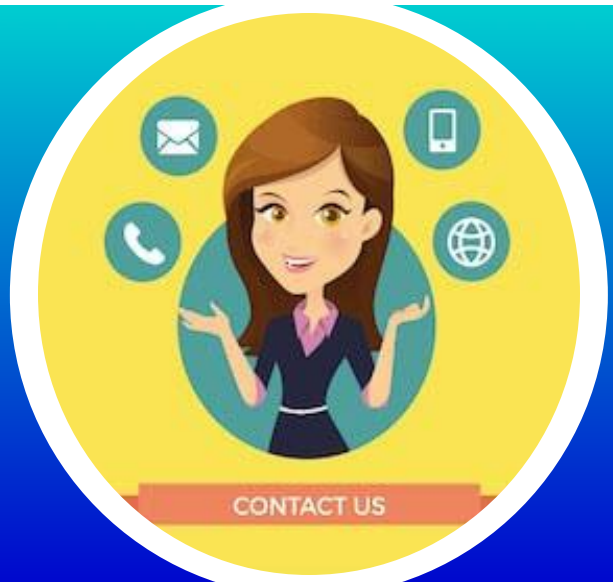


PHONE PURCHASE

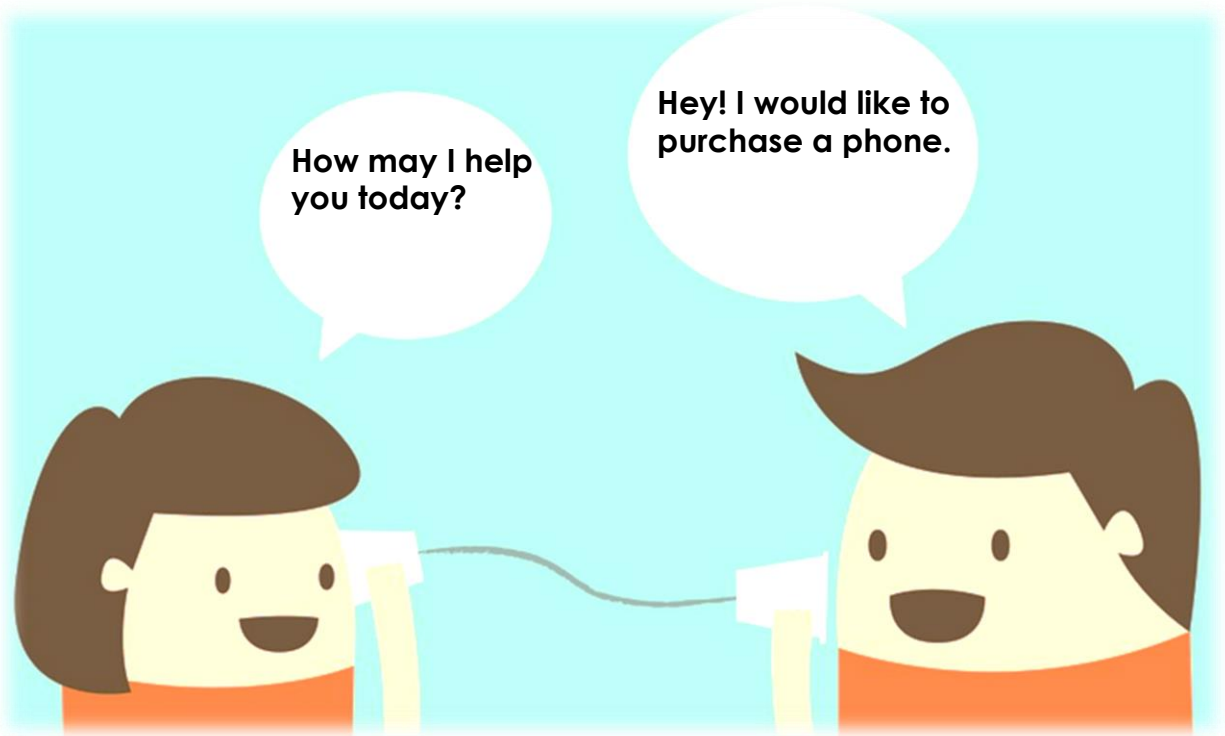
Job Aid



2021



Introduction



TracFone offers to its customers a wide range of **support channels** to choose from in order to purchase our products and services. Our Department Business Hours for all TracFone brands are from Monday to Sunday 8:00AM – 11:45PM EST. By dialing the corresponding brand hotline number, our customers can get in touch with you. It is your responsibility to give each of our customers the best possible selections and offers that they can avail to. It is part of the company's marketing strategy to encourage our existing customers to stay us and those potential customers to subscribe to our service.

This job aid will walk you through on the procedure to follow when our customers need assistance in purchasing a brand new handset.

Phone Purchase

If you receive calls from customers who seek assistance in purchasing a new handset, follow the steps outlined below:

1. In the Support tab, select **“External Links”** from the Support menu.
2. Select **“Direct Sales – WEB/IVR/CSR”**.
 - For Simple Mobile, you will have to select the **“Simple Mobile Shop”**.
 - For Page Plus and Go Smart brands, you will process the purchase through the (brand) websites.

NOTE: We do not sell handsets for Go Smart brand. CSRs may only process SIM and Airtime sales.

 - For Walmart Family Mobile, refer the customer to myfamilymobile.com to process the purchase themselves or advise them to visit the store.
3. The Direct Sales portal will populate on a separate window. On the Log on screen, enter the following:
 - Your **Avaya Login** is your **Employee ID**
 - The **Activation Zip Code** (obtained from the customer)
4. From the drop-down menu, select the brand of the phone the customer wishes to purchase. Once done, click Submit to proceed.

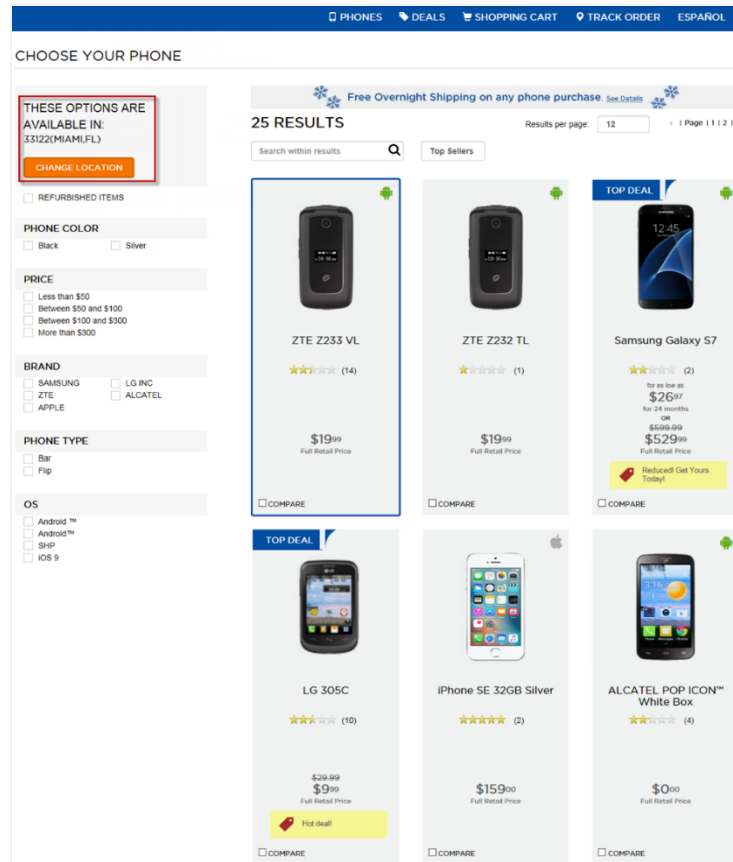
The screenshot shows the T.A.S. Support portal. On the left, the 'Support' menu has 'External Links' highlighted. In the main content area, the 'Direct Sales WEB / IVR / CSR' link is highlighted with a red box and a red arrow. The 'Direct Sales' form includes fields for 'Employee ID' and 'ZIP Code', a dropdown menu for 'Select an option below:', and a 'submit' button. The dropdown menu lists various TracFone stores, including 'TracFone Store', 'NET10 Store', 'StraightTalk store', 'T-Mobile Store', 'NET10 BYOP', 'StraightTalk BYOP', 'Net10 Home phone', 'Straight Talk Home phone', and 'Total Wireless Store'.

NOTE: The sample purchase is for the TracFone brand. The same procedure will be followed for other applicable brands.

5. The selected store then loads the zip-to-tech pop-up. Enter the zip code then click **“Continue”** to validate the area where the customer will be using the phone the most.

The screenshot shows a pop-up titled 'ARE YOU AN EXISTING CUSTOMER?'. It asks 'Get ready to shop for our hottest phones.' and provides two options: 'NO, I AM NOT' (enter the zip code of the area where you will be using your TracFone device the most) and 'YES, I AM' (enter your phone number). Both options have a 'CONTINUE' button.

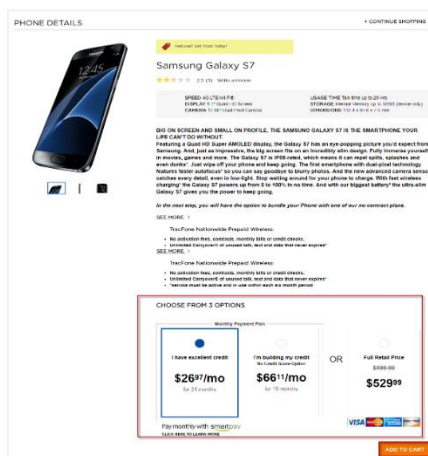
6. You will be directed to the Phone Catalog page. Validate the zip code from the left-hand side.



7. The phone catalog will show the list of phones that are compatible with the specified Zip Code. Click the desired phone for the customer.

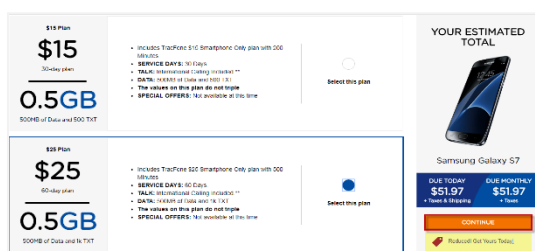
NOTE: If the customer has not selected any phone, then you must offer the phones listed in the e-store. You can filter the selections using the left-hand side options - by refurbished, phone color, price range, and brand of phone, phone type, and Operating System.

8. Once the phone is selected, the Phone Detail page will show its specifications and features; offer to read the details to the customer. Once done, click the **“Add Cart”** to proceed.
 - For high-end phones like iPhones and Samsung Galaxy S7 and S8, the customer has an option to choose a color and lease the phone through SmartPay or pay in Full. (For SmartPay, the customer will need to purchase on their own).
 - For phones that don't have a variety of colors and not available for leasing, click the **“Add to Cart”** to proceed.



NOTE: If the customer wants to add more devices to the cart, select “continue shopping” from the top right-hand side of the page.

9. The device cannot be added to the cart completely without selecting a plan to bundle with the phone. However, the customer may also proceed with the Phone only, with the exception of a free phone which has to be bundled with a service plan. The Plan Selection page allows the customer to select any plans available and compatible with the selected handset. Select the desired Plan and click **“Continue”** to proceed.



NOTE: If the customer has an existing phone, then he/she will be able to transfer the remaining benefits on to the old phone to the new phone via Phone Upgrade.

10. At the **Checkout** Page, give the customer the breakdown of what was added to Cart (product, quantities, and product cost). This page also allows the customer to review and edit (change phone or plan) the items they wish to purchase and to enter a compatible promo code that honors added discounts.

- If the promo code is not valid, a message will populate. If the promo code is no longer valid for use, remove the promo code and continue to the “Checkout” tab.
- If the promo code is still valid (no message received), click the “Checkout” button.

11. The **Shipping and Billing Info** page will appear. Ask the customer to provide the required information.

- ✓ All fields indicated by * are required.
- ✓ Make sure to spell and verify the given information for accuracy.
- ✓ The shipping address can be a P.O. Box or Rural Route (RR) address – However, advise the customer that there will be no delivery confirmation signature required.
- ✓ Delivery address can't be changed or redirect the package to a different address when the order has been placed.
- ✓ Enter noemail@tracfone.com on the email field if the customer does not have an email address.

12. On the same page, customers have an option to select the desired shipping method listed on the drop-down and include a message or greeting if they are purchasing the phone as a gift.

NOTE: Read the Shipping disclaimer to the customer.

13. Ask for the customer's **Payment Information**. To accurately enter the Credit/Debit Card Number and Security Number (CVV Code), you may ask the customer to repeat the numbers back to make sure that you entered them accurately. Click the **"Continue"** button to proceed.

14. Confirm if the Billing Address is the same with the given Shipping Address. If not, uncheck the box and enter the required information manually. Once done, click **"Continue to Order Summary"**.

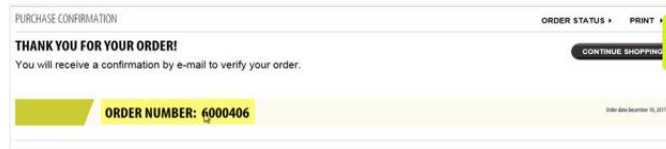
NOTE: The Billing information must be spelled exactly the same as it appears on the customer's credit/debit card.

15. The **Order Summary** page provides the breakdown of the charges based on the selected phones and plans. Seasonal discounts usually applied for phone bundle purchases. Give the total amount to be paid by the customer and ask for permission to bill their credit/debit card for the total amount.
- If the customer says yes, click Submit to proceed.
 - If the customer refuses, click the **"Back"** to review or change the order.

DO NOT submit the order without a confirmation from the customer.

16. The **Order Confirmation** page will prompt if the payment is successfully accepted by the system. This page will show a summary of the order and the generated **Order Number**.

17. Provide the Order Number to the customer.

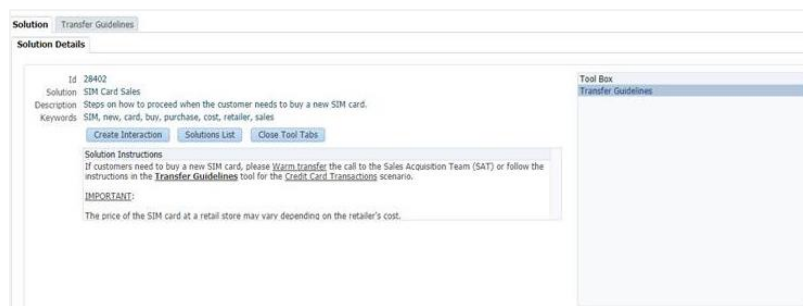


18. Inform the customer that **a signature is required for FedEx delivery.** (Due to covid19, for the time being no signature is required for online orders)

19. Close the call business as usual.

SIM Purchase

If you receive calls from customers who seek assistance in purchasing a new SIM card, and you are not a SAT agent, follow the SIM Card Sales Solution in TAS.



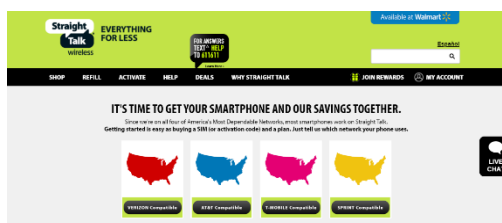
For SAT trained agents follow the steps outlined below:

1. In the Support tab, select **“External Links”** from the Support menu
2. Select **“Direct Sales – WEB/IVR/CSR”**.
 - For Simple Mobile, you will have to select the **“Simple Mobile Shop”**.
 - For Page Plus and Go Smart brands, you should process the purchase through the (brand) websites.
- NOTE:** We do not sell handsets for Go Smart brand. CSRs may only process SIM and Airtime sales.
- For Walmart Family Mobile, refer the customer to myfamilymobile.com to process the purchase themselves or advise them to visit the store.
3. The Direct Sales portal will populate on a separate window. On the Log on screen, enter the following:
 - Your **Avaya Login** is your **Employee ID**
 - The **Activation Zip Code** (obtained from the customer)
4. From the drop-down menu, select the brand of the phone the customer wishes to purchase. Once done, click Submit to proceed.

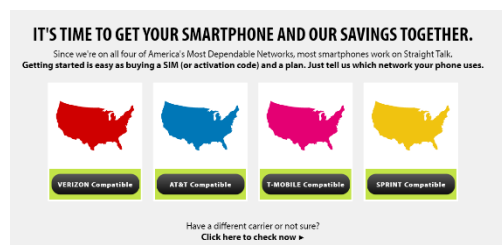


NOTE: The sample purchase is for the Straight Talk brand. The same procedure will be followed for other applicable brands.

- The selected store then loads the zip-to-tech pop-up. Enter the zip code then click "Continue" to validate the area where the customer will be using the phone the most.
- At this point, you will need to select the brand on the top left corner of the page. Unlike phone sales, you will need to go to the brand website to process a SIM sale. See below.



- From here, go to **SHOP**, then **BUY SIM CARDS OR BYOP**
- Ask the customer what carrier they currently have, or their phone is compatible with. Select the option below. (If unsure, select **Click here to check now**. See the next screenshot.)



9. Enter the customer's zip code.
10. Select the SIM card and select **ADD TO CART**.
11. Then select a plan. If the customer does not want a plan, select **SERVICE PLAN NOT NEEDED AT THIS TIME** at the bottom.
12. Next you will have the option to select **ADD ACCESSORIES, CONTINUE SHOPPING** or just **CHECK OUT**. If the customer is ready for check out, select this option.
13. Next you will have the option to select **FedEx 2 DAY free shipping, FedEx Next Day for \$4.95 or PO Box/ Rural Route (USPS) for \$6.95**. Select one and hit **continue**.

SHIPPING METHOD
FedEx 2-Day - FREE

FedEx 2-Day - FREE
Your estimated delivery is in 1 - 2 business days.

FedEx Next Day - \$4.95
Your estimated delivery is in 1 - 2 business days.

PO Box / Rural Route (USPS) - \$6.95
Your estimated delivery is in 6 business days.

* While orders continue to leave our facilities on time, please know your delivery may be delayed as our shipping partners continue to manage increased demand due to COVID-19. Thank you for your understanding.

► Learn more about FedEx 2-Day - FREE.

CONTINUE

14. Enter the customers shipping information. Confirm the information the customer has provided and then select **CONTINUE**.
15. Next you will have to enter in the CC information. Have the customer tell you their CC information.

NOTE: You **cannot** repeat the CC information to the customer. If the customer needs to verify, have them repeat the CC number.

16. Lastly, review the order and select place order. See below.

► Subtotal: \$0.99
Shipping: FREE
Discounts: \$0.00
► Taxes: \$0.07
based on your Zip code: 33178

Due today: \$1.06

Place Order

VeriSign

► Have a Gift message?

FREE SHIPPING

DO NOT submit the order without a confirmation from the customer.

17. Inform the customer that **a signature is required for FedEx delivery**. (Due to covid19, for the time being no signature is required for online orders)
18. Provide the order number to the customer and close the call BAU.

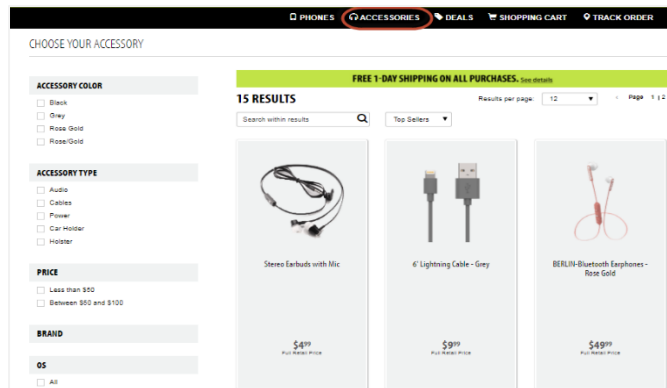
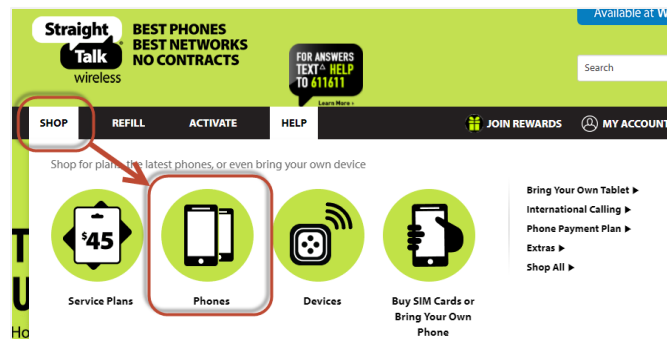
Phone Accessories

The following brands now have phone accessories available for sale:

- Straight Talk
- TracFone
- NET10
- Simple Mobile
- Total Wireless

If a customer is purchasing a handset or bundle and requests to add an accessory, please proceed with the sale (processes in the same manner as a regular handset purchase).

If the customer requests for details on the products, please direct them to the respective brand websites. From the homepage, customers must click on Shop > select Phones > select Accessories (along the top of the page).



EXCHANGES

As a general rule, there is no exchange process for accessories. Listed below are the procedures on how to address customer's complaints regarding purchased accessories.

- **Customer received the wrong item, wrong color, etc.** Follow the Transfer Guidelines and transfer the call to the Refund team.
 - The Refund Team will process a refund and place a new order for the customer on the web if the customer still wants to receive the exact item.
- **Customer is not happy with their purchase and wants to return the item for a refund.**
 - If the customer has the shipping label, ask them to simply follow the instructions.
 - If not, inform them to return the accessories to:

**Ingram Micro Mobility Returns/TracFone
1451 Allpoints Court, Suite 2
Plainfield, IN 46168**

- The customer MUST include the order number with their return.
 - Inform the customer that once the return is received, a refund will be processed.
- **Customer wants to cancel the order.** Once an order is placed it **cannot be cancelled**. The customer can refuse the package or return it by following the instruction on the shipping label or you can give the address to IMM (refer to the above address).

NOTE:

- ✚ Customer may return the accessories within 30 days from the original order date.
- ✚ Refund to customers account may take up to 30 days from the date we receive the returned item.
- ✚ The Customer is responsible for any expenses related to returning the package(s). Return shipping costs are non-refundable.
- ✚ BYOP purchases are non-refundable and should not be returned to IMM.