

Salerity

User Guide

Daily Procedure

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

- ☐ Gmail
- ☐ Five9
- ☐ Salerity



What is Salerity

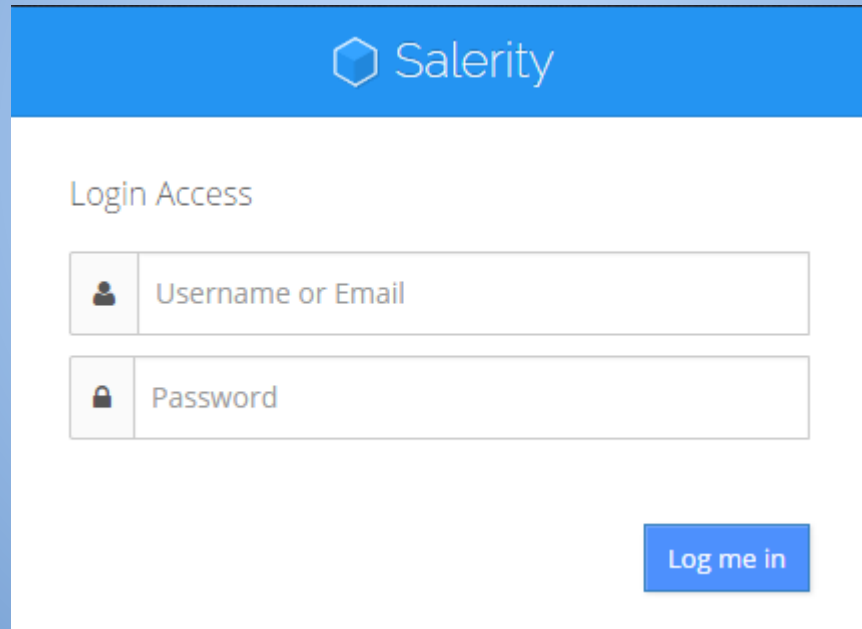
What is Salerity?

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>




The screenshot shows the Salerity login interface. At the top is a blue header with the Salerity logo and name. Below this is a white section titled 'Login Access'. It contains two input fields: 'Username or Email' with a user icon and 'Password' with a lock icon. A blue 'Log me in' button is positioned at the bottom right of the login area.

 Salerity

Login Access

 Username or Email

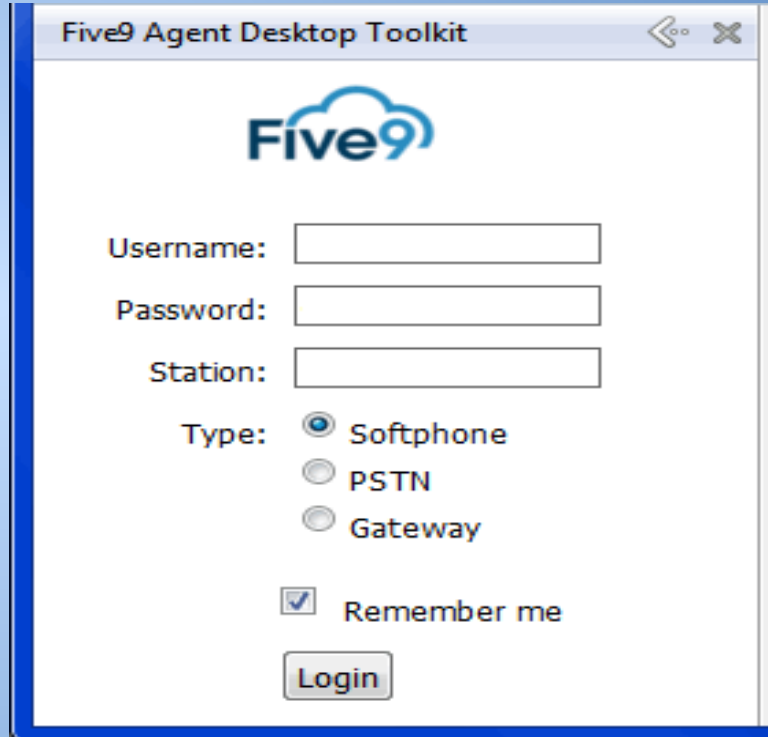
 Password

Log me in

Five9

What is Five9?

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



The image shows a screenshot of the 'Five9 Agent Desktop Toolkit' login window. The window has a title bar with the text 'Five9 Agent Desktop Toolkit' and standard window controls (minimize, maximize, close). The main content area features the Five9 logo at the top. Below the logo are three text input fields labeled 'Username:', 'Password:', and 'Station:'. Under the 'Station:' field is a 'Type:' section with three radio button options: 'Softphone' (which is selected), 'PSTN', and 'Gateway'. Below these options is a checkbox labeled 'Remember me' which is checked. At the bottom of the form is a 'Login' button.

Five9 Agent Desktop Toolkit

Five9

Username:

Password:

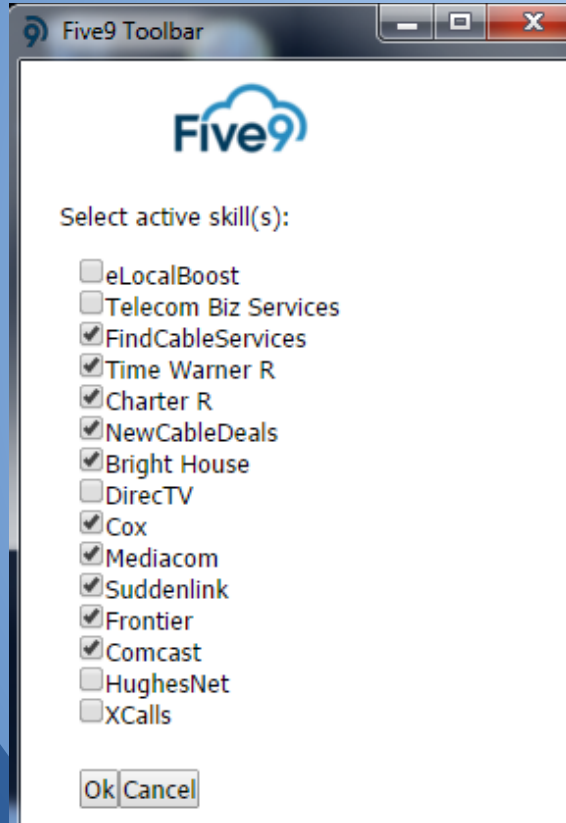
Station:

Type: ☒ Softphone
☐ PSTN
☐ Gateway

☒ Remember me

Login

Select the Providers We Sell



The screenshot shows a window titled "Five9 Toolbar" with a standard Windows title bar (minimize, maximize, close buttons). Inside the window, the "Five9" logo is at the top. Below it, the text "Select active skill(s):" is followed by a list of providers, each with a checkbox. The providers listed are: eLocalBoost, Telecom Biz Services, FindCableServices, Time Warner R, Charter R, NewCableDeals, Bright House, DirecTV, Cox, Mediacom, Suddenlink, Frontier, Comcast, HughesNet, and XCalls. The checkboxes for FindCableServices, Time Warner R, Charter R, NewCableDeals, Bright House, Cox, Mediacom, Suddenlink, Frontier, and Comcast are checked. At the bottom of the window are "Ok" and "Cancel" buttons.

Five9 Toolbar

Five9

Select active skill(s):

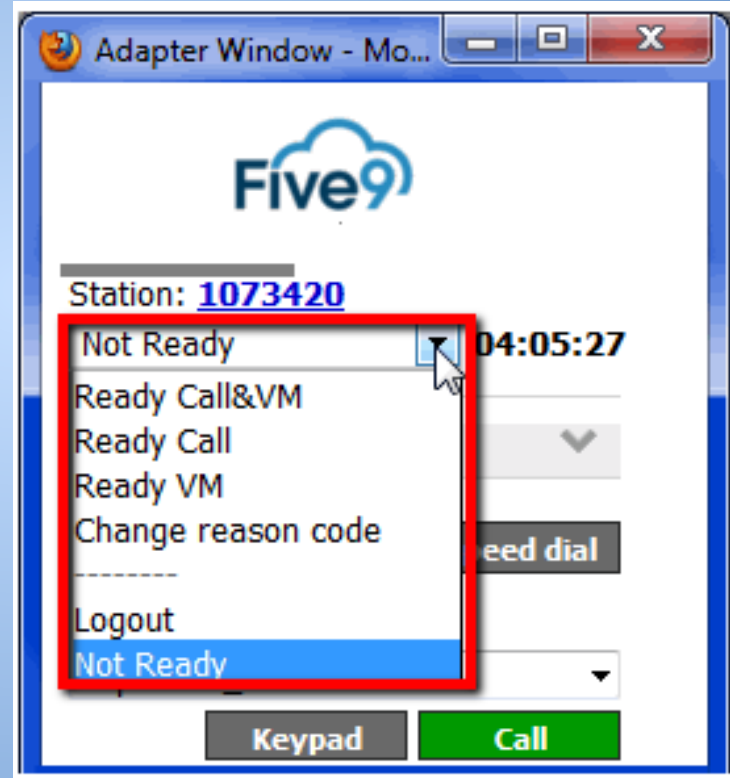
- ☐ eLocalBoost
- ☐ Telecom Biz Services
- ☒ FindCableServices
- ☒ Time Warner R
- ☒ Charter R
- ☒ NewCableDeals
- ☒ Bright House
- ☐ DirecTV
- ☒ Cox
- ☒ Mediacom
- ☒ Suddenlink
- ☒ Frontier
- ☒ Comcast
- ☐ HughesNet
- ☐ XCalls

Ok Cancel

- ☐ 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

The image shows a screenshot of the Salerity dashboard interface. The dashboard is divided into several sections, each with a red box highlighting a specific feature or data point. Red arrows point from text boxes to these features.

Five9 Toolbar: Located on the left side of the dashboard. It includes the Five9 logo, the user email `srstation5@serviceradius.com`, the station number `1221151`, and a "Ready Call" status. Below this are buttons for "New Call", "5 Most Recent Leads", and "Callback". Further down are links for "Chat", "Options", "Do Not Call List", and "Help".

Search: A magnifying glass icon in the top left navigation bar, highlighted by a red box and a red arrow pointing to the text "Search".

5 Most Recent Leads: A button in the left sidebar, highlighted by a red box and a red arrow pointing to the text "5 Most Recent Leads".

Helpful Links: A vertical bar in the center of the dashboard containing icons for search, a clock, and a link. A red arrow points from the text "Helpful Links" to this bar.

Announcements: A section titled "Announcements" with a blue speech bubble icon. It contains a message: "If you run into any issues or have any questions, please ask your supervisor!" posted by "Jack Gersten @ 3:58 PM".

Pending Tasks: A section titled "Pending Tasks" with a search bar and a "Show 25 rows" dropdown. It contains a table of tasks. A red arrow points from the text "Past Due tasks will be highlighted RED= BAD" to the first row of the table.

| Due Date | Subject | Related | Action |
|--------------------|-----------------|---------|--------|
| 09/25/2014 2:30 PM | DTV missed call | #000170 | ✓ |
| 09/26/2014 4:10 AM | DTV missed call | #000183 | ✓ |
| 09/26/2014 4:10 AM | DTV missed call | #000296 | ✓ |
| 09/26/2014 4:10 AM | DTV missed call | #000308 | ✓ |
| 09/26/2014 4:15 AM | DTV Follow Up | #000189 | ✓ |
| 09/26/2014 4:20 AM | DTV missed call | #000055 | ✓ |
| 09/26/2014 | DTV missed call | #000300 | ✓ |

Today's Revenue: A section titled "Today's Revenue" with a line graph showing revenue over time. The y-axis ranges from \$0 to \$200. A red arrow points from the text "You now have the ability to track your own orders sold!!!!" to the graph.

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

| | |
|------------------|--|
| Lead status | Qualified ▼ |
| Serviceable by | Service Provider based on address |
| Initial interest | The Provider the customer initially called about |

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?

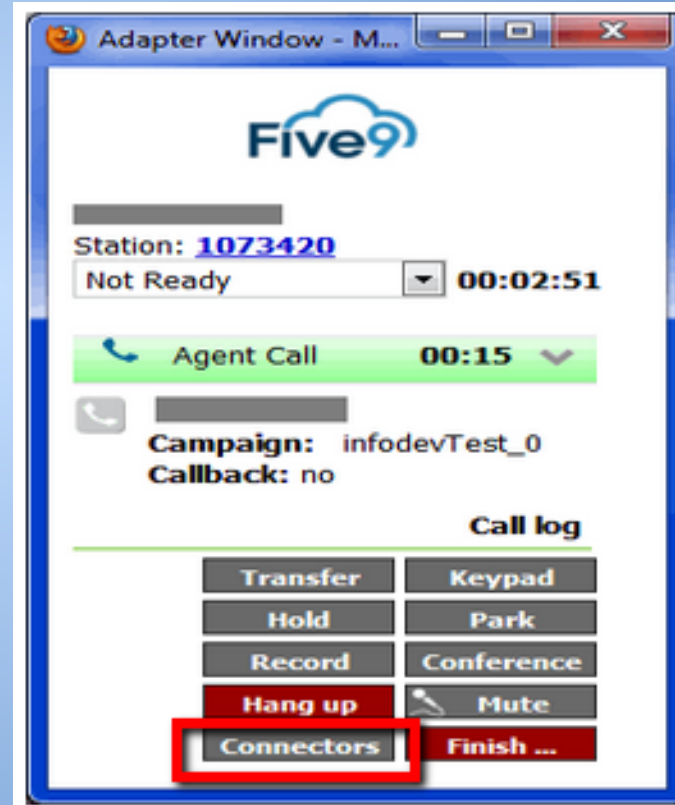
- ❑ New Customers
- ❑ Existing customers adding a new line of service
- ❑ Transferring Service?
 - ❑ We cannot transfer an existing account unless their contract has ended.

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

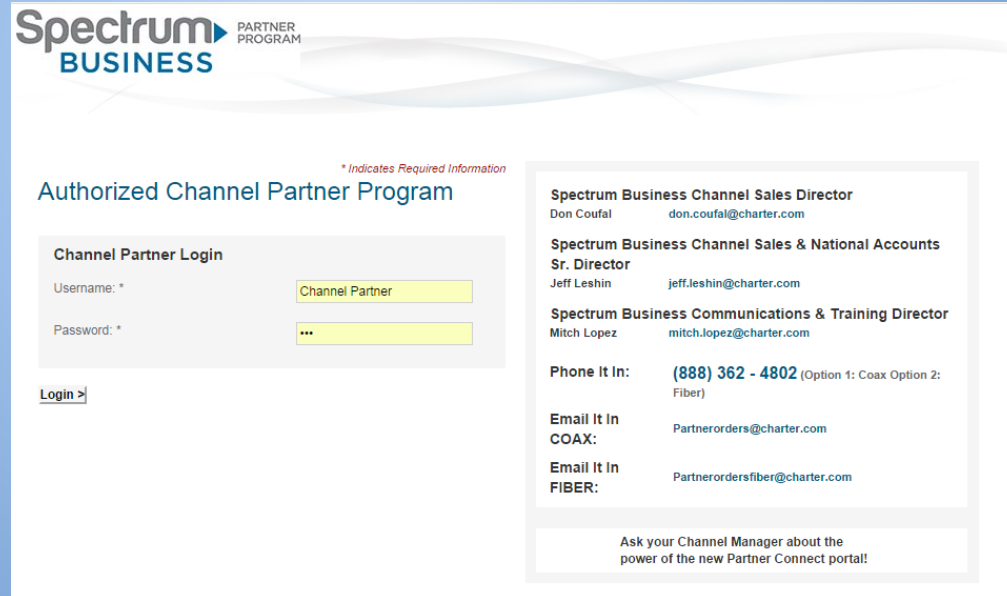


“Great, your serviceable!!”

Login: www2.charterbusiness.com/partner/tlr

Username: Channel Partner

Password: tlr



The screenshot shows the Spectrum Business Channel Partner Program login page. At the top left is the Spectrum Business logo with 'PARTNER PROGRAM' to its right. Below the logo is a wavy line graphic. The main heading is 'Authorized Channel Partner Program' with a red asterisk and the text '* Indicates Required Information' above it. On the left is a 'Channel Partner Login' box with fields for 'Username: *' (containing 'Channel Partner') and 'Password: *' (containing '***'). Below these fields is a 'Login >' button. On the right is a list of contact information for Spectrum Business Channel Sales Director, Sr. Director, and Communications & Training Director, including names, email addresses, and phone numbers. At the bottom right is a box with the text 'Ask your Channel Manager about the power of the new Partner Connect portal!'.

Spectrum BUSINESS PARTNER PROGRAM

** Indicates Required Information*

Authorized Channel Partner Program

Channel Partner Login
Username: *
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

Quick note

Wants to add tv and phone to existing internet

❏ Reason why a Lead is Unqualified

Quick note

customer is not interested in TW nor Hughes Net

❏ Use familiar abbreviation

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!”

Edit

Convert

Order Details

Edit

Existing customer ☒ No ☐ Yes

Order status

Pending

Pending Reason

Current Services

Processing Partner

Order notes

Services Ordered:

Install Fee:
First Months Bill:
Monthly:

Hosting Number (yes/no):
Port Number:
Port Company:

Notes: had a double lead. <http://salerity.com/manager/orders/129435> please see other.

Contract Termination
Date

Contract Term

Total Contract
Amount

0.00

\$

Monthly Commission

0.00

\$

One-time
Commission

0.00

\$

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 Details

Edit

| | | | |
|--------------------|--|---------------------------|------------|
| Existing customer | <input checked="" type="radio"/> No <input type="radio"/> Yes | Contract Termination Date | 05/27/2018 |
| Order status | Sold | Contract Term | 36 Months |
| Processing Partner | Telarus | Total Contract Amount | 884.16 \$ |
| Order notes | Services Ordered: Internet 10M, 3 BCP ULD Phones Install Fee: \$0.00 First Months Bill: \$194.97 Monthly: \$194.97 Hosting Number (yes/no): Port Number: Port Company: Notes: LP-PAPERWORK SUBMITTED. FOLLOW UP TO GET INSTALL DATE | | |
| | | Monthly Commission | 24.56 \$ |
| | | One-time Commission | 0.00 \$ |

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

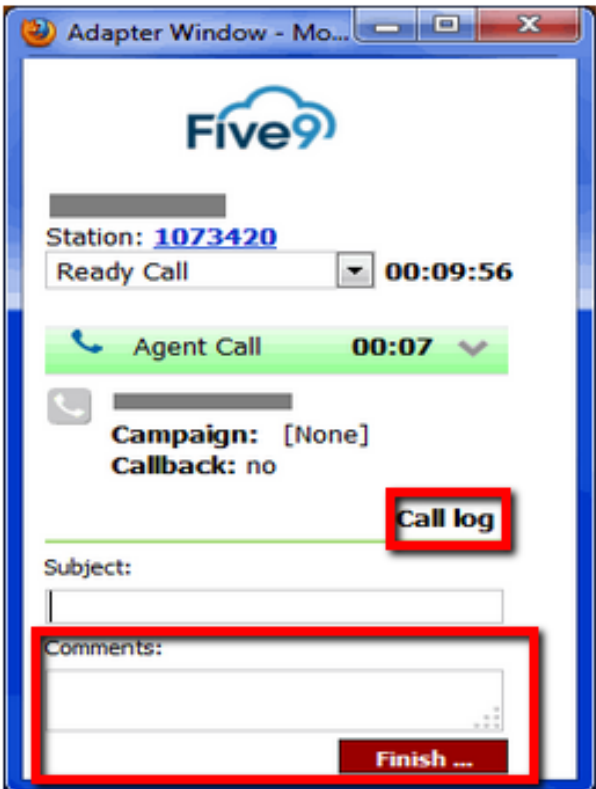
Notes: Any additional notes needed

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



The screenshot shows a software window titled "Adapter Window - Mo...". Inside, the "Five9" logo is at the top. Below it, a greyed-out field is followed by "Station: 1073420". A dropdown menu shows "Ready Call" and a timer displays "00:09:56". A green bar contains a phone icon, "Agent Call", "00:07", and a dropdown arrow. Below this, another greyed-out field is followed by "Campaign: [None]" and "Callback: no". A red box highlights a "Call log" button. Underneath is a "Subject:" label and an empty text box. Another red box highlights the "Comments:" label and a large text area. At the bottom right, a red "Finish ..." button is visible.

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

The screenshot shows a web application for managing tasks. A red box highlights the 'Pending Tasks' header. Another red box contains the text 'Do not create a New Task if one is already created', with a red arrow pointing to a 'New Task' button. A third red box contains the text 'Click on Green Arrow when you want to complete a Task and no other Follow Up needed', with a red arrow pointing to a green checkmark icon in the 'Actions' column. The table below shows a single task entry.

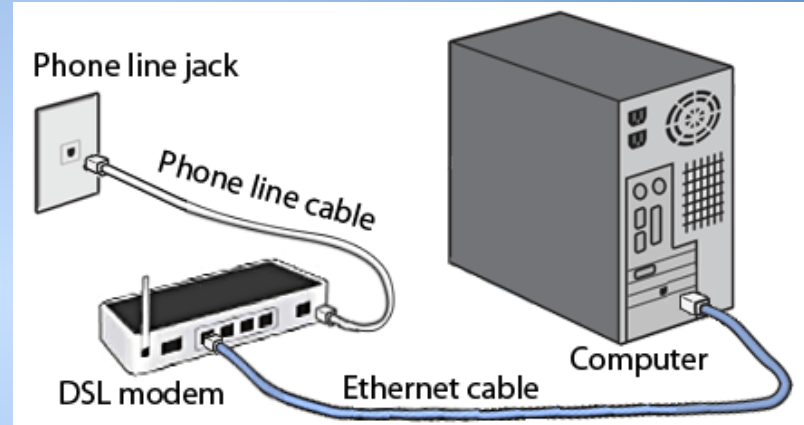
| Due Date | Assigned To | Subject | Actions |
|--------------------|---------------|------------------------------|---------|
| 06/15/2015 2:00 PM | Lauren Prieto | Las Palmeras: Install Update | |

Showing 1 to 1 of 1 entries

< Previous 1 Next >

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?

