Western Union Terminations - User Guide

Introduction

This help document describes the features available on the Western Union Terminations recording system for managing Agent terminations.

New Terminations

To begin a new termination, click the **New Termination** button.

Enter the Agent ID (typically a Terminal ID). If the agent is already on the Transworld system, the agent's address will be filled in. Otherwise, enter the business address, telephone number and email address.

You can modify agent details at any time. All changes to an agent record are recorded and are displayed in the audit trail when **all events** is selected.

When you create a new termination record, a product is created on the Transworld stock database to record and track the material collected from the agent.

Finding and Displaying Terminations

The terminations that have been recorded on the system are displayed at the top of the screen.

Click on the column header to sort the terminations by that column. Each click reverses the current order.

Enter a search term in the search box, then click go to search for a particular termination or set of terminations. The fields searched are: Agent ID, Agent Contact Name Agent Business Name, Agent Address 1, Agent Town, Agent Region/Postcode.

You can select the number of items per screen to display using the **Items** drop down box.

As you move the mouse over the list of terminations, each is highlighted. Click on a termination to select it and display the full details in the **Manage Terminations** box.

Termination Stages

Terminations typically go through four stages…

1. CONTACT AGENT

2. COLLECT FORMS

3. DELIVER TO WESTERN UNION

4. COMPLETE TERMINATION

The termination displays the next expected action. The system user clicks the relevant button and enters data or confirms a move to the next stage.

The stages are described in more detail below. A marker next to the action buttons in the termination detail box shows the button to click for the next expected stage.

Although the system prompts the user to move to the next expected stage, the user can move a termination to any stage, and can go back or repeat a stage if necessary.

Stage: Contact Agent

This stage is done by Western Union.

Click on the **Contact Agent** button.

Select the option button that represents the outcome of the call to the agent. If during the call a collection date was agreed, enter that date. The collection date must be at least 3 working days later than the call date.

If the call was successful, the termination moves to the **COLLECT FORMS** stage.

Stage: Collect Forms

This stage is done by Transworld.

Once the forms have been collected and returned to Transworld they are booked onto the stock system under the Product Code that corresponds to the Agent ID.

Separately, you must click on the **Forms Received (TW)** button to register that Transworld have received the forms. Enter any free text notes required.

The termination moves to the **DELIVER TO WESTERN UNION** stage.

Stage: Deliver To Western Union

This stage is done by Transworld.

Periodically the material received at Transworld is sent to Western Union.

To register that the forms received from this agent have been sent to Western Union, click the **Forms Sent to WU** button. Enter any free text notes required. Click the **Confirm FORMS SENT** button.

The termination moves to the **COMPLETE TERMINATION** stage.

Stage: Complete Termination

This stage is done by Western Union to indicate all required actions for this termination are now done.

Enter any free text notes required.

Click **Confirm**.

Once a termination is marked as closed, you can re-open it by clicking the **Mark as**

Re-opened button.

Other Actions

To set a termination to any required stage, click **Set Next Action...** then select the required item from the dropdown box.

To add a free text note to a termination, click **Add Note**.

To view a list of users who receive email notifications, and the notifications they receive, click the **notifications** link button. Notifications can only be changed by development at this time.

Exporting Data

Click the export link button to send all data collected to date to a file in comma-separate variable (CSV) format. CSV files can be opened by Microsoft Excel.

[end - last updated 19MAR14]