



OPUS MX

Home Page & Customer Verification

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AT&T

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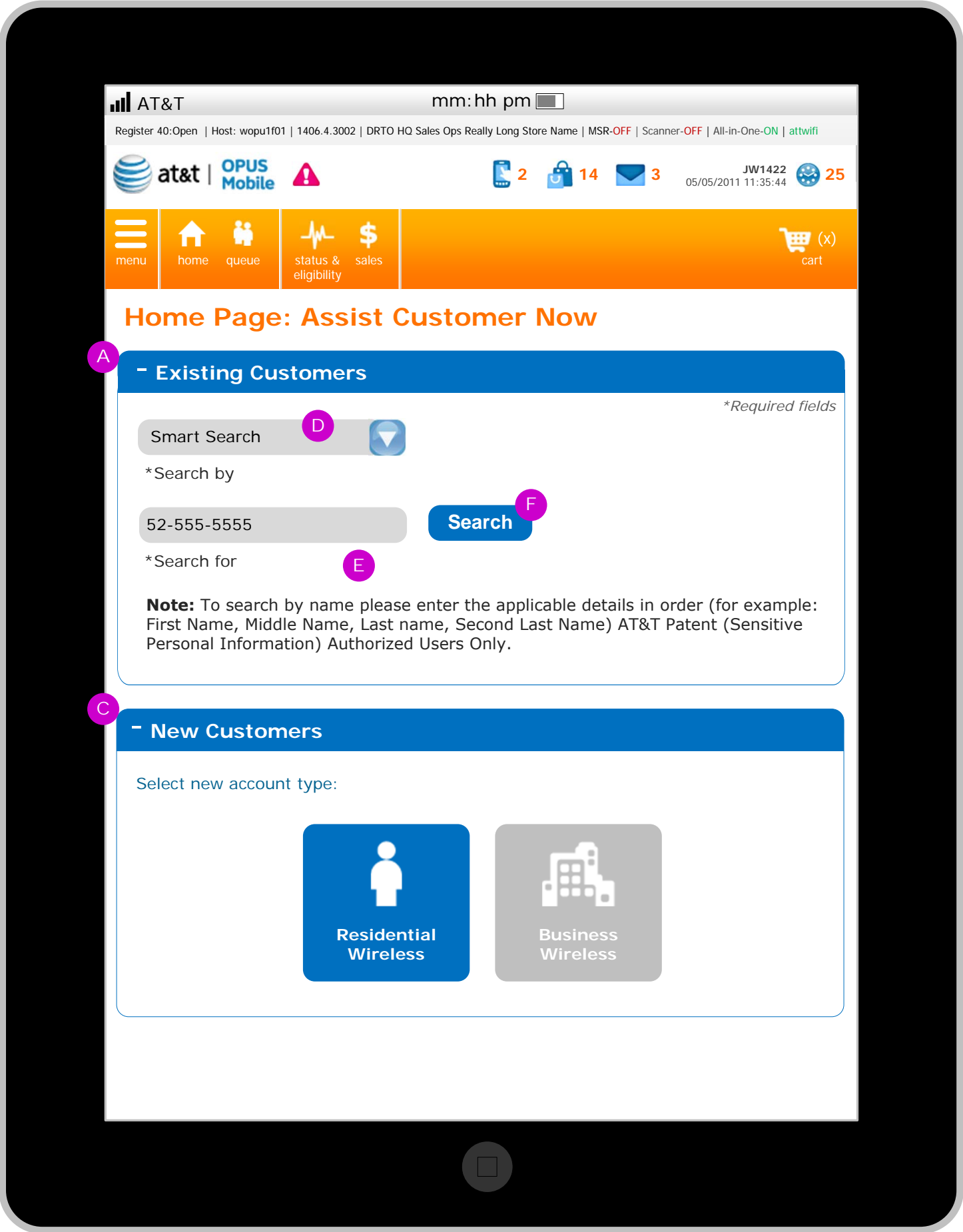
Authors: Thalia Call

03/30/2016

Revision History:

- Removed IMEI option from Search by drop down.
- Added "Renewal of Contract" to quick actions options and revised annotations for quick action drop down default scenarios.
- Search for customer added first name, last name and second last name field.
- 11/22/2016 - Added note to the home screen in the Existing Customer section.

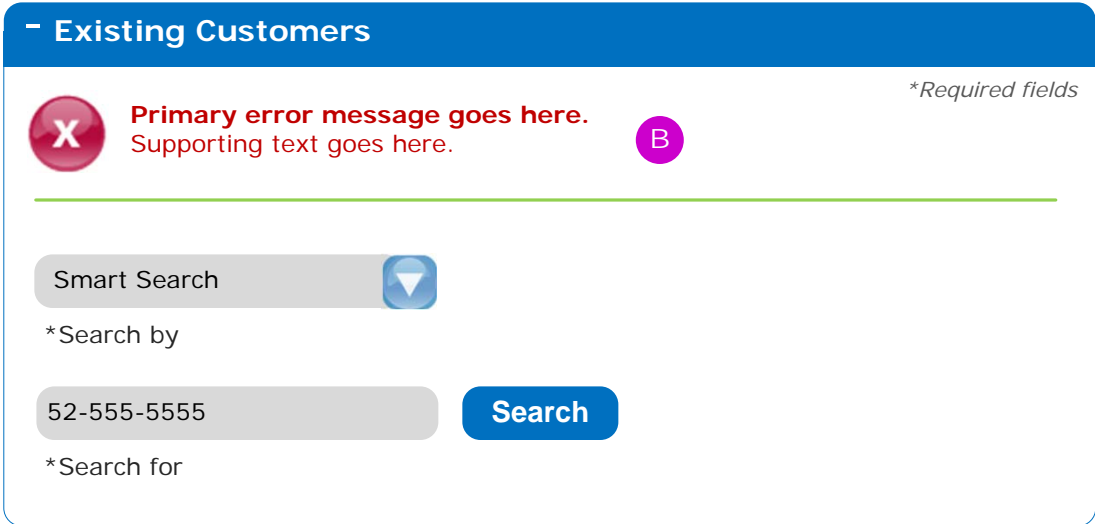
Customer Lookup



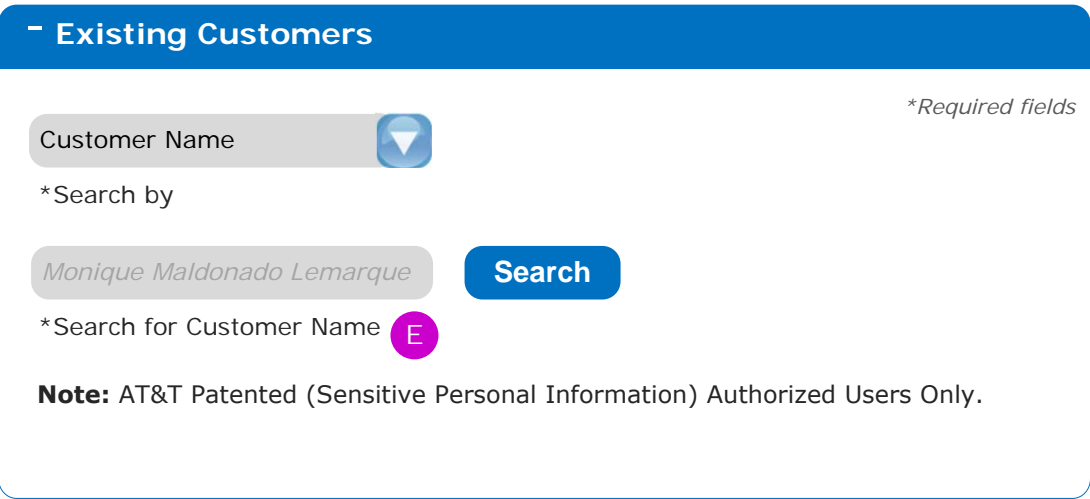
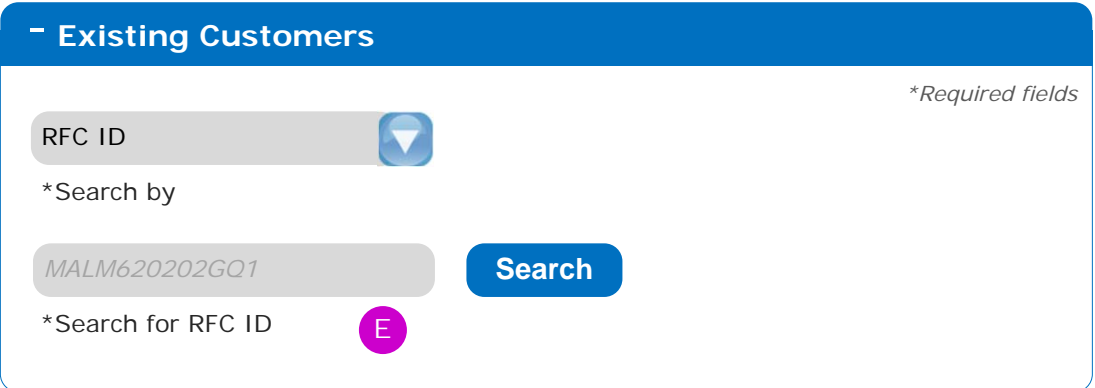
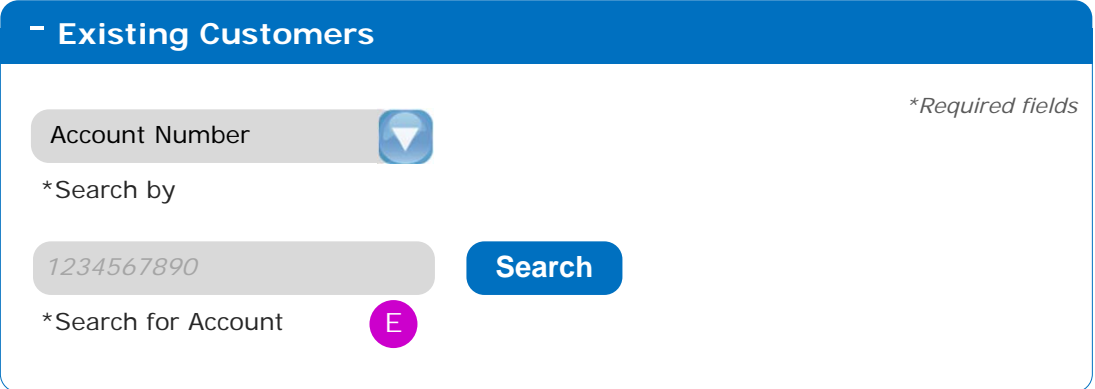
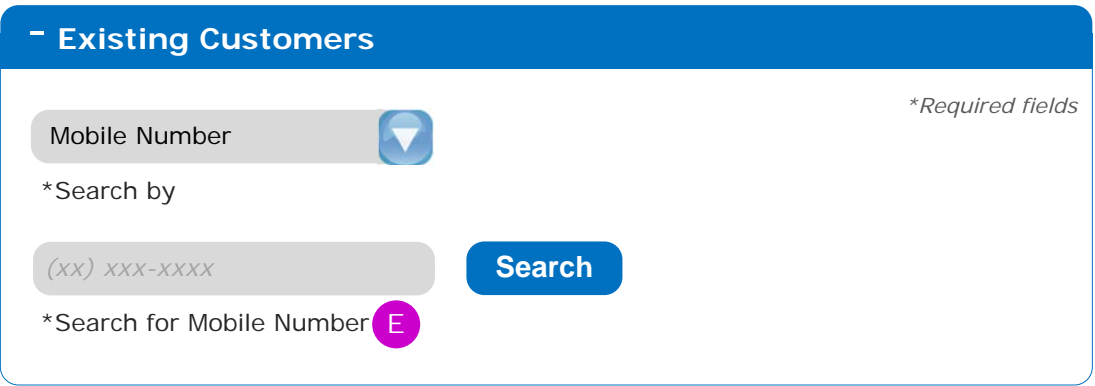
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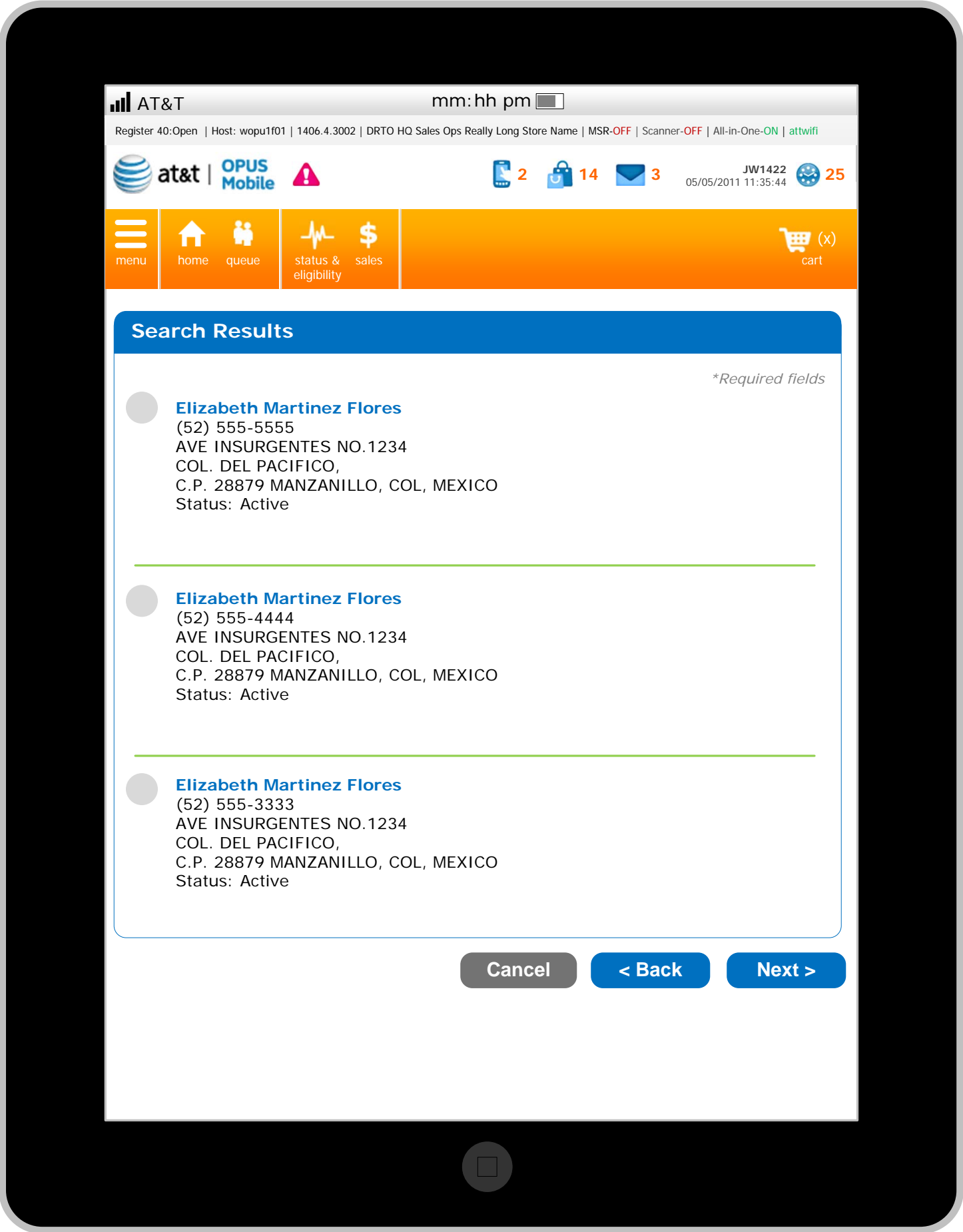
Phase 1: Home Page (Concept)

- A Display Existing Customers section as shown here.
- B If an error occurs when searching for a customer, show the error in the Existing Customers section as shown below.



- C Display New Customers section, as shown (PCA flag is OFF). Each of the account type buttons will lead to the first step of that service's ordering flow. Display the Business Wireless button as disabled.
- D Show these options in the "Search by" drop down:
 - Smart Search
 - Mobile Number
 - Account Number
 - RFC ID
 - Customer Name
- E While each option is selected, updated the field label and show an example of the correct content in the "Search for..." field in light gray text.
- F If multiple results are returned, "Search" will lead to the multiple results screen. Once a record is selected on that screen, the user will be taken to the Quick Action Selection combo page. If one result is returned, then "Search" will lead automatically to the "Quick Action Selection" combo page.





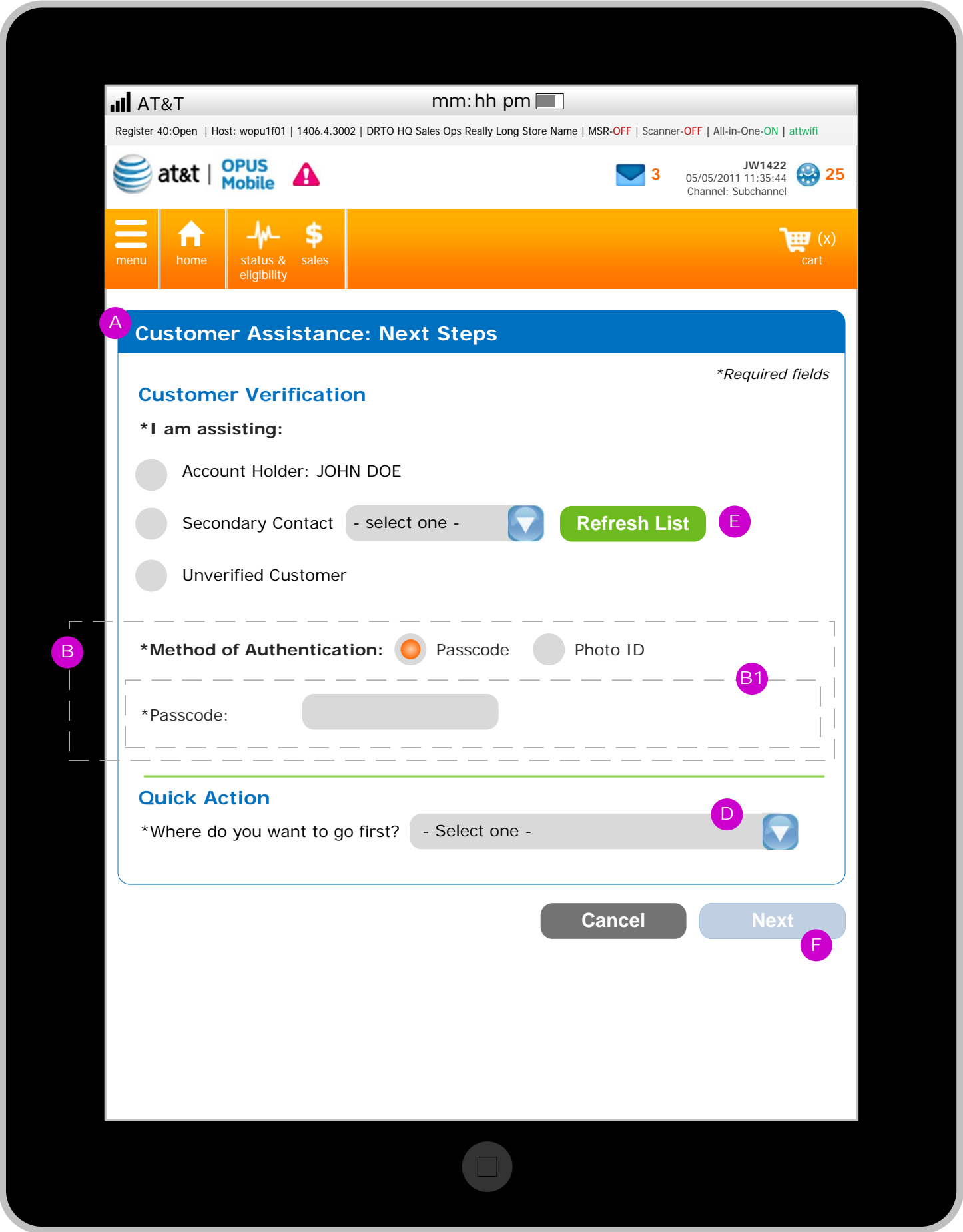
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A Display page in this manner when there are multiple search results for a wireless customer's name.

- Customer Name
- Mobile Number
- Address
- Status

Page needs review

Customer Assistance:
Quick Action - Verification



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Phase 1

- A When the page is first loaded, the user will be required to select a verification option.
- B If "Account Holder:..." or "Secondary Contact" is selected, display the authentication section.
- B1 If "Passcode" is selected as the authentication type, show that section as shown here.
- B2 If "Photo ID" is selected as the authentication type, show that section as shown here. No default option will be set.
- C If "Unverified" is selected, display text and note field, as shown.

***I am assisting:**

☐ Account Holder: JOHN DOE

☐ Secondary Contact - select one -

☐ Unverified Customer

***Method of Authentication:** ☒ Passcode ☐ Photo ID

***Passcode:**

Quick Action

***Where do you want to go first?** - Select one -

***I am assisting:**

☐ Account Holder: JOHN DOE

☐ Secondary Contact - select one -

☒ Unverified Customer

Unverified Customer access is limited to the actions specified in the Account Access Matrix.

Notes

- D The Quick Action options will be dynamically populated based upon the type of verification.
- If the customer is 'Unverified', only "Customer Summary" and "Pay Bill" will be available in the quick action drop down.
- D1 If "Renewal of Contract" was selected as the Customer Information option when the customer was added to the Queue, preselect "Renewal of Contract" in the quick action drop down. The sales rep may select other quick action options that will be dynamically populated.

Quick Action

***Where do you want to go first?** Renewal of Contract

- D2 If "Cancel Existing Service", "Clarification", "Services" or "Warranty Exchange" was selected as the Customer Information option when the customer was added to the Queue, preselect "Customer Summary" in the quick action drop down. The sales rep may select other quick action options that will be dynamically populated.

Quick Action

***Where do you want to go first?** Customer Summary

- E Provide an option to refresh the contents of the Secondary Contact list.
- F Disable "Next" button until all required information has been provided. "Next" takes user to the appropriate page based upon the quick action option.

- Callouts 1 – 2 contain example drop down values. Actual values will be systematically populated.

1 ***Photo ID Type:** - Select One -

Driver's License
Passport
IFE/INE
FM2
FM3

2 ***Where do you want to go first?** - select one -

Customer Summary
SIM/IMEI
Pay Bill
Rate Plan Change
Feature Change
Add a Line
View Bill
Renewal of Contract