Credit Outline

Estimated Time:

I. Background – 10 minutes

A. Preparation
   1. Handouts
      a. Credit Request screens
      b. Credit History screen
      c. Paper forms
      d. Completed request packet
      e. Blank Credit Request forms
   2. Activity Materials
      a. Guided Practice Form
      b. Credit Screen Exercise
      c. Credit Request Form

B. Opening – 10 minutes
   1. Welcome participants
   2. Provide information about training
      a. Name of training session
      b. Approximate length – 1.5 hours

II. Purpose of Training – 5 minutes

A. To provide details about Credit requests
B. To provide details about Credit request procedures
C. Expectations
   1. Provide the customer with accurate and complete information concerning credits.
   2. Assist the customer in a courteous and professional manner
   3. Have Fun

III. Objectives – 5 minutes

A. State the objectives
B. At the end of this training, using reference materials, you will be able to:
   1. Identify features of the credit request forms.
   2. Identify the credit request procedures.
   3. Describe accurately and completely, information concerning credit procedures.
   4. Proof of your ability will be to correctly complete the credit exercises.
C. Solicit and answer any questions about the objectives

IV. Credit Information – 45 minutes

A. Details of Credits
   1. What is a credit?
      a. A credit is an adjustment of a billing error.
   2. Why is a credit requested?
      a. A customer would like the money that was overpaid given back to him/her.

   b. VarTec will adjust for billing errors up to 30 days from the date the customer receives the bill.
   c. In the past VarTec has adjusted customer accounts when the customer notifies us within 90 days of the changes.
3. Who requests a credit?
   a. The customer
4. Who completes the credit request?
   a. The CSR

B. Screen Overview
1. Distribute the Credit Request screen and Credit History screen handout
2. Use of the Credit Request Program is to facilitate the customer's request for a credit in a timely manner.
3. In 1-2 billing cycles the request appear on the customer's bill
4. Explain the screen
   a. The first area is the Category Headings
   b. The second area is customer information
   c. The third is the notes area where details of the call are recorded by the CSR.
   d. The Requested Adjusted area is where the CSR will input the credit request details.
      i. Rated
      ii. Manual
   e. The last area is a listing of all the calls and charges that apply to the customer.
      i. Explain each color and what it means.
5. The Credit History of the customer is listed in the Credit History screen
   a. Reasons for use of this screen is to view the credit history
      i. To review the status of credits requested
      ii. To see if the customer calls frequently and has requested this type of credit before.
   b. The remarks section will display all the reason for the credit and an explanation of approval or disapproval.

C. Paper Forms
1. Distribute the Paper Form Handout.
2. When the call center is deep in Queue or when the computers are down, all credit requests will be completed on paper.
3. Use sample to explain each area that needs to be completed.

D. Explanation of Reason Codes
1. Turn to page 77 in *Training Manual*
2. Explain each reason code.

E. Exercises
1. Distribute the completed request packet.
2. Explain the completed request screen and paper
3. Walk through the explanation of each request have each CSR complete sample.
4. With the instructor as a customer have the CSRs complete the example.

V. <u>Review of credit outline</u> - 60 minutes

A. The review for the Credit Information will be conducted during the daily learning assessment.

Trouble Ticket Outline

Estimated Time:

I. **Background – 10 minutes**

A. Preparation
   1. Handouts
      a. Trouble Ticket screens
   2. Activity Materials
      a. Guided Practice Form
      b. Trouble Ticket Exercise

B. Opening – 10 minutes
   1. Welcome participants
   2. Provide information about training
      a. Name of training session
      b. Approximate length – 1.5 hours

II. **Purpose of Training – 5 minutes**

A. To provide details about Trouble Tickets

B. To provide details about Trouble Ticket procedures

C. Expectations
   1. Provide the customer with accurate and complete information concerning Trouble Ticket resolution.
   2. Assist the customer in a courteous and professional manner
   3. Have Fun

III. **Objectives – 5 minutes**

A. State the objectives

B. At the end of this training, using reference materials, you will be able to:
   1. Identify features of the Trouble Ticket program.
   2. Describe accurately and completely, information concerning Trouble Ticket procedures.
   3. Proof of your ability will be to correctly complete the Trouble Ticket exercises.

C. Solicit and answer any questions about the objectives

IV. **Trouble Ticket Information – 45 minutes**

A. Details of Trouble Tickets
   1. What is a Trouble Ticket
      a. A Trouble Ticket is a request for service support.
   2. Why is a Trouble Ticket requested?
      a. A customer has a problem when trying to make a long distance call.
      b. The customer will contact VarTec customer service and state the problem.
      c. The CSR will issue test call numbers for the issuing of a Trouble Ticket.
      d. The customer will call back in with the results and the CSR will then issue a Trouble Ticket.
   3. Who requests a Trouble Ticket?

        a. The customer
    4. Who completes the Trouble Ticket?
        a. The CSR
B. Screen Overview
    1. Distribute the Trouble Ticket handout
    2. Use of the Trouble Ticket program is to facilitate the customer's request for service problems in a timely manner.
    3. Explain the screen
        a. The first way to activate the program. (See *Option 1* on Handout)
        b. The second way to activate the program. (See *Option 2* on Handout)
        c. Explain each field.
    4. Use sample to explain each area that needs to be completed.
C. Explanation of Codes
    1. Turn to page 83 in the *Training Manual*
    2. Explain each reason code.
D. Probing Questions
    1. Turn to page 83 in the *Training Manual*
    2. Explain each question
    3. Give an example of question in context of a call
E. F6 Notes
    1. Turn to page 84 in the *Training Manual*
    2. Explain how a F6 Notes for Trouble Tickets should be written
F. Exercises
    1. Distribute the completed Trouble Ticket packet.
    2. Explain the completed Trouble Ticket
    3. Walk through the explanation of a Trouble Ticket request and have each CSR complete the sample.
    4. With the instructor as a customer have the CSRs complete the example.

V. <u>Review of Trouble Ticket outline</u> - 60 minutes

A. The review for the Trouble Ticket Information will be conducted during the daily learning assessment.

Block and Unblock Outline

Estimated Time: 40 minutes

I. Background – 5 minutes

A. Preparation
   1. Handouts
      a. Block and Unblock handout
   2. Activity Materials
      a. Guided Practice Form
      b. Block and Unblock Exercise

B. Opening – 5 minutes
   1. Provide information about training
      c. Name of training session
      d. Approximate length – 40 minutes

II. Purpose of Training – 5 minutes

A. To provide details about Block/Unblock

B. To provide details about Block/Unblock procedures

D. Expectations
   1. Provide the customer with accurate and complete information concerning Block/Unblock.
   2. Assist the customer in a courteous and professional manner
   3. Have Fun

III. Objectives – 5 minutes

A. State the objectives

B. At the end of this training, using reference materials, you will be able to:
   1. Identify features of the Block/Unblock program.
   2. Describe accurately and completely, information concerning Block/Unblock procedures.
   3. Proof of your ability will be to correctly complete the Block/Unblock exercises.

C. Solicit and answer any questions about the objectives

IV. Block/Unblock Information – 15 minutes

A. Details of Block/Unblock
   1. What is a Block
      a. A Block is a request for restrictions to a phone line or service.
   2. Why is a Block requested?
      a. A customer would like to restrict access to the VarTec switch.
   3. Who requests a Block?
      a. The customer is the only person able to request a block.
   4. Who completes the Block in the system?
      a. The CSR

B. Screen Overview
   1. Distribute the Block/Unblock handout

2. Use of the Block program is to facilitate the customer's request for service restrictions in a timely manner.
3. Explain the screen
   a. The way to activate the program. [See Figure *1* on Handout]
   b. Explain each field.

C. Explanation of Unblock
1. What is an Unblock
   a. An Unblock is a request for access to VarTec's service.
2. Why is an Unblock requested?
   a. A customer would like to have access to the VarTec switch.
3. Who requests an Unblock?
   a. The customer is the only person able to request an block, and they will need to send an LOA to Unblock the account.
4. Who completes the Unblock in the system?
   a. The CSR

D. Screen Overview
1. Use of the Unblock program is to facilitate the customer's request for service to be restored in a timely manner.
2. The customer needs to complete an LOA with the following information on it.
   a. Customer BNA
   b. That they will take responsibility for the charges.
   c. That they want the block removed.

E. Explain the screen
   a. The way to activate the program. [See Figure 5 in the Handout]
   b. Explain each field.

F. Exercises
   a. Turn to the exersices in the Handout
   c. Walk through the explanation of a Block and Unblock request and have each CSR complete the sample.
   d. With the instructor as a customer have the CSRs complete the example.

V. <u>Review of Block/Unblock outline</u> - 60 minutes

A. The review for the Block/Unblock Information will be conducted during the daily learning assessment.

Credit Request Information Module

A credit request can be completed on two different forms, paper and in the Credit Request program.

A picture of the Credit Request Screen is provided on the right. [See Figure 1]

This screen can be broken into six areas. Each area has a specific and vital function.

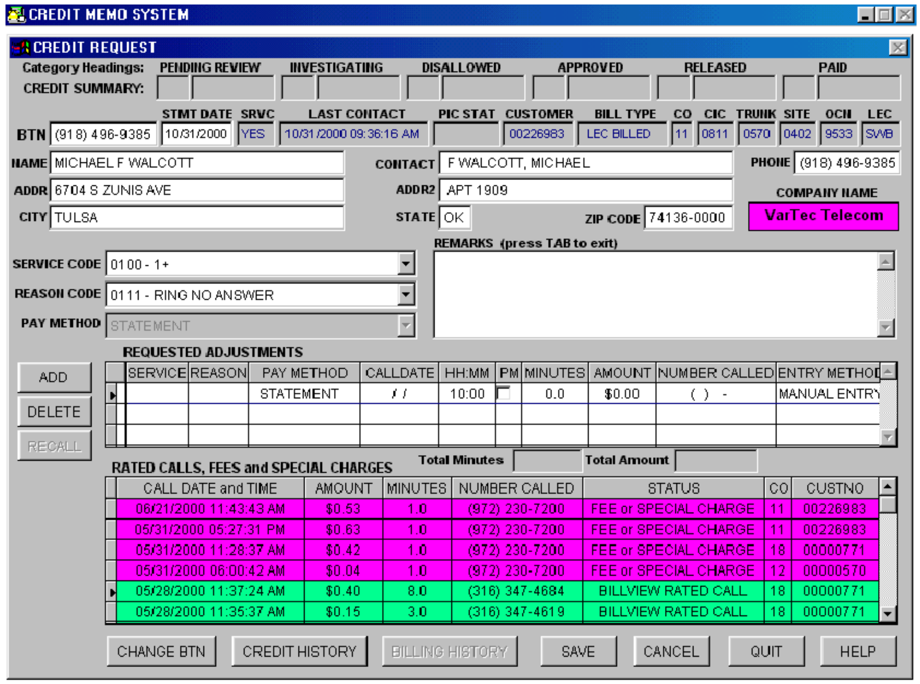


Figure 1

The **first** area is the Category Headings section. The CSR does **NOT** input any data in this area. [See Figure 2]

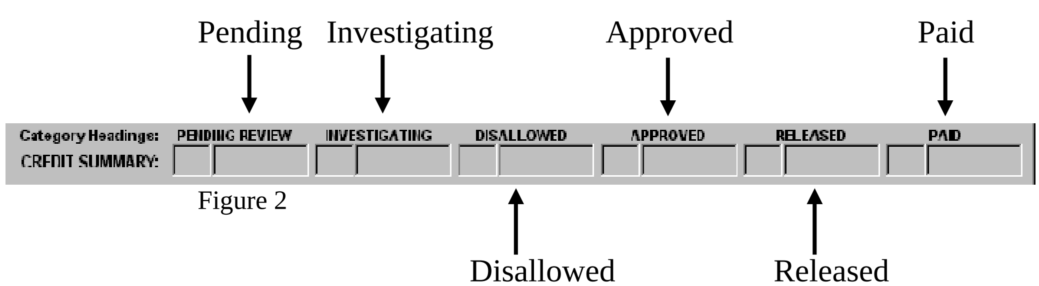


Figure 2

Category Heading and Credit Summary

Pending – The customer has called in and the CSR has documented the credit request.
Investigating – The customer research team is looking at the credit request to determine if the request will be issued to the customer's account.
Disallowed – The customer research team has not approved the credit.
Approved – The customer research team has investigated the request and approved it.
Released - The approved credit is released to LM Data in route to the LEC.
Paid - The final credit has been sent to the LEC from LM Data.

The square box on the left of each category is a listing of the number of credits for that category. The rectangle box on the right tells you the total dollar amount for that category. [See Figure 3]

Figure 3

The **second** area is the customer's information. NOTE: the field labeled STMT DATE just to the right of BTN is where the CSR will input or change the Statement Date. [See Figure 3]

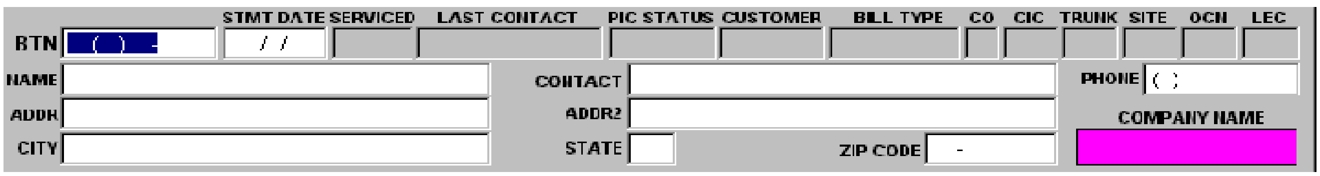


Figure 3

Before & After

Each white background field will need to be completed

- BTN
- Name
- Addr
- City
- Contact
- Addr2
- State
- Zip Code
- Phone

[See Figure 4]

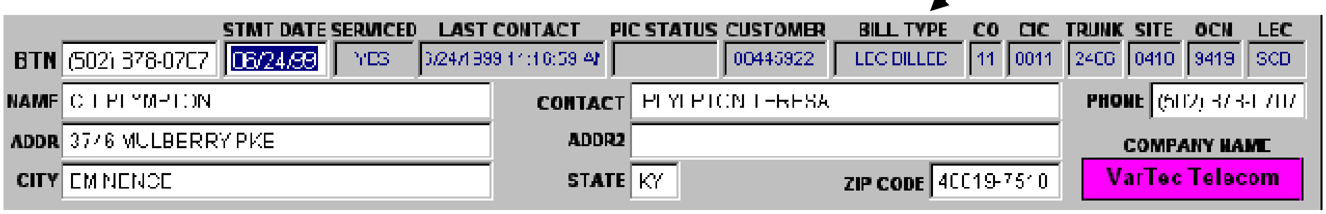


Figure 4

The **third** area is the Remarks Area. This field will be completed as listed in the Remarks section of the Credit Reason Code Matrix. (page 81 of the *Training Manual*) [See Figure 5]

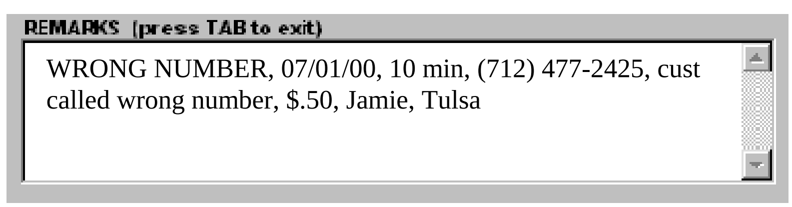


Figure 5

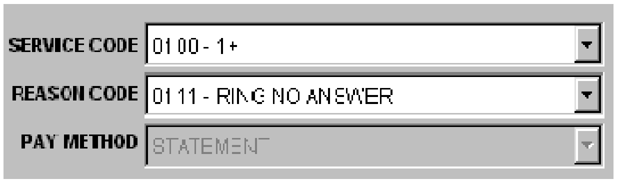


Figure 6

The **fourth** area is where the service and reason codes are located. The Service Code field and the Reason Code field have drop down menus for CSR selection. Once each code is chosen, the code will populate on the Requested Adjustment Grid. **Note: When completing a Manual Entry type credit, these fields will turn white instead of grey.** [See Figure 6]

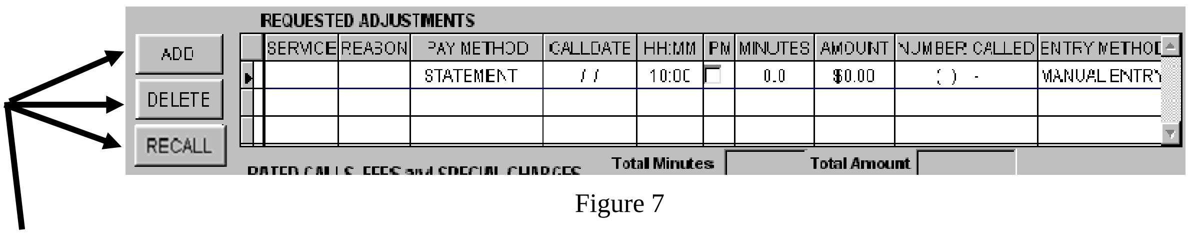


Figure 7

The **fifth** area is the Requested adjustments grid. When completing a Manual Entry type credit. The CSR will use the three command buttons on the left: Add, Delete and Recall. [See Figure 7]

Figure 8

By “left clicking” on the **Add** command button, the CSR will start a Manual Entry credit request. [See Figure 8]

Figure 9

By “left clicking” on the **Delete** command button, the CSR can remove a Credit request from the Requested Adjustment grid. [See Figure 9]

Figure 10

By “left clicking” on the **Recall** command button, the CSR can bring back to the request Adjustment Grid a Manual credit request that was deleted. [See Figure 10]

When the CSR clicks on the Add button a new credit request will be generated on the first line of the Requested Adjustment Grid. The CSR will complete the following fields:

Call Date, HH:MM PM Minutes Amount Number Called

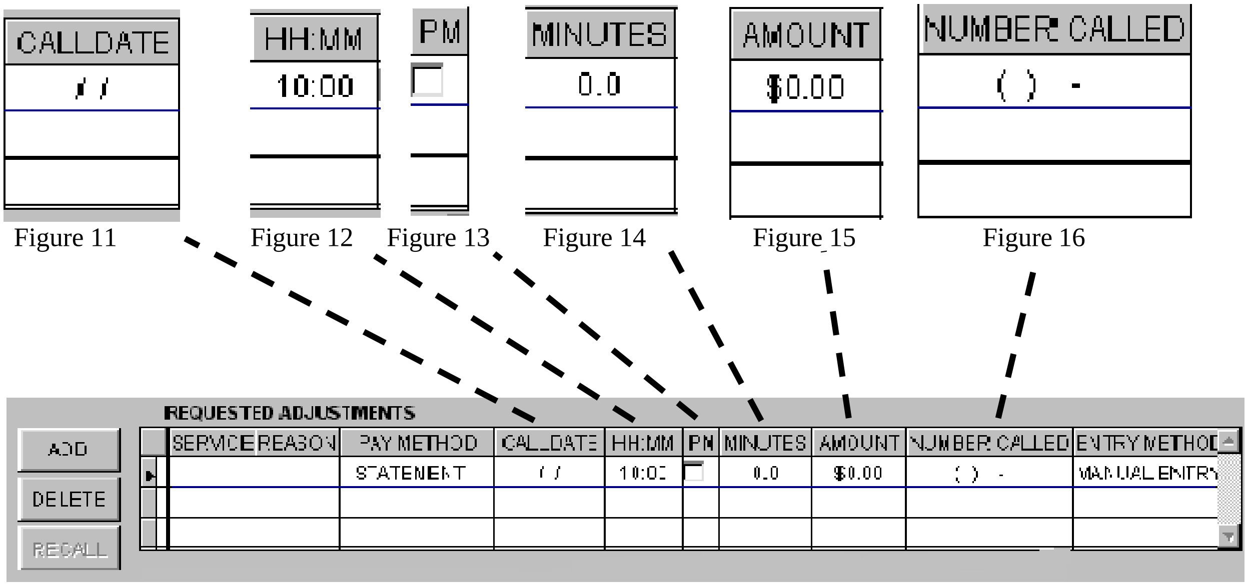


Figure 11 Figure 12 Figure 13 Figure 14 Figure 15 Figure 16

Figure 17

The **sixth** area is the Rated Calls, Fees and Special charges area. This area will display a listing of all calls and fees associated with this customer.

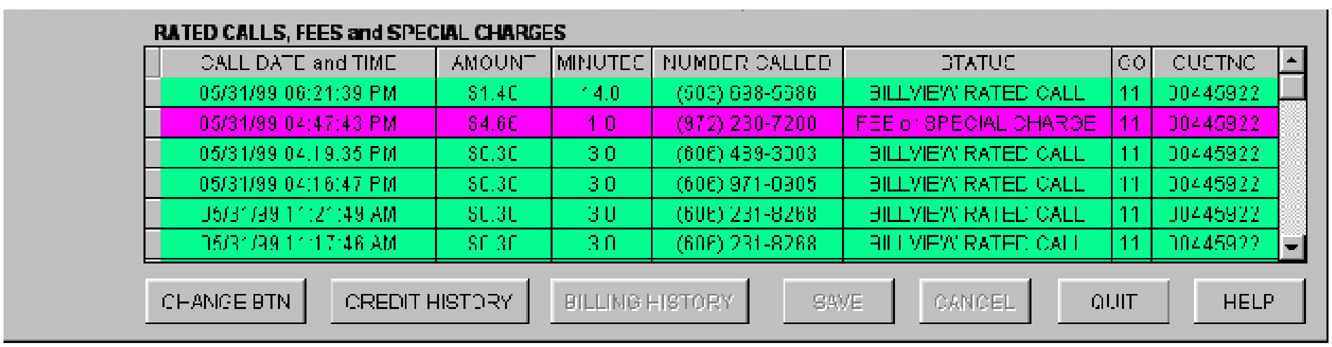


Figure 7

Each color represents a specific kind of call or fee.

GREEN – Represents a rated call.
PURPLE – Purple is a fee or special charge such as monthly fee, TIF< USF, etc.
BLUE – Blue is a credit request.
YELLOW – Represents a deleted credit request.

Steps to completing a Credit Request

STEP 1 – Select the correct customer from the Customer PIC List. [See Figure 8]

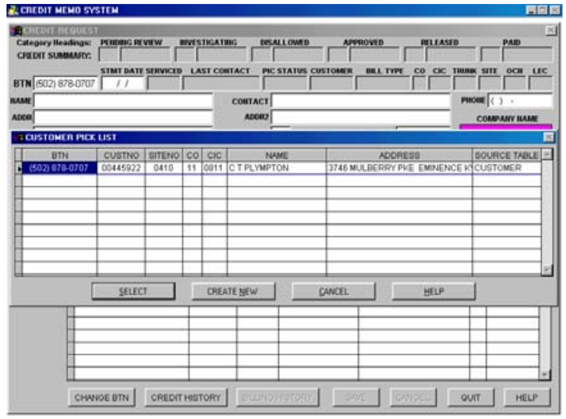


Figure 8

STEP 2 – Complete all the white background fields in the customer information area, especially the Statement Date Field. [See Figure 9]

A

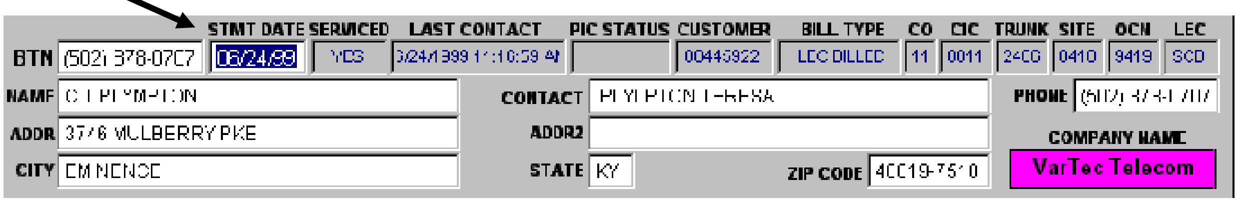


Figure 9

STEP 3 – For a rated entry (See page 81 of the *Training Manual*)

A – Change the Statement Date
B - Double click on the call or fee to be credited. It will transfer the information to the requested adjustments grid. It will also turn the call or fee blue.
C - Choose the appropriate Service Code
D - Choose the appropriate Reason Code
E - Type in the remarks
- See the remarks section of the reason code for everything that needs to be included.

F – Left click on SAVE

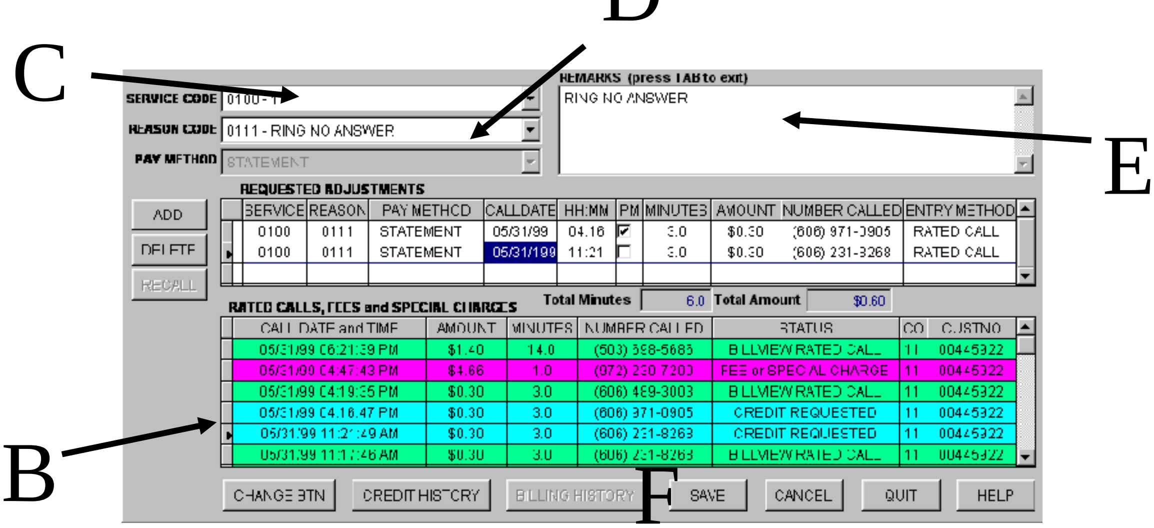


Figure 10

STEP 3 – For a manual entry (See page 81 of the *Training Manual*)

A – Change the statement date
B – Click of the Add button
C – This will start the request adjustment grid for a manual entry
D – Fill in:
- The service code
- The reason code
- The call date
- The time of the call
- Minutes – length of time call lasted
- Amount – dollar amount charged
- Number called

E – Type in the remarks
F – Left click on SAVE

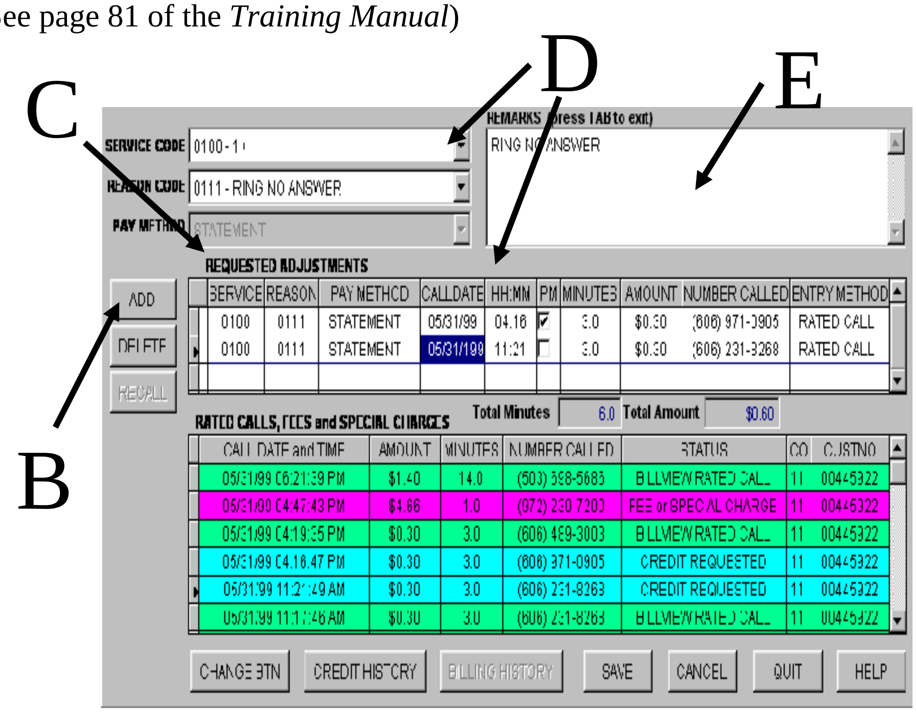


Figure 11

Sample Exercise

Write in the appropriate blank, the correct answer.

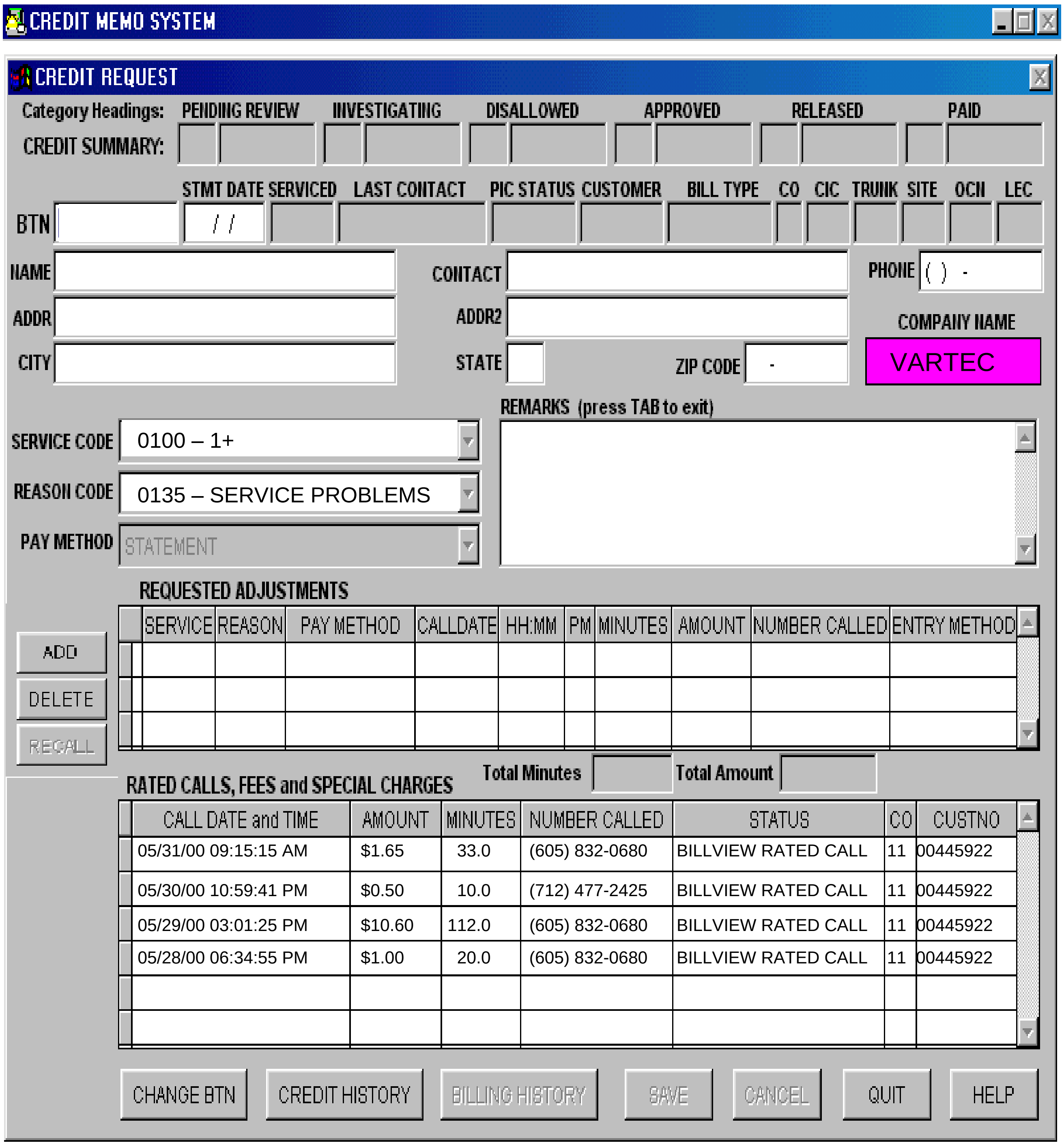


Figure 12

Credit Request Exercise

Directions: With the Instructor as the customer, you are to complete the credit request shown below.

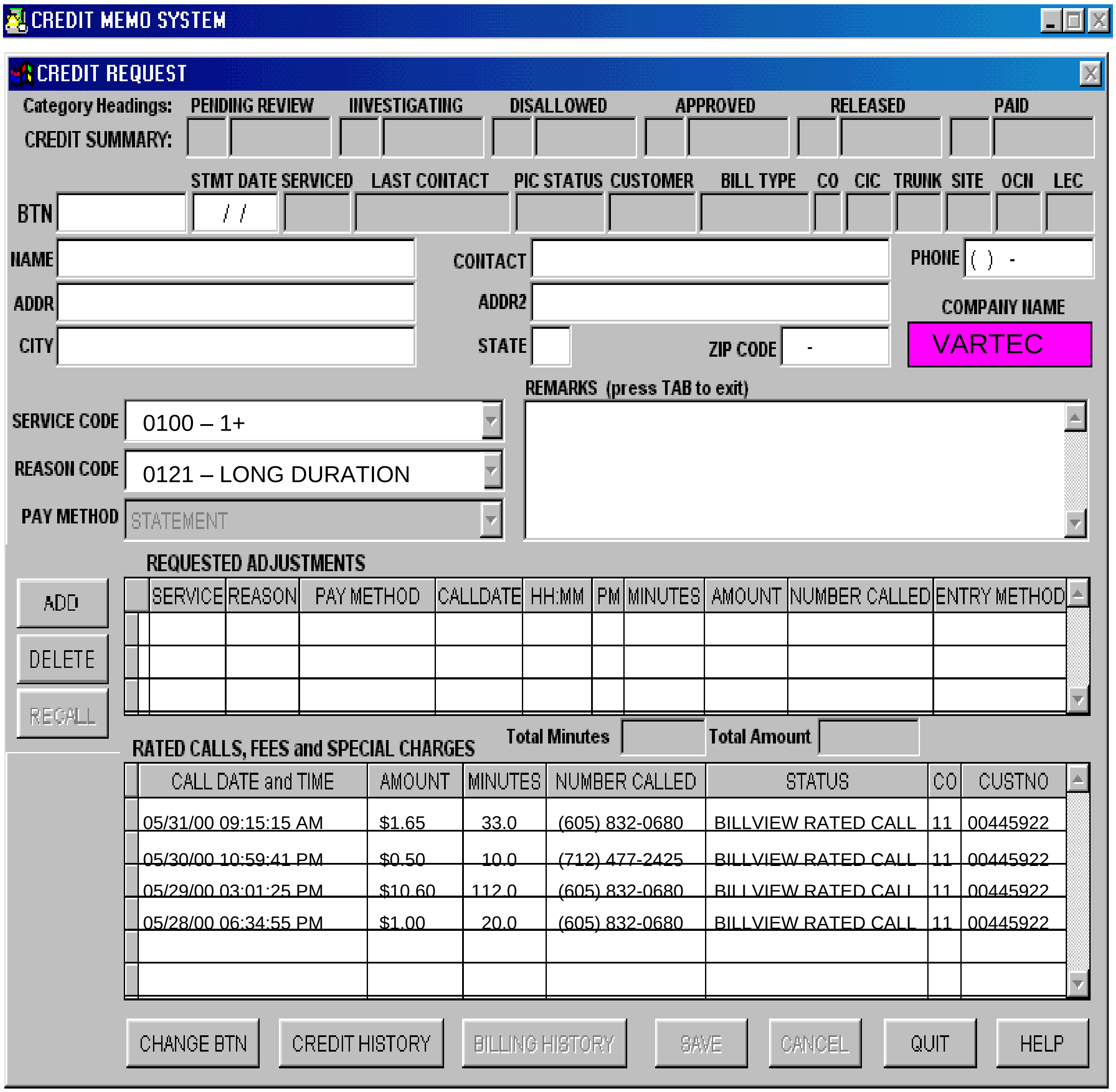


Figure 13

Trouble Ticket Field Descriptions

The Trouble Ticket screen is used when a customer has difficulty with long distance phone service. The Messages heard by customers when having telephone difficulty may vary. Customers may receive intercept messages from VarTec or their local telephone company or they may hear nothing at all.

[See Figure-1] There are two ways to activate the Trouble Ticket screen.

Option 1

- Locate the main toolbar in Customer Order Entry
- Select Request
- Select Trouble Ticket

Option 2

- Access Order Entry
- Enter customer's BTN
- Select appropriate company
- Select Trouble Ticket button

The following menu is displayed. [See Figure-2]

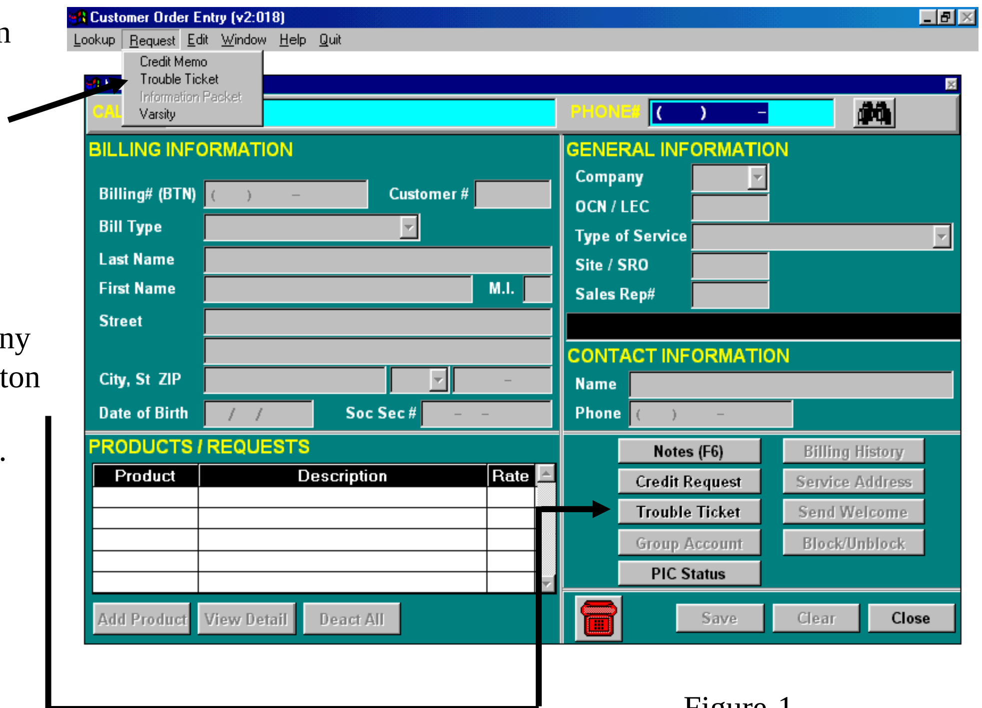


Figure-1

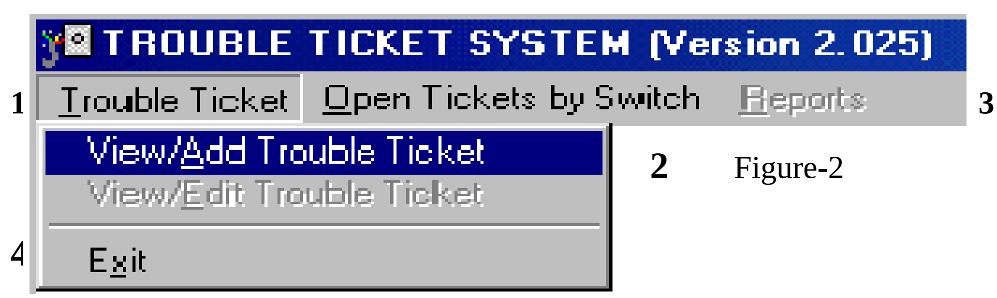
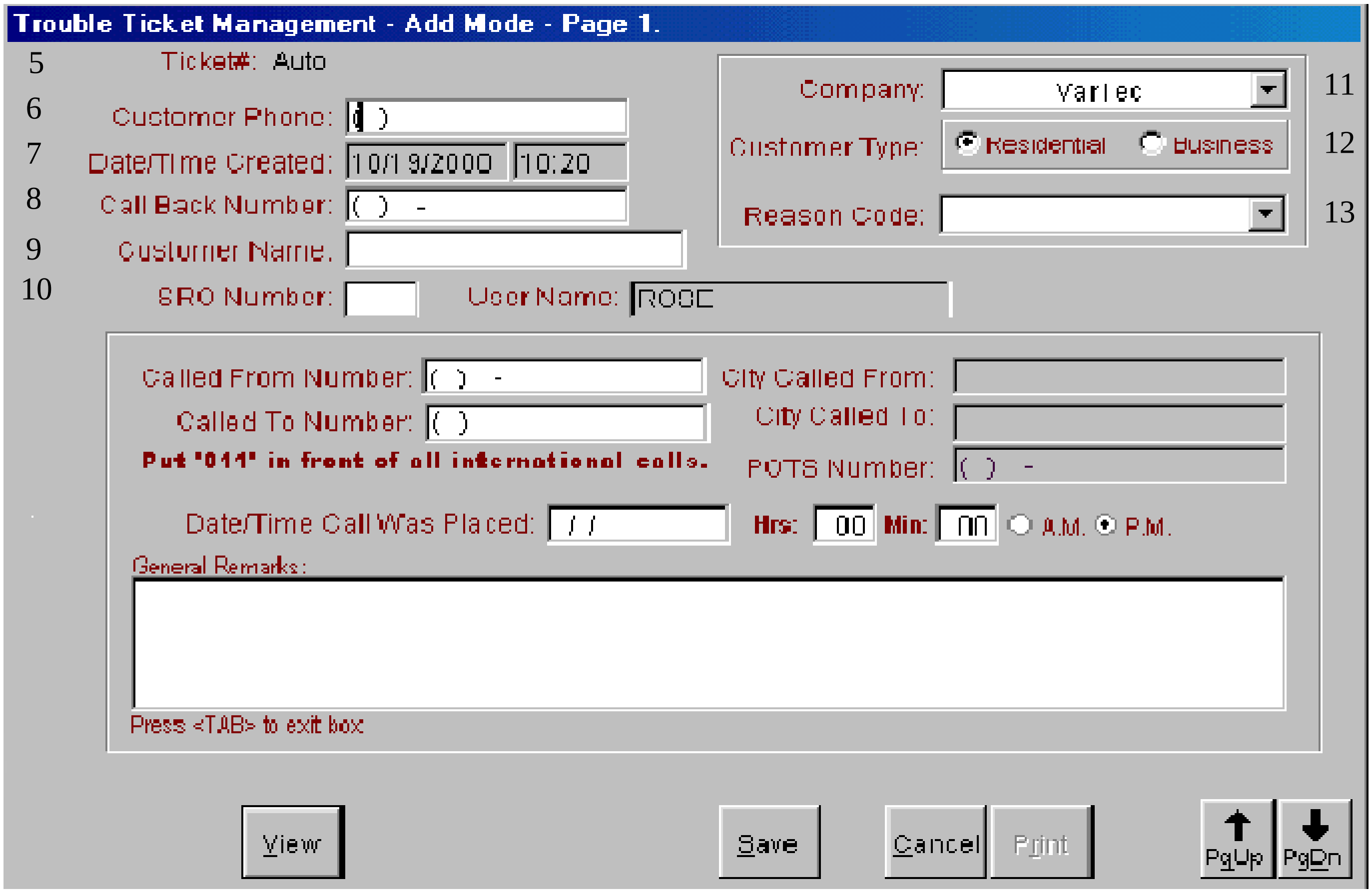


Figure-2

Field Number	Field Name	Description
1	Trouble Ticket	When selected displays the following options: View/Add Trouble Ticket View/Edit Trouble Ticket Exit
2	Open Tickets by Switch	Network access only
3		Network and management access only
4		Exits the trouble ticket system

Trouble Ticket Field Descriptions

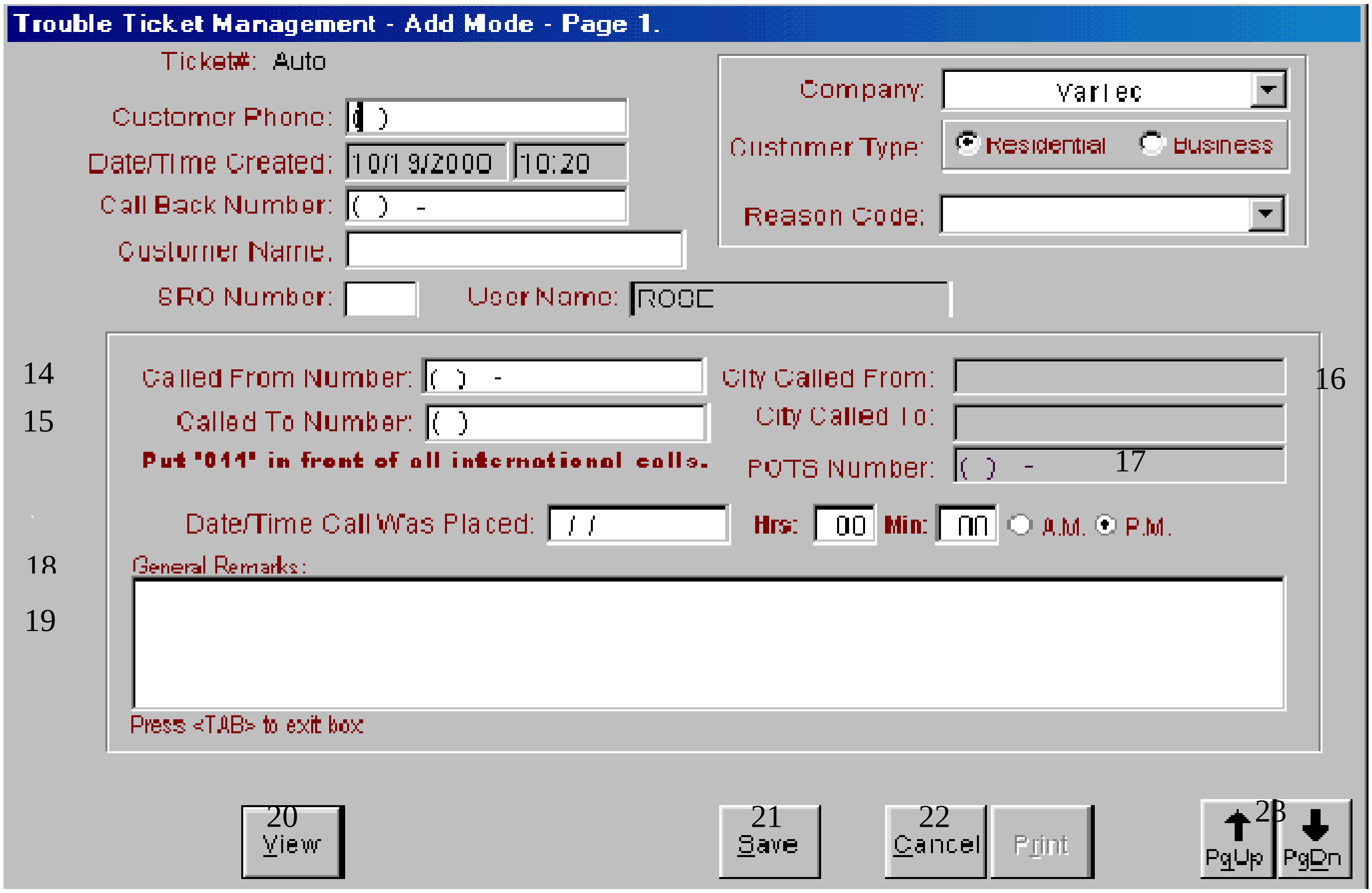
Trouble Ticket Management – Add Mode – Page 1
[See Figure – 3]



Field Number	Field Name	Description
5	Ticket #	System assigned Trouble Ticket number
6	Customer Phone	Phone number experiencing trouble
7	Date/ Time Created	Date and military time the trouble ticket was created. System populated
8	Call Back Number	Call back telephone number
9	Customer Name	Customer's name as it appears on the phone bill
10	SRO #	**S**witchless **R**esale **O**perator. Used by Business Group ***only***. User populated with 4 digit number on account.
11	Company	Name of company, e.g. VarTec, Clear Choice
12	Customer Type	Residence or Business customer.
13	Reason Code	Drop down box displays list of 3 digit codes describing types of trouble. Use selects appropriate code.

Trouble Ticket Field Descriptions

Trouble Ticket Management – Add Mode – Page 1



Field Number	Field Name	Description
14	Called From Number	The originating number of the call when the trouble was experienced. System populated with the Customer Phone number; can be overtyped if appropriate.
15	Called To Number	The domestic or international number called. International calls must included 011 before the phone number. **Note**: Access code is not included.
16	City Called From/To:	System populated with city when Called To Field populated. User is prompted to enter international cities and countries. See Figure-4]
17	POTS	**P**lain **O**ld **T**elephone **S**ervice – Network use ***only***
18	Date/Time Call Was Placed:	Date (ex: 010100) and time customer experienced difficulty.
19	General Remarks	Detailed remarks concerning service problem. Must include customer name, nature of the difficulty and Test call results (Notes copy to F6.)
20	View	Access the view only trouble ticket screen
21	Save	Saves the current trouble ticket
22	Cancel	Allows user to stop and exit out of the add mode

23	PgUp/PgDn	Pages up or pages down to different screens within the same ticket

Trouble Ticket Field Descriptions

The system is designed to hold up to four 700 tests. If more than four tests are selected, a message box will display. [See Figure-6]

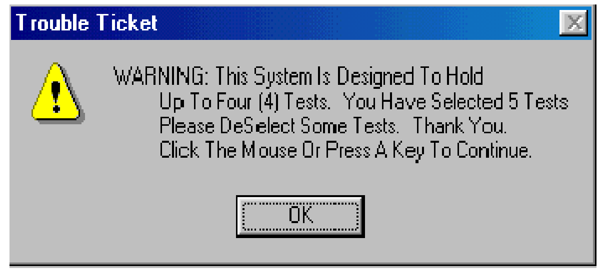


Figure 6

Once all required fields are populated press Enter to save the ticket.

Missing Values Message Box

The Missing Values message box will display if any required information is missing when the Trouble Ticket is saved. [See Figure-7]

A check mark will appear in the box to the left of the item that was omitted from the Trouble Ticket.

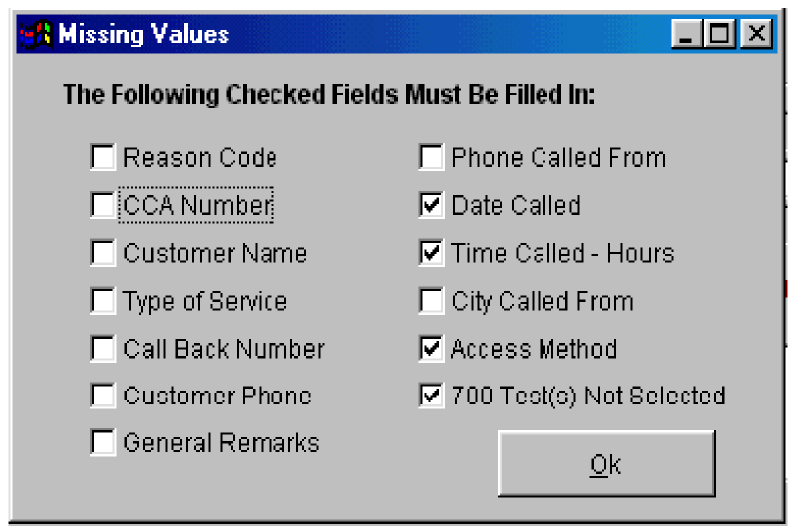


Figure 7

In Figure-7, three items were omitted from a Trouble Ticket: Date Called, Access Method, and 700 Tests Not Selected.

Click OK button with the left mouse button. This will display screen one of the Trouble Ticket. Enter the required information and select the Save button again.

When all the required information is entered, the Trouble Ticket will save. A message indicates the trouble ticket was saved successfully and provides the trouble ticket number.
[See Figure-8]

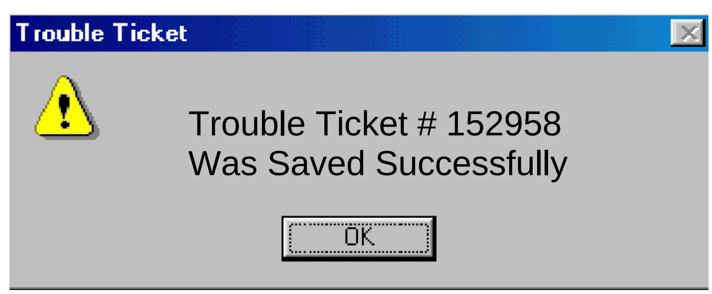


Figure 8

The Missing Values screen will continue to appear until all required information is entered.

The Customer Service Department cannot edit a Trouble Ticket once it is saved. If a change is necessary, a new Trouble Ticket must be created.

Trouble Ticket Field Descriptions

<u>Trouble Ticket Management – View Mode – Page 3</u>
[See Figure-9]

When viewing a pending or closed ticket, a third screen is available. Paging down to screen 3 [See Figure-9] accesses the resolution information provided by Network.

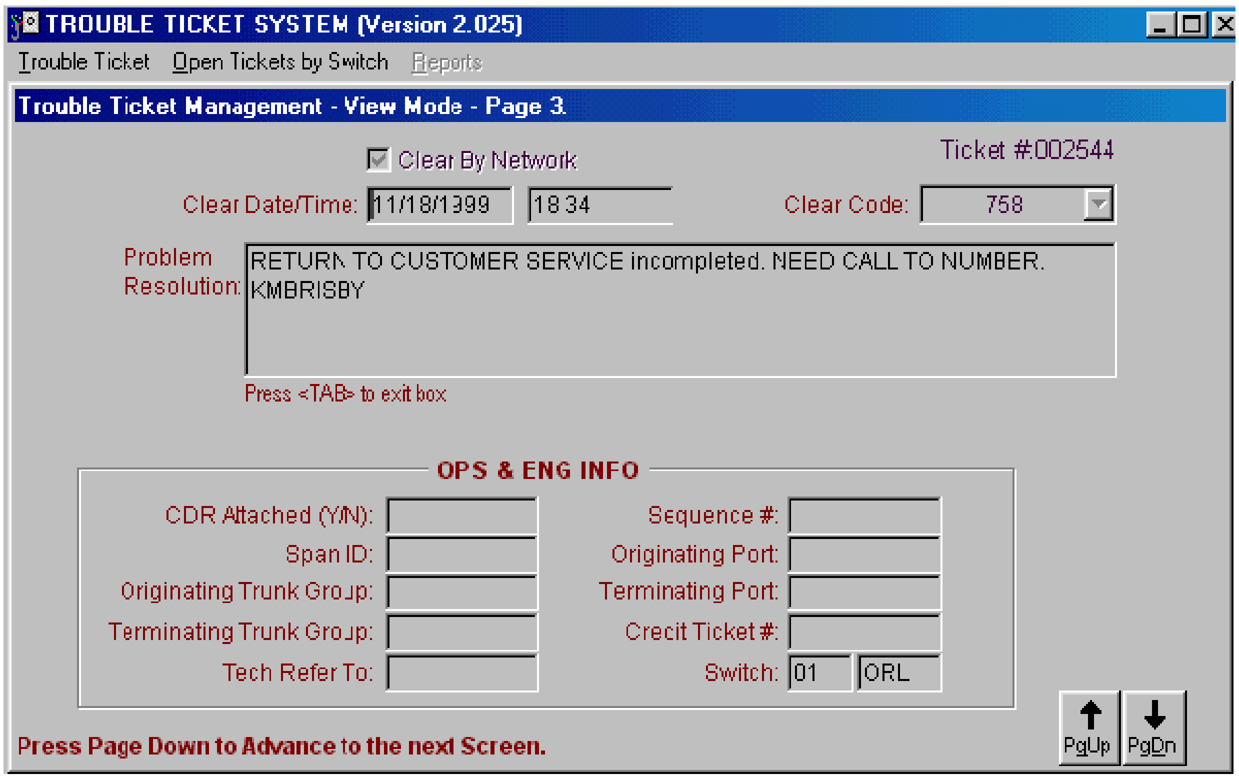


Figure 9

Field Number	Field Name	Description
33	Clear Date/Time	The date and time Network resolves or closes the ticket.
34	Clear Code	A three digit code which indicates the type of trouble found by Network
35	Problem Resolution	Network notes about trouble found after investigation
36	OPS & ENG INFO	Network department use ***only***

Block/Unblock Request

The Block/Unblock service screen allows customers to restrict service to his/her phone line or to remove any unwanted blocks. If a customer has been blocked they will hear one of two messages. [See page 71 of the *Training Manual*.]

Block Request

The method of access to the Block/Unblock service program is through the order entry system. [See Figure 1]

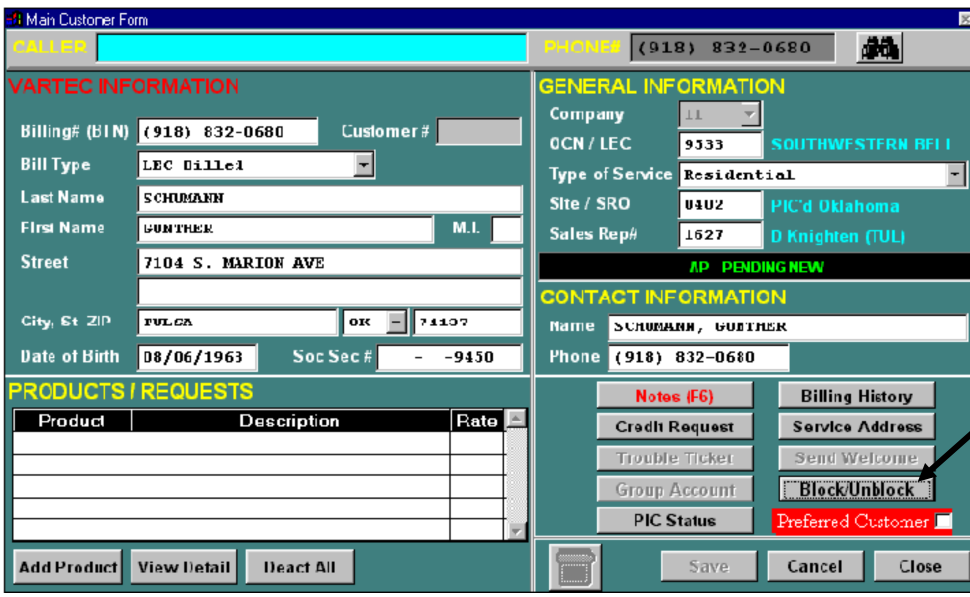


Figure 1

Once the CSR has accessed the program a second screen will appear. This screen controls all blocks of a customer's phone line, but the **ONLY** block that a CSR can place on a customer's phone line when the customer requests a block. [See Figure 2]

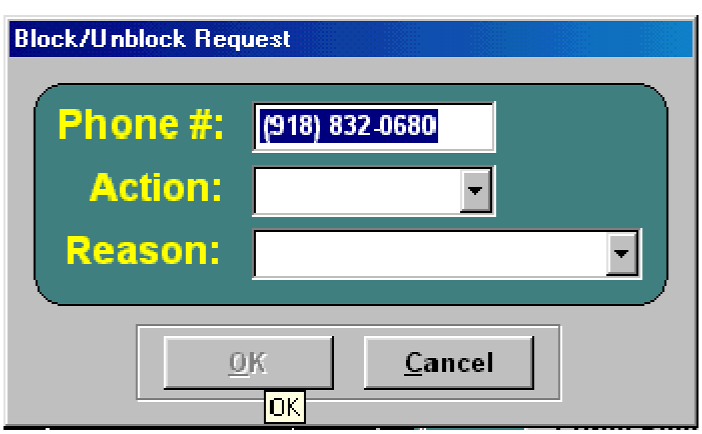


Figure 2

Three fields are used to implement a block.

- Customer's BTN [See Figure 3]

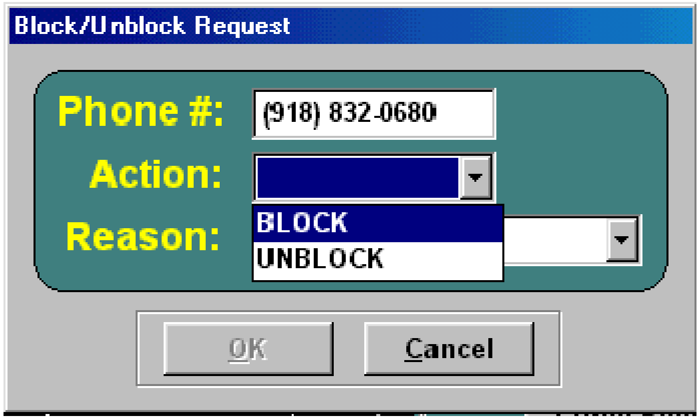


Figure 3

The Action field will display a drop down menu with the two options of

- BLOCK
- UNBLOCK

[See Figure 3]

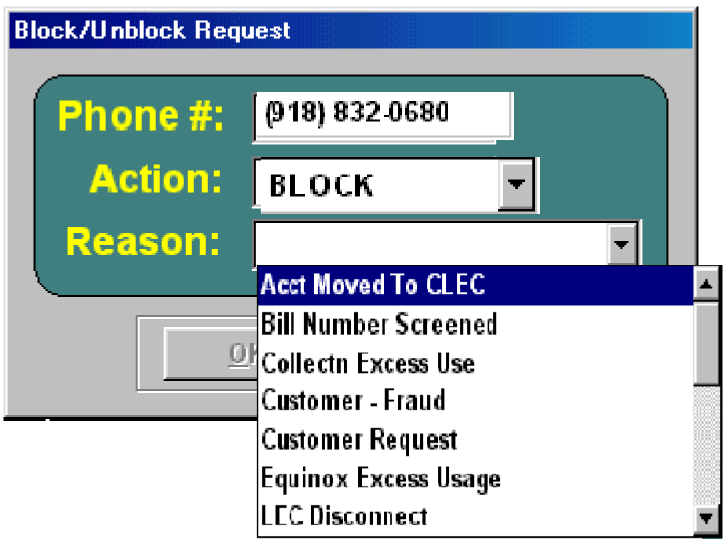


Figure 4

The Reason field will display a drop down menu with the options for the block or unblock. The options in the Reason field will be dependant upon the action chosen in the Action field. [See Figure 4]

The only reason for a block that a CSR can choose is the Customer Request reason. All other blocks are handled by the VarTec Networking Department.

The finial step in Blocking/Unblocking a customer is to left click on the 

button to save the block or unblock.

Unblock Request

The Block/Unblock service screen allows customers to restrict service to his/her phone line or to remove any unwanted blocks. If a customer has been blocked they will hear one of two messages. [See page 71 of the *Training Manual*.]

Unblock Requests
Unblocks are also accessed the same way as blocks. [See Figure 5]

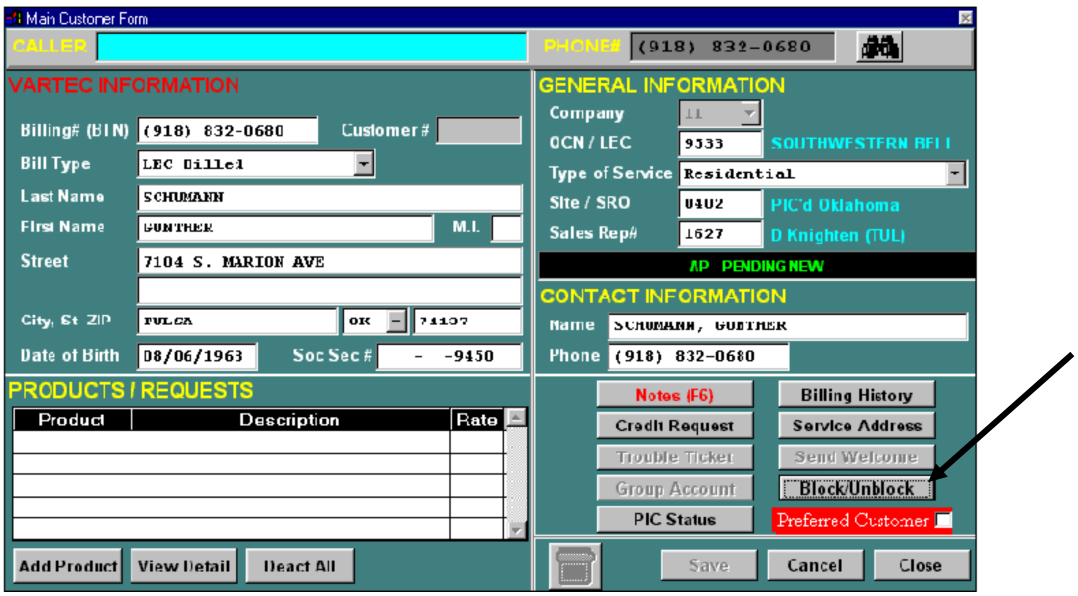


Figure 5

Once the CSR has accessed the program a second screen will appear. This screen controls all blocks and also all unblocking of a customer's phone line. [See Figure 6]

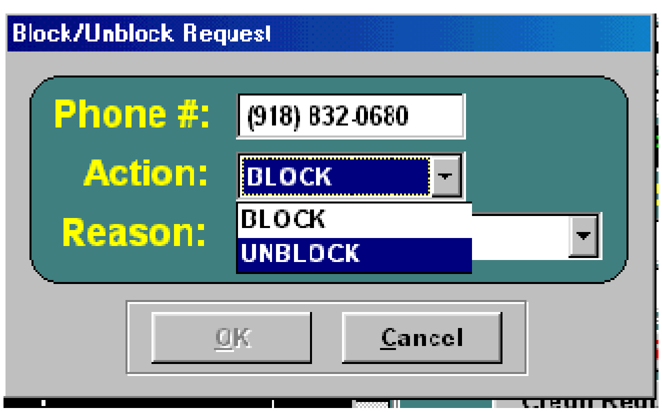


Figure 6

Three fields are used to implement a block.

- Customer's BTN
- Select Unblock in the Action field [See Figure 3]

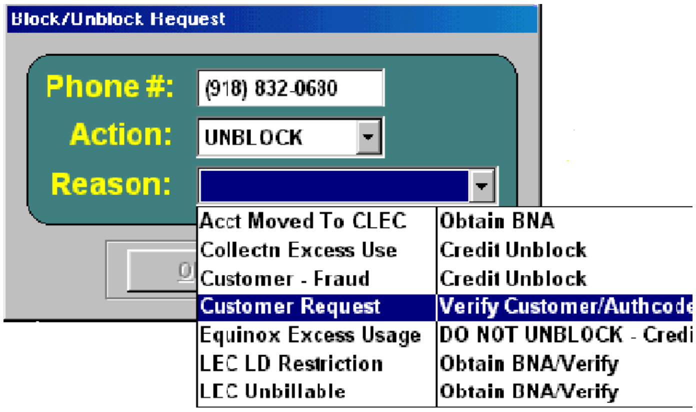


Figure 7

The Reason field will display a drop down menu with the options for unblock. The options in the Reason field will be dependant upon the action chosen in the Action field. [See Figure 7]

When a customer requests an unblock of their phone line, VarTec requires a Letter of Authorization. (LOA)

The finial step in Blocking/Unblocking a customer is to left click on the 

button to save the block or unblock.