merch Ref No. B2B201610275016710, and Billing/Shipping addresses. Below this is a table of order items with columns for ObjId, Source, Order Type, Type, Request Type, Amount, Tax Amount, Sales Tax Amount, Freight Amount, Discount Amount, Status, Count/User, and XProcessID. The last row shows a success status for USA on 10/27/2016. At the bottom is a table for 'Order & Ship Details' with columns for ObjId, Description, Item Part, Amount, Sales Tax Amount, E911 Amount, Usf Amount, Rrf Amount, Total Tax, and Total Amount. The last row shows a total amount of 34.04.



### Take Note

If the Order is not found in TAS, you may refer to the website to track if an order was placed successfully. You can also search for an order using the Ingram Micro Mobility (IMM) tool.

## Ingram Micro Mobility

Ingram Micro Mobility (IMM) performs TracFone fulfillment services, such shipping orders and processing returns.

You will use the IMM Tool to determine:

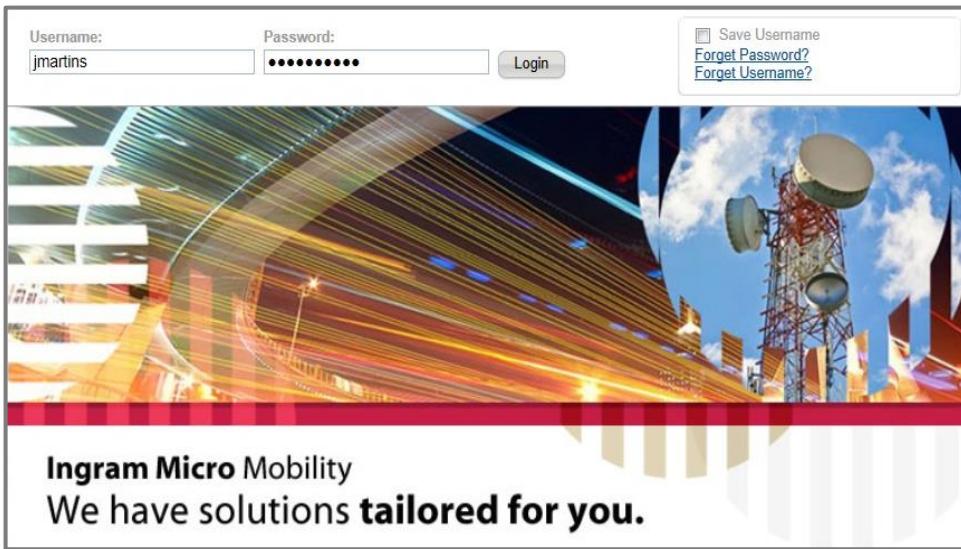
Specific components of an order

Shipping status details

Customer shipping information

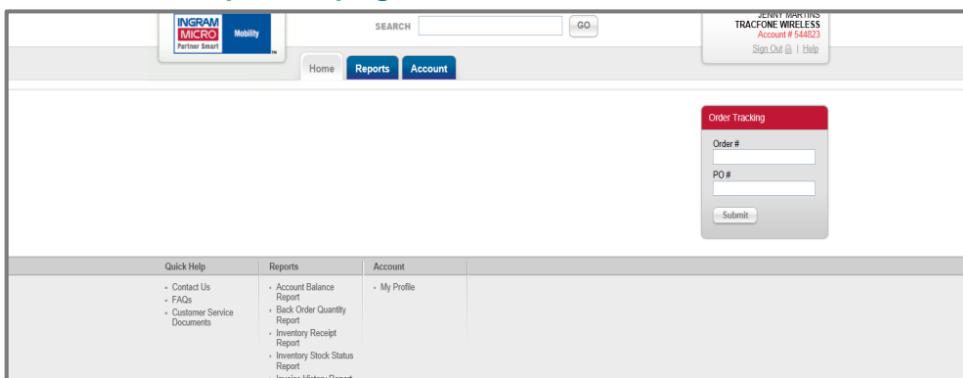
## Login into Ingram Micro Mobility

- 1 Select the Ingram Micro Mobility link on your desktop or in your browser's favorites list. The log-in page will display.
- 2 Enter your username and password. If the username or password is disabled, inform your supervisor immediately.
- 3 Select Login to display the homepage.



The image shows the Ingram Micro Mobility login page. At the top, there are fields for 'Username' (jmartins) and 'Password' (represented by a series of dots). To the right of these fields are three links: 'Save Username', 'Forgot Password?', and 'Forgot Username?'. Below the login form is a large, colorful background image featuring a city skyline at night with streaks of light and a prominent satellite dish tower. At the bottom of the page, the text 'Ingram Micro Mobility' and 'We have solutions tailored for you.' is displayed.

## Ingram Micro Mobility Homepage



The image shows the Ingram Micro Mobility homepage. At the top left is the 'INGRAM MICRO Mobility' logo. To the right is a search bar with a 'GO' button. On the far right, it shows 'JENNY MARTINS TRACFONE WIRELESS Account # 544823' with 'Sign Out' and 'Help' links. Below the header are three buttons: 'Home', 'Reports', and 'Account'. The main content area features a 'Quick Help' section with links like 'Contact Us', 'FAQs', and 'Customer Service Documents'. To the right of this is a 'Reports' section with links for 'Account Balance Report', 'Back Order Quantity Report', 'Inventory Receipt Report', 'Inventory Stock Status Report', and 'Invoice History Report'. Further right is an 'Account' section with a 'My Profile' link. At the bottom right of the page is an 'Order Tracking' form with fields for 'Order #' and 'PO #' and a 'Submit' button.

## Customer Report Page

View the order details by conducting a search using the Order number or P.O number.

- 1 Enter the customer's Order # or PO # and select Submit.

- 2 The Order Details Page includes the following information.

Product Name	Qty	Price	Total	Shipment Status	Tracking Number	ESN Listing
T-Mobile Micro SIM + \$45 Monthly Unlimited Item Code: ST64PSIMT5MB.NTNMP46	1	\$51.99	<b>\$51.99</b>	Shipped from TFD7 12/13/2013	FedEx 585495903800 FX01	<a href="#">View</a>
Package- Micro Bring Your Own Phone TMO Item Code: ST64PSIMT5MB	1	\$0.00	<b>\$0.00</b>	Shipped from TFD7 12/13/2013	FedEx 585495903800 FX01	<a href="#">View</a>
STRAIGHT TALK LETTER VERSION 2 Item Code: STRAIGHTLETTERV2	0	\$0.00	<b>\$0.00</b>	Cancelled	N/A	N/A



### Take Note

- Click on the View link for equipment serial numbers for that item (if available)
- Click on the Tracking # link to view the latest shipment status from carrier (not available in some cases)

Field	Description
Order Number	IMM reference number
Order Date	This date will differ from the original date shown in "Track Your Order" because the order date is revised in BP Online based on the actual date BP receives the order, after all credit authorizations have been completed and the order is approved for fulfillment.
Purchase Order Number	TracFone's reference number generated at order initiation
Shipment Status	Indicates if and when the order has shipped
Order Status	Fulfillment point (in this case, the order is completed – it has been picked, packed and shipped)
Product Name	Detailed outline of all the components of the package shipped to the customer.
Quantity	Volume of each item shipped
Price	Unit cost of each item
Total	Final cost to customer per unit shipped
Shipment Status	Various stages such as: In progress, Cancelled, Back order Shipped
Tracking Number	Provides details of shipping and tracking and courier used by clicking on the tracking number, the courier's web page will appear providing details of the shipment en route to the customer.
ESN Listing	Provides the SNP of the airtime card which can be used, via Toss Util, to determine the usage, if any, of the applicable airtime card shipped.

## Missing Items

If a customer claims that an item is missing from an order placed via our TracFonewebsite, check the order on the IMM Tool to confirm if all items included in the order have been shipped. If not, refer to the Transfer Guidelines in Agent Support on where to transfer the call.

If Ingram Micro Mobility displays the same Order Number with different dates, one created from the previous year(s) and the other one was created recently, make sure to use the most recent order number to provide the information requested by the customer. This happens because we are using two different platforms to create orders and the e-commerce platform is assigning a number that was previously created by the tool.

## Search Merchant Reference Number

The TAS tool has an option to easily identify the serial number associated to any credit card transactions. To do so, follow these steps:

- Once the customer calls with a Transaction ID from enrollment or any purchase made using a credit card, go to the Incoming Call page and select Search Merchant Ref No.

The screenshot shows the TAS software interface with the 'Incoming Call' tab selected. In the search bar, there is a red box around the 'Search Merchant Ref No' button. Other buttons in the bar include 'Search Service', 'New Contact Account', 'Search Contact', 'Search eBay Order', 'Search Credit Card', 'Search B2B/B2C Order', and 'Clear'. Below the search bar, there are several input fields for searching contacts based on various criteria like Serial Number, Email, Interaction Id, etc. At the bottom of the search bar, there is a message: 'No data to display.'

- Enter the Transaction ID or BP number in the Merchant Ref No field and select Search. Once you have the results, click Select.

The screenshot shows a table titled 'Credit Cards by Merchant Reference Number'. It has a header row with columns: Credit Card, Exp Month, Exp Year, Type, First Name, Last Name, Status, and Select. The first row contains data: '\*\*\*\*\*0792', '03', '2018', 'Visa', 'Cyber', 'fdfad', 'ACTIVE', and a red box around the 'Select' button. There is also a 'Search' button above the table and another one in the header bar.

3

Go to the Credit Card History Plans tab to view the serial number associated to the transaction.

The screenshot shows the TAS Credit Card Maintenance screen. At the top, there are three main sections: Credit Card Information, Credit Card Holder Information, and Credit Card Current Max Values. Below these is a section for Credit Card New Max Values. At the bottom, there are tabs for Credit Card Notes, Credit Card History, Credit Card History Plans (which is the active tab), and B2B History. A message box is visible at the bottom left. A table titled 'Transactions 1' lists one entry with columns: Request Date, Request Type, Merchant Reference Number, Merchant Id, Auth Amount, Amount, Tax Amount, and ESN. The ESN value '100000000013448923' is highlighted with a red box.



You are **NOT** allowed to disclose to the customer any information we have in our system.

## Service Profile Page

The Service Profile page displays all vital information pertaining to customer's phone that includes the following:

- Serial Number
- SIM Number
- Phone Status
- MIN Status
- Zip Code
- Activation Date
- Expire Date
- Auto-Refill
- Cards in Reserve
- Rate Plan
- Service Type
- Device Type and etc

While most of the information in the Service Profile is self-explanatory, let's quickly review some of the options that require further explanation. Also keep in mind that the information and availability will differ based on the brand.

The Device Type in Service Profile helps you determine the type of technology that you are working on.

The screenshot shows the TAS Service Profile page. At the top, there are tabs for Ticker, Console, Incoming Call, Support, Admin, and a search bar for ESN / MIN. Below the tabs, there is a 'Feedback' link. The main area is titled 'Service Profile' and contains a table with various device details. The table includes columns for Serial Number, Hex Serial Number, Part Number, Technology, Brand, Sequence, Dealer, and Phone Status. Other columns include SIM Status, MSID, MIN Status, Zip, Carrier, Customer ID, Contact Name, Ld, Group Id, Activation Date, Deact Date, Cards In Reserve, Service End Date, Next Charge Date, Rate Plan, Service Plan ObjId, Service Type, Service Plan ObjId, Service Type, Next Refill Date, Warranty Exchanges, and Extended Information. On the right side, there are icons for copy, print, and refresh. At the bottom, there are buttons for New Customer, Same Customer, Contact Profile, and Refresh.

## Device Types

Feature Phone	A mobile phone with capabilities such as texting, voicemail, incoming and outgoing calls. Feature phones do not have data capabilities. These are the ONLY phones that have a Prepaid Menu option.
BYOP	A service program that allows customers to use their own compatible phones (instead of our branded phones). Normally, they will just purchase a compatible SIM Card or Network Access Code and airtime service plan to activate their service.
SmartPhone	A mobile phone with data capability and more functionality than a basic feature phone. These phones typically have an operating system (IOS, Android, etc.) capable of running downloaded applications.

## Additional Service Type Info in the Service Profile – Tracfone Brand

The Service Profile for TracFone accounts also lists which plan (PayGo, Double Minute or Triple Minute Plan) the customer's serial number is associated with.

### Servie Type

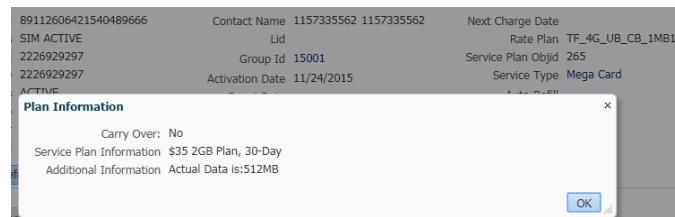
- **PayGo** – the various prepaid airtime service plan denominations of minutes and service days offered by TracFone. Once a PayGo card is added, the phone will only receive the exact benefits of the card added.
- **Double or Triple Minute** – the PayGo minutes added that doubles or triples after redemption. Only purchased minutes will double or triple after redemption.
  - Triple Minute Plan is no longer available to TracFone new products, including BYOP SIM kit. Existing phones with Triple Plan, including those enrolled in Auto-refill, will still have the same benefits.



### Servie Plan Description

To view a description of the current service plan, select the hyperlink in the Service Type field. The plan information includes:

- ✓ Carry Over: Yes or No
- ✓ Service Plan Information: Price, High Speed Data, Days and Talk & Text
- ✓ Additional Information: This is an optional field and will only appear if the customer has received additional benefits like Compensation/Replacement.
- ✓ Actual Data lists the amount of data added via replacement ticket which resets the data usage.
- ✓ This is applicable to all brands except Tracfone and Safelink customers.



### Phone Status

The Phone Status in the Service Profile lists the current state of the phone.

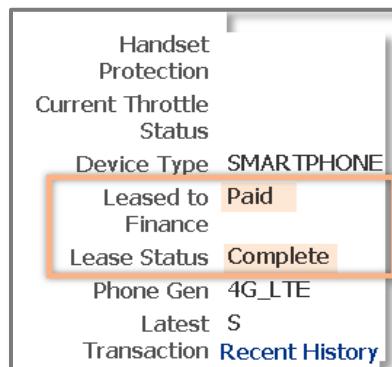
Phone Status	Description
New	Phone is brand new and not activated or programmed in the system.
Refurbished	Phone cannot be activated without an airtime service plan. Phone is reconditioned from the warehouse; not activated or programmed in the system.
Active	Phone cannot be activated without an airtime service plan. Phone is already activated/programmed in the system.
Past Due	Phone has an active Service End Date. Phone is ready to use for making and receiving calls or any other transactions.
Used	Phone is deactivated because customer did not add airtime before the Service End Date, or needs an airtime card to reactivate the phone.
Inactive	Phone is deactivated because customer transferred minutes and/or phone number from one phone to another phone.
Risk Assessment	Phone is deactivated before its due date.
Stolen	Phone can be reactivated using the existing airtime service plan.
	Phone is not activated in the system's database, because the phone is not properly scanned or was not scanned at all.
	Phone is deactivated due to fraudulent activities. Contact Business Assurance and Fraud Management Department for assistance.
	Customer reported the phone lost/stolen.

### SmartPay Lease Account

Once a SmartPay Lease customer has paid their account in full, the Service Profile in TAS will display the following:

Leased to Finance: Paid

Lease Status: Complete



## Service Profile Buttons

The Service Profile section has three main buttons:

[New Customer](#)

[Same Customer](#)

[Contact Profile](#)

**New Customer** button will take you back to the Search Contact page, and the session will be cleared for you to enter new contact information.

**Same Customer** button will take you back to the Search Contact page. The current customer will remain in session, and the Serial Number and MIN will be pre-populated.

If you just created an account, the Same Customer button will take you back to the Search Contact page. However, the Customer ID field will pre-populate.

**Contact Profile** button allows you to validate the customer's identity. You can either follow the steps illustrated below or click the Contact Profile button from the Incoming Call page.

To view the Contact Profile:

- 1 Enter the customer's information
- 2 Select Search Contact
- 3 Select the Customer ID link

The screenshot shows the 'Search Contact' interface. At the top, there are several input fields: Serial Number (100000001878171), Email, Interaction Id, Contact Phone, Lifeline Id, SIM, MIN, First Name, Address 1, Order Id, Customer Id, Airtime Pin, Last Name, Zip, and BAN. Below these are buttons for 'Search Service', 'New Contact Account', 'Search Contact' (which is highlighted in green), 'Search Ebay Order', 'Search Credit Card', 'Search Merchant Ref No', 'Search B2B/B2C Order', and 'Clear'. A large table below lists customer information: OrgId, Customer Id, First Name, Last Name, Phone, Address, City, State, Zip, and Email. One row is selected, showing STRAIGHT\_TALK, 1131414007, and other details.

## TAS Scripts

Once you have navigated the tool and/or selected a flow corresponding to the customer's issue, some scripts will show up to guide you through the call so you would know what to tell to the customer. The scripts indicate instructions to be given and questions to be asked to the customer. The color convention of the scripting signals information that you must be aware of and a **RED disclaimer** that indicates a warning so you can provide emphasis on the information that the customer MUST know. See sample screenshots below.



### Take Note

- Both black and red are for your information only. You do not need to read and provide it verbatim. These scripts may be paraphrased as long as the customer receives the essential information.

**Paygo customer adding a Paygo card:**  
Add Now will redeem card and add card benefits to current balances. Add to Reserve button does not apply for this scenario.

**All other scenarios:**  
Add Now will cause the plan added to begin immediately and any remaining benefits of the current plan to be lost. A service plan added to the Net10 Reserve will be automatically applied on the phone's Service End Date and no service will be lost.  
A customer switching between Paygo and Monthly Plan service must select the Add Now option.

**ADD NOW WARNING:** By choosing to Add this plan Now, your new plan will begin immediately and you will lose any remaining service from your current service plan. You acknowledge that you are forfeiting any unused service and service days remaining on your phone and that you will not receive a refund or credit for the unused service and days.

## Reviewing Flash Announcements in TAS

Prior to servicing an account, you should always check to see if the account has any flash announcements. The **Flash** button will continuously glow in RED even after you click the button to view the contents.

If an account has a flash announcement, it will appear in the Service Profile. Select **Flash** to view the details.

The screenshot shows the TAS Service Profile page. At the top, there are tabs: Ticker, Console, Incoming Call, Support, Admin, Search ESN / MIN / SIM, and a timestamp Load time(ms): 1014 CLFYSIT1. Below the tabs, the Service Profile section displays account information. A red box highlights the 'Flash' button in the bottom left corner of the profile area. Other buttons visible include New Customer, Same Customer, Contact Profile, Refresh, and Hide/Expand.

You must read the information provided and follow the instructions (if necessary).

The screenshot shows the TAS Service Profile page with a 'Flash' alert window open. The alert title is 'Flash' and contains the following text:

**2G Migration Alert Text - 34**  
**2G MIGRATION - DON'T ASK SECURITY QUESTIONS**

**Managing 2G Migration Calls**

- THIS IS A PAST DUE 2G DEVICE. THIS PHONE CANNOT BE REACTIVATED.
- If customer's call is to NOT be contacted, go to 2G Migration Opt-Out solution.

Are you aware that this phone will stop working on December 31st, including 911 emergency calls? You will need to replace your phone. We have several discounts available for you. Would you like to hear them?

**Purchase Offers:**

1. They can go to a retailer and buy a phone. Once they call back to Activate it, they will be compensated:
  - Pay-As-You-Go: Get an extra 200 minutes
  - 1000-Minute Plan: Get an extra 600 minutes.
  - Unlimited Plan: Get an extra 285MB of data and 23 service days.
2. Offer discount towards the purchase of a phone. Process sale now. Don't provide promo codes (refer to Training Flash #44 Promo Code Tool).

**ADD NOW WARNING:** By choosing to Add this plan Now, your new plan will begin immediately and you will lose any remaining service from your current service plan. You acknowledge that you are forfeiting any unused service and service days remaining on your phone and that you will not receive a refund or credit for the unused service and days.



The most recent flash update will appear on the top. You may need to scroll up/down to see the other updates.