



OPUS MX

Residential Activations

1604 283917 lusacell - OPUS/OPUS Mobile/OPUS turnkey to create Spanish screens for new Mexican Billing Solution

AT&T

Retail UX & Innovation

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5/6/2016

Revision History:

5/6/2016:

- Updated behavior on Customer Info page so that the "Next" button will remain enabled when "...add a secondary contact..." check box is selected.

3/29/2016:

Added Service Acceptance questions.

2/24/2016:

- Removed "Secondary Contact Number" field.
- Updated scenarios for 'Preferred method of contact'.
- Added headers for "Paperless Billing" and "Notification Method".
- Added Notification Type and options.

2/11/2016:

- Removed 'Access Permissions' from Secondary Contact section and Edit Contact overlay.
- Added mandatory field for 'Email Address for Bill Notification' and removed 'Confirm Email' button from the Contact Info section of the Customer Information page.
- Removed all instances of 'Sales Rep' drop down.
- Updated upload documents screen to include Proof of Address drop down. Removed 'Additional Document 1' and 'Additional Document 2' from document type options.
- Added resident/citizen question to the Identification section. (Business to confirm necessity of this question on the front-end and verbiage)
- Modified the default display of Billing and Tax address fields. Both section will be expanded by default. User will have the option to use the customer address for both or either billing and tax addresses.
- Updated Account type values from 'Consumer ' to 'Residential' and changed radio option to drop down.
- Added "Test" to the list of sub account types.
- Added indicator to Second last name field
- Removed the number of lines to activate field.
- Changed Gender drop down to optional
- Removed the "Was the account holder born in Mexico" question that was determining if CURP ID is required.
- Moved CURP ID to the list of identification types. (Renamed 'secondary identification' type to "Identification")
- Removed the "Is Account Holder a Mexican citizen" question. RFC ID is always required. Removed RFC ID expiration date.
- The RFC field will be mandatory (10 – 13 digits) and by default will be auto-populated using account information fields.
- Manually entered RFC IDs should be checked to determine validity. Added popup with criteria for valid RFC ID.
- Changed Secondary Contact number field to optional . Removed the validation on Secondary contact.
- Changed first name and last name in the References sections to have only one field titled "Full Name". Added 'relationship' drop down.
- Made 'Primary Email Address' optional. Removed check box for 'customer does not have email' option.
- Updated the identification types F2 and F3 to FM2 and FM3. Removed expiration date fields from identification types. .
- Changed 'Physical Address' to 'Customer Address'. Changed 'Service Address' to 'Billing Address'. Customer Address is the primary address and will be requested first.
- Replaced "Address line 1" with three separate fields for: Street / External / Internal.
- Added a field for customer's "Preferred method of notification". Added field to provide the email or SMS number once the selection is made.
- Changed 'Income Range' to "Monthly Income Range"
- Callout added to denote that 'Proof of address' will only appear for Customer Address.
- Renamed ""Primary Phone Number" to ""Primary Contact Number" in the Contact Information section.
- Added Bill Cycle Date, Authorized Users, and Account Passcode to the Customer Information page.
- Renamed "Account Type" to "Customer Type" and "Account Sub Type" to "Customer Sub-Type"
- Added all 4 name fields to Reference sections 1 & 2
- Changed Bill Cycle to read-only
- Removed Autopay enrollment from OOW.

4/28/2016:

- Update Notification Method with checkbox for Email and SMS and add additional call outs for K3
- Removed ID and # when referring to RFC and updated callouts.

4/28/2016:

- Removed asterisk from Customer Address, Billing address and tax address.

AT&T

mm:hh pm

Register 40:Open | Host: wogu101 | 1406.4.3002 | DRTG HQ Sales Ops Really Long Store Name | MSR-OFF | Scanner-OFF | All-In-One-ON | attwifi

AT&T

OPUS Mobile

JW1422

05/05/2011 11:35:44

25

menu

home

queue

status & eligibility

\$

close out

now assisting

Martinez Flores

Elizabeth

cart (0)

CUSTOMER INFO

SERVICE & DEVICE

RATE PLAN & FEATURES

REVIEW & ACTIVATE

New Activation – Customer Information

Residential

- select one -

- select one -

*Customer Type

*Customer Sub-Type

*Category

Account Holder's Personal Information

Salutation

*First Name

Middle Name

* Last Name

*Second Last Name

*Date of Birth

dd

mm

yyyy

*Gender

Employer Name

*Monthly Income Range

Identification

* Is the customer a resident/citizen of Mexico?

Yes

No

- Select One -

- Select One -

*Proof of ID

*<Proof of ID Value> Identification Number

XXXX999999XXX

- Select One -

*RFC

*RFC Validation

CURP ID #

- Select One -

CURP Validation

Category Identification: Army

*<Category Value> Identification Number: 12-345-67

Contact Information

*Preferred Contact Number

Preferred Email

*Preferred method of contact:

Contact Number

Email

Paperless Billing

Check here if the customer does not want to receive a paperless bill or does not have email.

*Email Address for Paperless Bill

Notification Method

Notification Type:

Email

SMS

*Notification Email

Reference #1

*First Name

Middle Name

* Last Name

*Second Last Name

*Phone Number

Reference #2

*First Name

Middle Name

* Last Name

*Second Last Name

*Phone Number

Customer Address

- Select one -

- select one -

- select one -

*Proof of Address

*Postal Code

*Neighborhood

*Street

*Extended Address

Continued on Step 1: Individual Acct-Cust Info (bottom)

Continued on next page

Design Notes

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- This page displays New Activation – Customer Information.
- A Display Customer Type, Customer Sub-Type, Lines to Activate fields as shown.
- A1 If the Customer Sub-Type is "Individual", display the "Category" drop down. Otherwise it will be hidden.
- B Display customer name fields: First, middle, last name, and second last name fields in this manner.
- C Date of birth field will follow the convention: dd / mm / yyyy
- D Display "...resident/citizen..." question and default to "Yes". (Need input on contract verbiage.)
- D1 Display 'Proof of ID' dropdown. Selection of a value will be mandatory.
- D2 Label will dynamically display the value selected from the Proof of ID dropdown.
- E Display RFC field. The Rep must manually enter the customer's RFC.
- E1 As the Rep types the number, after a certain length of characters determined to be long enough, the system will automatically check if the number is valid. --If RFC verification fails, display this invalid/error.

Please enter a valid RFC.
- There will be an M&P for the Rep to verify the RFC in the store. Note: An in-store device will be used to verify RFC authenticity. The Rep will manually verify RFC via website (see Quick links).
- E2 The Rep must select a value from the RFC validation drop down.
- F When CURP ID # is entered, the Rep should select a value from the CURP validation drop down.
- G If the selected "Category" value is not "General", display the Category Identification and corresponding Identification Number field as shown.
- The ID number or License number of the selected Category Identification must be provided.
- H Label will dynamically display the value selected from the Category dropdown.

- Contact Information** section:
 - I Display "Preferred Contact Number" as a mandatory field.
 - I1 Show "Preferred Email" as an optional field.
 - I2 'Preferred method of contact' will default to the "Contact Number" radio option. User may edit.
- Paperless Billing** section:
 - J Display "Email Address for Paperless Bill" as a mandatory field and show check box, for the User to indicate that an email address is not available or the customer does not want a paperless bill.
 - J1 If the "...does not want paperless bill" check box is selected, disable the Email Address for Paperless Bill field.
- Notification Method** section:
 - K The customer's 'Notification Type' will not contain a default value.
 - K1 If 'Email' is selected display "Notification Email" as a mandatory field.
 - K2 If "SMS" is selected as the 'Notification Type', display this message and mandatory number entry field.
 - K3 If both 'Email' and 'SMS' are selected display the mandatory "Notification Email" and "Notification Mobile Number" entry fields.
 - L Display Reference#1 and Reference#2 sections, in this manner.
 - M Removes Lines to Activate dropdown.
- Dotted line -- displays to illustrate dynamic content. Not intended to be coded into the display of the screen.

Design Notes Cont'd.

- Callouts 1 – 6 contain example drop down values. Actual values will be systematically populated.

- 1 Customer Sub-Type drop down values may include:

Individual

- Select one -

Individual

Employee(own & family)

VIP

- 1B The Category drop down is only shown when the Customer Sub Type is "Individual":

General

General

Army

Student

Retired

Special Needs

Employee

- 2 Income Range drop down values may include:

- Select one -

- Select one -

0-999

1,000-4,999

5,000-9,999

10,000-19,000

20,000-29,000

30,000-39,000

40,000-49,000

50,000-499,000

500,000-999,000

1,000,000 or above

- 3 Salutation drop down values may include:

- Select one -

- Select one -

Senor

Senora

Senorita

- 4 RFC Validation and CURP Validation drop down values may include:

- Select One -

- Select One -

Yes

Could not be verified

- 5 Proof of ID drop down values may include:

- Select One -

Driver's License

Passport

IFE/INE

FM2

FM3

Paperless Billing

Check here if the customer does not want to receive a paperless bill or does not have email.

*Email Address for Paperless Bill

Notification Method

Notification Type:

Email

SMS

*Notification Email

Notification Method

Notification Type:

Email

SMS

5488888888

*Notification Mobile Number

Please inform the customer that sending SMS messages through Non - AT&T carriers may incur carrier charges.

Notification Method

Notification Type:

Email

SMS

*Notification Email

5488888888

*Notification Mobile Number

Please inform the customer that sending SMS messages through Non - AT&T carriers may incur carrier charges.

Top section covered on Step 1: Individual Acct-Cust Info (top)

Continued from previous page

Reference #2

This section is covered on previous page

Second Last Name

*Phone Number

Customer Address

- Select one -

*Proof of Address

*Postal Code

- select one -

*Neighborhood

*Street

*External

Internal

Address Line 2

Municipality

City

State

Country

Tax Address

Check here if Tax address is different than Customer address.

Billing Address

Check here if Billing address is different than Customer address.

Account Options

*Account Passcode

*Re-enter Account Passcode

A Passcode is used to enhance the security on an account. It will be used to authenticate the customer. Passcode must be 6 to 10 digits.

Please ask the customer the following questions:

1. Does the customer Opt-in to receive promotions and offers?

Yes

No

2. Will the customer agree to share personal information with third parties?

Yes

No

Additional Options

Check here if you would like to add a secondary contact or legal representative.

CancelNext >

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A

Display Customer Address section in this manner.

B

Proof of address (document to used to verify the Customer address) will only display within the Customer address section.

C

Disable 'Neighborhood' drop down until the postal code is provided.

D

After selecting the "Neighborhood", the following fields will be prepopulated: Municipality and City.

E

When the "Use this address for all addresses" button is selected:
-The "...address is same..." checkbox will be auto selected,
-Address entry fields will be hidden and;
-A read-only address will display within the Billing Address and Tax Address sections.

F

When the check box "...address is same..." is unselected, display address entry fields, as shown.

G

Display Account Options section in this manner.
--The user may set a Account Passcode between x min and x max digits. (Need Input)

H

--Promotion and personal information options are mandatory.

I

When "...add a secondary contact..." check box is selected, display section in this manner allowing the user to enter the content.

J

Show instructional text to inform the user of the maximum number of contacts that can be added.

J1

Preferred method of contact may be SMS or Email.

J2

If the user selects Email as the preferred method of contact, the Email field becomes required, marked with a "*".

K

When the 'Add New Contact' button is selected, the content entered in the form will populate and be added to a table below.

K1

Disable the 'Add New Contact' button after the maximum number of authorized users is reached.

L

When "...add a secondary contact..." check box is selected, the "Next" button will remain enabled.

M

The "Edit" button will launch the Edit Contact overlay.

N

The "Delete" button will display the confirmation alert overlay.

Add New Contact

Are you sure you want to remove John Doe as a contact?

No

Yes

O

If "No" is selected, close the alert and return user to the Contacts section of the Customer Information page.

P

If "Yes" is selected, close the alert and return the user to the Contacts section of the Customer Information page, refreshing the page and deleting the selected Contact from the row in the table.

Q

The "Next" button will be enabled allowing the system to save the added Contact.

R

Selecting "Next", takes the User to the 'Credit Questions' (aka Out of Wallet) page with the changes committed. The system will capture fields for credit check including the 'store region' and create the BAN.

--If there is a system error creating the account, when 'Next' is selected, display an error message at the top of the page. (See Create Account – Error page).

Design Notes Cont'd.

-

Example drop down values.

1

Proof of Address drop down values may include:

- Select one -

Water Bill

Light Bill

Gas Bill

Electricity Bill

Other

Covered on left side of this page

Customer Address

- Select one -

28879

Col. Del Pacifico

*Proof of Address

*Postal Code

*Neighborhood

*Street

*External

Internal

Address Line 2

Municipality

Benito Juarez

City

Manzanillo

State

COLIMA

Country

MEXICO

Tax Address

Check here if Tax address is different than Customer address.

*Postal Code

- select one -

*Neighborhood

*Street

*External

Internal

Address Line 2

Municipality

City

State

Country

Billing Address

Check here if Billing address is different than Customer address.

*Postal Code

- select one -

*Neighborhood

*Street

*External

Internal

Address Line 2

Municipality

City

State

Country

Account Options

*Account Passcode

*Re-enter Account Passcode

A Passcode is used to enhance the security on an account. It will be used to authenticate the customer. Passcode must be 6 to 10 digits.

Covered on left side of this page

Additional Options

Check here if you would like to add a secondary contact or legal representative.

Secondary Contact or Legal Representative

A maximum of 9 contacts can be added.

*First Name

Middle Name

*Last Name

Second Last Name

Preferred method of contact:

- Select One -

*Contact Number

Email

Add New Contact

CancelNext >

Additional Options

Check here if you would like to add a secondary contact or legal representative.

Secondary Contact or Legal Representative

A maximum of 9 contacts users can be added.

*First Name

Middle Name

*Last Name

Second Last Name

Preferred method of contact:

Email

*Contact Number

*Email

Add New Contact

Current Contacts

Name:

John Doe

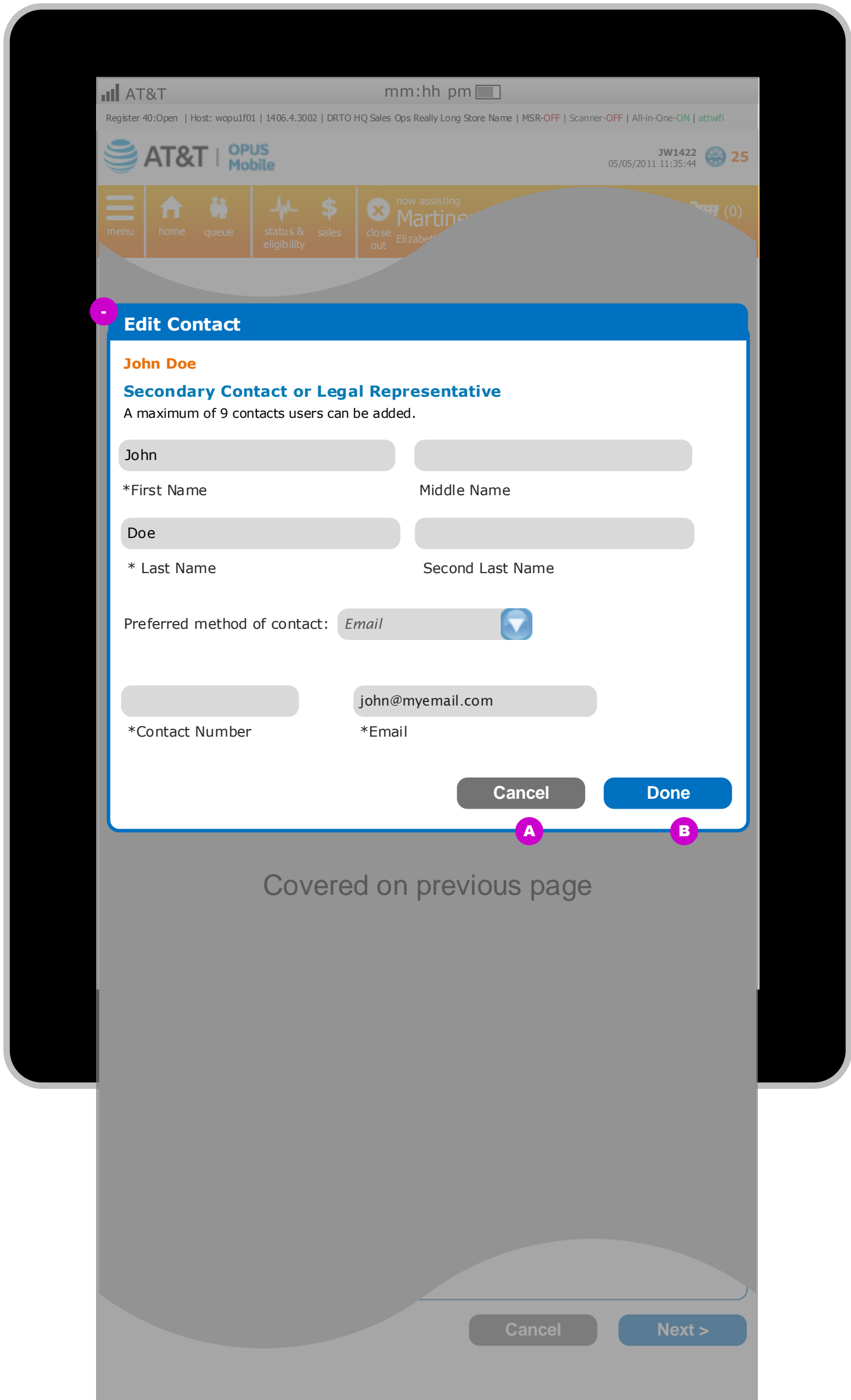
Added

Edit

Delete

CancelNext >

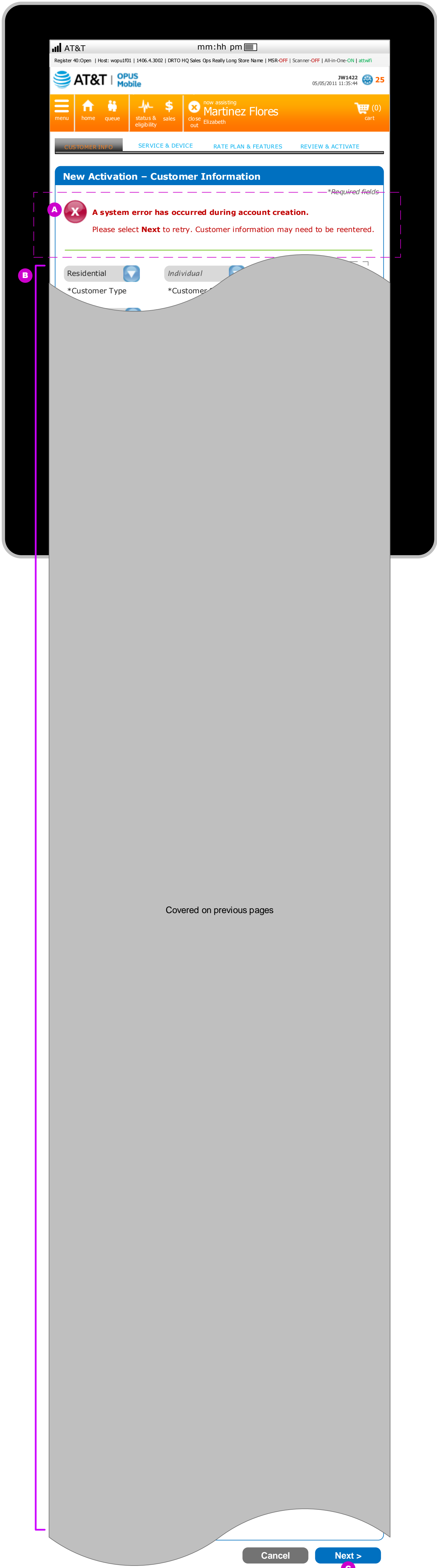
Edit Contact - overlay



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- The overlay page displays if the 'Edit' button is selected from the Contacts section. All existing information will be prepopulated in the form elements.
- A The "Cancel" button will close the overlay and return the user to the Contacts section with no changes made.
- B "Done" closes overlay, saves the updates and returns the user to the Contacts section with the changes populated.

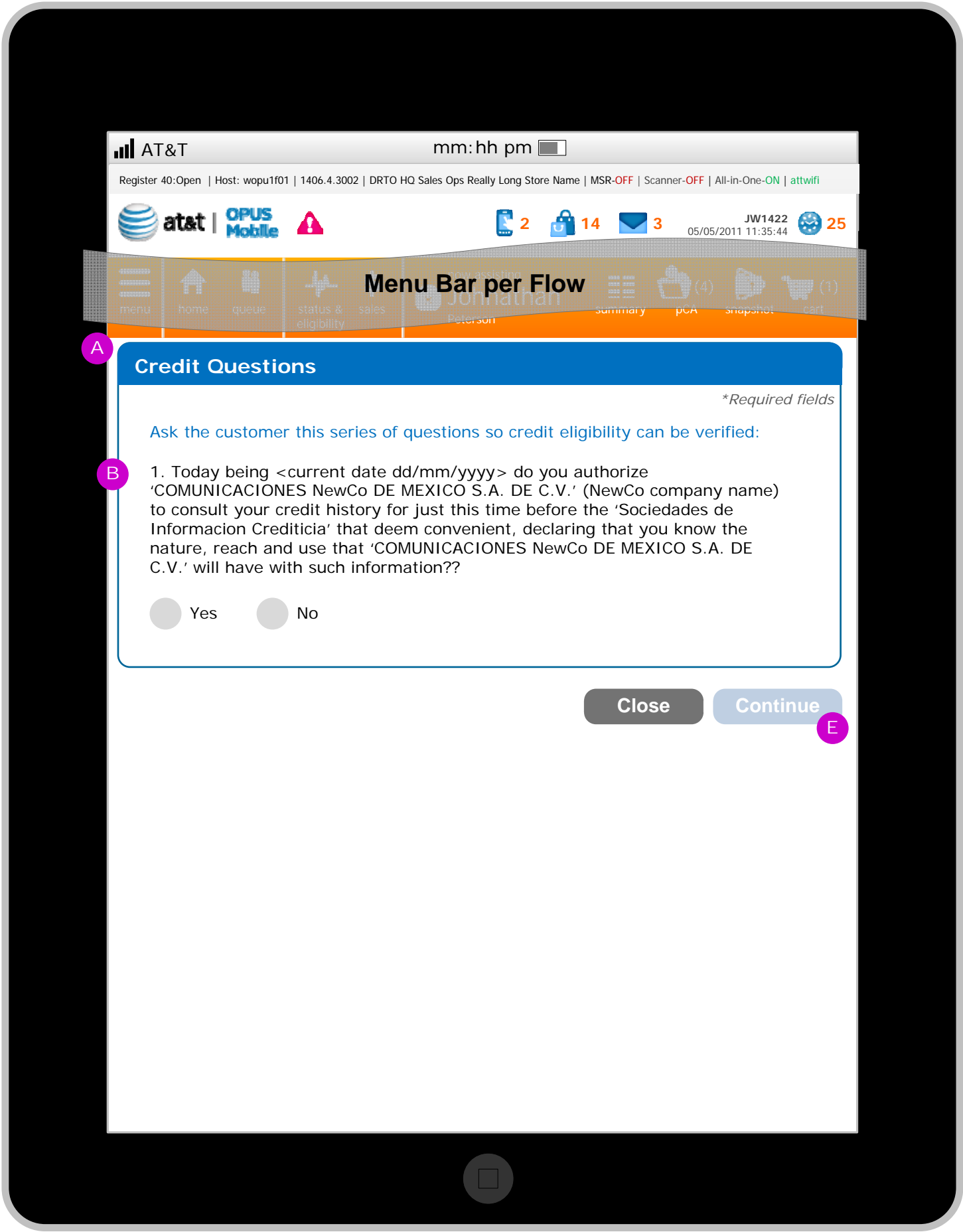


Design Notes

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- A Display the following error message at the top of the page, if there is a system error creating the account, when 'Next' is selected on the Customer Information page.
- B Any data entered so far will be used to prepopulated on the screen.
- C "Next", takes the User to the 'Credit Questions' page, if the account is created successfully.

Credit Questions



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- A This page will not have any default selections.
- B Question 1 will display on page load.
- B1 Show this message when "No" is selected.
- C Display Question 2, only if Question 1 is answered as "Yes".
- C1 Show this message when "No" is selected.
- D Display Questions 3-5, only if 1 & 2 are answered as "Yes".
- D1 Display credit card section, only if Question 3 is answered as "Yes".
- E Selecting "Continue" takes User to the Upload Documents page.
- F Show this error message, if mandatory responses have not been provided, when Continue is selected.

Out of Wallet Questions

Ask the customer this series of questions so credit eligibility can be verified:

1. Today being <current date dd/mm/yyyy> do you authorize 'COMUNICACIONES NewCo DE MEXICO S.A. DE C.V.' (NewCo company name) to consult your credit history for just this time before the 'Sociedades de Informacion Crediticia' that deem convenient, declaring that you know the nature, reach and use that 'COMUNICACIONES NewCo DE MEXICO S.A. DE C.V.' will have with such information??

☒ Yes ☐ No

2. Will you provide an authorization signature?

☒ Yes ☐ No

3. Do you have a credit card?

☒ Yes ☐ No

4. Do you have a mortgage?

☐ Yes ☒ No

5. Do/Did you have a car loan in the past 24 months?

☐ Yes ☒ No

Close

Continue

Ask the customer this series of questions so credit eligibility can be verified:

1. Today being <current date dd/mm/yyyy> do you authorize 'COMUNICACIONES NewCo DE MEXICO S.A. DE C.V.' (NewCo company name) to consult your credit history for just this time before the 'Sociedades de Informacion Crediticia' that deem convenient, declaring that you know the nature, reach and use that 'COMUNICACIONES NewCo DE MEXICO S.A. DE C.V.' will have with such information??

☐ Yes ☒ No

B1 **Consent is required to proceed. You will not be able to continue.....**

2. Will you provide an authorization signature?

☐ Yes ☒ No

C1 **Authorization is required to proceed. You will not be able to continue.....**

3. Do you have a credit card?

☒ Yes ☐ No

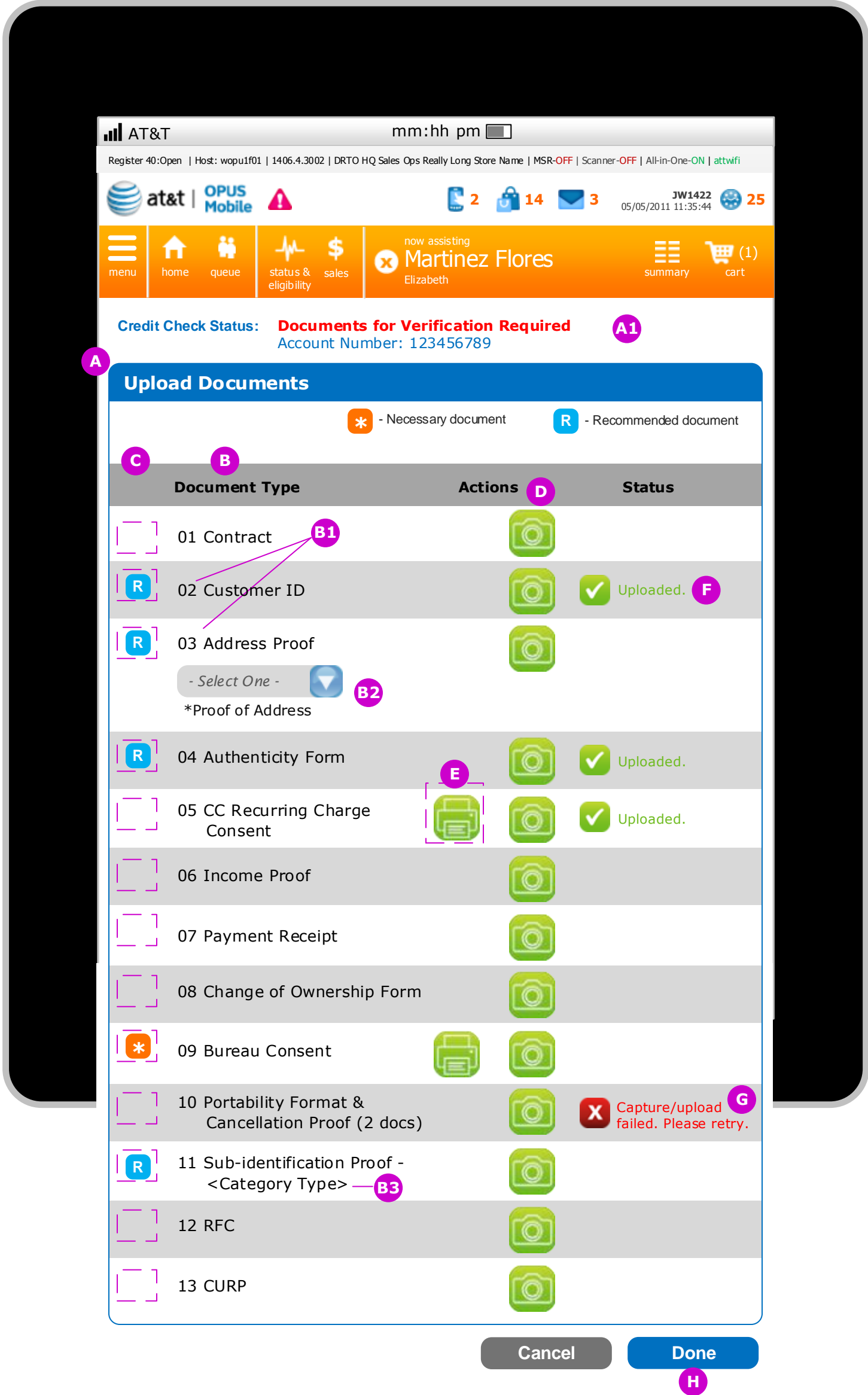
D1 *Last 4 digits of credit card

Out of Wallet Questions

Please answer all of the questions before continuing.

1. Question goes here?

See left for definition of this section.



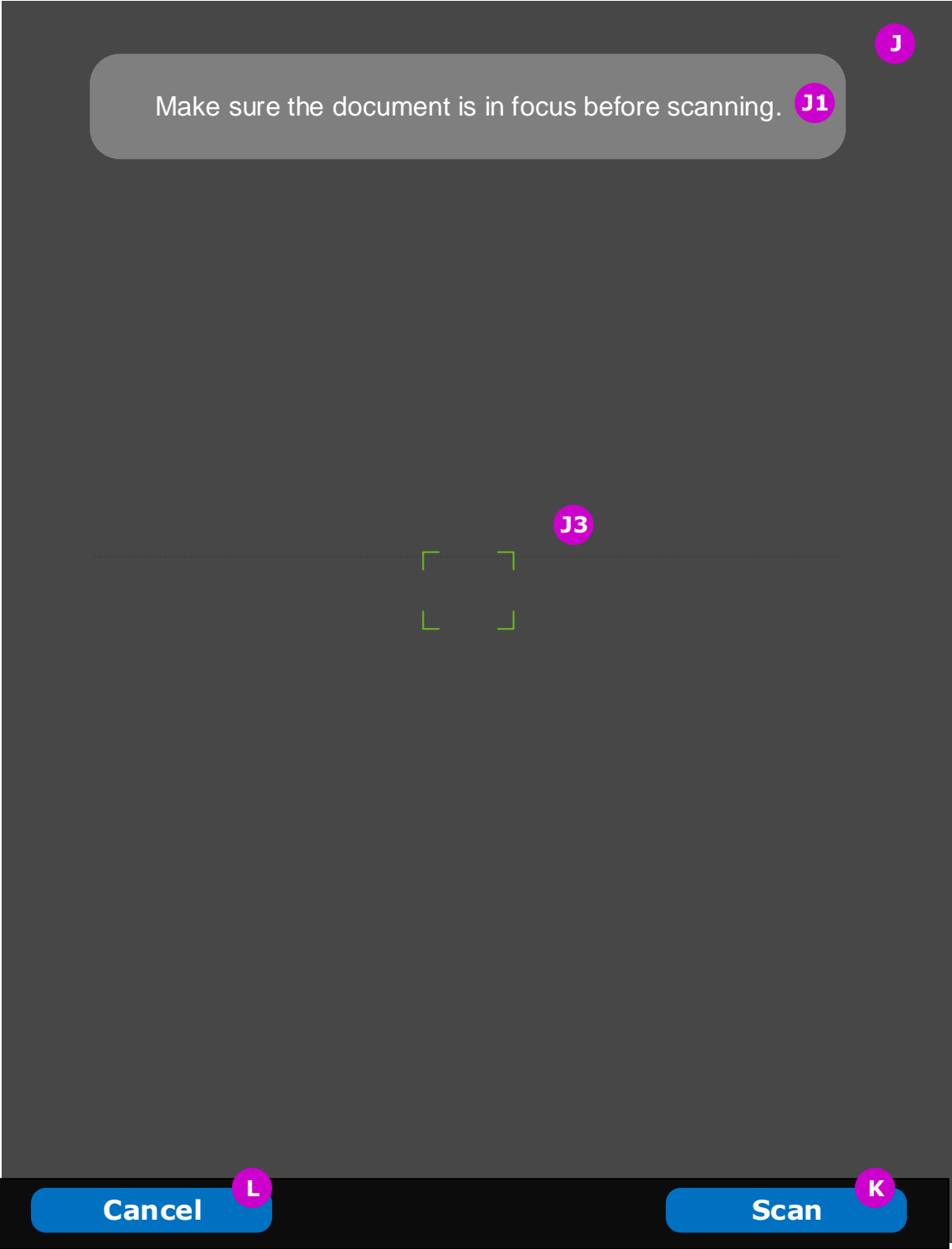
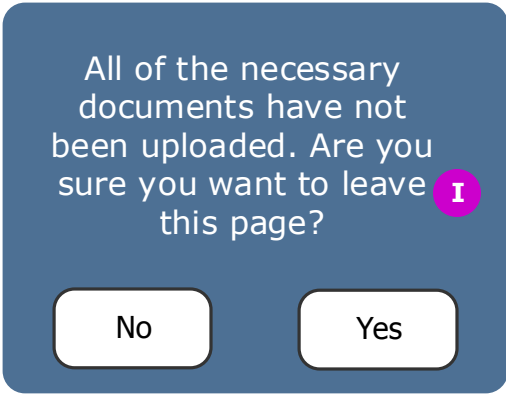
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- The content of this screen is for illustrative purposes only. It does not represent any real flow.
- A Display this page for the Rep to capture/upload documents needed for the credit check.
- A1 Display credit check bar only for activation and add-a-line.
- B Display all documents potentially subject to upload.
- B1 A static number identifies each document.
- B2 Display "Proof of Address" drop down as a mandatory field for the 'Address Proof' document type, as shown.
- B3 Dynamically display the "Category" selected from the Customer Information page with the Document Type "Sub-identification Proof - category_value_goes_here"
- C In the leftmost column, use the following icons to indicate whether the document is "Necessary" or "Recommended" based upon the flow and scenario. (For flow/scenario table see SRD).

* Necessary

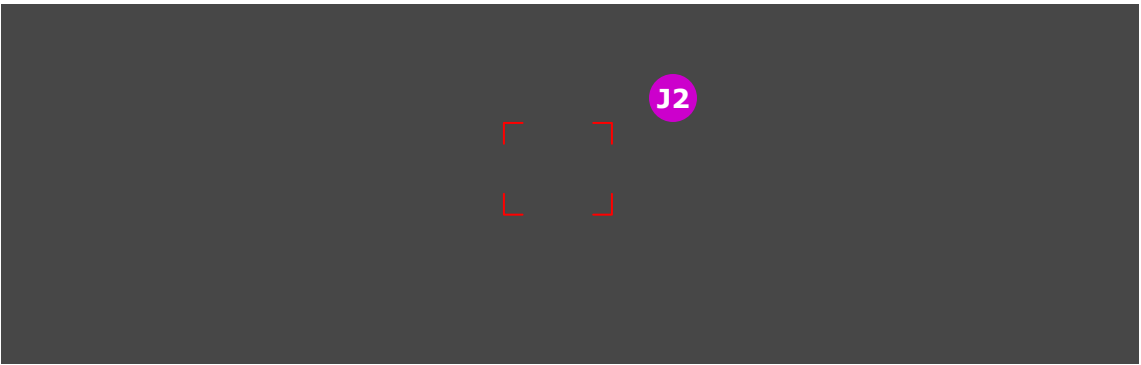
R Recommended

- Note: The combination shown on this screen is for example purposes only, not to be coded onto the page. Actual values will be dependent upon the specific scenario.
- D When this page is viewed on a tablet, show this camera button. When selected launch the camera capture page. This button will remain active so that the User may replace the document (Scroll down this page so see an example.)
- E Display this print button for any 'document type' that can be printed. When selected, the appropriate document will be generated and sent to the printer.
- F If the camera capture/replace/upload process is successful for a document, display a green check mark and message.
- G If the capture/replace/upload process fails, display a failed icon (red X) as well as an inline error message.
- H User may leave the page at any time, regardless of whether all required documents have been uploaded.
- I If all necessary documents have not been uploaded, confirm user's intent to exit page.

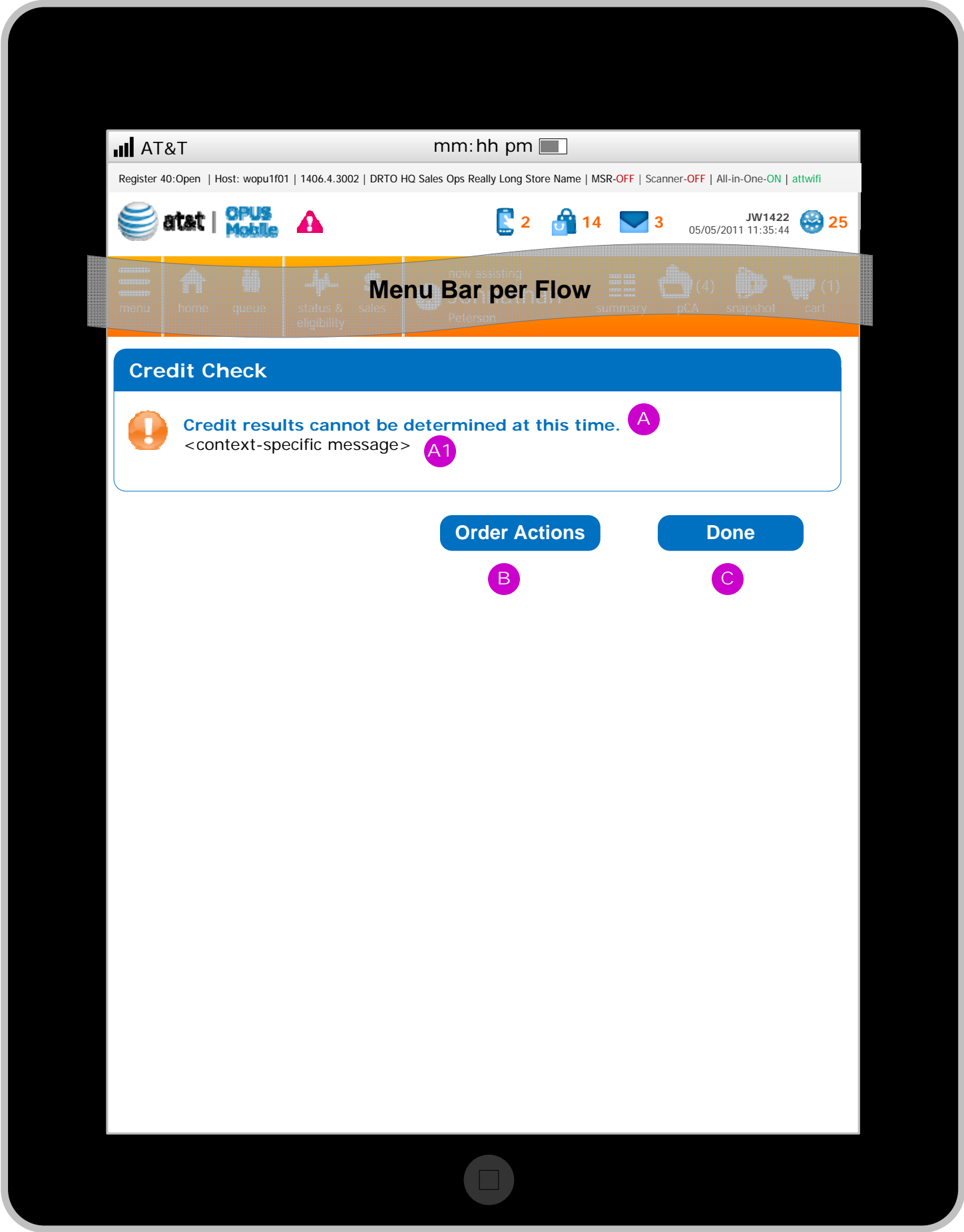


Design Notes Cont'd.

- J Display the camera overlay, when "Camera" button is selected.
- J1 In the camera overlay:
Display instructional message, as shown.
- The camera will continually auto focus.
- J2 If the image is not focused the box will be red.
- J3 When the image gets focused the box will turn to green.
- K Selecting 'Scan' will capture image and close the overlay, returning the User to the Upload Documents screen.
 - If image upload is successful see callout F.
 - If image upload fails see callout G.
- L When 'Cancel' button is selected close overlay and return the user to the originating screen without any changes.



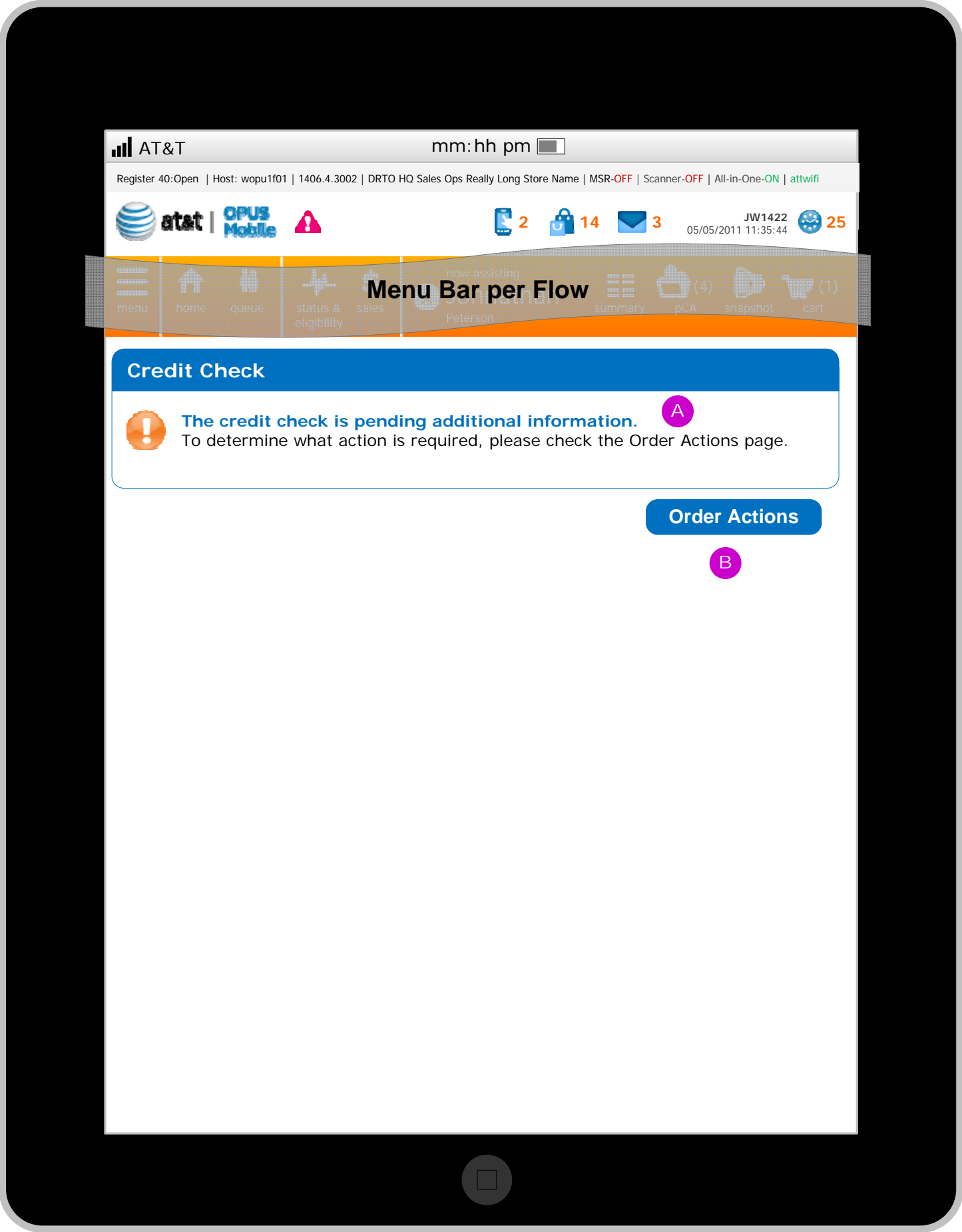
Credit Wait Msg



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- Show this page when the credit check cannot be completed immediately.
- Generic wording.
- Display appropriate wording based on indication from backend.
 - Estimated wait time less than 30 mins
 - Estimated wait time less than an hour
 - Estimated wait time less than 4 hours
 - Customer will be notified when issue is resolved.
- Takes user to Order Actions page.
- Takes user to Home page for new customers or to Customer Summary for existing customers.

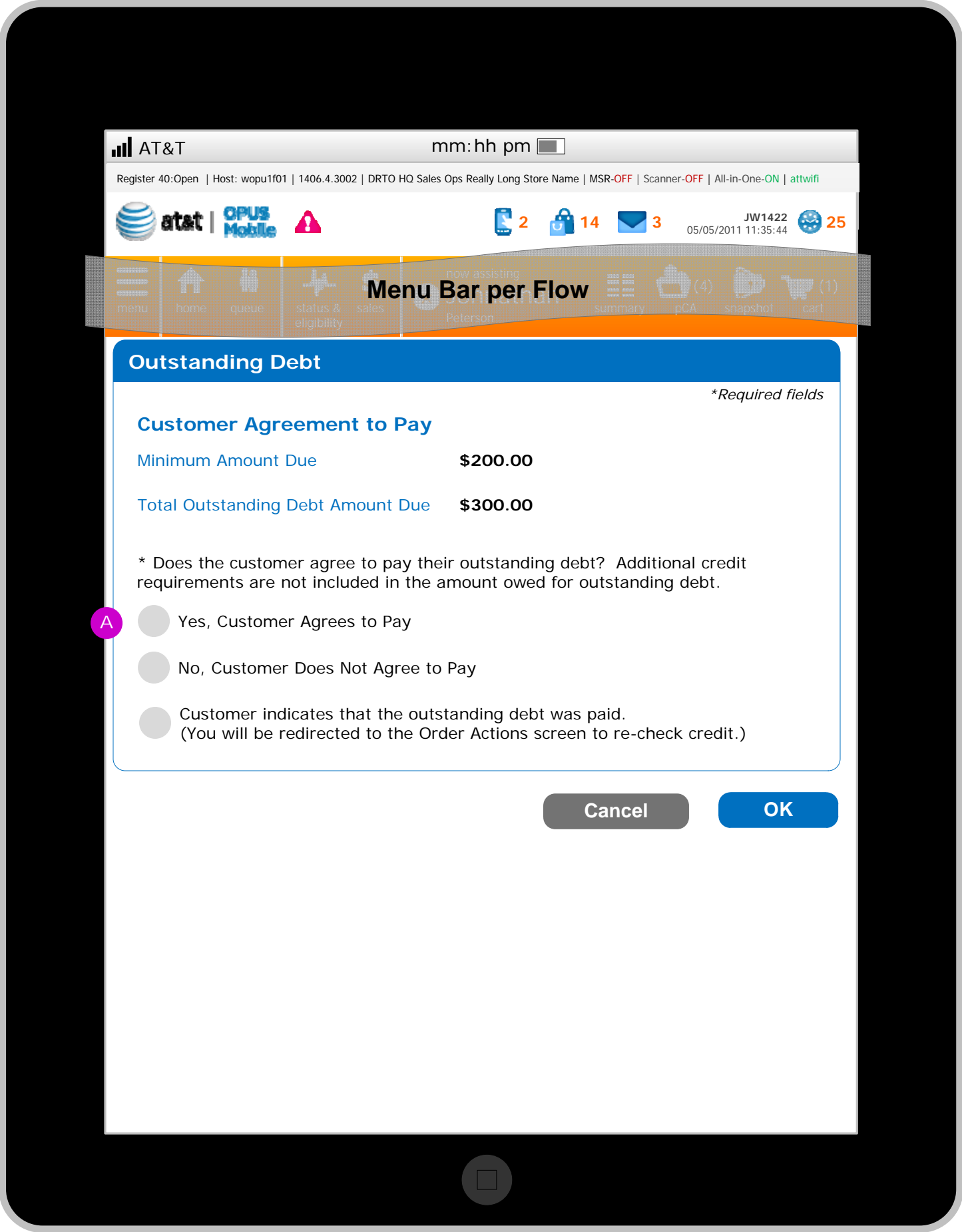
Generic Pending Msg



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- Show this page when the transaction is in a pending state.
- Message.
- Takes user to Order Actions page.

Outstanding Debt



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- Display this screen if outstanding debt is found on this account.
- A There is no default.
- B If customer agrees to pay, navigate to the Payments flow (Payment Information screen) to settle the debt before returning to this flow.
- C If customer does not agree to pay, show an “error” message. The only action open to rep is to cancel order.
- D The “already paid” option takes the rep to the Order Actions page to re-check credit.
- E If rep selects OK without make a payment selection, display an error message.

Outstanding Debt

Please select a payment response.

E

- B ☒ Yes, Customer Agrees to Pay

- C ☐ No, Customer Does Not Agree to Pay

X

The customer needs to agree to pay ALL outstanding debt(s) before being able to continue. If the customer does not agree to pay their debt, then select **Cancel** and cancel out the order.

- D ☐ Customer indicates that the outstanding debt was paid.
(You will be redirected to the Order Actions screen to re-check credit.)

Order Actions

Refer to:

http://clddev0srv04830.itservices.sbc.com:8600/OPUS/OPUS_Launcher_DEV/pdfs/OPUS/OPUSMobile_MX_283917_PendingTransactions.pdf

Residential Activation (Part 2)

Refer to:

http://clddev0srv04830.itservices.sbc.com:8600/OPUS/OPUS_Launcher_DEV/pdfs/OPUS/OPUSMobile_MX_283917_ResidentialActivation_part2_multi.pdf
