A Guide for VeriCon users

VERICON
verify & connect

User Manual

Ver 1.1 – 02/04/2012

Contents

Overview

Operations Portal

Stats

This page of the operations portal contains a detailed view of the performance of the centres which you would be in charge of.

The conversions can be viewed according to date. By default it would display today's date, however to switch to another date, all you are required to do is click on the calendar image next to the date and choose a different date.

There are two kinds of conversions, call conversion and customer conversion. The call conversion would show the stats of the calls where they were transferred to TPV, so if one customer was transferred twice where the first time the customer declined and the second was approved, the report will include one declined and one approved. The second report is the customer conversion, this would show stats per customer, so similarly if the customer was transferred twice and declined the first time and approved the second time, the report would show only one approved.

Sales

Here you will be able to sort the sales by centre and date. This would be useful where you would like to see the sales at certain times. Only the approved sales are shown here followed by the sale ID, creation date and time of the form and the date and time it was approved.

Quality Assurance Portal

Fresh Sales

Here you will be able to view all sales made by the centres and process these sales. The sales are grouped by centre and date. You will be able to see the amount of sales made, what has been processed and yet to be processed.

To begin, select the centre you wish to process sales for and change the date field by clicking the calendar button (the date field is the date of sale), by default no centre is select and the date would be today's date, then click on search.

You will be able to see how many sales were made by that centre on that date, the amount of sales returned as reworks, the sales yet to be processed, the sales that have been approved and lastly the sales that have been rejected. These are all grouped by campaign.

Underneath that table would be the summary of pending sales. It will show you the sale ID which is clickable to process the sale, the lead ID (phone number in data packet), campaign and sale type (business or residential).

Process Sale

Once you have clicked on the sale ID you will be able to process that sale. There is a check list of what is required to be validated.

- Valid Lead – if the lead was from the data packet this would automatically be checked, otherwise if not checked you are required to check if this number is on the DNC
- Recording – the script required would be in the drop down list, simply click on "Load Script" to open the script and double check the recording to make sure that it is clean and complete
- Customer Details – clicking on the "Details" button will open a popup with all the customer's details. You are required to double check all these details as the DSR will be generated using these details
- DSR – the system wouldn't be able to completely fill up the DSR as there are a few details not included in the sales form, hence you are required to complete these
- Plans – Due the process of plans in the DSR, you are required to manually fill in the fields for these. Simply click on the "Plans" button and you will have the list of plans sold to the customer, then fill up the fields according to those details
- Voice File – You must upload the voice files before you are able to process the sale. The voice file must be in a .GSM format. If the voice file is sent across to you in a different format, you must convert this file. Please be sure to not upload any files larger than 5MB as the system will reject those

If the sale is fine to process, click on "Approved" otherwise click on "Reject" then select if this is due to a rework or an "In-House Rejection", then follow that by a reason why.

Sales Portal

Sales Form

This page will be used for submitting all Sales Forms and retrieving the Sale ID which will be given to the TPV department.

You are firstly prompted to enter the "Customer's Lead ID". The lead ID is the number that you have dialled. You must enter the correct number as this will be transmitted to QA and if the number entered is incorrect it will result in an **In-House Rejection.** The customer lead ID will lock once the sale has been submitted. Please make sure you enter the correct details as you will not be able to edit these details, however, TPV is able to edit everything excluding the Lead ID but they will be subjected to the same validation that is done during the Sales Form.

Once this has been done, you will be prompted to select a campaign and sale type. You must select both of these. The campaign drop down will only contain the campaigns assigned to your centre. Make sure you select the correct sale type, be that residential or business.

Once the form is completed, click on "Submit" and if there are no errors with your input a pop up will show up giving you the Sale ID.

Sale Details

This section contains the details of the sale including your details and the details you have selected previously. Make sure these details are correct, if not, please click on the "Cancel" button, as if the sale is submitted using another agent's ID **they will get paid for the sale and not you.**

Customer Details

Here you are required to enter the customer's details. All fields except "Middle Name" are required;

- Title – Select the customer's title (Mr, Mrs, Miss, Ms, Dr)
- First Name – Enter the customer's first name
- Middle Name – Enter the customer's middle name
- Last Name – Enter the customer's last name
- D.O.B – You must select the customer's date of birth from the date picker, it cannot be typed in manually. There is a restriction on the date picker to not allow you to choose a date before 18 years of today's date.
- Billing – Select either "E-Bill" or "Post". If E-Bill is selected you must enter the customer's email address, otherwise once you select Post, the field will automatically change to N/A and become disabled.
- E-Mail – Enter the customer's email address. This will validate the existence of a mail server on the domain and check if the email has a valid input.
- Mobile – Enter the customer's mobile, otherwise if they do not have one you must check 'N/A'. The field is validated to check if the mobile number entered is real, make sure you do not put any white spaces before or after the number.

Customer Address

In this section you will have to enter the customer's physical and postal address.

VeriCon contains a list of 97% of addresses in Australia. Once you click on Physical or Postal Address a pop up will appear with a form to fill up to attain the customer's correct address. Manual searching of addresses is only permitted if the address is not found in GNAF. PO Boxes and addresses with a property name need to be entered into Manual.

GNAF

1. Enter the customer's Postcode and click on another section of the pop up so the Suburb dropdown can be populated
2. Select the suburb
3. Enter the customer's Unit, Flat or Shop number in the "Unit" field if any. Level and Lot numbers are not accepted in this field
4. Enter the customer's street number in the "No" field. If the number is a range (96-100) only enter one of them (96 or 100)
5. Begin typing the customer's street name and an auto fill will begin populating. Select the correct one using your keyboard and press enter, **do not select it with your mouse!**
6. Select the street type
7. Click on "Search" to match your results to the database
8. Select the correct address and the click on "Select" at the bottom of the pop up

Manual

1. Enter the customer's Postcode and click on another section of the pop up so the Suburb dropdown can be populated
2. Select the suburb
3. Type in the street address or mail box
4. Click on "Select" at the bottom of the pop up

Note: The address will be checked again during the verification. If the address is entered manually, the verifier will double check it against GNAF, if it is found using the same input you have entered, your centre manager will be notified and centre penalised.

Business Identification

This section will validate the business information of the customer.

- ABN – Enter the customer's ABN which is then checked against the ABR. If the fields below remain blank, the ABN entered is invalid, otherwise it will be populated with the business information
- Position – Enter the customer's position in the business
- ABN status – this must show "Active" for the sale to be submitted

Customer Identification

This section will validate the identification of the customer.

- ID Type – Select the type of ID the customer has provided
- ID Number – Enter the customer's ID number. Make sure that you enter a valid ID number as the ID is validated and if found invalid, you will not be able to submit the sale

Selected Packages

Here you will see all the packages (lines – plans) related to the sale.

You can delete the package by clicking the delete button on the right. To add a package you must click on "Add Package" and fill up the relevant details.

- CLI – Enter the customer's phone number without any white spaces at the beginning or end of the number. Firstly the number will be checked against the existing customer table, if the number is existing you will get an error or if the number has already been submitted within the data period
- Plan – Select the plan that the customer wishes to sign that number up on

Rates

On this page there is a list of all plans that are sold by the company. These are split into PSTN, ADSL and Bundle. To view the rates of a plan simply click on the button of the plan of your choice, a popup will open with the relevant details of that plan.

International rates are also available at the bottom of the page. Countries are sorted alphabetically and can be searched by clicking on one of the options and typing the first letter of that country to jump to that position in the list.

ADSL Checker

Here you will be able to check if the customer has ADSL or ADSL 2+ availability and which plan they can be signed up on (Metro or Regional).

You must type in their CLI (phone number) and clicking on "Check" will return the result.

Admin

Stats

Here you will be able to see the charts of the sales made by your centre for the week. These are split into Approved, Declined and Line Issue per day. The two types of charts are for call stats and customer stats. The call conversion will be based on the calls transferred to TPV and the customer conversion is based on the customers. So with the call conversion if a customer is transferred to TPV twice and declined the first and approved the second, it would show as two entries (one declined and one approved), however with customer conversion, it would only show as one entry which was the last one (one approved).

IVR

This page allows you to enter the sale ID and check what the result would be when transferred to TPVs IVR. This is a great method for when you would like to check the reason why the IVR rejected your sale ID.

Self Verification Portal

Roster

This feature displays your current roster for the week, the roster for next week and gives you the ability to enter your availability for next week.

The table under the heading next week would show you the dates and if you have entered your availability, will display the availability that you have entered. Then once your team leader has finalised the roster, it will also include your shift times.

Clicking the "Availability" button will bring up a popup where you can enter your availability for next week. This button will disappear when you have entered your availability. To do this, you need to select from the drop down your start and end time (in 15 minute intervals). If you are not available for that day, simply click on "N/A" and the entire day will disable.

After submitting your availability your team leader has access to this and will make your roster accordingly.

Note: If you need to change your availability, you are required to speak to your team leader as this feature has been disabled due to management decisions.

Sales Form

This page will be used for submitting all Sales Forms and retrieving the Sale ID which will be given to the TPV department.

You are firstly prompted to enter the "Customer's Lead ID". The lead ID is the number that you have dialled. You must enter the correct number as this will be transmitted to QA and if the number entered is incorrect it will result in an **In-House Rejection.** The customer lead ID will lock once the sale has been submitted. Please make sure you enter the correct details as you will not be able to edit these details, however, TPV is able to edit everything excluding the Lead ID but they will be subjected to the same validation that is done during the Sales Form.

Once this has been done, you will be prompted to select a campaign and sale type. You must select both of these. The campaign drop down will only contain the campaigns assigned to your centre. Make sure you select the correct sale type, be that residential or business.

Once the form is completed, click on "Submit" and if there are no errors with your input a pop up will show up giving you the Sale ID.

Sale Details

This section contains the details of the sale including your details and the details you have selected previously. Make sure these details are correct, if not, please click on the "Cancel" button, as if the sale is submitted using another agent's ID **they will get paid for the sale and not you.**

Customer Details

Here you are required to enter the customer's details. All fields except "Middle Name" are required;

- Title – Select the customer's title (Mr, Mrs, Miss, Ms, Dr)
- First Name – Enter the customer's first name
- Middle Name – Enter the customer's middle name
- Last Name – Enter the customer's last name
- D.O.B – You must select the customer's date of birth from the date picker, it cannot be typed in manually. There is a restriction on the date picker to not allow you to choose a date before 18 years of today's date.
- Billing – Select either "E-Bill" or "Post". If E-Bill is selected you must enter the customer's email address, otherwise once you select Post, the field will automatically change to N/A and become disabled.
- E-Mail – Enter the customer's email address. This will validate the existence of a mail server on the domain and check if the email has a valid input.
- Mobile – Enter the customer's mobile, otherwise if they do not have one you must check 'N/A'. The field is validated to check if the mobile number entered is real, make sure you do not put any white spaces before or after the number.

Customer Address

In this section you will have to enter the customer's physical and postal address.

VeriCon contains a list of 97% of addresses in Australia. Once you click on Physical or Postal Address a pop up will appear with a form to fill up to attain the customer's correct address. Manual searching of addresses is only permitted if the address is not found in GNAF. PO Boxes and addresses with a property name need to be entered into Manual.

GNAF

9. Enter the customer's Postcode and click on another section of the pop up so the Suburb dropdown can be populated
10. Select the suburb
11. Enter the customer's Unit, Flat or Shop number in the "Unit" field if any. Level and Lot numbers are not accepted in this field
12. Enter the customer's street number in the "No" field. If the number is a range (96-100) only enter one of them (96 or 100)
13. Begin typing the customer's street name and an auto fill will begin populating. Select the correct one using your keyboard and press enter, **do not select it with your mouse!**
14. Select the street type
15. Click on "Search" to match your results to the database
16. Select the correct address and the click on "Select" at the bottom of the pop up

Manual

5. Enter the customer's Postcode and click on another section of the pop up so the Suburb dropdown can be populated
6. Select the suburb
7. Type in the street address or mail box
8. Click on "Select" at the bottom of the pop up

Note: The address will be checked again during the verification. If the address is entered manually, the verifier will double check it against GNAF, if it is found using the same input you have entered, your centre manager will be notified and centre penalised.

Business Identification

This section will validate the business information of the customer.

- ABN – Enter the customer's ABN which is then checked against the ABR. If the fields below remain blank, the ABN entered is invalid, otherwise it will be populated with the business information
- Position – Enter the customer's position in the business
- ABN status – this must show "Active" for the sale to be submitted

Customer Identification

This section will validate the identification of the customer.

- ID Type – Select the type of ID the customer has provided
- ID Number – Enter the customer's ID number. Make sure that you enter a valid ID number as the ID is validated and if found invalid, you will not be able to submit the sale

Selected Packages

Here you will see all the packages (lines – plans) related to the sale.

You can delete the package by clicking the delete button on the right. To add a package you must click on "Add Package" and fill up the relevant details.

- CLI – Enter the customer's phone number without any white spaces at the beginning or end of the number. Firstly the number will be checked against the existing customer table, if the number is existing you will get an error or if the number has already been submitted within the data period
- Plan – Select the plan that the customer wishes to sign that number up on

Note: After pressing the submit button you will be asked for the dialled number and notes, you are required to enter the dialled number, which at times is different to the lead number, however, notes are not required.

Verification

Here you will be able to view the script for the verification process. You have an option of campaigns assigned to you and then all plans.

The questions in the verification script are shown one at a time. Clicking the next button will display the next question, however due to compliance requirements there is a time delay on the activation of the next button.

Rates

On this page there is a list of all plans that are sold by the company. These are split into PSTN, ADSL and Bundle. To view the rates of a plan simply click on the button of the plan of your choice, a popup will open with the relevant details of that plan.

International rates are also available at the bottom of the page. Countries are sorted alphabetically and can be searched by clicking on one of the options and typing the first letter of that country to jump to that position in the list.

ADSL Checker

Here you will be able to check if the customer has ADSL or ADSL 2+ availability and which plan they can be signed up on (Metro or Regional).

You must type in their CLI (phone number) and clicking on “Check” will return the result.

Admin

Roster

The roster admin page will display the rosters for your centre on a per week basis. By default the current week’s roster is displayed.

Clicking the “New Roster” button will open up the page where you can view all your staff and their availability. Once you click on their name, a popup will open where you can see their availability and create their roster accordingly.

Third Party Verification Portal

Verification

Here you will have all the details and scripts necessary to be able to verify a sale.

To begin you are required to enter the sale ID which will be provided to you by the agent or the IVR. Clicking “Load Sale” will firstly check if the sale ID is valid or has exceeded the centres data expiry period. If all checks pass then you will be redirected to the dashboard which includes all the important details of the sale.

Sale Details

This includes the details of the sale and the agent that submitted the sale form. You also have the ability to change the sale type from a Residential to Business or vice versa.

TPV Notes

This section includes the notes from all previous verifiers for that sale along with the status they disposed the sale as.

Previous Attempts

Here you will be able to see a view of the history of this lead. All lead history is logged, so you will be able to see entire cycle of this lead from the first time we called it until you have opened that sale.

Selected Packages

This is very useful as if the customer wants to sign up for a different plan to what they were initially transferred on, you can edit that here. You also have the ability to add more packages and delete any if need be. Keep in mind that you are subject to the same validation as the initial agent, so if they can’t submit that number, neither can you.

Scripts

If there is more than one package you will have the option to select which script you would like to view. This gives you the option to select the most appropriate script that would include all packages.

The scripts are designed in a way where you will only be able to view one question at a time. To make it easier for you, if there is any input required, rather than having to switch to another page to input the customer’s details, you will have the fields below the question so you can enter them while still on the same page to increase efficiency.

If you require to write notes there is a “Notes” button on the top left hand corner of the script. Once you submit this, the notes will automatically be saved along with the sale. You also have the option to edit all the customer’s details at the end by simply clicking the “Edit” button.

At any time if the customer declines you can simply click the “Cancel” button beneath the script. This will bring up a popup where you are required to select if it is a ‘Declined’, ‘Line Issue’ or ‘Hold’ reason then enter a note explaining why you have declined the sale. Otherwise to approve the sale, simply get to the end of the script and click on the “Submit” button to do that.

Rates

On this page there is a list of all plans that are sold by the company. These are split into PSTN, ADSL and Bundle. To view the rates of a plan simply click on the button of the plan of your choice, a popup will open with the relevant details of that plan.

International rates are also available at the bottom of the page. Countries are sorted alphabetically and can be searched by clicking on one of the options and typing the first letter of that country to jump to that position in the list.

ADSL Checker

Here you will be able to check if the customer has ADSL or ADSL 2+ availability and which plan they can be signed up on (Metro or Regional).

You must type in their CLI (phone number) and clicking on “Check” will return the result.