Salerity

User Guide

Daily Procedure

Must be logged into these systems 5 minutes before your shift starts.

- ❑ Gmail
- ❑ Five9
- ❑ Salerity

What is Salerity

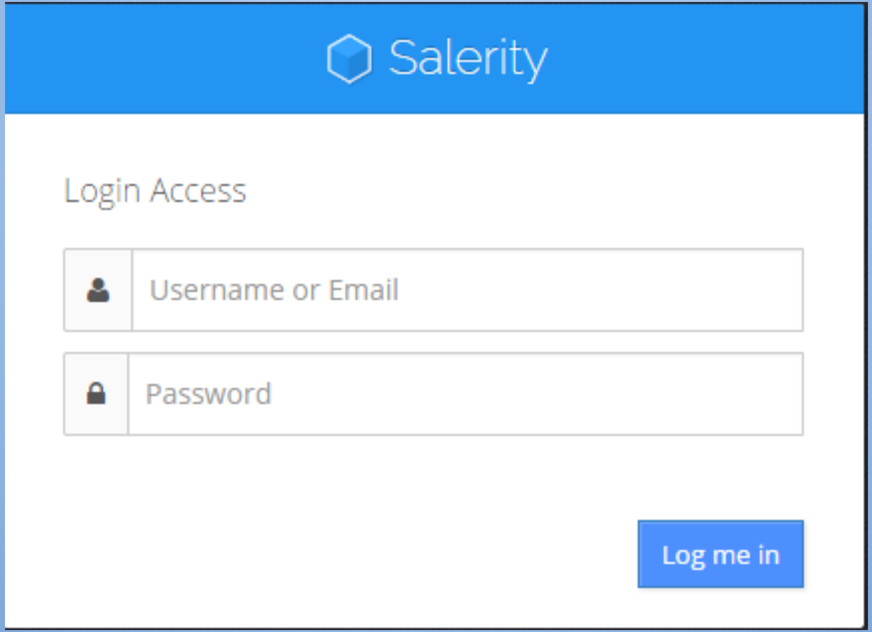
What is Salerity?

Salerity is our record management system which keeps track of our leads and orders from customers.

- Login using your Alpha Dynamica email and password: abpass1234

Logging into Salerity

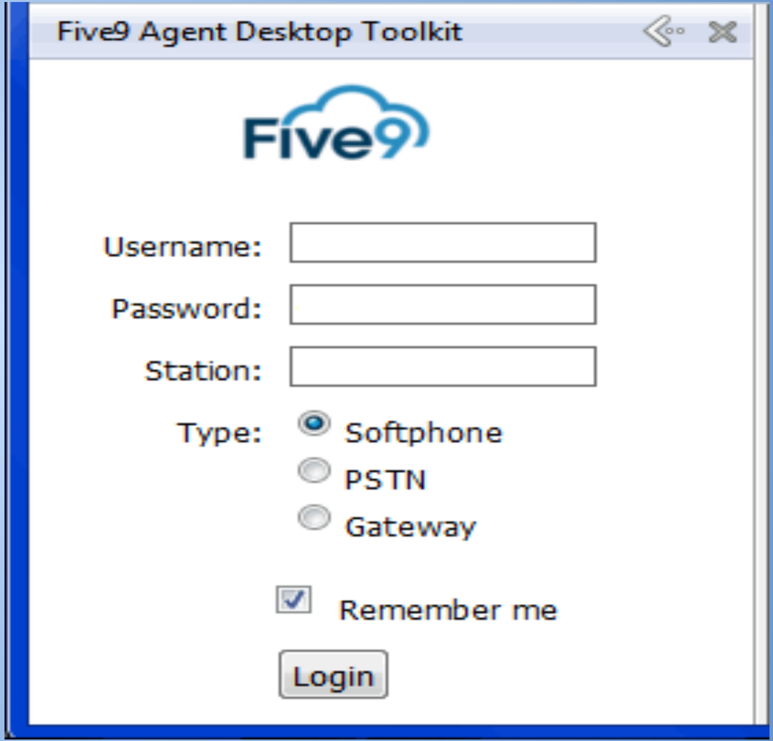
Visit http://www.salerity.com/manager/user/login



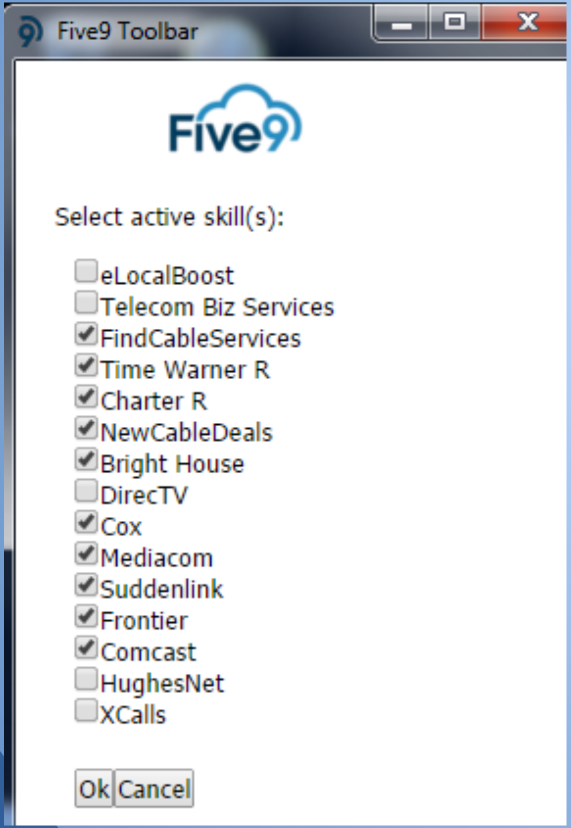
Five9

What is Five9?

Five9 is our phone system we use that is integrated with Salerity



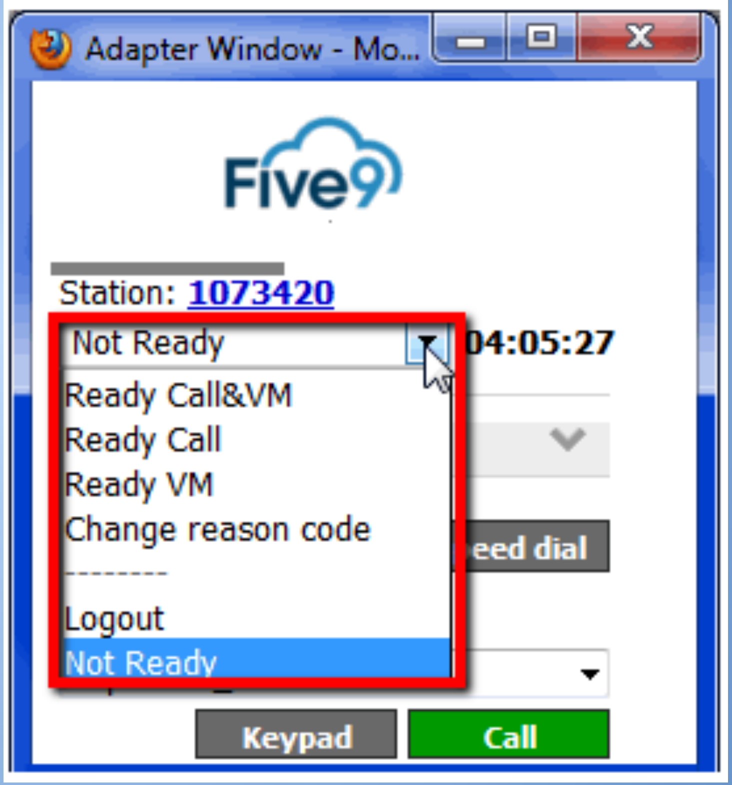
Select the Providers We Sell



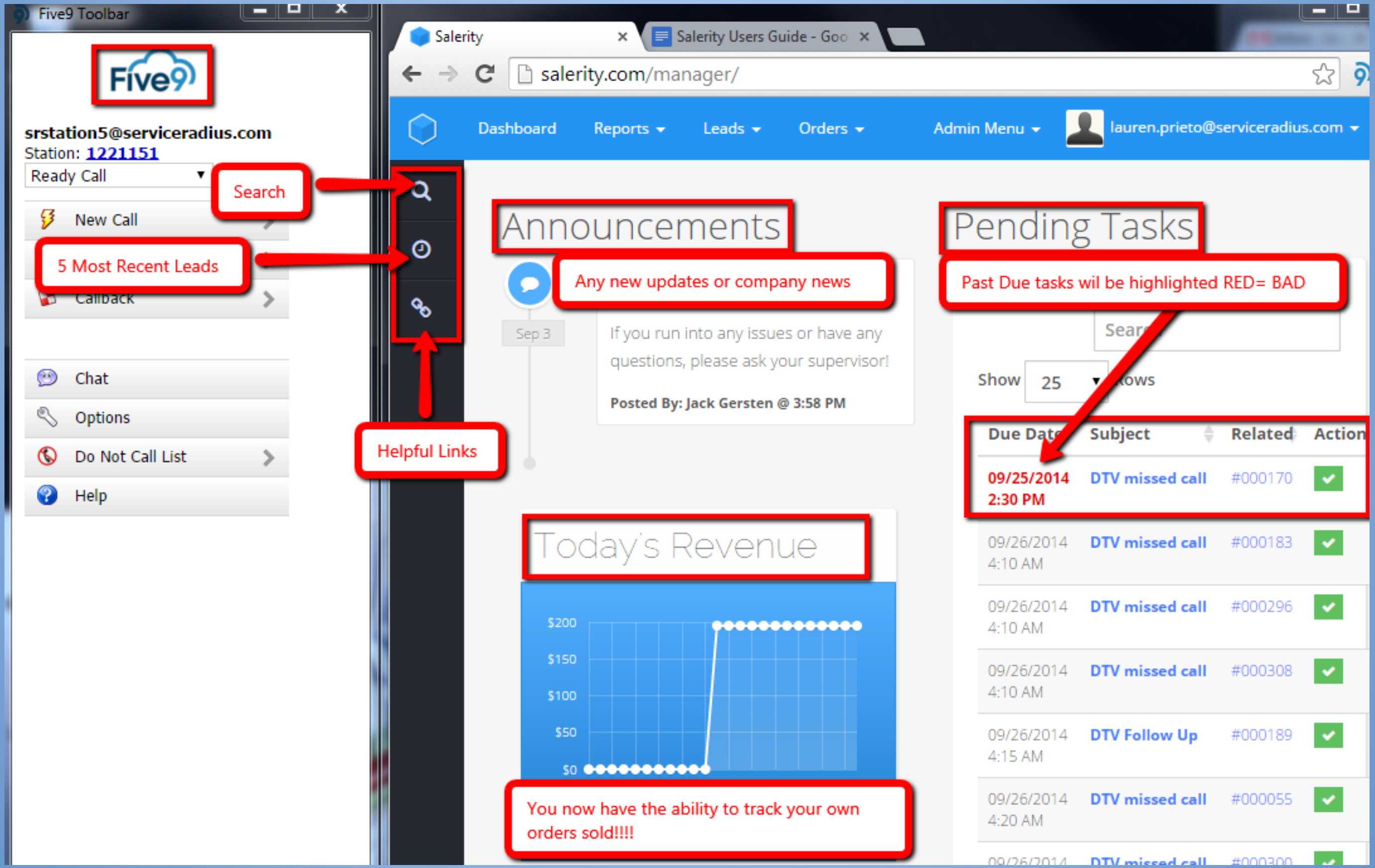
- ❏ Time Warner R
- ❏ Charter R
- ❏ Cox
- ❏ Comcast
- ❏ Bright House
- ❏ Mediacom
- ❏ FindCableServices
- ❏ NewCableDeals
- ❏ Frontier
- ❏ AT&T
- ❏ Telecom Biz Services
- ❏ Biz Services Outbound

Reason Code for Not Ready Call

- Break
- Follow-Up Work
- Meal
- Meeting
- Training



Let's Look at the Dashboard

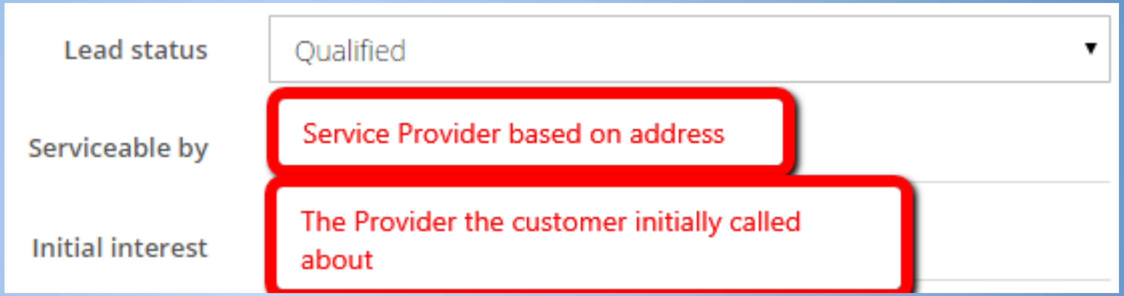


What is a Lead?

Inbound/Outbound call or Web Lead that is looking to add a new line of service or start new service for their Business.

Lead Status

- Open
- Contacted
- Qualified
- Unqualified
- Duplicate



What is a Web Lead?

A Lead sent to us via the Internet that is Pre-Qualified with Pre-filled information by the customer

Script for an Inbound Call...

“Thank you for calling, are you looking to add or start new service for your business or do you need Billing or Technical Support?”

Who can we help?

- New Customers
- Existing customers adding a new line of service
- Transferring Service?
  - We cannot transfer an existing account unless their contract has ended.

Customer Service

- Existing customer NOT adding or starting new service
- Billing issues or questions
- Technical Support
- Adding Channels
- Making a payment
- Office Location address and hours

Connectors - Salerity Lead

Click on the **Connector - Salerity Lead** button on your Five9 console to create a blank Lead from an Inbound Call

Why???

Because it saves the Customer's telephone number and the number they called to reach us!!!

Number called	(925) 529-6995
Original caller id	(281) 757-1432

“I want to start new service”

“Ok great! I need to gather some information from you to verify your location and see who the providers are, would that be ok?”

What info do you gather?

- ❑ First Name
- ❑ Last Name
- ❑ Telephone Number
- ❑ Company Name
- ❑ Email Address
- ❑ FULL Address and "Suite" number/letter if applies
- ❑ City
- ❑ State
- ❑ Zip Code

Verify & Check Serviceability

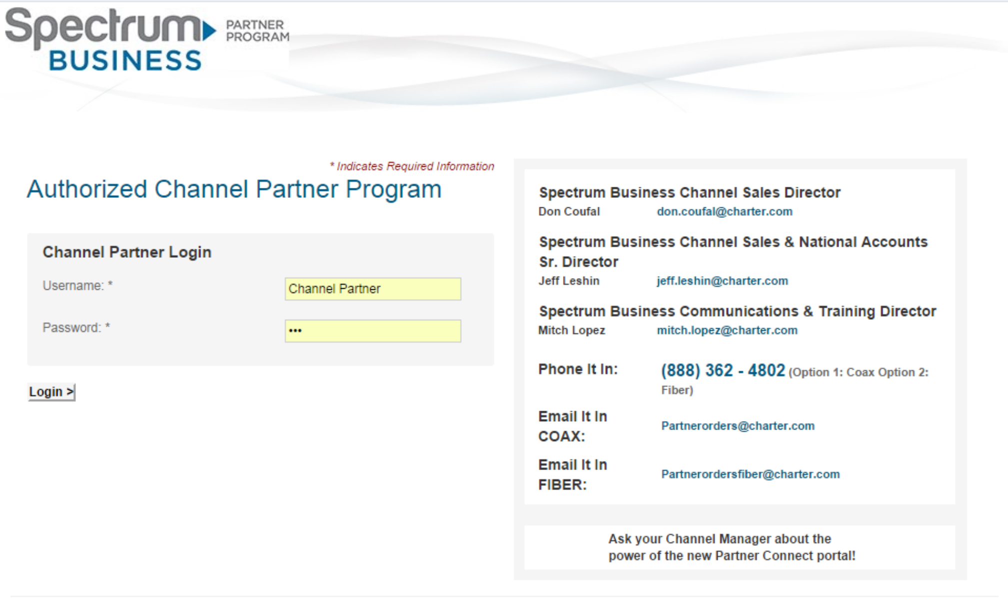
“Thank you ______. Please hold one moment while I verify your location and check serviceability.”

- ❏ Use Google Maps to Verify Location
- ❏ Use ‘Charter Serviceability Link’ to check serviceability

1 min 30 seconds from Start to Finish

“Great, your serviceable!!”

Login: www2.charterbusiness.com/partner/tlr
Username: Channel Partner
Password: tlr



Spectrum BUSINESS PARTNER PROGRAM

* Indicates Required Information

Authorized Channel Partner Program

Channel Partner Login

Username: * Channel Partner

Password: * •••

Login >

Spectrum Business Channel Sales Director
Don Coufal don.coufal@charter.com

Spectrum Business Channel Sales & National Accounts Sr. Director
Jeff Leshin jeff.leshin@charter.com

Spectrum Business Communications & Training Director
Mitch Lopez mitch.lopez@charter.com

Phone It In: (888) 362 - 4802 (Option 1: Coax Option 2: Fiber)

Email It In COAX: Partnerorders@charter.com

Email It In FIBER: Partnerordersfiber@charter.com

Ask your Channel Manager about the power of the new Partner Connect portal!

Quick Notes

- A quick description of the service(s) the customer is interested in
- Reason why a Lead is Unqualified
- Use familiar abbreviation

Quick note Wants to add tv and phone to existing internet

Quick note customer is not interested in TW nor Hughes Net

Quick note address is serviceable by Mediacom. Not interested in HughesNet and not serviceable with Frontier

“Do you want to set up service?”

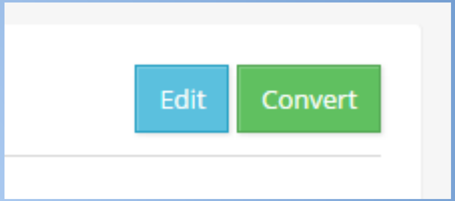
After you go over pricing and service(s), simply ask if they would like to set up service. Include:

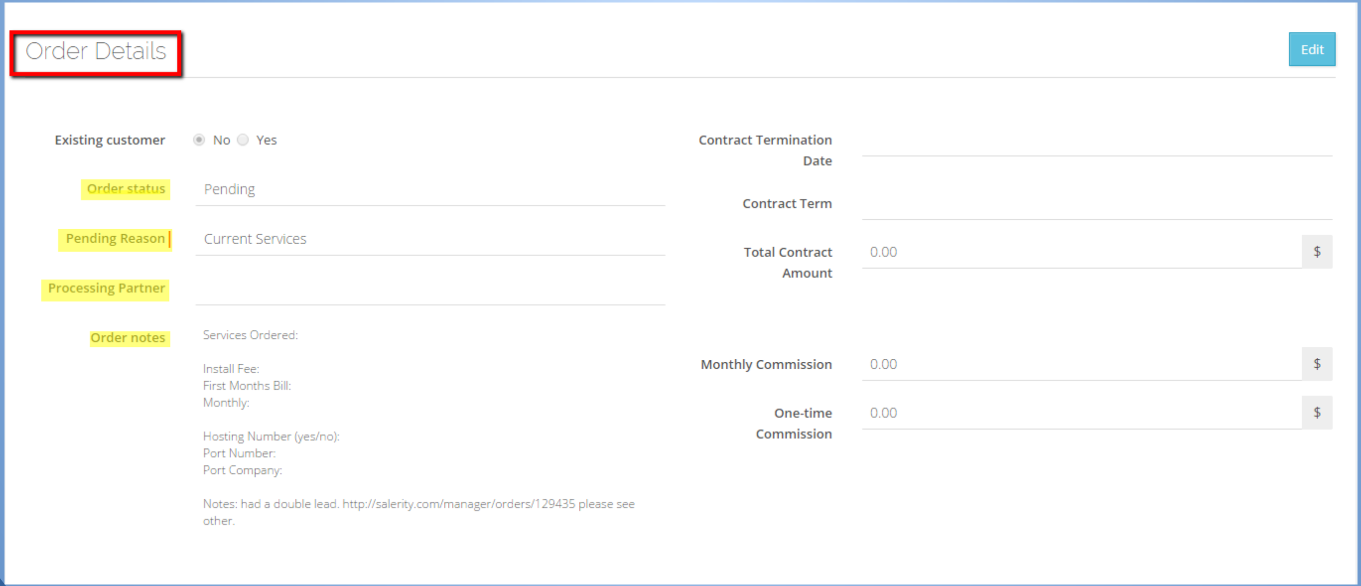
- ❑ Package + Equipment + Additional One-Time Fee(s) + Installation Fee
- ❑ Work Order Process:
  - ❑ Site Survey
  - ❑ Installation
- ❑ Send a Service Agreement either via email or fax for the customer to Sign and send back.

What do you do next?

Convert Lead to a Pending Order

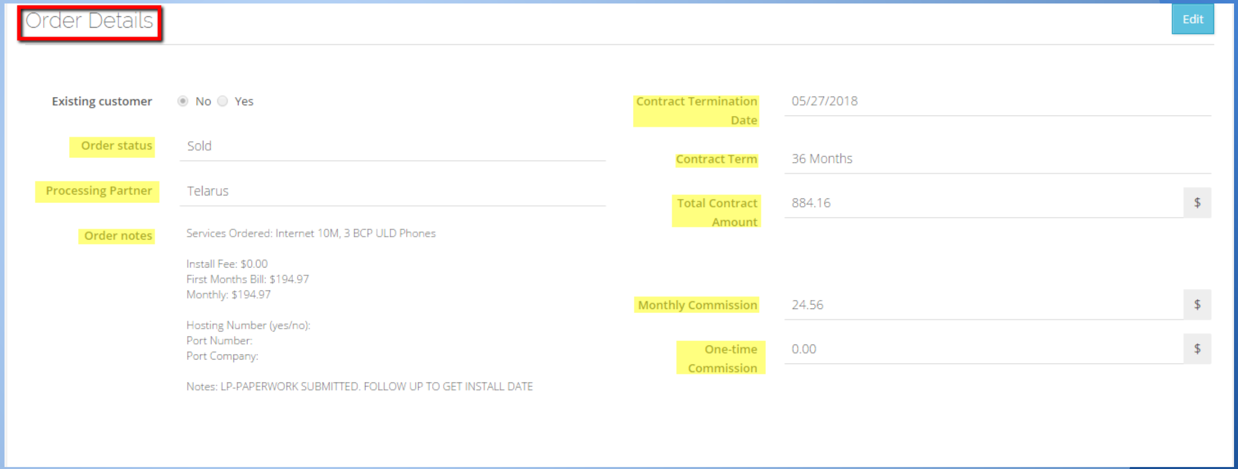
"Yes, I want to set up service!"





Change Pending to Sold Order

Change once you have a Signed Service Agreement back from the customer. Still set a Follow Up Task to get an installation date and time from the Provider.



Order Notes

Services Ordered: Spectrum 60M Internet+Wifi
Install Fee: $199.00
First Months Bill: $263.99 ($69.99 Monthly+$199 Install)
Monthly Bill: $64.99 ($59.99 services+$5.00 router)

Make Notes During the Call

Order Notes...

Host Number: You will never get the new telephone number

Port Number: Number(s) customer is trying to keep

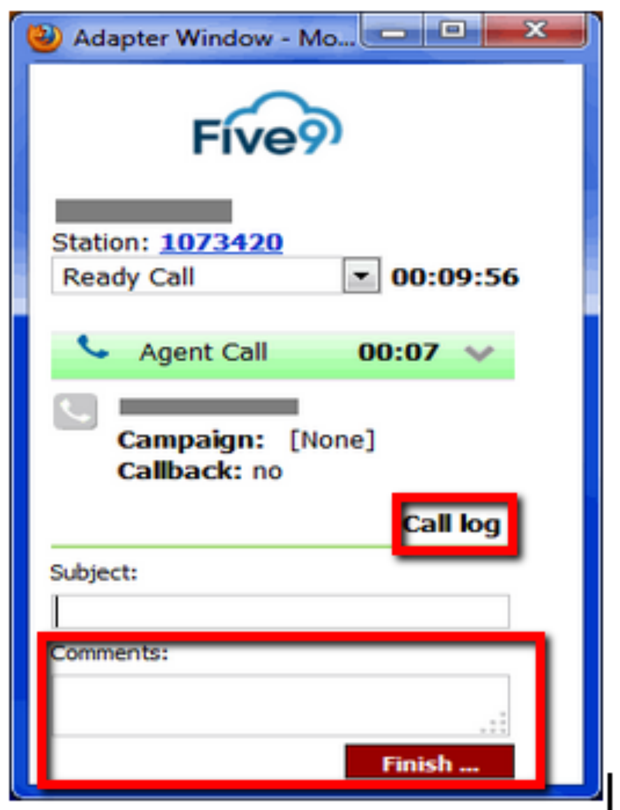
Port Company: Company the existing number belongs to

Notes: Any additional notes needed

What is the Call Log?

Leave comments in the Call Log for any lead that is created

Why?
To create a call history for the Lead



What about Customer Service Calls

If a Lead was not created you do not need to leave a comment in the Call Log

End Call Dispositions

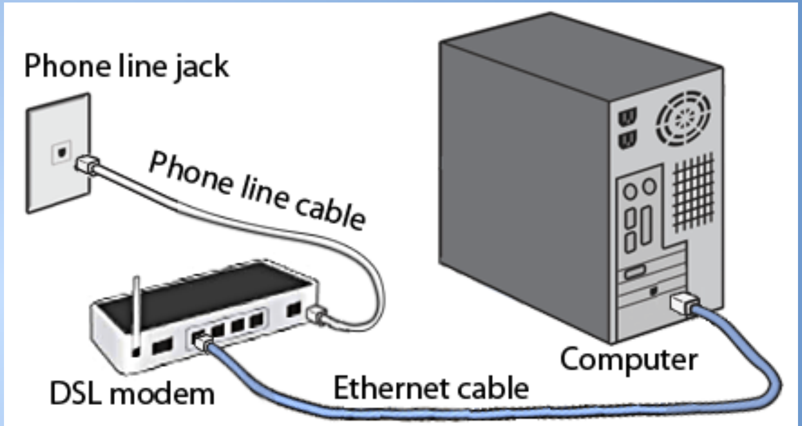
- ❑ CustServ-Billing-Tech
- ❑ Lead or Customer
- ❑ Office Location
- ❑ DNC (Do Not Call)

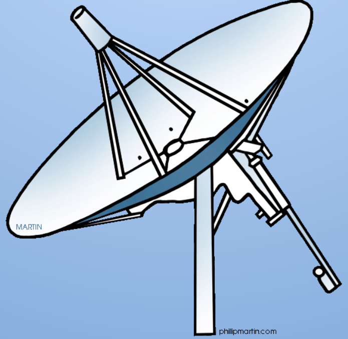
Tasks: Follow Ups

- ❏ Give OUR Callback Number
- ❏ Leave detailed Quick Notes in Lead
- ❏ Create a Task
- ❏ Follow Up 3x before Un-Tasking

Non-Cable Location

If a location is not in a cable area, the only other alternative for the customer is DSL or Satellite providers





Any Questions?