

# V2021.09 user guide

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Subscriber Intelligence



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### **GETTING STARTED**

### Introduction

Our award-winning subscription, billing and CRM platform gives you the flexibility critical to growth, and we are focused on delivering a solution that is the reliable backbone to your subscription business.

#### SUBSCRIPTION MANAGEMENT

Our flexible subscription management lets you tailor your offers to the needs of your subscribers and easily manage multiple price variations and payment frequencies.

#### Benefit from:

- Simple subscription creation
- Support multiple business models including content and product subscriptions
- Apply multiple prices to the same subscription
- Attach discounts to subscriptions during and after set-up
- Customised discounts and tracking
- Flexible payment frequency daily, weekly, monthly and annually

#### BILLING

Nothing frustrates a subscriber more than inaccurate billing. Our easy to use platform supports all your billing needs.

- Support 300 payment methods and 100 currencies worldwide
- Mid month pro-rata adjustments
- Tax support
- Currency and entitlement rate support
- Credit control cycle
- Pre-integrated payment service providers

#### CRM

Understand your customer and segment your data easily for offers and communications.

- Single customer view
- Real-time insight dashboard to monitor KPIs
- Sophisticated segmentation for marketing campaigns and customer communications
- Security delivering the right product entitled to the subscriber
- Integrates across your core infrastructure
- Fully integrated with Singula Subscriber Intelligence Platform

### What's new – September 2021

Our September release focuses on fixing some bugs. Here's a summary of what we've fixed:

#### WHAT'S FIXED

- We've fixed a bug which meant the password was revealed on the login page
- We've fixed a bug which prevented you from finding a customer using a partial email address
- **BETA** We've fixed a bug which meant you couldn't disable or enable a case type
- **BETA** We've fixed a bug which meant, in certain scenarios, a subscription would be shown twice within the list of customer products.



### Login

#### LOGIN FOR THE FIRST TIME

- 1. Select the link in your welcome email.
- 2. Enter your new password
- 3. Confirm your new password
- 4. Select **'Confirm'** to apply your new password
- 5. You should now be able to login using your username and new password.

•		
	singula decisions	
	Usemame	
	Password	
	Login	
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#### **Password rules**

Your password must contain at least 8 characters and be a combination uppercase, lowercase and numeric characters. Special characters are optional.

#### I'VE NOT RECEIVED MY WELCOME EMAIL

Contact your administrator who can resend your welcome email. The link within the email expires after 1 hour.

#### THE LINK IN MY EMAIL HAS EXPIRED

Contact your administrator who can resend your welcome email. The link within the email expires after 1 hour.

### **Our BETA**

We are introducing improved functionality and a brand new user interface with the aim of making functions easier and quicker of our users. Launched in 2021, the programme allows us to share these improvements and gather feedback from our users.

Keep up-to-date with new features and improvements through our release notes.

#### HOW DO I ACCESS THE BETA?

- 1. Select Configuration
- 2. Select Users and Groups
- 3. Search for the user using their username
- 4. Select the **Pen** icon against the user
- 5. Tick the **BETA** user checkbox
- 6. Select Update user

### SERVICES

### **Subscriptions**

#### **ABOUT SUBSCRIPTIONS**

A subscription is a contract in which a person pays a fee for a product or to access a service on a regular basis.

Subscriptions can be created with customised details including pricing, initial charge, currency and billing frequency. A subscription can have one or many discounts applied.

#### **VIEWING SUBSCRIPTION PRODUCTS**

- 1. Select Services
- 2. Select Subscriptions

This list of subscription products contains all active subscription products and historical subscription products.

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Home									Q :
5ervices	Subscription name	<ul> <li>Status</li> </ul>	• Group	Price		Frequency	Last updated	· Availability	-
Subscriptions Crossgrades				-	121	-			/ ×
One-off purchases									× ×
Catalogue				-	100				/ ×
Marketing				1000000	1		-		1 .
CRM									/ x
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#### **CREATE A SUBSCRIPTION**

- 1. Select Services
- 2. Select Subscriptions
- 3. Select + Create subscription

#### NAME YOUR SUBSCRIPTION

- 4. Enter a subscription name remember this is the name presented to your customer
- 5. Describe your subscription this could be used to promote the features of your subscription
- 6. Set the Initial term of your subscription this is the contract term, for example 3 months or 1 year

• • •						
singula decisions						💄 Greg Herd 오
	Orange Vision	Create subscription				
# Home						
Services	Name your subscription					
Subscriptions	Subscription name*:				0	
Crossgrades	Description*:					
One-off purchases					0	
Catalogue						
Marketing	Initial term*:	Please select	~ 0			
👻 CRM	Group:	Please select	<ul> <li>Add group</li> </ul>			
D Finance	Create pricing					
🗐 Insight	Category*:	Please select				
Configuration	Frequency*:	Please select	~ <b>0</b>			
O Support	Initial charge:	0.00	Price*: 0.00	Please select	~	
• support		+ Another currency 0				
	Would you like to apply	a free trial period?				
	Would you like to apply a free trial period?	🔾 Yes 💿 No				
	Add a discount					

#### PRICING

- 7. Select a category to add your subscription this means all your products are organised in a catalogue;
- 8. Select Frequency this is how often the subscriber will be billed for example every month
- 9. Set an Initial charge this is where a one-off initial payment is required, for example, to pay for equipment or connection/setup fee
- 10. Enter the subscription Price this is the amount you will charge the customer for their subscription at each bill.
- **11**. Select the currency for that particular price point.
- 12. Select + Another currency to add price points for more currencies (if required)

#### ADDING FREE TRIAL - THIS IS OPTIONAL

- 13. Choose to add a free trial
- 14. Enter the duration of the free trial this means the customer will be able to use the subscription for the period you have set, without being billed. Once the trial period is over, the billing account will be created and the customer will be billed the price of the subscription less any discount applied at checkout.

#### ADDING A DISCOUNT - THIS IS OPTIONAL

- 15. Choose to add a discount
- 16. Choose the discount(s) by typing the discount name or selecting from the list See Create discounts
- 17. A summary of the selected discount(s) will appear. You can remove a discount by selecting x

	🐣 Greg Herd 📀
Frequency*: Please select 🗸 🔮	
Initial charge: 0.00 Price*: 0.00 Please select V	
+ Another currency	
Would you like to apply a free trial period?         Would you like to apply a ○ Yes ● No         Add a discount         Associating a discount with a status of 'ITEMPLATE' to a product will activate the discount.         Associating a discount with a status of 'ITEMPLATE' to a product will activate the discount.         Associating a discount with a status of 'ITEMPLATE' will hide it from view until the discount is activated.         Would you like to apply a ○ Yes ● No         Select conditional access (CA) enablement         Item requires CA ○ Yes ● No         enablement*:         Crossgrade eligibility criteria         By default, all subscriptions are eligible for crossgrade.         ③ Allow this subscription to crossgrade to all other subscriptions         ④ Allow the subscriptions to crossgrade to this subscription	
	Initial charge: 0.00   Price*: 0.00   Price*:   0   0   0   Price*:   0   0   0   0   0   0   0   0   Price*:   0  <

#### ADDING A CONDITIONAL ACCESS ENTITLEMENTS - THIS IS OPTIONAL

- 18. Choose to add conditional access entitlements
- 19. Enter the CA product code(s). This will be supplied by your CA provider and is required to be made available by Singula Decisions
- 20. A summary of the selected entitlements(s) will appear. You can remove an entitlement by selecting x

#### ADDING CROSSGRADES

- 21. Choose if you would like to "Allow this subscription to crossgrade to all other subscriptions" this means a customer can move to another subscription
- 22. Choose if you would like to "Allow other subscriptions to crossgrade to this subscription" this means a customer can move from another subscription to this subscription

#### CONFIRM YOUR SUBSCRIPTION

- 23. Select Continue to preview and review your subscription product
- 24. Select Edit if you want to change any details
- 25. Select when you want your subscription product to become available:
- 26. Now make the subscription available immediately
- 27. Indefinite make the subscription available on an unlimited basis
- 28. Schedule my subscription to become available on make the subscription available on a date and time that you choose
- 29. Expires on remove the subscription from sale on a date and time that you choose
- 30. Select Confirm to save the subscription product

#### **CHANGE A SUBSCRIPTION PRODUCT**

- 1. Select Services
- 2. Select Subscriptions
- 3. Locate the subscription and select the Pen button
- 4. Complete any **changes** to the subscription; any fields that are greyed out cannot be edited
- 5. You can change:
  - Name
  - Description
  - Initial term
  - Free Trial
  - Discounts
  - CA Enablements
  - Availability (Active status)
- 6. Select **Confirm** to save any changes made

### Pay per view

#### **ABOUT PAY PER VIEW**

A pay per view is usually a premium piece or set of content in which a customer pays a fee to watch.

You can create and maintain pay per view events along with setting up customised details such as pricing and currencies. A pay per view cannot have discounts applied.

#### **VIEW PAY PER VIEW PRODUCTS**

- 1. Select Services
- 2. Select One-off purchases

This list of one-off purchase products contains all active and historical pay per view, access passes and publication products.

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Ĩ	Orange Vision   Manage one-off purchases					+ Create item	▲ Import item
l Home							Q ,
Services	Item pame	• Status •	Туре	Price	Last updated	Availability	
Subscriptions Crossgrades			1		-	-	/ x
One-off purchases Catalogue			10	100000	100000	1.0000000	/ x
Marketing			n	1000			/ x
CRM	1000000		10000	10000	4100000	1000000	
Finance	1000000		100000	10000	1000000	100000012	/ x
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#### **CREATE A PAY PER VIEW**

- 1. Select Services
- 2. Select One-off purchases
- 3. Select + Create one-off item

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■ Home     Services	Orange Vision Create item Name your item	
Subscriptions Crossgrades One-off purchases Catalogue	tern hame* 0 Description*:	
Marketing     CRM     CRJ Finance	Category* Please select   Item type* Digital item   Create pricing	
Insight     Configuration	Price*: 0.00 Please select v	
€ Support	Select conditional access (CA) enablement.	

#### NAME YOUR PAY PER VIEW

- 4. Enter a name remember this is the name presented to your customer
- 5. Describe your pay per view this could be used to promote the features of your event
- 6. Choose a catalogue category to add the one-off item to by either typing ahead the category name or choosing from the drop down list;
- 7. Choose the item type; Digital Item

#### PRICING

- 8. Enter the item 'Price' this is the amount you will charge the customer.
- 9. Select the currency for that particular price point.
- 10. Select '+ Another currency' to add price points for more currencies (if required)

#### ADDING A CONDITIONAL ACCESS ENTITLEMENTS - THIS IS OPTIONAL

- 11. Select to add conditional access entitlements
- 12. Enter the CA product code(s). This will be supplied by your provider and is required to be made available by Singula Decisions. See Conditional Access.
- 13. A summary of the selected entitlements(s) will appear. You can remove a entitlement by selecting the 'X' button

#### CONFIRM YOUR PAY PER VIEW

- 14. Select the 'Continue' button to preview and review your pay per view product
- 15. Select 'Edit' if you want to change any details
- 16. Select when you want your pay per view product to become available:
  - 'Now' make the pay per view product available immediately
    - 'Indefinite' make the pay per view product available on an unlimited basis
    - 'Schedule my pay per view product to become available on' make the pay per view product available on a date and time that I choose
  - 'Expires on' remove the pay per view product from sale on a date and time that I choose
- 17. Select 'Confirm' to save the pay per view product

#### CHANGE A PAY PER VIEW PRODUCT

- 1. Select Services
- 2. Select One-off purchases
- 3. Locate the pay per view product and select the 'Pen' button
- 4. Complete any changes to to access pass; any fields that are greyed out cannot be edited
  - You can change:
  - Name
  - Description
  - Price
  - Currency
  - CA Enablements
  - Availability (Active status)
- 5. Select Confirm to save any changes made



### **Access pass**

#### **ABOUT ACCESS PASSES**

An access pass allows access to content for a defined period of time.

You can create and maintain access passes along with setting up customised details such as pricing, currencies and duration. An access pass cannot have discounts applied.

#### **VIEW ACCESS PASS PRODUCTS**

- 1. Select 'Services'
- 2. Select 'One-off purchases'

This list of one-off purchase products contains all active and historical pay per view, access passes and publication products.

#### **CREATE AN ACCESS PASS PRODUCT**

- 1. Select 'Services'
- 2. Select 'One-off purchases'
- 3. Select '+ Create one-off item' button

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상 CRM EB: Finance 교례 Insight O Configuration O Support	Item type*: Digital item	~
	Rem requires CA 🕐 Yes 🔹 No 0 exablement*:	

#### NAME YOUR PAY PER VIEW

- 4. Enter a name remember this is the name presented to your customer
- 5. Describe your pay per view this could be used to promote the features of your event
- 6. Choose a catalogue category to add the one-off item to by either typing ahead the category name or choosing from the drop down list;
- 7. Choose the item type; access pass

8. You can associate an access pass to an existing group or create a new group by selecting 'Add group'. Using 'groups' allows you to stack multiple access passes. Access passes within the same group, will not run concurrently, instead they will be applied once the previous access pass has expired.

#### PRICING

- 9. Enter the item 'Price' this is the amount you will charge the customer.
- 10. Select the currency for that particular price point.
- 11. Select '+ Another currency' to add price points for more currencies (if required)

#### DURATION

12. Enter the duration of the access pass

#### ADDING A CONDITIONAL ACCESS ENTITLEMENTS - THIS IS OPTIONAL

- 13. Select to add conditional access entitlements
- 14. Enter the CA product code(s). This will be supplied by your provider and is required to be made available by Singula Decisions. See Conditional Access.
- 15. A summary of the selected entitlements(s) will appear. You can remove a entitlement by selecting the 'X' button

#### CONFIRM YOUR PAY PER VIEW

- 16. Select the 'Continue' button to preview and review your access pass product
- 17. Select 'Edit' if you want to change any details
- 18. Select when you want your access pass product to become available:
  - 'Now' make the access pass product available immediately
  - 'Indefinite' make the access pass product available on an unlimited basis
  - 'Schedule my access pass product to become available on' make the access pass product available on a date and time that I choose
  - 'Expires on' remove the access pass product from sale on a date and time that I choose
- 19. Select 'Confirm' to save the access pass product

#### **CHANGE AN ACCESS PASS PRODUCT**

- 1. Select Services
- 2. Select One-off purchases
- 3. Locate the access pass and select the 'Pen' button
- 4. Complete any changes to access pass; any fields that are greyed out cannot be edited

#### You can change:

- Name
- Description
- Price
- Currency
- CA Enablements
- Availability (Active status)
- 5. Select Confirm to save any changes made



### Catalogue

singula decisions		🛔 Greg Herd 오
=	Orange Vision   Manage catalogue	Keys ACCESS PASS(ES) ONE-OFF FURCHASE(S) PUBLICATION(S) SUBSCRIPTION(S)
# Home	Manage catalogue categories	Add to catalogue category
<ul> <li>Services</li> <li>Subscriptions</li> <li>Crossgrades</li> <li>One-off purchases</li> <li>Catalogue</li> <li>Marketing</li> <li>CRM</li> <li>Finance</li> <li>Insight</li> <li>Configuration</li> <li>Support</li> </ul>		Choose subscription  Please select  Choose item Please select  Choose ategory Please select  Cancel Add  Add new catalogue category  Category name Enter name Parent category Please select  Cancel

### MARKETING

### **Discounts**

Discounts are used for marketing promotion to reduce the price of the products purchased. You can use discounts to introduce new products, retain existing customers, or drive revenue growth. Discounts can be a percentage or a fixed monetary value.

#### **VIEWING DISCOUNTS**

- 1. Select Marketing
- 2. Select Offers and Discounts

By default all the discounts will be shown, you can use the filter on the left-hand side to show just the active or the disabled discounts.

You'll see the type of discount along with how many times it has been applied (selecting this will show which products it has been applied to), the name of the discount and it's availability.

#### **CREATE A DISCOUNT**

- 1. Select Marketing
- 2. Select Offers and Discounts

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=	Orange Visio	Offers and discounts				
🖷 Home						
* Services	Filter by	Report Marx	Discounts			NEW DISCOUNT
Marketing	DISCOUNT		TYPE	DISCOUNT	AVAILABILITY	
CRM	OPTIONS		-			Vew mccow
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<ul> <li>Insight</li> <li>Configuration</li> </ul>	APPLY PLETERS				1000	wew biscours
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#### 3. Select New Discount

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	Orange Vision Offers and discounts		
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* Services	Discounts	MACK .	
Marketing	Discount information When you and your customers want		
쓭 CRM	to identify the discount through the management and application of the	Discount name*	
D Finance	discount.	Discount description*	
🖼 insight			
Configuration			
Support			
	Discount value Wenyou want to offer your customers a fund amount or percentage discount and reartist the number of times the discount is appled.	Discount type* Choose	
	Refer a friend When you want customers to offer the discount to their finded and family using their unique code.	Discount eligible for refer a friend	
	Promotion When you want to link the discount to a promotion code.	Premotion code type Choose	
		CANCER	

- 4. Complete the discount form
  - Discount Name: Choose a name for your discount
  - Discount Description: Provide more detail about the discount you are creating, e.g. "10% discount for three months".
  - Discount value: Choose if the discount will be a percentage or a fixed price discount

#### Percentage Discount:

- Enter a percentage for the discount
- Apply discount restriction: If you select this you can restrict the number of times the discount can be applied to a customer's account

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	Orange Vision Offers and discounts		
🖶 Home			
* Services	Discounts	INCK .	
Marketing	Discount information When you and your customers want	Discount name*	
🗑 CRM	to identify the discount through the management and application of the	Discont interes.	
203 Finance	discount,	Discount description*	
🖼 insight			
• Configuration			
<ul> <li>Support</li> </ul>			
	Discount value When you want to offer your customers a fixed amount or percentage discount and rearricit the number of times the discount is applied.	Discount type* Peromaga Discount	
	Refer a friend When you ward customers to offer the discount to the referreds and family using their unique code.	Discount eligible for refer a friend	
	Promotion When you want to link the discount to a promotion code.	Promotion code type Choose	
		Conce.	

#### Fixed Price Discount:

- Choose the currency and then the amount of discount, then click Add: You can then add more currencies and the respective discounts by following the same steps.
- Apply discount restriction: If you select this you can restrict the number of times the discount can be applied to a customer's account

singula decisions			👗 Greg Herd 오
=	Orange Vision Offers and discounts		
🖶 Home			
* Services	Discounts	( ANCH	
Marketing	Discount information When you and your customers want		
🗑 CRM	to identify the discount through the management and application of the	Discount name*	
(B) Finance	discount,	Discount description*	
🖼 Insight			
• Configuration			
● Support	Discount value Were you want to offer you customers a fixed amount or personage discount and restrict the number of times the discount is applied.	Discount type* Twee Price Discount * Fixed amount* Choose Apply discount restriction	
	When you want columns is draw the discount is then Friends and family using their unique code. Promotion When you want to link the discount to a promotion code.	Discourt eligible for refer a friend      Promotion code type      Choose      Choose	

#### Applying a Zero price discount

#### You can also add a discount with a zero price reduction.

- Refer a friend: Mark this as Yes if you want to make the discount available as part of a Refer a Friend code, otherwise leave as No
- Promotion: Select from the drop down which type of promotion code you want to use:

#### ADDING A MULTI-USE PROMOTION CODE

- 1. Select Multi-use promotion code
- 2. Add your code here

Multi-use promotion code		
Code*		
Show options		
ADD PROMOTION CODE		

- 3. Select Show options to manage the promotion code
  - Campaign The marketing campaign driving the discount offer. You may either type in a new campaign, or select one that already exists from the drop-down list;
  - Source The campaign Source is usually the medium via which the customer is informed of the offer (e.g. a TV or radio station, a newspaper, magazine, email) that you may wish to track back from the sale. You may either type in a new campaign Source, or select one that already exists from the drop-down list;
  - Start Date\* Enter the date your campaign promotion will start;
  - End Date\* Enter the date your campaign promotion will end, or leave blank for an indefinite date;

Multi-use promotion code	- 28.5		
ode*			
lide options			
Campaign	Source	Start	End
CHOOSE	▼ CHOOSE ▼	yyyy-mm-dd	yyyy-mm-dd

4. Select Add Promotion code. The code will now be listed below and you have the option to add more code combinations with the discount as well as removing any listed.

Multi-use promotion	code				
Code*					
Hide options Campaign		Source		Start	End
CHOOSE	•	CHOOSE	*	yyyy-mm-dd	yyyy-mm-dd
ADD PROMOTION O	CODE				
BOGOF123	FL	AVOUR	TV	May 13, 2021	Jun 13, 2021 🛛 🗙

#### **ADDING A SINGLE-USE PROMOTION CODE**

Single use promo code allows you to create a set amount of promotion codes which can then be given to prospective/existing customers to sign up to a new subscription with a promotional discount.

The codes are single use, so they cannot be shared and once it has been used it no longer remains valid.

This can be used for marketing promotions to encourage customers to sign up for products and subscriptions. The customer must provide the single use promo code during the new subscription process as it will need to be verified against the database to confirm if it is available and valid and of course apply any discounts to the subscription. (you will need to setup your rules around Single use promo code and what promotion/discount it is aligned to).

- 1. Select Single-use promotion code.
- 2. Select Promotion from the available promotions

Single-use promotion code		
romotion*		
Choose 👻		
Promotion is required		

3. Select Save

Promotion code type	
Single-use promotion code	
Promotion*	
Alpha Soup 🗙 🔻	
NCEL	S/

Once a discount has been created, you can view and edit in the discounts screen.

#### **VIEWING AND EDITING A DISCOUNT**

You can edit all attributes of a discount.

- 1. Select Marketing
- 2. Select Offers and Discounts
- 3. Choose the discount you want to view and edit



### **BETA discounts**

#### **VIEWING DISCOUNTS**

1. From the Marketing tab select Discounts

All discounts, active and disabled, will be displayed. You can filter discounts by status.

Singula Decisions		💷 Products 🐨 Marketing 🗸 💮 Customers 🗸	æ
Filter by Discount options	Discounts		New discount
All     Active	Туре	Discount	Availability
Disabled Reset Apply filters		_	View
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	-	=	View
	=	=	View
	=	=	View
	—	_	View
	-		View
		=	View
			View

#### **CREATE A DISCOUNT**

- 1. From the Marketing tab select Discounts
- 2. Select New discount

#### **DISCOUNT INFORMATION**

3. Complete the **discount name** and **discount description** - this will be presented to your customers.

#### DISCOUNT VALUE

4. Choose a discount type either fixed price or percentage

#### Percentage discount

- Enter percentage value
- Add discount restriction. For example 30% for 3 months where 3 would be the number of times to apply the discount.

#### **Fixed price**

- Choose currency
- Enter value
- Add discount restriction. For example 30% for 3 months where 3 would be the number of times to apply the discount.
- 5. Choose if you want the discount to be used as part of a refer a friend campaign.

- 6. Choose if you want the discount to be linked to a promotion, either a single use promo or multi-use promo
- 7. Select Save

Singula Decisions		🐵 Products 🚭 Marketing 🗸 🙄 Customers 🖌	(a) ~
Dis	scounts		Hack
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		Discourt discription *	
Whe cut perc	scount value on you want to offer your tomera a fixed amount or centage discount and restrict the here of times the discount is led.	Bisset type *	•
Whe	fer a friend en you want customers to offer the count to their friends and family g their unique code.	Discount eligible for refer a friend	
Whe	ornotion en you want to link the discount to ornotion code.	Franklin odd tyre	
		Cancel	Save
Subscribe Management ( 1922) Singla Dessona (Johnet el Janua			singula decisions

#### **EDIT A DISCOUNT**

- 1. From the Marketing tab select Discounts
- 2. Identify and select your discount
- 3. Make your changes
- 4. Select the Save button to save your changes

### **Promotions**

Create promotions that link to your marketing campaigns. Promotions allow you to link campaigns to product sales.

#### **VIEWING A PROMOTION**

You can view and edit an existing promotion by selecting it from the list. You'll see the information for the Quantity created and redeemed, the name of the promotion, how many groups of codes it has and it's availability.

You can also filter the Promotions using:

- Time period choose a start date and end date
- Promotion options choosing to see All or just the Active or Disabled promotions

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	Orange Vision	Promotions					
	and the second						
Services	Filter by	Recoil Mark	Promotions				NEW PROMOTIO
Marketing			QUANTITY	PROMOTION	GROUPS	AVAILABILITY	
CRM	TIME PERIOD					-	
Finance	Starts before Starts on		_				NEW PROMOTO
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				=			WW MONDO

#### **CREATE A PROMOTION**

- 1. Select Marketing
- 2. Select **Promotion**
- 3. Selecting New Promotion

singula decisions				🛔 Greg Herd 오
=	Orange Vision Promotions			
r Home	erenge risteri			
* Services		Promotions	INCH	
Marketing		Promotion information When you want to identify the	Promotion name*	
쓸 CRM		promotion through the management of a discount.	Promotisin name"	
(2) Finance			Promotion description*	
🖼 Insight				
• Configuration				
Support			Campaign name None X = Source NONE X =	
		Promotion code When you want to offer your customers a unique promotion code whether generated or uploaded from another source.	Create promo codes* Choose	
		Promotion availability When you want the promotion to be used.	Starts on* 2021-09-07 Ends on yypy-mm-ds Office December Promotion	
			CANCEL	

- Promotion Name: This is how you will identify the discount. The following characters are allowed: A-Z, a-z, 1-9, spaces, hyphens, % sign, and currency symbols (£, \$, €), up to a maximum length of 50 characters.
- Promotion Description: Provide more detail about the type of discount you are creating, e.g. "10% discount for three months".
- Campaign Name: Associate the promotion with an existing campaign".
- Source: Associate the promotion with an existing source".
- Promotion Code: You can choose to generate promotion codes or upload promotion codes

#### Generating promotion codes:

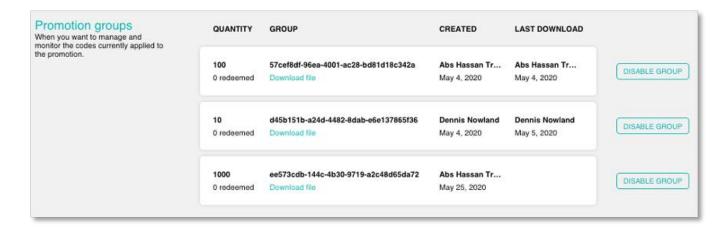
- Number of codes to generate: Choose up to a maximum of 200,000 codes.
- Promo code length: Code should contain between 6 and 32 characters.
- Promo code prefix: The prefix is included in the total promo code length

When you Save the promotion, a file will be generated with the codes. This can then be downloaded.

#### Upload promotion codes:

- Choose CSV file: Click Choose file to upload a CSV file with your promotion codes
- Promotion availability: Select the start and if applicable the end date. Leaving the end date blank will give the promotion no expiry date.
- Selecting disable promotion will stop the promotion being available and therefore cannot be used for any subscriptions.

If you chose to generate Promo codes then you will see the codes will have been generated and an option to download the file. You can also see how many codes have been redeemed.





### **BETA promotions**

#### **VIEWING PROMOTIONS**

1. From the Marketing tab select Discounts

All discounts, active and disabled, will be displayed. You can filter discounts by status.

ingula Decisions		🖙 Products 😔 Marketing 👻 💿 Customers	С		æ
itter by	Promotions				New promotion
Time Period					
Starts before           Starts on	Quantity	Promotion	Groups	Availability	
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	Sector Sector				
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	and the second				View
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#### **CREATE AND GENERATE PROMO CODE**

- 1. From the Marketing tab select Promotions
- 2. Select New promotion

#### **PROMOTION INFORMATION**

- 3. Complete the promotion name and promotion description this will be presented to your customers.
- 4. Choose to link your promotion to a campaign and source.

#### **PROMOTION CODE**

- 5. Choose to generate promo codes
- 6. Enter number of codes to generate up to a maximum of 200,000 codes
- 7. Enter the length of promo code between 6 and 32 characters
- 8. Specify a promo code prefix the prefix is included in the total promo code length

#### **PROMOTION AVAILABILITY**

- 9. Choose when you want your promotion to start and end or choose to disable for later use.
- 10. Select Save

Singula Decisions		💷 Products 😓 Marketing 🗸 🙄 Customers 🗸				
	Promotions	Back				
	Promotion information When you want to identify the promotion through the management of a discount.	Principa vana *				
		Promotion description *				
		Choose				
		team Choose				
	Promotion code When you want to offer your customers a unique promotion code whether generated or uploaded from	Create annies under * Generate promotion codes.				
	another source.	Restlet of cable is generate *				
		Up to a maximum of 200,004 codes.				
		Cade abuild contain between 6 and 12 diseases Present only ports				
		The perfusion existing researching the				
	Promotion availability When you want the promotion to be used.	304% em <sup>*</sup> 08709/2021				
riber Management   62021 Singula Decumes Limb	Miski / Ani-	fabra Ir	singula dec			

#### **CREATE AND UPLOAD PROMO CODES**

- 1. From the Marketing tab select Promotions
- 2. Select New promotion

#### **PROMOTION INFORMATION**

- 3. Complete the promotion name and promotion description this will be presented to your customers.
- 4. Choose to link your promotion to a campaign and source.

#### **PROMOTION CODE**

- 5. Choose to upload promo codes
- 6. Choose a CSV file you can download a sample file from the application

#### **PROMOTION AVAILABILITY**

- 7. Choose when you want your promotion to start and end or choose to disable for later use
- 8. Select Save

gula Decisions		🎟 Products 🛞 Marketing 👻 😳 Customers 👻	
	Promotions		Back
	Promotion information When you want to identify the promotion through the management of a discount.	Promotion topon *	
		Promotion discription *	
		Caregoint hand Choose_	*
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	Promotion code When you want to offer your customers a unique promotion code whether generated or upplaced from	Criste prime sales * Upfload promotion codes	
	another source.	Choose CSV file Download an exempte of an unional file	
	Promotion availability When you want the promotion to be used.	Nerto sa * 08/09/2021	
		Enderson 🗊	
		Disable Promotion	
aer Managerheret ( 62021 Singula Decumena Lind	Magdarose.		singula de

#### **EDIT A PROMOTION**

- 1. From the Marketing tab select Promotions
- 2. Identify and select your promotion
- 3. Make your changes
- 4. Select the Save button to save your changes

### CRM

### **Creating a customer**

#### **Online or Contact Centre Agent**

A customer can be created by the customer through an online registration process or by an agent in a contact centre.

- 1. Select **CRM** which will reveal the Search customer screen
- 2. Select + Add customer
- 3. Complete the customer's personal details. Items marked \* are mandatory.

			👗 Greg Herd 오
≡ # Home	Enter new customers details and account inf		VOU ARE HERE: Home > CRM > Create customer  * Close  * Close * Close * Close * Close * Close * Close * Close *
* Services	CUSTOMER DETAILS		i OTHER INFORMATION
Marketing	Tide* Fin	st name	
CRM Advanced search	Last name*	Gender Nationality Select gender * Select nationality *	
Generate Access Pin Launch eAgent	Display name	Vimond ID	
D Finance	Username*	Email*	₩ MARKETING PREFERENCES
🖬 Insight	Telephone	Mobile	Contact preferences
Configuration		rrency* Customer type	I may be contacted about the service using one of the following contact methods.
Support	dd mm yyyy S	elect Currency v Standard v	Phone      SMS      Social      Whitemail      Receipts
	ADDRESS BOOK		I would like to receive receipts following successful purchases.
	Country*	Address type*	Receipt
	Select Country Post / ZIP code	v Home v	
	Building	Address 1	
	Address 2	Address 3	
	Town / City	Area / State	

Title – This is the customer's title;

**Username** – A unique username for the customer. If you enter an email address as their username, the email field will automatically update with the same email address;

**Email** – A unique email address for the customer. If the customer consents, this can be used for marketing purposes; **Date of birth** – The customers date of birth in the format DD/MM/YYYY;

**Country** – The customers country of residence;

Currency – The currency the customer will use;

Address type – The type of address the customer has

**Marketing preferences** – The customer's contact preferences. Receipt is not a marketing preference it is used for purchases only

**Customer type** – 'Standard or 'VIP'. 'Standard' is set by default. Setting as 'VIP' will suppress any payments for subscription products.

Other Information - Custom fields as specify by you business.

Receipts - Ensures bill receipts are sent automatically with every bill

- 4. Select **Save** to create the customer.
- 5. Once saved, the customer will be **allocated a unique Customer Reference number**. The customer has been created as a prospect as no products are associated with their account.

### **BETA Creating a customer**

#### **Online or Contact Centre Agent**

A customer can be created by the customer through an online registration process or by an agent in a contact centre.

1. From the Customer tab select New customer

PERSONAL DETAILS	ABO	IT CUSTOMER		ADDRESS		ADD ADDRESS	CONTACT	ETAILS	
The ·	Gende				There are no addresses y	ret.	Mohile		
Fiel turn	Natur	diγ					Talaphone		
Kastpanse*:	Displa	name							
Enal *	Custor	nar type					CUSTOMER	CONSENTS	
Weename*	Defed	currency *					Customer may t following contact		the service using one of the
Date of both	Estern	d Nataresce					SMS	C Phone	Whitemail
							# Social		
CUSTOM ATTRIBUTES							SAVE CUST	OMER	
accepted_briteliskanaler_tarres.	Serma_slate	+ Accepted Covere Terms Date	Martan Cust	en Field Y			This will create products for this		nt. You'll then be able to add

#### PERSONAL DETAILS

2. Complete the customers personal details. The email address you enter will automatically populate the username field. You have the option to change the username.

#### ABOUT CUSTOMER

3. Complete additional information about the customer. Once the customer account has been created the currency cannot be changed.

#### **CUSTOMER ADDRESS**

- 4. Choose the address type
- 5. Choose the country
- 6. Search for an address using the customers house number and postcode (UK only). If an exact match is not found, you'll be able to select the customer address from the search results. You also have the option to enter the address manually
- 7. Select 'Add' to apply the address. You can remove the address by selecting the 'Trash' icon

ADDRESS	ADD MANUALLY	ADDRESS	FIND ADDRESS	ADDRESS	ADD MANUALLY	ADDRESS	
Address type *	*	Address type *	•	Address type * HOME		HOME ADDRESS	1
Country * United Kingdom	-	Country *	*	Country * United Kingdom		Pay Wizard Group Cluny Court Chapetton Drive KIRKCALDY	
House No. Post/Zip code *	٩	POIIT/2/P Code		House No. Post/Zp to ky2.6g	••• Q	KY2 6QJ GBR	
Cancel	Add	halling		HOME ADDRESS			
		Address Ins 1		Pay Wizard Group Cluny Court			
		Address Tex 2		Chapelton Drive KIRKCALDY KY2 6QJ GBR			
		Address line 3		Cancel	Add		
		Toen/Oly					

#### CONTACT DETAILS

8. Complete the customers contact telephone numbers

#### CUSTOMER CONSENTS

9. Select the relevant customer consents

#### **CUSTOMER ATTRIBUTES**

- 10. If available, enter the customer attributes required by your business.
- 11. Select 'Create customer' to save the customer. Any errors on the page will be highlighted.

Once saved the customer's account can be amended or additional details added - see Managing a customer's personal details.

### **Finding a customer**

#### 1. Select CRM

singula decisions					Greg Herd 🛛
≣ # Home	Orange Vision   Search customers Find your customers details and account information		Validate single-use promo code	YOU Validate RAF code	ARE HERE: Home > CRM + Add customer
<ul> <li>Services</li> <li>Marketing</li> </ul>	SEARCH				
CRM     Advanced search     Generate Access Pin     Launch eXgent     E32 Finance	Customer reference First name Display name Username	Last name En	mend ID mail Ilephone number		
<ul> <li>Insight</li> <li>Configuration</li> <li>Support</li> </ul>		Search Clear			

- 2. Search for your customer using one or a combination of search options.
- 3. Select Search or press Enter to continue

#### **Partial search**

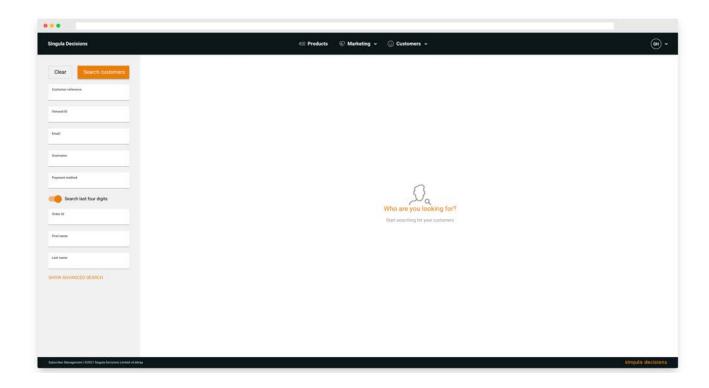
You have the option to do a partial search using a post/zip code, first name, last name, email, phone, username and payment details.

#### **USING ADVANCED SEARCH**

- 1. Search for your customer using one or a combination of search options.
  - Customer reference number
  - Vimond ID
  - Email
  - Username
  - Payment method this will be the payment method registered by the customer when they signed up or purchased a product. This will be a credit card number or bank account number. You can search using the last 4 digits or the full number.
  - Order ID
  - First name
  - Last name

### **BETA Finding a customer**

- 1. Select **Customers** from the main menu
- 2. Select Customer search



- 3. **Enter** the customer's details you can choose to search using one or more fields. Select 'Show Advanced search' to display the advanced search options.
- 4. Press Enter or select 'Search customers'
- 5. If an exact match is found, the customer account will be displayed. If more than one account is found, each matching result will be displayed.

#### **USING ADVANCED SEARCH**

Advanced search is used to locate customers using a specific set of search criteria. Select 'Show advanced search' to reveal the search options.

#### **NO SEARCH RESULTS**

This is because a customer account does not match your search criteria. Check your search and try again or simplify the number of search options used.

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Clear Search customers		
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Search last four digits	2	
Delet M	No customer's found We can't find any customer's matching your search. Please try again.	
First name Steve		
Last name Royd		
HOW ADVANCED BEARCH		

### **BETA Customer account**

The customer account gives you a summary of the customer including their personal details, recent products, open cases, payment methods and recent activity.

gula Decisions		Products	🟵 Marketing 🖌 💿 Custo	omers v			æ
Mr Chris Lloyd 112939							Return to search res
	CUSTOMER ACCOUNT	CUSTOMER DETAILS PRODUC	CTS VIEWING CARDS CASES	S RECENT ACTIVITY	PAYMENT DETAILS		
CUSTOMER DETAILS	EDIT	RECENT PRODUCTS					ADD PRODUCT
		NAME	TYPE	PRICE	STARTED	STATUS	
	_	= Boating Monthly ± Order ID: 103021	Subscription Referrer ID: None	SEK80.00 ann No discount	wally 19 Jan 2021 05:06:38	AUTIVE	>
		C More Monthly     Order ID: 102211	Subscription Referrer ID: None	SEK200.00 m No discount	onthiy 21 Jan 2020 08:57:29	AUTOR	2
		OPEN CASES					ADD CASE
		TYPE	SUBJECT		DATE ADDED		
		Billing Incorrect Bill	Bill query		29 Jul 2021 02:49:14		>
		PAYMENT METHODS		MANAGE	RECENT ACTIVITY	VIEW	N ALL ACTIVITY
		DETAILS	TYPE	STATUS	G Subscription Billing Resubmission Fale	d	
		Visa Expites: 12/2021	VISA	ACTIVE	1		
		Visa			Subscription Billing Resubmission Falle	a	

#### **CUSTOMER ACCOUNT HEADER**

You will see the unique customer account number, customer's name and customer type 'Standard' or 'VIP'.

#### Standard

			Products 💮	Marketing ~ (	① Custome	rs ~		æ
Mr Chris Lloyd 112939								Return to search read
	CUSTOMER ACCOUNT	CUSTOMER DETAILS	PRODUCTS	VIEWING CARDS	CASES	RECENT ACTIVITY	PAYMENT DETAILS	

Singula Decisions		68 F	Products 🗧 🕤	Marketing ~	🔅 Custom	ers ~		(iii) ~
😳 Mr Chris Lloyd 112939 🛛 🔤								Roturn to assarch results
	CUSTOMER ACCOUNT	CUSTOMER DETAILS	PRODUCTS	VIEWING CARDS	CASES	RECENT ACTIVITY	PAYMENT DETAILS	

#### **CUSTOMER ACCOUNT MENU**

The customer account menu enables you to navigate around the customer's account quickly and easily.

	CUSTOMER ACCOUNT	CUSTOMER DETAILS PRODUCTS	VIEWING CARDS CASES	RECENT ACTIVITY PAYMENT DE	TAILS	_	-
		·				_	
		-					5
RESAUDO						-	ð.
							5

#### **PERSONAL DETAILS**

You will see the customers address, contact details, email address and refer a friend code. You may also see either display name or customer PIN depending on the system configuration.

•••				
CUSTOMER DETAILS	EDIT			
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_				
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				\$

#### **RECENT PRODUCTS**

You will see the name, type, price, date started and current status of a recent product.

Select the product to view more information on the product. All products can be viewed by selecting Products

						•
_	RECENT PRODUCTS	TYPE -	PRICE	STARTED .	AD	D PRODUČT
HEM.500	Boating Monthly     Order ID: 103021     G More Monthly     C More Monthly     Grder ID: 100211	Subscription Referrer ID: None Subscription Referrer ID: None	SEX80.00 annually No discount SEX200.00 monthly No discount	19 Jan 2021 05:06:38 21 Jan 2020 08:57:29	ALTIVE	•
						-
						3
	-		-			

### Add product

Selecting Add product will take you out of BETA into the existing customer checkout.

### **OPEN CASES**

You will see open cases on the customer's account.

Select the case to view more information on the case. All cases can be viewed by selecting Cases

• • •				
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=				
BESAJGO				<b>88</b> >
-				
	OPEN CASES	SUBJECT	DATE ADDED	ADD CASE
	TYPE	SUBJECT Bill quety	29 Jul 2021	ADD CASE
	TYPE			
	TYPE	Bil query	29 Jul 2021	
	TYPE Billing Incorrect Bill	Bil query	29.463021 0249.14	•
	TYPE Billing Incorrect Bill	Bill quety	29 AU 2021 02:49:14	
	TYPE Billing Incorrect Bill	Bill guery	29 Jul 2021 02-0514	

#### View case

Selecting 'View case' will take you out of BETA into the existing customer case screen.

#### **PAYMENT METHODS**

You will see all the active payment methods that have been added to the customer account - ordered by date added You will see the type and status for each. Statuses include active and expired.

•••					
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	PAYMENT METHODS		-		
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		-			

#### Manage payment methods

Selecting Manage will take you out of BETA into the existing customer payment screen.

#### **RECENT ACTIVITY**

You can see the last five actions on the customer account. See Customer activity for more details.

	•
RECENT ACTIVITY	VIEW ALL ACTIVITY

#### **EDIT A CUSTOMER**

You can edit when you see the pen icon.



### **Customer personal details**

singula decisions		👗 Greg Herd 🗢
≡ ₩ Home	Edit your customers details and account information	You are here Home > CDM > MC Oreistopher Llayd Customer activity <b>X</b> Close
Services     Marketing     CRM     Advanced search     Generate Access Pin     Lunch extent     Since		
G2 Finance     Gal Insight     Configuration     Support		

#### **VIEWING A CUSTOMER'S PERSONAL DETAILS**

1. Select the Edit button on the Customer Details section.

#### **UPDATING A CUSTOMER'S PERSONAL DETAILS**

- 1. Select the **Edit** on the Customer Details section.
- 2. Edit the customer's details
- 3. Select Save

### **BETA Customer personal details**

#### **UPDATING PERSONAL DETAILS**

1. Select **Edit** from the customer account page or select Customer Details

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	CUSTOMER ACCOUNT	CUSTOMER DETAILS PRODUC	TS VIEWING CARDS CASES	RECENT ACTIVITY PAY	MENT DETAILS		
CUSTOMER DETAILS	EDIT	RECENT PRODUCTS					ADD PRODUCT
_ =		NAME	TYPE	PRICE	STARTED	STATUS	
		<ul> <li>Boating Monthly</li> <li>Order ID: 103021</li> </ul>	Subscription Referent ID: None	SEK80.00 annually No discount	19 Jan 2021 05:06:38	AUTIVE	>
_ !		C More Monthly     Order ID: 102211	Subscription Referrer ID: None	SEK200.00 monthly No discount	21 Jan 2020 08:57:29	ACTIVE	2
ί <b>λ</b>		OPEN CASES					ADD CASE
		TYPE	SUBJECT		DATE ADDED		
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		Visa Expires: 12/2021	VISA	ACTIVE	Subscription Billing Resubmission Failed		
		Visa			S summaripeon bining resubmission Failed		

- 2. Make your changes
- 3. Select the Update Customer button to save your changes

Mr Chris Lloyd 112939	CUSTOMER ACCOUNT CUSTOMER DETAILS	PRODUCTS	VIEWING CARDS CASES RECEN	NT ACTIVITY PAYMENT DETAILS		
PERSONAL DETAILS	ABOUT CUSTOMER		ADDRESS	ADO ADDRESS	CONTACT	DETAILS
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		_	_		This will update	a customer acccount.

#### **CUSTOMER'S REFER A FRIEND CODE**

You can activate or de-activate a Refer a Friend code.

- 1. Select Edit from the customer account or alternatively select Customer Details
- 2. View the Personal Details area, and use the switch to enable or disable the customer's refer a friend code
- 3. Select Update customer to save your changes.

#### **LEAVE WITHOUT SAVING**

To stop any changes being lost, you will be asked to confirm that you want to leave the page.

la Decisions		Products 🐨 Marketing 🖌 💮 Customers 🗸	
New customer			6
ERSONAL DETAILS	ABOUT CUSTOMER	ADDRESS ADD ADDRESS	S CONTACT DETAILS
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en et hern	External Reference		SMS C Phone Whitemail
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cogind, heliothianolor, serve ecogind, heliothianolor, serve	ulain 🗸 Accepted Course Terms Date	Marker Correct Table 1	This will create a customer acccount. You'll then be able to add n products for this customer.

### **Customer subscription products**

#### **VIEW SUBSCRIPTION PRODUCTS**

The subscriptions area provides a quick summary of customer subscriptions; you'll see the name, status, price and any discounts, if associated.

To view more detail about the subscriptions select View

This will open the Current subscription and history page

Two tables will be displayed, one showing the information on the current subscription(s), the second showing the customer's subscription history.

#### ADD A SUBSCRIPTION PRODUCT

- 1. Select + Add which will open the Add service wizard. You can select a subscription, by default subscriptions are filtered by the customers currency. To change the currency, select 'CHANGE' in the title bar and choose a currency from the drop down.
- 2. Choose a subscription from the catalogue and select 'Next'. Once added, a confirmation of subscription and the amount will be displayed in the cart.
- 3. If required, enter a referrer ID. The code is validated after entry.
- 4. Add a discount by choosing a campaign, source and promotion code from the drop-down. Leave it blank if you don't require a discount.
- 5. Select Next

#### A summary containing subscription details, amount, discount amount and total amount due will be displayed.

- 6. Choose an existing payment method from the Select payment drop down and select Next.
- 7. The Order Summary screen will show details of the order including subscription, price, discounts and final price after discounts are applied. Review the details and select 'Finish'
- 8. The subscription will be added. You will see:
  - Status
  - Last Change date
  - Start date
  - Price
  - Frequency

#### Selecting the `+' expand button will show:

- Minimum term end
- Referrer ID or Viewing Card
- Order ID
- Promo Code
- Refer a Friend code
- Next Charge date

#### ADDING AN ALTERNATIVE PAYMENT METHOD DURING ADD SUBSCRIPTION

- 1. Select +Add which will open the Add service wizard. You can select a subscription, by default subscriptions are filtered by the customers currency. To change the currency, select 'CHANGE' in the title bar and choose a currency from the drop down.
- 2. Choose a subscription from the catalogue and select 'Next'. Once added, a confirmation of subscription and the amount will be displayed in the cart.
- 3. If required, enter a referrer ID. The code is validated after entry.
- 4. Add a discount by choosing a campaign, source and promotion code from the drop-down. Leave it blank if you don't require a discount.

#### 5. Select Next

#### A summary containing subscription details, amount, discount amount and total amount due will be displayed.

- 6. Choose Add card
- 7. A new tab in your browser will open. A summary of the customer's details will be displayed, select Add payment
- 8. This will launch the Global Iris or Realex Payments secure hosted payment page (HPP). Enter the customer's card number, expiry date, security code and cardholder name
- 9. Select the 'Pay Now' button once finished (at this stage you're authorising the card, not taking a payment). A success message will appear if the details entered were correct and the card will be stored against customer's account.
- 10. Go back to the previous tab and click the refresh button next to the Select payment drop down.
- 11. Select the newly added payment method from the drop down and select 'Finish'

The subscription is added to the customer's record.

Klarna and Invoice must be added via the add payment method before the create subscription process.

Cash payments – If the customer is paying by cash, select Invoice from the Select payment method drop down - see Customer payment methods.

#### Adding new subscriptions for cancelled or terminated customer accounts

To add new subscriptions to a cancelled or terminated account, you would need to create a new subscription.

Before creating a new subscription make sure that a valid and up to date Payment method is captured - see Customer payment methods. Ensure Viewing Card information, if required, is up-to-date.

Note: Any outstanding balances or debt should be managed by your own business rules and credit control

#### MANAGING A SUBSCRIPTION PRODUCT

You can see:

- Information
- Filter History
- Change Payment method
- Edit billing date
- Edit referrer ID/ Viewing card
- View Crossgrades
- Cancel
- Pause

#### **PAUSE A SUBSCRIPTION PRODUCT**

You can suppress both billing and viewing entitlements using a subscription pause. You can pause a subscription for a minimum of 1 billing instance, up to 24 billing instances. Only monthly subscriptions can be paused.

- 1. Select View from the Subscriptions area
- 2. Locate the subscription you want to pause and select Manage Subscription
- 3. Select Pause. The Pause Subscription window will appear.
- 4. Choose the number of billing periods to pause the subscription
- 5. Select Confirm

The Subscription status will be paused from their next billing date. The date that pause will start and is due to end is shown within the subscriptions table.

#### **REMOVE A PAUSE**

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to pause and click Manage Subscription
- 3. Select Pause. The Withdraw scheduled pause window will appear
- 4. Select 'Confirm' to withdraw the scheduled pause.

The Subscription status will be active and billing along with viewing entitlements will resume.

#### **CANCEL A SUBSCRIPTION PRODUCT**

A customer can cancel their subscription at anytime; however, if they are still in contract they may incur a charge for cancelling.

Any early termination charges will be illustrated ahead of confirming a cancellation.

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to cancel and select Manage Subscription
- 3. Select Cancel. The Remove Subscription window will appear.
- 4. Choose the cancellation date this can be a specific date, an immediate cancellation or cancel on next renewal date. Note: If you choose a specific date for cancellation then a calendar will pop up for you to select the date
- 5. Choose the cancellation reason
- 6. Select Get cancellation fee. The message will be updated with cancellation type, cancellation reason and any cancellation fees.
- 7. Select Confirm to action the cancellation. A Success message will appear along with the Subscription tables updated with the cancellation requested

If this was an immediate cancellation, the subscription will show status as cancelled straight away.

To view the cancellation date, click + to expand the Subscription information.

#### WITHDRAW A CANCELLATION

A scheduled cancellation can be withdrawn at any time up to the cancellation date.

- 1. Select Manage subscription
- 2. Select Withdraw scheduled cancellation
- 3. Select Confirm to withdraw the cancellation

The subscription will be reinstated.

#### **REFRESH PRODUCT ENTITLEMENTS**

You may need to sync a customer subscription with a entitlement service. This action is called 'Nudge' and is completed in the Subscriptions section.

- 1. Select View
- 2. Locate the subscription you want to sync
- 3. Select Refresh to sync the entitlements

This will resend the subscription entitlements and restore the customer's viewing.

#### **CHANGE A SUBSCRIPTION PRODUCT PAYMENT METHOD**

- 1. Select Manage Subscription
- 2. Select Change payment method
- 3. Select Change:
- 4. Choose a payment method from the drop down or choose Add card

5. Select Save to confirm changes

#### **CHANGE SUBSCRIPTION BILLING DATE**

- 1. Select Manage Subscription
- 2. Select Edit billing date
- 3. Select the billing day and choose if you want to apply pro-ration to the customer's bill
- 4. Select Get Info. A Summary screen of the change requested along with any pro-rata billing is displayed
- 5. Select Confirm to confirm changes

#### **CROSSGRADE A SUBSCRIPTION PRODUCT**

A customer can move from their current subscription to another one based on the crossgrade configuration.

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to cancel and select Manage Subscription
- 3. Select View crossgrades
- 4. Select the package to change to along with any discounts, if applicable. When you select the new subscription, the cart banner will update showing details of the change along with any differences in costs. This will also indicate what type of change it is; Crossgrade, Upgrade or Downgrade with arrows.
- 5. Select Finish at the end of the Cart to confirm the subscription change (this is an immediate change)

The subscription history will now be updated to show this change in subscription.

Once completed, the customer will be charged the pro-rated amount and their bill date will be adjusted to 'today'

The new subscription will be active along with its new term (monthly or annual)

#### **UPGRADE A SUBSCRIPTION PRODUCT**

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to cancel and select Manage Subscription
- 3. Select View Crossgrades. The Crossgrade wizard will appear
- 4. Select the package to change to along with any discounts, if applicable. When you select the new upgraded subscription, the cart banner will update showing details of the change along with any differences in costs for the new subscription.
- 5. Select Finish at the end of the Cart to confirm the subscription change (this is an immediate change):

The subscription history will now be updated to show this change in subscription. Once completed, the customer will be charged the pro-rated amount and their bill date will be adjusted to 'today'. The new subscription will be active along with its new term (monthly or annual).

#### **DOWNGRADE A SUBSCRIPTION PRODUCT**

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to cancel and select Manage Subscription
- 3. Select View Crossgrades. The Crossgrade wizard will appear
- 4. Select the package to change to along with any discounts, if applicable. When you select the new downgraded subscription, the cart banner will update showing details of the change along with any differences in costs for the new subscription.
- 5. At the Payment section, the default option is for the downgrade to take place at the contract end term. There is an option to 'force immediate downgrade' if required. This could be the next month's billing date if the current subscription is a monthly contract or it could be at end of an annual contract for 12 month contracts)
- 6. Select Finish to confirm the downgrade

A success message will appear, confirming the downgrade:

- If an immediate downgrade is requested, this will be completed immediately and billing will be pro-rated and the new subscription term started.
- If the default downgrade option is chosen, then this will be scheduled to downgrade at the end of the current subscription's minimum term. This will show in the Subscription tables as Downgrade Scheduled. There will be no pro-rationed billing applied and once the downgrade is complete the new subscription's minimum term will become active.

#### **CANCEL A SCHEDULED DOWNGRADE**

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to cancel and select Manage Subscription
- 3. Select 'Withdraw scheduled downgrade'

#### **ADD A MANUAL PAYMENT**

If a customer makes a manual payment, in person with cash, then this transaction balance needs to be manually added to their account.

- 1. In the Customer account area select View
- 2. Locate the subscription you want to add a manual payment
- 3. Select Add payment
- 4. Select the payment type you want to add Cash or Voucher

The following fields will be displayed:

- Cash amount this is mandatory
- Official receipt number
- Collection code
- Temporary receipt number
- 5. Complete the required fields
- 6. Select Confirm

The Customer account statement will now show the manual payment entry along with the updated account balance.

#### **CHANGE A REFERRER ID**

- 1. Select 'View" in the Subscriptions area
- 2. Locate the subscription you want to cancel and select Manage Subscription
- 3. Select Edit Referrer ID
- 4. Enter the New referrer ID
- 5. Select Confirm

#### **SUBSCRIPTION HISTORY**

Subscription history shows the customer's current and previous subscriptions.

You'll be able to see more information on the subscription including:

- Name;
- Status (e.g. cancelled, active);
- Movement (was the subscription cancelled, crossgraded etc);
- Start (when the subscription began);
- End (when did it end or is due to end);
- Price (how much the subscription is and if there were any discounts added).

### **BETA Customer subscription products**

#### **VIEW A SUBSCRIPTION PRODUCT**

- 1. View a customer account
- 2. Select Products

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#### **CANCEL A SUBSCRIPTION**

- 1. Choose the pen to edit the subscription product
- 2. Select subscription status
- 3. Select cancel subscription
- 4. Select cancel on date or cancel immediately
- 5. Select cancel subscription

#### **Cancel on date**

- Select the date of cancellation
- The cancellation fee will be calculated based on the date of cancellation.
- You can select the payment method to clear the cancellation fee
- You can choose to write-off the cancellation fee
- You can choose the cancellation reason

#### **Cancel immediately**

- The cancellation fee will be calculated based on the date of cancellation.
- You can select the payment method to clear the cancellation fee
- You can choose to write-off the cancellation fee
- You can choose the cancellation reason

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#### **CHANGE A SUBSCRIPTION PRODUCT**

- 1. Choose the pen to edit the subscription product
- 2. Select subscription status
- 3. Select the new subscription. A summary of the selected subscription will be displayed including any pro-rata charges.
- 4. Choose an available discount, if required
- 5. Choose from an existing payment method
- 6. Select Change subscription

#### Crossgrade

The customer will be charged the pro-rated amount and their bill date will be adjusted to 'today'

#### Upgrade

The customer will be charged the pro-rated amount and their bill date will be adjusted to 'today'. The new subscription will be active along with its new term (monthly or annual).

#### Downgrade

- If an immediate downgrade is requested, this will be completed immediately and billing will be pro-rated and the new subscription term started.
- If the default downgrade option is chosen, then this will be scheduled to downgrade at the end of the current subscription's minimum term. The subscription will be shown as Downgrade Scheduled. There will be no pro-rationed billing applied and once the downgrade is complete the new subscription's minimum term will become active.

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#### **CHANGE REFERRER ID**

- 1. Choose the pen to edit the subscription product
- 2. Select referrer ID
- 3. Enter new referrer ID
- 4. Select Change to confirm

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### **Customer one-off purchases**

#### **VIEW ONE-OFF PURCHASE**

The one-off purchases area provides a quick summary of customer pay per view or access passes; you'll see the date purchased, name, price, referrer ID and order ID.

To view more detail about the purchases select View

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#### ADD A ONE-OFF PURCHASE WITH EXISTING PAYMENT METHOD

- Select + Add which will open the Add purchase wizard. You can select a one-off purchase, by default products are filtered by the customers currency. To change the currency, select CHANGE in the title bar and choose a currency from the drop down.
- 2. Choose a one-off purchase from the catalogue and select Next. Once added, a confirmation of the product and the amount will be displayed in the cart.
- 3. If required, enter a referrer ID. The code is validated after entry.
- 4. You can't add a discount to a one-off purchase select Next
- 5. Choose an existing payment method and select Next. The Order Summary screen will show details of the order including subscription, price, discounts and final price after discounts are applied
- 6. Review the details and select 'Finish'

#### ADDING AN ALTERNATIVE PAYMENT METHOD DURING ADD ONE-OFF PURCHASE

- Select + Add which will open the Add purchase wizard. You can select a one-off purchase, by default products are filtered by the customers currency. To change the currency, select CHANGE in the title bar and choose a currency from the drop down.
- 2. Choose a one-off purchase from the catalogue and select Next. Once added, a confirmation of the product and the amount will be displayed in the cart.
- 3. If required, enter a referrer ID. The code is validated after entry.
- 4. You can't add a disocunt to a one-off purchase. Select Next
- 5. Choose Add card. A new tab in your browser will open
- 6. A summary of the customer's details will be displayed, select Add payment. This will launch the Global Iris or Realex Payments secure hosted payment page (HPP).
- 7. Enter the customer's card number, expiry date, security code and cardholder name

- 8. Select the 'Pay Now' button once finished (at this stage you're authorising the card, not taking a payment). A success message will appear if the details entered were correct and the card will be stored against customer's account.
- 9. Go back to the previous tab and click the refresh button next to the Select payment drop down.
- 10. Select the newly added payment method from the drop down and select Finish. The Order Summary screen will show details of the order including subscription, price, discounts and final price after discounts are applied.
- 11. Review the details and select Finish

#### **MANAGING A ONE-OFF PURCHASE**

You can see:

- Information
- Filter History
- Change Payment method
- Edit billing date
- Edit referrer ID/ Viewing card
- View Crossgrades
- Cancel
- Pause

#### **ADD A MANUAL PAYMENT**

If a customer makes a manual payment, in person with cash, then this transaction balance needs to be manually added to their account.

- 1. In the Customer account area select View
- 2. Locate the one-off purchase you want to add a manual payment
- 3. Select Add payment
- 4. Select the payment type you want to add Cash or Voucher

The following fields will be displayed:

- Cash amount this is mandatory
- Official receipt number
- Collection code
- Temporary receipt number
- 5. Complete the required fields
- 6. Select Confirm

The Customer account statement will now show the manual payment entry along with the updated account balance.

### **Customer payment methods**

#### **ADDING A CREDIT/DEBIT CARD**

Within the Payment method area select Add

1. Select 'Card'. You'll then be taken to a new tab in your browser which displays the customer's details.

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- 2. Select Add payment from the top right of the 'Personal details' box.
- This will launch the Payment details window; the Global Iris or Realex Payments secure hosted payment page (HPP) 3. Enter the customer's card number, expiry date, security code and cardholder name:
- 4. Select Pay Now (at this stage you're authorising the card, not taking a payment).

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- 5. A success message will appear if the details entered were correct and the card will be stored against customer's account. If unsuccessful an error message, briefly explaining what went wrong will appear.
- 6. Go back to the previous tab and select refresh at the top right of the Payment Methods area where you'll see the customer's card details, once refreshed.

#### **ADDING INVOICE PAYMENT**

There may be instances when you want to setup an account with an Invoice payment method. Examples of this could be:

- VIP customers where you don't want the customer to be billed VIP status will need to be setup on the Customer Details sections under Customer Type
- Customers or business that wish to pay via Bank Transfer or Cheque
- 1. Select Add button at the top right of the 'Payment Method' box, this will reveal a drop down with an option to an invoice payment.
- 2. Select Invoice.
- 3. Select Invoice

Note: If no payment details are provided, select 'Not Provided'

Other payment methods can be configured. (Klarna, DIBS, Paypal)

Klarna payments – You cannot add a Klarna payment method via SSM, the customer will need to do this through the website.

### **BETA Customer payment methods**

#### **VIEW PAYMENT METHODS**

#### 1. Select Payment details

All payment methods stored on the customer account will be displayed. Each can be selected to reveal more details.

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#### **ACTIVATE A PAYMENT METHOD**

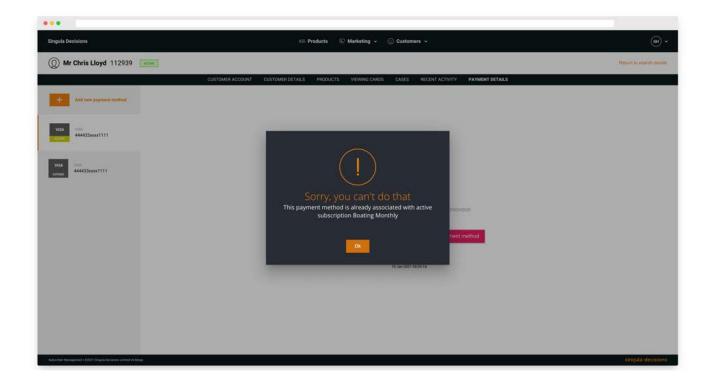
- 1. Select Payment details
- 2. Select the payment method to be activated
- 3. Select Activate payment method
- 4. Confirm the activation

#### **DEACTIVATE A PAYMENT METHOD**

- 1. Select Payment details
- 2. Select the payment method to be deactivated
- 3. Select Deactivate payment method
- 4. Confirm the deactivation

#### Active subscription

You won't be able to remove a payment method if it is used with an active subscription.



#### **REMOVE A PAYMENT METHOD**

- 1. Select Payment details
- 2. Select the payment method to be removed
- 3. Select Remove payment method
- 4. Confirm the removal

#### Active subscription

You won't be able to remove a payment method if it is used with an active subscription.

### **Customer cases**

Cases and <u>Inboxes</u> provide a flexible framework for managing Customer engagement, issue resolution and workflow.

Cases are system 'tickets' that are raised against a Customer Account and stored in the Cases section.

These can be used stand alone, for example as a record of customer contact eg 'the Customer called to discuss an upgrade to their subscription' or the case can be added to an Inbox workflow.

#### **CREATE A CASE**

1. Click the Add on the Cases area:

CASES		ADD VIEW
Title	Status	Date
General Enquiries	* CLOSED	06-Nov-2020
Technical	* CLOSED	06-Nov-2020
General Enguiries	* CLOSED	06-Nov-2020

Fill in the details of the interaction as described below:

- Case type Select the reason for the customer's interaction from the drop down list;
- Sub case type Select a sub type from the drop-down list, this is used to further define the Case Type described above;
- Case Tag Select a tag for then call if applicable
- Case Subject Briefly describe what the interaction is about;
- Case Description Provide more detail about the interaction, this will help out if the customer contacts again;
- Deadline Select a date from the calendar;
- Status Select whether the case is open (unresolved) or closed (resolved);
- Priority Select whether the case is 'Normal' or 'Urgent' from the drop down.
- Contact method Select how the customer got in contact with you

#### 2. Select Save

Case type*	Case subtype		Case tag	
General Enquiries	<ul> <li>Enquiry</li> </ul>	~	Select a case tag	~
Case Subject*				
Payment query				
Case description*				
Payment query, what action wa	as taken?			
Deadline	Status*			1
beddine	Open	~		
Priority*		Contact method	j*	
	×	Email		~

The Case will appear in the cases table.

Title	Status	Date
General Enquiries	V OPEN	09-Nov-2020
General Enquiries	* CLOSED	06-Nov-2020
Technical	* CLOSED	06-Nov-2020

### ADD A NOTE TO AN EXISTING CASE

1. Select View in the cases area

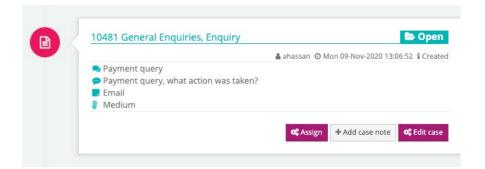
Title	Status	Date
General Enquiries	V OPEN	09-Nov-2020
General Enquiries	* CLOSED	06-Nov-2020
Technical	* CLOSED	06-Nov-2020

2. Located the case in the timeline view. You will see information on it's creation as well as the name of the person who created it and whether the note is open or closed.

108514 Mr Forename Smith Customer notes	VOU ARE HERE: Home + CBM + Mr Forename Senith + Cas K Close
Filter by case type	Ø Cear fiters ♣ Add
	210481 General Enquiries, Enquiry 2007
	Payment query     Payment query     Payment query, what action was taken?     Ernal     Medium
	C¢ Assign ♦ Add case note
10463 General Enquiries, Enquiry	IClosed B
▲ ahassan @ Fri 06-Nov-2020 10.53:12 & Cre ▲ ahassan @ Fri 06-Nov-2020 10.53:12 & Cle	ced
Billing date query     Customer called to query when billing date was. Advised the date, query reso     Email     Medium	
	open case
~	
23	10462 Technical, Investigation     Amasen @/md6.Nov-3020 1052.15 & Created
2	10462 Technical, Investigation     Closed

#### 3. Select Add case note button

Note – For a closed case, simply re-open the case to allow further notes to be added (re-opening cases is subject to your user role)



#### Add case note button displayed

10481 CASE NOTES		я
🗣 review case		
66 Still no update		
	🌡 ahassan 🥥 Mon 09-Nov-20	20 13:09:34
	+ Add note	Close

#### 4. Complete the subject and description

<b>\$</b> 10	481 CASE NOTES	ж
🗣 re	view case	
66 St	ill no update	🌡 ahassan 🧿 Mon 09-Nov-2020 13:09:34
2	Latest update	anassan @ Mon 09-Nov-2020 13:09:34
66	Payment due	
		Save Cancel

Note: If Add case note was selected then the Add Case Notes window will appear containing a case subject field and case notes field, complete these to add you new case notes:

<b>\$</b> 1048	81 CASE NOTES	×
®.		
		Save Cancel

5. Select Save

The case notes have now been saved and can be viewed by selecting View case notes

Success! Case note saved succe	ssfully.
🌣 10481 CASE NOTES	×
<ul> <li>Latest update</li> <li>Payment due</li> </ul>	<b>å</b> ahassan
🗣 review case <b>6</b> Still no update	🛔 ahassan 🧿 Mon 09-Nov-2020 13:09:34
	+ Add note Close

#### **EDIT AN EXISTING CASE**

You can edit a case once it's been created. This allows you to amend any fields that were completed when the case was created.

1. Click the Edit case button

Note - For a closed case, simply select re-open case to allow editing (subject to user access role)



2. Complete your changes to the case

Case type*		Case subtype			Case tag	
General Enquiries	~	Enquiry		~	Select a case tag	~
Case Subject*						
Payment query						
Case description*						
Payment query, what actic	on was take	n?				
Deadline		Status*				
		Open	~			
Priority*			Contact meth	nod*		
FHORICY			Email			~

3. Select Save to confirm your changes.

#### **FILTER CASE TYPES**

All the cases are displayed in a timeline view. This shows detail of the case including the date and a brief description.

You can filter the cases to find a case faster by selecting filter by case type from the drop down box available:

Filter by case type			
*			Clear filters + Add

### **BETA Customer cases**

#### **VIEW CUSTOMER CASES**

#### 1. Select Cases

All cases, active and closed, will be displayed.

thar by	Customer cases				Add cas
Case rolgiest	Type Subject	Priority	Date added	Status	
me Period Raised before Raised on	Billing Bill query Incorrect Bill	MEDIUM Due: 1 Jan 2021	<b>29 Jul 2021</b> 02:49:14	OPEN	Me
Raised after	Billing Incorrect Bill	MEDIUM Due: 1 Jan 2021	<b>29 Jul 2021</b> 02:48:16	CLOSED	Vie
lter Options		There are no	a further cases to load		
Dest type. Photose					
tee states 20058: •					
are plinty 20006					
Reset Apply filters					

#### Search cases

Search for a case by entering the case subject

#### Filter

- filter by date
- filter by case type
- filter case status
- filter by case priority

#### Add case

Add case is not yet available in BETA. Selecting Add case will display cases within the existing application.

### **Customer activity**

Customer interactions are recorded and accessed through Customer Activity. The Customer Activity section allows you to view the activities on an account in line with the customer journey. You can also filter these interactions by date, type or legacy to find the interaction you're looking for.

#### HOW TO VIEW THE INTERACTIONS

To see the interactions on an account:

- 1. Go to the Customer Dashboard
- 2. Select Customer Activity

dit your customers details and account info	rmation					_	Customer activity	/ X Close
CUSTOMER DETAILS		EDIT	* SUBSCRIPTIONS					VIEW
Customer ID 78f34650-87f4-4841-b3a7-24760d3e9d	41		Name		Status	Price	Referrer ID	Order ID
Mr Forename Smith ahassan@singuladecisions.com			Entertainment Monthly Su	bscription		£20.00 0		101873
Home address TV Company Company Address	Vimond ID		CUSTOMER ACCOU	NTS				VIEW
Company Address Company Address kyS8ea United Kingdom 0000000000	Refer a friend ScjgO0t8		Date 06-Nov-2020	✓ ACTIN	Status /E		Value Cree	dit £0.00
CASES		ADD VIEW	PAYMENT METHOD	5				C ADD
Title	Status	Date			REALEX VISA			
General Enquiries	* CLOSED	06-Nov-2020	VISA		444433xxx Mr Smith 01-2025	x1111		
Technical	* CLOSED	06-Nov-2020			01-2025			
General Enquiries	* CLOSED	06-Nov-2020	* ONE-OFF PURCHASE	S				VIEW
VIEWING CARD AND DEVICES		VIEW	Date Nam	e Pri	ce R(	eferrer ID	Orde	er ID
VIEWING CARD AND DEVICES  Platform T	ype Status	VIEW Start date	Date Nam	e Pri	ce Ri	eferrer ID	Orde	er ID

This will open the Customer Activity in a new window:

Customer Interacti	ions					
Filter by Reset filters	Foren	ame Smith (ahassa	an@singuladecisions.co	m)		х
View in legacy mode View actions that are not yet available in this activity timeline. You won't be able to filter these actions.	8	Email Sent a120af51-967c-4b27-b4da- f175cb6eb5d6	Action Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com></ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	VIEW SENT EMAIL
Select from date yyyy-mm-dd	Q,	Subscription Billing Success f1b9a871-6ab0-4eff-835d- ff24eeb98b44	Action Entertainment Monthly Subscription, Order ID 101873	Subscription Entertainment Monthly Subscription	<b>PW_SYSTEM</b> 6 Nov 2020 10:44:00	
Select to date						
yyyy-mm-dd ACTIVITY OPTIONS	**	New Purchase b902e62a-bcf4-4c95-8dbd- 70076845faf1	Action Subscription, Entertainment Monthly Subscription, Order ID 101873	Subscription Entertainment Monthly Subscription	<b>ahassan</b> 6 Nov 2020 10:44:00	
Select type Choose		New Payment Method c80fe5ca-a929-4f6b-a770- 5f1e3ced5b55	Action VISA 444433xxxx1111	PaymentMethod -	<b>ahassan</b> 6 Nov 2020 10:41:00	
APPLY FILTERS	Q.	New Customer Created 0e452688-769c-43d5-b399- c9dc0abed858	Action New Customer Created	2	<b>ahassan</b> 6 Nov 2020 10:39:00	
			There are no	further interactions to load	1	

#### **CUSTOMER ACTIVITY**

The Customer Activity window display all interactions that have taken place on the customer's account:

Filter by Reset filters		ame Smith (ahassa	an@singuladecisions.co	m)		×
View in legacy mode View actions that are not yet available in this activity immelie. You won't be able to filter these actions.	9	<b>Email Sent</b> a120af51-967c-4b27-b4da- f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com></ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	VIEW SENT EMA
Select from date yyyy-mm-dd	P.	Subscription Billing Success f1b9a871-6ab0-4eff-835d- ff24eeb98b44	Action Entertainment Monthly Subscription, Order ID 101873	Subscription Entertainment Monthly Subscription	<b>PW_SYSTEM</b> 6 Nov 2020 10:44:00	
Select to date			5 Q		2	
yyyy-mm-dd ACTIVITY OPTIONS		New Purchase b902e62a-bcf4-4c95-8dbd- 70076845faf1	Action Subscription, Entertainment Monthly Subscription, Order ID 101873	Subscription Entertainment Monthly Subscription	ahassan 6 Nov 2020 10:44:00	
Select type Choose		New Payment Method c80fe5ca-a929-4f6b-a770- 5f1e3ced5b55	Action VISA 444433xxxx1111	PaymentMethod -	<b>ahassan</b> 6 Nov 2020 10:41:00	
APPLY FILTERS	R	New Customer Created 0e452688-769c-43d5-b399- c9dc0abed858	Action New Customer Created	122 - R	<b>ahassan</b> 6 Nov 2020 10:39:00	
			<b>T</b> L	further interactions to load		

On the left you can filter the interactions by:

- Date (start and end)
- Activity (this list will only show the activities that are linked to an interaction completed on the account)

#### Legacy Interactions

Any interactions including those that are not yet part of the Customer Activity interactions can be found by selecting "View in Legacy mode'.

You cannot filter Legacy Interactions using the Date range or Activity.

Filter by Reset filters	Foren	ame Smith (ahass	san@singuladecisions.com)		
View in legacy mode View actions that are not yet available in this activity timeline. You won't be able to filter these actions.		Email sent	Bonjour Forename - sent to "Forename Smith" ≪ahassan@singuladecisions.com>	47969ea4-c7d6-4732-8d8d- a0fb364e97b9 6 Nov 2020 00:00:00	
	0	New Payment Details 8186	VISA/444433xxxxx1111	<b>ahassan</b> 6 Nov 2020 00:00:00	
	۲	New Customer Created 108514	Mr Forename Smith	<b>ahassan</b> 6 Nov 2020 00:00:00	
			There are no further interactio	ons to load	

#### **OVERVIEW OF INTERACTIONS**

Interactions are presented in order of newest first:

Email Sent a120af51-967c-4b27-b4da- f175cb6eb5d6	Action Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com></ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	VIEW SE
Subscription Billing Success f1b9a871-6ab0-4eff-835d- ff24eeb98b44	Action Entertainment Monthly Subscription, Order ID 101873	Subscription Entertainment Monthly Subscription	<b>PW_SYSTEM</b> 6 Nov 2020 10:44:00	
New Purchase b902e62a-bcf4-4c95-8dbd- 70076845faf1	Action Subscription, Entertainment Monthly Subscription, Order ID 101873	Subscription Entertainment Monthly Subscription	<b>ahassan</b> 6 Nov 2020 10:44:00	
New Payment Method c80fe5ca-a929-4f6b-a770- 5f1e3ced5b55	Action VISA 444433xxxx1111	PaymentMethod -	<b>ahassan</b> 6 Nov 2020 10:41:00	
New Customer Created 0e452688-769c-43d5-b399- c9dc0abed858	Action New Customer Created	* *	<b>ahassan</b> 6 Nov 2020 10:39:00	

Each will have it's unique icon as well as information about the interaction.

#### See the example below:

Q	<b>Email Sent</b> a120af51-967c-4b27-b4da- f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com></ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	VIEW SENT EMAIL
Q	<b>Email Sent</b> a120af51-967c-4b27-b4da- f175cb6eb5d6	Action Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com></ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	VIEW SENT EMAIL

Each interaction will display specific attributes.

The table below contains the full list of interactions that could be recorded, along with what information is found on each:

INTERACTIONS	ATTRIBUTES
Customer's Billing date has changed	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Billing Date Changed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of the Interaction</li> <li>- Change bill day 'from'</li> <li>- Change bill day 'to'</li> </ul>
Customer's subscription Account payment method has been changed	<ul> <li>Unique ID</li> <li>Title of interaction = 'Account Payment Method Changed'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>'from'</li> <li>'to'</li> <li>Associated subscription product</li> </ul>
Additional payment has been made to a Customer's subscription Account	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Additional Payment Made'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Payment method used</li> </ul>
Address changes made to a Customer's Account	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Address Details Modified'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Field name(s) that changed</li> </ul>
Customer's Account enters the Credit Control Cycle	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Credit Control Cycle Entered'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- DIBS acquirer response code</li> <li>- Klarna response Code</li> </ul>
Customer's Account leaves the Credit Control Cycle	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Credit Control Cycle Exited'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> </ul>
Customer's subscription Account is cancelled	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Cancelled'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name that has been cancelled</li> <li>- Subscription order ID</li> </ul>
Customer's subscription Account is scheduled to be cancelled	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Cancellation Scheduled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that has been cancelled</li> <li>Scheduled cancellation date</li> <li>Subscription order ID</li> </ul>
Customer's subscription Account scheduled cancellation is withdrawn	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Cancellation Withdrawn'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that was to be cancelled</li> <li>Subscription Order ID</li> </ul>

Customer's subscription Account is scheduled to be downgraded	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Downgrade Scheduled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that is to be downgraded 'from'</li> <li>Subscription product name that is to be downgraded 'to'</li> <li>Scheduled downgrade date</li> <li>Subscription Order ID</li> </ul>
Customer's subscription Account scheduled downgrade is withdrawn	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Downgrade Withdrawn'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name that was to be downgraded</li> <li>- Subscription Order ID</li> </ul>
Customer's subscription is changed	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Changed'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name 'from'</li> <li>Subscription product name 'to'</li> <li>Subscription Order ID</li> </ul>
Customer's subscription is renewed	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Renewed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name</li> <li>- Subscription Order ID</li> <li>- Discount name</li> <li>- Discount occurrence</li> </ul>
Customer's subscription is billed successfully	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Billing Success'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name</li> <li>- Subscription Order ID</li> <li>- Discount name</li> <li>- Discount occurrence</li> </ul>
Customer's subscription has failed billing	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Billing Success Failed'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name</li> <li>Subscription Order ID</li> <li>DIBS acquirer response code</li> <li>Klarna response Code</li> </ul>
Customer purchases a new product	<ul> <li>Unique ID</li> <li>Title of interaction = 'New Purchase'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Product name</li> <li>Product Order ID</li> <li>Discount name</li> <li>Total discount occurrences</li> <li>-</li> </ul>
New Customer is created	- Unique ID - Title of interaction = 'New Customer Created' - User ID (for Agent initiated action)

	- 'System' (for API or SSM initiated action) - Date/time stamp of Interaction
New payment method is added to a Customer account	<ul> <li>Unique ID</li> <li>Title of interaction = 'New Payment Method'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Masked PAN/Klarna details</li> <li>Current active subscription product (if available)</li> </ul>
Manual refund has been issued to a Customer	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Manual Refund Issued'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- to which the refund was issued</li> <li>- Refunded amount</li> <li>- Subscription Order ID</li> </ul>
Manual credit has been applied to a Customer account	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Manual Credit Added'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Credit amount</li> <li>- Account ID to which credit was applied</li> </ul>
Manual charge has been applied to a Customer account	<ul> <li>Unique ID</li> <li>Title of interaction = 'Manual Charge Added'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Charge amount</li> <li>Account ID to which charge was applied</li> </ul>
Customer's product entitlements have been refreshed	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Entitlements Refreshed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name</li> <li>- Subscription Order ID</li> </ul>
Customer's account has been anonymised	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Customer Anonymised'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> </ul>
Customer has been sent an email receipt	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Email sent'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Email (receipt) Subject</li> <li>- Customer To: email address</li> </ul>
Customer's subscription is scheduled to be paused	<ul> <li>Unique ID</li> <li>Title of interaction = 'Pause Scheduled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Scheduled date on which Pause will take place</li> <li>Number of months Paused for</li> <li>Subscription product name that is to be paused</li> <li>Subscription Order ID</li> </ul>
Customer's subscription is paused	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Pause Activated'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Number of months Paused for</li> </ul>

	- Subscription product name that is paused - Subscription Order ID
Customer's scheduled paused subscription is cancelled	<ul> <li>Unique ID</li> <li>Title of interaction = 'Scheduled Pause cancelled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that was paused</li> <li>Subscription Order ID</li> </ul>
Customer's scheduled paused subscription is ended early	<ul> <li>Unique ID</li> <li>Title of interaction = 'Pause Ended Early'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that was paused</li> <li>Subscription Order ID</li> </ul>
Customer's scheduled paused subscription has ended	<ul> <li>Unique ID</li> <li>Title of interaction = 'Pause Ended'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that was paused</li> <li>Subscription Order ID</li> </ul>
Customer's subscription has failed billing resubmission within the CCC	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Billing Resubmission Failed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name</li> <li>- Subscription Order ID</li> <li>- DIBS acquirer response code</li> <li>- Klarna response Code</li> </ul>

#### VIEWING AND RESENDING AN EMAIL

If an email has been sent to a customer due to an interaction, you will be presented with an option to view the email:

Q.	Email Sent a120af51-967c-4b27-b4da- f175cb6eb5d6	Action Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com></ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	VIEW SENT EMAIL
----	--	--	----------------------------------	---------------------------------------	-----------------

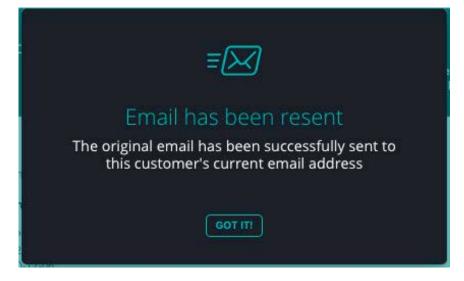
The sent email will be displayed in a pop-up window.

The pop-up will show the email that was sent to the customer and you will have the option to resend it, simply by clicking 'resend email':

Checkout success	Forename Smith	×
Bonjour Forename	Sent to: ahassan@singuladeci Sent From: no_reply@devel.pa 6 November 2020 10:44:00	sions.com iywizard.com
Mr Forename Smith		
Your Purchase		
Your Subscription Purchase: Entertainment Monthly Subscription Recurring Charge: 20.00 GBP Renewal Date: 2020-12-06		
Contract Term: 1 MONTH		
Masked Pan: 444433xxxx1111		
Order Number:101873 Total cost:32.00 GBP		
Purchase date: 2020-11-06		
Sincerely,		
Just a we statement from me		
Mantra 1. Sweep the Sheds		
"Never be too big to do the small things that need to be done."		
-Return to interactions	Email not received?	RESEND EMAIL

A confirmation message will appear on screen confirming the email has been resent.

Emails will be sent out immediately to the customer's registered email address.



### **BETA Customer activity**

#### **VIEW ACTIVITY**

- 1. From the Customer Account select Recent Activity
- 2. All customer actions will be displayed in a timeline
- 3. You can filter actions by date and type of activity

ingula Decisions			Products      Marketing      C	Customers ~			(BH
Mr Chris Lloyd 11293	89 метни						Return to search resul
	_	CUSTOMER ACCOUNT CUSTOMER DET	AILS PRODUCTS VIEWING CARDS	CASES RECENT ACTIVITY	PAYMENT DETAILS		
War by							
Wiew in legacy mode	6	SUBSCRIPTION BILLING RESUBMISSION FAILED	ACTION		BUBSCRIPTION.	PW, SYSTEM	
New actions that are not yet available in his activity timeline. You won't be able to							
iter these actions.		SUBSCRIPTION BILLING RESUBMISSION FAILED	ACTION		SUBSCRIPTION	PW_SYSTEM	
Select from data							
Select to date	9	SUBSCRIPTION BILLING RESUBMISSION FAILED	ACTION		SUBSCRIPTION	PW_SYSTEM	
1							
Activity optimize	(9)	SUBSCRIPTION BILLING RESUBMISSION FAILED	ACTION.		BUBSICRIPTION	PW_SYSTEM	
Reset Apply filters	1.1						
Reset	-59	SUBSCRIPTION BILLING RESUBMISSION PAILED	ACTION		SUBSCRIPTION	PW_SYSTEM	
	(19)	SUBSCRIPTION BILLING SUCCESS	ACTION		SUBSCRIPTION	PW_SYSTEM	
	(B)	SUBSCRIPTION BILLING FAILED	ACTION		SUBSCRIPTION	PW_SYSTEM	
	(1)	CREDIT CONTROL CYCLE ENTERED	ACTION		SUBSCRIPTION	PW, SYSTEM	
		EMAIL SENT	ACTION		EMAIL	CLLOYD	View email

#### Legacy mode

Actions that are not yet part of the customer activity can be found by selecting 'View in Legacy mode'.

You cannot filter legacy actions using the date range or activity type options.

#### **ACTIVITY ITEMS AVAILABLE IN BETA**

The table below contains the full list of actions that could be recorded on a customer account.

INTERACTIONS	ATTRIBUTES
Customer's Billing date has changed	<ul> <li>Unique ID</li> <li>Title of interaction = 'Billing Date Changed'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of the Interaction</li> <li>Change bill day 'from'</li> <li>Change bill day 'to'</li> </ul>
Customer's subscription Account payment method has been changed	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Account Payment Method Changed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- 'from'</li> <li>- 'to'</li> <li>- Associated subscription product</li> </ul>

Additional payment has been made to a Customer's subscription Account	<ul> <li>Unique ID</li> <li>Title of interaction = 'Additional Payment Made'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Payment method used</li> </ul>
Address changes made to a Customer's Account	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Address Details Modified'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Field name(s) that changed</li> </ul>
Customer's Account enters the Credit Control Cycle	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Credit Control Cycle Entered'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- DIBS acquirer response code</li> <li>- Klarna response Code</li> </ul>
Customer's Account leaves the Credit Control Cycle	- Unique ID - Title of interaction = 'Credit Control Cycle Exited' - User ID (for Agent initiated action) - 'System' (for API or SSM initiated action) - Date/time stamp of Interaction
Customer's subscription Account is cancelled	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Cancelled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that has been cancelled</li> <li>Subscription order ID</li> </ul>
Customer's subscription Account is scheduled to be cancelled	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Cancellation Scheduled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that has been cancelled</li> <li>Scheduled cancellation date</li> <li>Subscription order ID</li> </ul>
Customer's subscription Account scheduled cancellation is withdrawn	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Cancellation Withdrawn'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name that was to be cancelled</li> <li>- Subscription Order ID</li> </ul>
Customer's subscription Account is scheduled to be downgraded	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Downgrade Scheduled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that is to be downgraded 'from'</li> <li>Subscription product name that is to be downgraded 'to'</li> <li>Scheduled downgrade date</li> <li>Subscription Order ID</li> </ul>
Customer's subscription Account scheduled downgrade is withdrawn	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Downgrade Withdrawn'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name that was to be downgraded</li> <li>- Subscription Order ID</li> </ul>
Customer's subscription is changed	- Unique ID - Title of interaction = 'Subscription Changed' - User ID (for Agent initiated action)

	- 'System' (for API or SSM initiated action) - Date/time stamp of Interaction
	- Subscription product name 'from' - Subscription product name 'to' - Subscription Order ID
Customer's subscription is renewed	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Renewed'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name</li> <li>Subscription Order ID</li> <li>Discount name</li> <li>Discount occurrence</li> </ul>
Customer's subscription is billed successfully	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Billing Success'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name</li> <li>Subscription Order ID</li> <li>Discount name</li> <li>Discount occurrence</li> </ul>
Customer's subscription has failed billing	<ul> <li>Unique ID</li> <li>Title of interaction = 'Subscription Billing Success Failed'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name</li> <li>Subscription Order ID</li> <li>DIBS acquirer response code</li> <li>Klarna response Code</li> </ul>
Customer purchases a new product	<ul> <li>Unique ID</li> <li>Title of interaction = 'New Purchase'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Product name</li> <li>Product Order ID</li> <li>Discount name</li> <li>Total discount occurrences</li> <li>-</li> </ul>
New Customer is created	- Unique ID - Title of interaction = 'New Customer Created' - User ID (for Agent initiated action) - 'System' (for API or SSM initiated action) - Date/time stamp of Interaction
New payment method is added to a Customer account	<ul> <li>Unique ID</li> <li>Title of interaction = 'New Payment Method'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Masked PAN/Klarna details</li> <li>Current active subscription product (if available)</li> </ul>
Manual refund has been issued to a Customer	<ul> <li>Unique ID</li> <li>Title of interaction = 'Manual Refund Issued'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>to which the refund was issued</li> <li>Refunded amount</li> <li>Subscription Order ID</li> </ul>
Manual credit has been applied to a Customer account	- Unique ID - Title of interaction = 'Manual Credit Added' - User ID (for Agent initiated action)

	<ul> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Credit amount</li> <li>Account ID to which credit was applied</li> </ul>
Manual charge has been applied to a Customer account	<ul> <li>Unique ID</li> <li>Title of interaction = 'Manual Charge Added'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Charge amount</li> <li>Account ID to which charge was applied</li> </ul>
Customer's product entitlements have been refreshed	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Entitlements Refreshed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name</li> <li>- Subscription Order ID</li> </ul>
Customer's account has been anonymised	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Customer Anonymised'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> </ul>
Customer has been sent an email receipt	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Email sent'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Email (receipt) Subject</li> <li>- Customer To: email address</li> </ul>
Customer's subscription is scheduled to be paused	<ul> <li>Unique ID</li> <li>Title of interaction = 'Pause Scheduled'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Scheduled date on which Pause will take place</li> <li>Number of months Paused for</li> <li>Subscription product name that is to be paused</li> <li>Subscription Order ID</li> </ul>
Customer's subscription is paused	<ul> <li>Unique ID</li> <li>Title of interaction = 'Pause Activated'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Number of months Paused for</li> <li>Subscription product name that is paused</li> <li>Subscription Order ID</li> </ul>
Customer's scheduled paused subscription is cancelled	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Scheduled Pause cancelled'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name that was paused</li> <li>- Subscription Order ID</li> </ul>
Customer's scheduled paused subscription is ended early	<ul> <li>Unique ID</li> <li>Title of interaction = 'Pause Ended Early'</li> <li>User ID (for Agent initiated action)</li> <li>'System' (for API or SSM initiated action)</li> <li>Date/time stamp of Interaction</li> <li>Subscription product name that was paused</li> <li>Subscription Order ID</li> </ul>
Customer's scheduled paused subscription has ended	- Unique ID - Title of interaction = 'Pause Ended' - User ID (for Agent initiated action) - 'System' (for API or SSM initiated action)

	- Date/time stamp of Interaction - Subscription product name that was paused - Subscription Order ID
Customer's subscription has failed billing resubmission within the CCC	<ul> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Billing Resubmission Failed'</li> <li>- User ID (for Agent initiated action)</li> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> <li>- Subscription product name</li> <li>- Subscription Order ID</li> <li>- DIBS acquirer response code</li> <li>- Klarna response Code</li> </ul>

### **Customer codes**

#### **REFER A FRIEND CODE**

- 1. From the Customers tab select 'Check code'
- 2. Ensure Refer a friend is selected
- 3. Enter the code
- 4. Select Search

Your search results will be displayed.

•••						
Singula Decisions		📾 Pr	oducts 😔 Marketing 🖌 😳	Customers ~		(an) •
			heck customer co			
					_	
	Refer a friend	~	8ESMJ0k0	AT MULTIPLE	۹	
	n	ie code BESM	1J0k0 is valid and active for Mr Chris Lloyd	up to 8 ch. d with CSN 112939		
			VIEW ACCOUNT			
Subscribe Management   62021 lingula Dermona Limitet el Minga						singula decisions

A valid code

•••			
Singula Decisions	en Pr	oducts 🛞 Marketing 👻 🔘 Customers 🗸	(GH) ~
		heck customer code	
	Refer a friend 🗸 🗸	000000	
		8ESMJ0k1 Q	
	ouny use reter a t	ranna sana analani sa na ranna ranna ranna a gagara	
Subscriber Management   62021 Bingula Decimina Limited vit Minga		singula d	ecisions

An invalid code

#### SINGLE USE PROMO CODE

- 1. From the Customers tab select Check code
- 2. Ensure Single use promo code is selected
- 3. Enter the code
- 4. Select Search

Your search results will be displayed.



### **BETA Customer codes**

#### **REFER A FRIEND CODE**

- 1. From the 'Customers' tab select 'Check code'
- 2. Ensure 'Refer a friend' is selected
- 3. Enter the code
- 4. Select 'Search'

Your search results will be displayed.

•••				
Singula Decisions	es Pr	oducts 🛞 Marketing 🗸 🔘 Customers 🗸		(it) ~
	C	neck customer code		
		Enter the curtomer's code to check its status		
	Refer a friend 🗸 🗸	8ESMJ0k0	Q	
	The code #ESM	JORO is valid and active for Mr Chris Lloyd with CSN 112939 VIEW ACCOUNT		
Subcorder Managerer/ (3202) Singula Decisiona Limited eksterja				singula decisions

#### An example of a valid refer a friend code

•••		
Singula Decisions	I Products 🛞 Marketing 🗸 🕲 Customers 🗸	œ ·
	Check customer code	
	Finter the curtomer's code to check to vitatual	
	Refer a friend ~ 8ESMJ0k1 Q	
	Sorry the refer a friend code #ESMJQk1 is not valid. Please check and try again.	
Subscriber Management ( 02021 Singula Despons Limited vicitings		singula decisions

An example of an invalid refer a friend code

#### SINGLE USE PROMO CODE

- 1. From the 'Customers' tab select 'Check code'
- 2. Ensure 'Single use promo code' is selected
- 3. Enter the code
- 4. Select 'Search'

Your search results will be displayed.

#### **CUSTOMER REFUND**

The process of providing a refund is done within the Customer Accounts section. The refund will go back to the payment method used for the subscription or the purchase.

#### **TO PROCESS A REFUND:**

1. Click the View button in the top right corner of the Customer Accounts section:

CUSTOMER ACCOUN	115	VIEW
Date	Status	Value
02-Dec-2019	✓ ACTIVE	Credit £0.00

#### 2. Click the Refund button against the payment in the Account statement

	CCOUNT SUMMARY							CI RESET FILTER
Account ID	Last Activity	Account Type	Status	Balance	Product Name	Orde	r ID	Actions
4794	02-Dec-2019	Service	- ACTIVE	£0.00 Mont	hly Sports Extra	101862		Ξ 🚥 🕇
ACCOUNT ID	14794: STATEMENT						CREDIT BA	LANCE: £0.0
D ACCOUNT ID Date	14794: STATEMENT	Description		Status	Charges	Credits	CREDIT BA Balance	LANCE: £0.0
		Description r 02-12-2019 to 01-12-2020			Charges £5.99	Credits		LANCE: £0.0



This will open the Refund Payment window

Refund amount £5.99		
Refund reason*	÷	
	Cancel	Confirm

- 3. Confirm the refund amount and select the refund reason
- 4. Click Confirm to action the refund

The Refund successful message will be displayed along with an entry in the Account statement for the refund:

Date	Description	Status	Charges	Credits	Balance
			energes	1	
)3-Dec-2019	Refund Credit	AUTHORISED		£5.99	£0.0
03-Dec-2019	Refund Payment	AUTHORISED		£(5.99)	£5.9
02-Dec-2019	Repeating Charge for 02-12-2019 to 01-12-2020		£5.99		£0.0
02-Dec-2019	Payment	REFUNDED		£5.99	£(5.99

### **Customer devices and platforms**

The Viewing card and devices box gives a quick glance of the customer's viewing card number (VCN) and any devices associated to their account.

You can check statuses of Viewing Cards and Devices as well as add and deactivate them.

To view more details of the customer's viewing card and devices, click the View button at the top right of the box. This will open the Manage viewing cards and platforms and devices page:

VIEWING CARD AND D	LVICL5		VI
		Status	Start date

The Devices and platforms table allows you to view, add and manage a customer's device:

GILE   4009895 Dr	Davis Nerbit			YOU ARE HERE. Home > CRM	> Dr Davis Nerbit > Devi
nage viewing cards, platform	ns and devices				× Close
MANAGE VIEWING C	ARD 203000104				
Mr D Nerbit	PIN		Sec-Top Box Number	Number of kin	
Paywizard	1234		1234561234567890		
Grkcaldy	PIN Past	word	Card status	Credit limit	
Manage this viewing card	123456		A	10.00	
	Undelive	red card count	Status description		
	1		Active		
DEVICES AND PLATE	ORMS				+ ADC
	Platform	Туре	Identification Code	Status	Actions
Device ID	Platform				

The Devices and platforms table displays the following information:

- Device ID;
- Platform E.g. iPad, Ridacard;
- Type;
- Identification code;
- Status Shows if the device is currently active or inactive;
- Actions Select the appropriate button to validate or re-validate a device

### Add a Device

1. Click the + Add button at the top right of the table to add a device to the customer's account.

This will display the Add device window:

ADD DEVICE			3
Platform*	Device type*		
Nagra Cardless	\$ Set Top Box		\$
Identification code*			
		Cancel	Confirm

- 2. Complete the details:
  - Platform Select the customer's platform from the drop down e.g. iPad;
  - Device type When a platform is selected this field will be pre-populated with the related device type. Alternatively, you can select another device type from the drop down if there are alternative options available;
  - Identification code Enter the identification code of the device;
  - Network device ID (this field will only appear depending on the platform selected)

#### Note: Fields marked with a \* are mandatory.

3. To validate a device, click the Chain button at the right of the table to open the Validate device window:

DEVICES AND PLATFORMS +ADD								
Device ID	Platform	Туре	Identification Code	Status	Actions			
3852	IPAD	IPAD	123456	Active	8 0			

4. Click Confirm to go ahead with the validation, otherwise click Cancel.



### **Customer Sky viewing card**

If a customer has issues with their Sky viewing card or their viewing, you can complete viewing card related actions to resolve the issue.

1. Click on View in the Viewing Card and Devices section:

VIEWING CARD AND D	EVICES		VIEW
Platform	Туре	Status	Start date

#### Click on Manage this viewing card:

AGILE   4009912 Miss Sop	hie lura		YOU ARE HERE: Home > CRM > N
Manage viewing cards, platforms and de			× Close
MANAGE VIEWING CARD 2	03000153		
Miss S Jura	PIN	Set-Top Box Number AB11223312222118	Number of kin
Cluny Court John Smith Business Park Kirkcaldy	PIN Password	Card status	Credit limit 50.00
Manage this viewing card	Undelivered card count	Status description	

The following options are presented when you click the Manage this viewing card button:

Manage this viewing card
C Re-pair
<b> ⇒</b> Replace
🔁 Re-authorise
🖒 First Authorisation
<b>ບ</b> Re-enable free-to-air
Re-issue undelivered card
🚠 Card/Set-top box relationship
PIN and ratings
𝗞 Pay-per-view credit limits
🔚 EPG dial prefix
% Resend all bits

#### **RE-PAIR**

A request can be sent to re-pair the viewing card with the customer's set top box number.

Click on this option and the Re-pair window will show asking if you want to send a message to re-pair the card.

Click Confirm to go ahead otherwise click Cancel.

#### REPLACE

If a customer requires a replacement card we can arrange for one to be sent out.

 Replace function – The function to be performed, select either 'Replace' to request a replacement or 'Cancel' to cancel the original request;

Reason code - Select a reason for the replacement or cancellation of the card from the drop down;

Special delivery included – Select 'Yes' for the replacement card to include special delivery otherwise select 'No'.

2. Select Confirm to go ahead with the change.

#### CALLBACK

Allows a message to be sent to the viewing card requesting the set top box to callback.

1. Select Confirm to go ahead otherwise click Cancel.

#### **RE-AUTHORISE**

Allows you to send a message to re-authorise the viewing card.

- 1. Select Re-authorise
- 2. Select Confirm to go ahead otherwise click Cancel.

#### **FIRST-AUTHORISATION**

If a customer is using a viewing card for the first time, a first authorisation needs to be carried out to activate viewing.

- 1. Enter the following information in the First authorisation box:
  - Version number The viewing card version number;
    - Serial number The serial number on the viewing card.
- 2. Select Confirm to go ahead.

#### **RE-ENABLE FREE-TO-AIR**

A user can use a Sky box without a subscription by viewing Free-To-Air (FTA) channels. If a customer loses viewing, we can send a request to re-enable FTA channels.

- 1. Select Re-enable
- 2. Select Confirm' to go procedd otherwise click Cancel.

#### **RE-ISSUE UNDELIVERED CARD**

A customer can request a viewing card to be reissued if a previous card was undelivered.

- 1. Select Re-issue undelivered card
- 2. Select Confirm' to proceed otherwise click Cancel.

#### **CARD/SET-TOP BOX RELATIONSHIP**

The relationship between the card and the customer's set top box can be set

- 1. Select Card/set top box relationship
- 2. Enter the following details:

- Version number The card version number;
- Serial number The serial number on the card.
- 3. Select Confirm to proceed

#### **PIN AND RATINGS**

Allows you to set pin and ratings for viewing card.

- 1. Select PIN and ratings
- 2. Enter the following details:
  - PIN The Personal Identification Number (PIN) for the customer's viewing card e.g. 1234;
  - Spend limit Enter the customers spend limit. You cannot enter more than the predefined limit set by an administrator;
  - Password Enter the password;
  - Ratings Select a rating to view certain content e.g. any content with a 15 and above rating will require a PIN.
- 3. Select Confirm to proceed

#### **PAY-PER-VIEW CREDIT LIMITS**

Allows you to enter a pay per view credit limit (you cannot enter an amount higher than the default amount set by an administrator).

- 1. Select Pay-per-view credit limits
- 2. Enter an amount in the 'Limit' field e.g. 50.00.
- 3. Select Confirm to proceed

#### **EPG DIAL PREFIX**

Sky boxes can make a dial up internet connection to Sky's servers via the telephone line, this is used to transfer information about PPV purchases and ensure multi-room boxes are in the same household.

The EPG dial fix allows you to change the prefix that is dialled before the Electronic Programme Guide (EPG) callback phone.

- 1. Select EPG dial prefix
- 2. Enter the dial prefix number maximum of 10 characters from "#^0123456789
- 3. Select Confirm to proceed

#### **RESEND ALL BITS**

Request to resend personal settings to the card.

- 1. Select Resend all bits
- 2. Select Confirm to proceed

### **Inbox messages**

Inboxes are used to handle Cases. System Users can be assigned to Inboxes such as 'Finance', 'Customer Service' or 'Technical'.

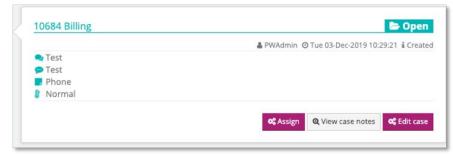
Cases can then be assigned to an Inbox where a User may take ownership and 'handle' the Case eg a Finance User might take ownership of a Case in the Finance Inbox that had been raised where a Customer had complained about poor video quality.

The Finance User could then handle the case by offering a refund or a credit and thereby close the Case and Inbox entry.

#### SENDING AN INBOX MESSAGE

Inbox messages are sent via a customer case note.

1. Select Assign at the bottom of a case note:



#### This will open the Assign a case window:

Action*		Priority*		
Select an action	•	Select a pri	ority	•
nbox*	Due type*		Due date*	
Select the inbox	<ul> <li>Select the d</li> </ul>	ue type 💌		<b>#</b>
Nessage				

- 2. Complete the fields of the Assign a case window, as follows:
  - Action Any action to be taken as the result of this inbox message. Select an option from the drop-down list;
  - Priority The priority attached to this inbox message e.g. high;
  - Inbox Select an inbox from the drop down;
  - Due type When any action to be taken as the result of this inbox message is due;
  - Due date Select a date from the calendar for when the inbox is due to be resolved;
  - Message Enter the inbox message clearly outlining any action expected by the customer.

#### Fields marked with a \* are mandatory.

3. Select Assign to send the inbox message.

### **Viewing Inbox messages**

#### Providing you have access to view inboxes:

- 1. Go to the Search customers screen
- 2. Select View inbox

NT   Search custo						YOU ARE HERE: Home > (
SEARCH						
Customer refe	ence	Post / ZIP	code	Viewing card number		
First name	First name		Last name		Email	
Username		Payment	method	Telephone number		
ALL INBOXES			Search Clear			
Inbox	Overdue	Due today	Next three days	Next seven days	Not yet due	
Test Inbox	1	0	0	1	0	
Test	4	0	0	0	0	
Callback	2	0	0	0	0	

The All Inboxes table shows up to date Inbox message statuses from all the Inboxes you have access to. This includes the status on when they are due to be actioned and if they're overdue. This will open the Inboxing page:

ONNIER   Inboxir	ng									YOU ARE HERE	And the second second	× Clos
MAINTAIN INBO	X MESSAGES										Cle	ar filters
Filter inbox All	¢	Filter priority		Filter action	1	Filter importance  All	Filter owner			Filter box type Inbox		0
Inbox name	Action id	Priority	Importance	Owned by	Action	Reference		Туре	Date due	2	Actions	
Customer Service	100118	HIGH	Overdue		INFORMATION	CASE 10121 Why have been cancelle	d7	Before	29-May-2019	i 🔒 🖾	× *	8 0
Customer Service	100122	HIGH	Overdue		INFORMATION	CASE 10125 Payment Card Enquiry		Before	12-jun-2019	1 6 5	× *	8 0
Customer Service	100131	LOW	Overdue		REFUND	CASE 10261 new case		Before	24-jun-2019	i @ 5	× 1*	80
Customer Service	100128	HIGH	Overdue		CLAIM	CASE 10209 Mandatory!		Before	25-Jun-2019	i @ 5	× 1*	8 0
Customer Service	100130	HIGH	Overdue		CLAIM	CASE 10260 Drpå zero test 1			15-Aug-2019	i 🔒 5	× *	8 0
Customer Service	100140	HIGH	Overdue	clioydBBR	REFUND	CASE 10482 Sort Billing		Before	09-Oct-2019	i @ 5	×	8 0
Customer Service	100146	HIGH	Overdue	clloydBBR	INFORMATION	CASE 10582 Payment Card Enguiry		Before	13-Nov-2019	i 6 5	×	80

Note: You will only be able to see the 'All inboxes' table if you are assigned to view inboxes.

Above the Maintain inbox messages table there are filters allowing you to search for specific inbox information.

You can search for an inbox by name, priority, action, importance or owner, select a filter from one of the drop downs to automatically display the related inbox information.

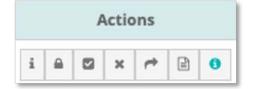
### **Inbox actions**

Inboxes are used to handle Cases. System Users can be assigned to Inboxes such as 'Finance', 'Customer Service' or 'Technical'.

Cases can then be assigned to an Inbox where a User may take ownership and 'handle' the Case eg a Finance User might take ownership of a Case in the Finance Inbox that had been raised where a Customer had complained about poor video quality.

The Finance User could then handle the case by offering a refund or a credit and thereby close the Case and Inbox entry.

There are several inbox actions that can be carried out, these are explained below:



#### SHOW INBOX MESSAGE

To view the message associated to an inbox click the 'I' button in the Actions section. This will reveal a box below the inbox containing the message:

Overdue	CLAIM	CASE 10161 Cancel	Before
	Overdue	Overdue	Overdue CLAIM CASE 10161 Cancel

#### **TAKE OWNERSHIP OF AN INBOX**

If the recipient of an inbox message has the knowledge and authority to deal with actions regarding an inbox message he/she can take ownership of the message and take the appropriate action.

To take ownership of an inbox, click the 'Lock' button in the Actions section. Your name will appear in the 'Owned by' field of the 'Maintain inbox messages' table confirming you've taken ownership of that inbox and a success message will appear confirming you own that inbox.

Inbox name	Action id	Priority	Importance	Owned by	Act
Customer Service	100124	HIGH	Overdue	PWAdmin	CLAIM

#### MARKING INBOX MESSAGES AS COMPLETE

When an inbox has been dealt with by the relevant people you can mark it complete by clicking the 'tick' button in the Actions section.

The inbox will now be removed from the 'Maintain inbox messages' table along with a success message at the top confirming the action.

### Success! 100124 is now marked as complete

#### **CANCELLING INBOX MESSAGES**

If an inbox needs to be cancelled click the 'cross' button in the Actions section.

The inbox will now be removed from the 'Maintain inbox messages' table and a success message will appear confirming the inbox has been cancelled.



#### FORWARDING INBOX MESSAGES

If the recipient of an inbox message is unable to deal with a message for any reason, they can forward it to another inbox to be handled by someone else.

To forward an inbox message click the 'forward arrow' button in the Actions section.

The 'Forward inbox message' window will be displayed:

nbox*	Due type*	Due date*	
	•	•	
lessage			

Fill in the following fields:

Inbox – Select another inbox to send the message to;

Due type -

Due date - Click on this field to reveal a calendar to select the due date from;

Message - Provide more detail about the inbox.

Fields marked with a \* are mandatory.

Click 'Forward' to go ahead, otherwise click 'Cancel'. The inbox message will now be sent to another recipient.

#### **VIEWING A CASE RELATED TO AN INBOX**

To view the case note associated to the inbox click the 'Note' button and this will open the 'Maintain case' pop up window:

🕸 MAINTAIN CASE			×
100490 Tech Suppo	rt No Sound		S OPEN
& O Mon 16-Jan-2017 11:	47:28		
Subject			
No sound on the TV			
Description			
No sound on the TV fo	or forward inbox message		
Case notes			
Add note	Open customer	Close	Close and save

This will provide more insight into the inbox message. You can gather more information by opening the customer record, the 'Open customer' button will do this.

You can also add a note to the case by clicking the 'Add note' button.

If any additional actions were carried out, click the 'Close and save' button otherwise click 'Close'.

### **Customer access PIN**

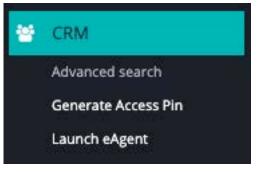
This functionality allows you to generate an Access PIN to give Non-DSAT Customers access to streaming services.

For a customer to register and access their product or service through a streaming service they will need to complete an online form which requires their Access PIN.

This Access PIN is unique to their Purchase or Subscription and they may get in touch to find out their Access PIN.

You can use Singula Subscriber Management to view their Access PIN and provide them with it or generate an Access PIN for them if one hasn't been generated before.

- 1. Select CRM
- 2. Select Generate Access PIN:



3. Search for the customer using their CSN

	Cu	stomer PIN	١	
	Check of	generate customer acces	PIN	
CSN				Q
min. 3 number				

4. The customer's details will populate, if an Access PIN has already been generated it will appear here:

5.

		Customer PIN Check or generate customer access PIN	
CSN	108439		٩
	min. 3 numbers	Mr Chris Lloyd username: clloyd1@tv4dev.com	

If an Access PIN is not visible, there will be a button to click called 'Generate PIN', simply click this and a PIN will populate:

		Customer PIN Check or generate customer access PIN	
SN	108439		٩
	min. 3 numbers	Mr Chris Lloyd username: clloyd1@tv4dev.com	
		Generate PIN	

### INSIGHTS

### **Insight dashboard**

The Insight Dashboard gives you a quick, real-time view of customer subscription movements, reinstatements, cancellations, enablements, one-off purchases and cases.

1. Select Insight in the main menu.

singula decisions			👗 Greg Herd 오
≡ # Home	Orange Vision   Insight Helping you understand your customer behaviour		VOU ARE HERE: Home 3 insight Downloads
<ul> <li>★ Services</li> <li>● Marketing</li> <li>♦ CRM</li> </ul>	TODAY'S SUBSCRIPTIONS	TODAY'S REINSTATEMENTS IMPERIENT	TODAY'S CANCELLATIONS IMPRIVIEW
CD Finance  Insight  Configuration	NEW SUBSCRIPTIONS TODAY O down 100% compared to the same time last week	NEW REINSTATEMENTS TODAY 0 no change compared to the same time last week	NEW CANCELLATIONS TODAY O no change compared to the same time last week
Support	TODAY'S ENABLEMENTS IMPRIVEW	NEW ONE-OFF PURCHASES MIREWEW	TODAY'S CASES PER HOUR
	no charge compared to the same time last week	ro charge compared to the same time last week	to change compared to the same time list week

#### What can I see and do?

- Hovering your cursor over the graph line reveals statistics for that time period
- Comparisons of the day against the same day, last week
- Access detailed real-time reports
- Access a secure download area

#### SUBSCRIPTION MOVEMENTS

- 1. Select Insight in the main menu.
- 2. Select Review within the Today's subscriptions widget. You can also access subscription movements from Today's Reinstatements and Today's Cancellations widgets

- The real-time subscription movement report details customer additions, reinstatements and cancellations. Beginning at midnight, the report is updated every time you click Refresh details
- Additions/Reinstatements shows the number of customers that have joined (addition) or returned (reinstated) for that day and when it happened. Hovering your cursor over the bar graphs allows you to see the statistics
- Pending Cancellations reveals the number of scheduled cancellations (when customer chooses to cancel) for that day and when that happened
- A view showing 24-hours of activity
- Analyse your data further by downloading a detailed report in the either Excel or CSV. Select Export Details
- Filter views by toggling items within the legend

singula decisions				🛔 Greg Herd 🛛	
<b>.</b>	Orange Vision   Real time insight Monitor todays subscription movements		you are	HERE: Home > Insight > Real time insight Report Date 16-Sep-2021	
<ul><li>₩ Home</li><li>★ Services</li></ul>	Last refreshed at 11:03			C Refresh details A Export details	
Marketing     CRM     CRM     Finance     Insight     Configuration     Support	ADDITIONS/REINSTATEMENTS	16 17 18 19 20 21 22 23	PENDING CANCELLATIONS source of the second	z 3 4 5 6 7 8 9 10 11 12 13 34 15 36 17 38 19 20 21 22 23 Hour	
	Additions Reinstatements		Pending cancellations		
	Movement Type Additions	AA Racing Front Monthly	Product	Count	
	Items per page 5 ×				

#### **ENABLEMENTS**

- 1. Select Insight in the main menu.
- 2. Select Review within the Enablements widget

- The real-time enablement report details the number of viewing enablements sent by the subscriber management platform.
- Enablements are segmented into Additions and Reinstatements detailing the number of new enablements or enablements because of a customer returning. Hovering your cursor over the bar graphs allows you to see the statistics
- A view showing 24-hours of activity
- Analyse your data further by downloading a detailed report in the either Excel or CSV. Select Export Details
- Filter views by toggling items within the legend

singula decisions					👗 Greg Herd 🛛
≡ #r Home	Orange Vision   One-off purchase insight Monitor your current one-off purchase activity		YOU ARE HERE	Home > Insight > One-off purchase insight Report Date 16-Sep-2021	
* Services	Last refreshed at 11:27				C Refresh details 📥 Export details
Marketing	ENABLING CONTRACTS		ONE-OFF PURCHAS	SE BUYS	
쓸 CRM					
회 Finance	ments				
🗂 Insight	e enable	sóng o			
Configuration	Number of endlements				
Support	22 -1 0 1 2 3 4 5 6 7 8 9 10 11 11 Hour Additions 🦲 Rein			4 5 6 7 8 9 10 11 12 13 14 15 Hour Show Al 10 IPPV 017 10 Sky CA	
	One-off purchase buys by product: 16 September 202	1			
	Product	IPPV	TTO	Sky CA	Total
	Total:	0	0	0	0
	Items per page 5 *				

#### **ONE-OFF PURCHASES**

- 1. Select Insight in the main menu.
- 2. Select Review within the One-off purchase widget

- The real-time enablement report details the number of successful one-off purchases
- One-off purchase are segmented into the type of product for example pay per view, conditional access and access pass
- A view showing 24-hours of activity
- Analyse your data further by downloading a detailed report in the either Excel or CSV. Select Export Details
- Filter views by toggling items within the legend

singula decisions					💄 Greg Herd 오	
≡ # Home	Orange Vision   One-off purchase insight Monitor your current one-off purchase activity			YOU ARE HERE: Home .> Insight .> One off purchase is Report Date 16-Sep-202		
* Services	Last refreshed at 11:27				C Refresh details A Export details	
Marketing	ENABLING CONTRACTS		ONE-OFF PURCH	HASE BUYS		
ው CRM						
🖾 Finance	tement					
🔁 Insight	o enab		srive o			
Configuration	Auribor of enablements					
Support:	22 -1 0 1 2 3 4 5 6 7 8 9 10 11 Hot Additions R	z	24 0 1 2	3 4 5 6 7 8 9 10 11 12 13 14 1 Hour Show Al I PPP OTT Sky CA		
	One-off purchase buys by product: 16 September 20	21				
	Product	IPPV	TTO	Sky CA	Total	
	Total:	0	0	0	0	
	Items per page 5 *					

#### CASES

- 1. Select Insight in the main menu.
- 2. Select Review within the Cases widget

- The real-time case report details the number of new cases
- Cases are segmented by type for example this could be a techical issue or a billing enquiry
- A view showing 24-hours of activity
- Analyse your data further by downloading a detailed report in the either Excel or CSV. Select Export Details
- Filter views by toggling items within the legend

singula decisions			👗 Greg Herd 오
=	Orange Vision   Real time cases Monitor today's customers queries		YOU ARE HERE: Home > insight > Real time cases Report Date 16-Sep-2021
# Home	Monitor today's customers queries		C Refresh details 🛦 Export details
* Services	Last refreshed at 11:28		Diverresh details A Export details
Marketing	CASES CREATED TODAY		
CRM			
C Finance			
🐑 Insight			
Configuration		No data to display	
O Support :			
	Today's cases: 16 September 2021		
	Case Type	Subtype	Total
	Total:		0
	Items per page 5 *		

#### **HISTORICAL REPORTS**

singula decisions			🛔 Greg Herd 🛇
≡ # Home	Orange Vision   Insight Helping you understand your customer behaviour		VOU ARE HERE: Home > Insight
<ul> <li>★ Services</li> <li>         ● Marketing     </li> <li>         ▲ CRM     </li> </ul>	TODAY'S SUBSCRIPTIONS	TODAY'S REINSTATEMENTS	TODAY'S CANCELLATIONS
CB Finance	NEW SUBSCRIPTIONS TODAY O down 100% compared to the same time last week	NEW REINSTATEMENTS TODAY O no change compared to the same time last week	NEW CANCELLATIONS TODAY O no change compared to the same time last week
Support	TODAY'S ENABLEMENTS	TODAY'S ONE-OFF PURCHASES	TODAY'S CASES PER HOUR
	NEW ENABLEMENTS TODAY 0 no change compared to the same time last week	NEW ONE-OFF PURCHASES TODAY 0 no change compared to the same time last week	NEW CASES TODAY 0 no change compared to the same time last week
	SUBSCRIBER MOVEMENTS	FINANCIAL TRANSACTIONS CASES	REFERRALS API MONITORING

Each report reveals a detailed view along with the ability to download data for further analysis. You can filter the view by toggling items within the legend

ingula decisions											Greg Herd 😔
16	Orange Vision   Subscril	per movements						8	OU ARE HERE: He	ome > insight >	Subscriber Movem
ł Home	Monitor the growth of your subscr								Ent	er Report Date	15-Sep-2021
											🛦 Export detail
services	1 ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (										
Marketing	Subscriber movements		SUBSCRIBER M	OVEMENTS							
CRM	Additions		2								
Finance	Reinstatements		1								
Insight	Cancellations		0 (1)		_						
	Terminations		Jaguer (1)								
Configuration	Transfers from										
Support			(2)								
	Transfers to			13-Sep	14-Sep	15-Sep	16-Sep	17-Sep	18-Sep		19-Sep
	Transfers to Closing balance			13-Sep		15-Sep	Date				19-Sep
		September 2021		13-Sep			Date				19-Sep
	Closing balance	September 2021 Mon	Tue	13-Sep Wed			Date			Month	19-Sep Inception
	Closing balance Subscriber movements: 15 Movement Type	11			Show All	Additions 🔜 Ref	Date statements 🖬 Canor	dationa 🧰 Terminatio	week	Month	Inception
	Closing balance Subscriber movements: 15	Mon	Tue	Wed	Show At	Addisons Ref	Date statements Cence Sat	dationa 📕 Terminask Sun	201.010		Inception
	Closing balance Subscriber movements: 15 Movement Type	Mon	Tue	Wed	Show At	Addisons Ref	Date statements Cence Sat	dationa 📕 Terminask Sun	week	Month	Inception 2,60
	Closing balance Subscriber movements: 15 Movement Type Additions	Mon	Tue	Wed	Show At	Addisons Ref	Date statements Cence Sat	dationa 📕 Terminask Sun	week	Month	Inception 2,6
	Closing balance Subscriber movements: 15 Movement Type Additions Reinstatements	Mon	Tue 14-Sep-2021 1	Wed	Show At	Addisons Ref	Date statements Cence Sat	dationa 📕 Terminask Sun	Week 2	Month 25	Inception 2,60
	Closing balance Subscriber movements: 15 Movement Type Additions Reinstatements Cancellations	Mon	Tue 14-Sep-2021 1	Wed	Show At	Addisons Ref	Date statements Cence Sat	dationa 📕 Terminask Sun	Week 2	Month 25 (18)	
	Closing balance Subscriber movements: 15 Movement Type Additions Reinstatements Cancellations Terminations	Mon	Tue 14-Sep-2021 1	Wed	Show At	Addisons Ref	Date statements Cence Sat	dationa 📕 Terminask Sun	Week 2 (1)	Month 25 (18) (11)	Inception 2,60 (39 (24

#### **DOWNLOAD AREA**

- 1. Select Downloads
- 2. You will be required to login. You should have a seperate set of login credentials.
- 3. Select Downloads on the menu bar
- 4. Select the report you wish to download. They are organised so you can easily identify the required report.

ashboard	Registrations	Transactions	Subscriptions	Downloads	User Details	Log Out
📔 1.Daily	Reports					
	ly Reports					
3.Month	hly Reports					
🧧 4.Annua	al Reports					
5 Adho	Reports					

#### CONFIGURATION

#### Users

#### **ADDING A NEW USER**

- 1. Select Configuration
- 2. Select Users and Groups
- 3. Select + Create new user
- 4. Enter the User details including their Full name, Username and Email. A mobile telephone number is optional.

#### **User details**

Username - is case sensitive and can be up to 20 characters long, alphanumerical and the following special characters are also allowed:  $! \pounds -$ . \* (). The user name will be used to log in along with the password.

Email address - this will be the email that any password resets or user profile changes will be sent to.

singula decisions		🚨 Greg Herd 🛇
=	Create new user	YOU ARE HERE Home > Configuration > Create new user
# Home	20 - Y Produci a del Prima de 2000 -	Cancel Add user
★ Services		
	USER DETAILS	
Marketing	Full name * 🛛	Email * 📀
📽 CRM	Enter full name	Email address
Enance	Username * 🛛	Confirm email * 🛛 🕢
🖬 Insight	1	Email address
Configuration	Z Active 😧	Mobile telephone number
Users and Groups		• 070-123 45 67
Setup payment method		
System Options	ADVANCED CONFIGURATION	ROLES
CRM Settings Case Management	Beta User	
Email Templates		O System Administrator O Call Centre Supervisor O Call Centre Agent
Email Domain Management		
O Support		

- 5. Tick the Active box or you can choose to leave 'Inactive'
- 6. Select the Role you want to assign to the user. See roles
- 7. Select Add User

If successful, a message will be displayed confirming the user has been created. The user will receive an email with an unique URL which allows them to create their secure password.

#### Passwords

Passwords must contain a minimum of 8 characters, including 1 uppercase letter, 1 lowercase letter and 1 number. Special characters should not be used.

#### **RESETTING A USER PASSWORD**

- 1. Select Configuration
- 2. Select Users and Groups
- 3. Search for the user using their username
- 4. Select the 'Pen' icon against the user
- 5. Confirm the email address is correct. This is where the reset password email will be sent.
- 6. Select Reset Password

#### **RESET PASSWORD**

The user will receive an email containing a URL which allows them to change their password.

#### **DEACTIVATING A USER**

- 1. Select 'Configuration'
- 2. Select 'Users and Groups'
- 3. Search for the user using their username
- 4. Select the 'Pen' icon against the user
- 5. Remove the tick from the 'Active' checkbox
- 6. Select 'Update user'
- ✓ Active

#### **ACTIVATING A USER**

- 1. Select 'Configuration'
- 2. Select 'Users and Groups'
- 3. Search for the user using their username
- 4. Select the 'Pen' icon against the user
- 5. Tick the 'Active' checkbox
- 6. Select 'Update user'



#### MANAGING ROLES AND PERMISSIONS

- 1. Select 'Configuration'
- 2. Select 'Users and Groups'
- 3. Search for the user using their username
- 4. Select the 'Pen' icon against the user
- 5. Choose the correct user role. See Roles and permissions to see access levels
- 6. Select \*\*'Update user'\*\*

ROLES		
System Administrator	O Call Centre Supervisor	○ Call Centre Agent

#### **ADDING A BETA USER**

- 1. Select 'Configuration'
- 2. Select 'Users and Groups'
- 3. Search for the user using their username
- 4. Select the 'Pen' icon against the user
- 5. Tick the 'BETA user' checkbox
- 6. Select 'Update user'



#### **Roles and permissions**

Roles allow you to restrict access to your subscriber management system

There are 5 user roles to choose from, each have different levels of permissions.

AREA	ADMINISTRATOR	ADMINSTRATOR (NO CRM)	CUSTOMER SERVICE	SALES AGENT	FINANCE	MARKETING
Services	<b>&gt;</b>					
Marketing		$\checkmark$				
CRM			<ul> <li></li> </ul>		<ul> <li></li> </ul>	
Finance		$\checkmark$			<ul> <li></li> </ul>	
Insight					<ul> <li></li> </ul>	
Configuration		$\checkmark$				
Support		$\checkmark$	<ul> <li></li> </ul>		$\checkmark$	

#### Manage user roles

- 1. Select Configuration
- 2. Select Users and Groups
- 3. Search for the User using their username
- 4. Select the 'pen' icon against the user
- 5. Make your changes to the role/permissions and active status
- 6. Select Update User to confirm the changes

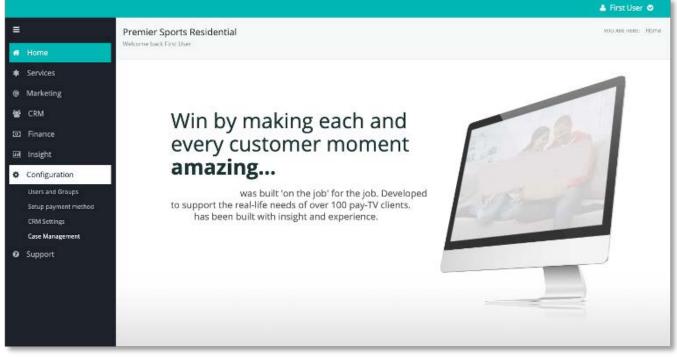
#### Cases

Case management allows you to create and manage your Case types, Contact methods, Priorities, Closure reasons and Tags. These are used when leaving a case note or interaction in a customer's account.

These options allow you to categorise the customer interactions, which you can use for Case inboxing and prioritisation as well as reporting.

To view and setup Case Management:

- 1. Click Configuration
- 2. Click Case Management



The Manage Case option screen will appear:

This will display any existing Case Types in a table

There are options along the top for:

- Manage Contact Methods
- Manage Priorities
- Manage Closure Reasons
- Manage Case Tags

REN	IIER SPORTS RESIDENTIAL   N	lanage Case Options			YOU ARE HERE: I	Home > Manage Case Ty
	, e your case types, contact methods, prior		Manage Contact Methods	Manage Priorities	Manage Closure Reasons	Manage Case Tag
.ase	Types					+ vuo case typ
ase	Case Type	Status	Creation Date	Modifi	ed Date	+ Add case typ
⊥ase ⊕		Status	Creation Date	Modifi 27-Nov-2019	ed Date	Actions

This will display any existing Case Types in a table

There are options along the top for:

- Manage Contact Methods
- Manage Priorities
- Manage Closure Reasons
- Manage Case Tags

#### **CREATE AND MANAGE CASE TYPES**

Creating Case types allows you to categorise the reason a customer has been in contact with you

An example could be Sales, General Enquiry, Billing etc.

To create a Case Type:

1. Click + Add Case Type on top right corner

anag	e your case types, contact methods, p	riorities, closure reasons and tags	Manage Contact Methods	Manage Priorities	Manage Closure Reasons	Manage Case Ta
ase	Types					+ Add case ty
	Case Type	Status	Creation Date	Modifie	d Date	Actions
Ð	Customer Service	✓ Active	27-Nov-2019	27-Nov-2019	(8 x	+
				a state of the state of the state		

- 2. A Manage Case Type window will appear, enter the Case Type Name and select the Active status for the Case type
- 3. Click Confirm to save

C MANAGE CASE TYPE	×
Enter the case type information	
Name*	
Active	
	Cancel Confirm

A Success confirmation message will appear on the screen

The Case Type you've created will appear in the Case Types table:

ase	Types				+ Add case t
	Case Type	Status	Creation Date	Modified Date	Actions
ŧ	Customer Service	✓ Active	27-Nov-2019	27-Nov-2019	2 × +
Ð	Retention	✓ Active	29-Nov-2019	29-Nov-2019	2 × +
Ð	Sales	* inactive	29-Nov-2019	29-Nov-2019	2 - +

#### To edit the Case type click the 'pen' icon

I MANAGE CASE TYPE	х
Enter the case type informa	tion
Name*	Customer Service
Active	8
	Cancel Confirm

#### To deactivate the Case type click the `cross' icon

CASE TYPE STATUS		2
Are you sure you want to make <b>Customer Se</b>	rvice Inactive?	
	Cancel	Confirm

#### To add a sub type to the Case type click the `+' icon

		ж
ø		
	Cancel	Confirm
	0	1

#### ADD A CASE SUB TYPE TO A CASE TYPE

Adding a Case Sub Type allows you to further categorise the reason why a customer has contacted you

#### To setup a Case Sub Type:

1. Click the `+ icon' on the Case Type in the Case types table

Case	Types				+ Add case typ
	Case Type	Status	Creation Date	Modified Date	Actions
+	Customer Service	✓ Active	27-Nov-2019	27-Nov-2019	🧭 🗙 🕇
÷	Retention	✓ Active	29-Nov-2019	29-Nov-2019	3 × +
Ŧ	Sales	* Inactive	29-Nov-2019	29-Nov-2019	3 - +

C MANAGE CASE TYP	E X
Enter the case type inform	nation
Name*	Cancel
Active	۵
	Cancel Confirm

- 2. Enter a name for the Sub Type
- 3. Choose the Active status
- 4. Click Confirm to save

A confirmation message will appear on the Case Management screen

#### VIEW THE CASE SUB TYPE ASSOCIATED WITH A CASE TYPE

To view the Case Sub type associated with a Case type:

 In the Case Types field, click the `+' button on the left side of the Case Type to expand the field and populate the Case Sub Type table

Case	Types				+ Add case type
	Case Type	Status	Creation Date	Modified Date	Actions
+	Customer Service	🛩 Active	27-Nov-2019	27-Nov-2019	18 x +
+	Retention	✓ Active	29-Nov-2019	29-Nov-2019	2 × +
Ŧ	Sales	* inactive	29-Nov-2019	29-Nov-2019	2 - +

#### 2. Here you can see the:

- Case Sub Type Name
- Status
- Creation date
- Modified date
- Actions; options to edit or deactivate

ase	Types							+ Add case ty
	Case Type	Status		Creation Date	Modified Date			Actions
+)	Customer Service	✓ Active		27-Nov-2019	27-Nov-2019	12	×	+
8	Retention	✓ Active		29-Nov-2019	29-Nov-2019	ľ	×	+
	Case Subtype	Status		Creation Date	Modified Date			Actions
Can	cel	✓ Active	29	-Nov-2019	29-Nov-2019		Ø	×
Ð	Sales	* Inactive		29-Nov-2019	29-Nov-2019	2	~	+

#### **MANAGE CLOSURE REASONS**

You can create or edit your case closure reasons – this will be the outcome to the customer interaction e.g. What was done to resolve the query/issue.

To create or edit a Closure Reason:

1. Click the Manage Closure Reasons button:

REMIER SPORTS RE	SIDENTIAL   Mana	ige Case Options			YOU ARE HERE: H	ome > Manage Case Typ
lanage your case types, coi	ntact methods, priorities,	closure reasons and tags	Manage Case Types	Manage Contact Methods	Manage Closure Reasons	Manage Case Tags
Case Priorities						+ Add priority
Case Priority	Status	Default	Ranking	Creation Date	Modified Date	Actions
Normal	✓ Active	✓ Default	10000	27-Nov-2019	27-Nov-2019	<b>X</b>
Urgent	✓ Active		10001	27-Nov-2019	27-Nov-2019	8 ×

#### 2. The Manage Case Closure Reasons section will appear:

Any existing Closure Reasons will appear in the table. These can be edited or activated/deactivated using the icons on the right of the table

REMIER SPORTS RESIDENTIAL   M	anage Case Options	Contractor of the local sector of the local se		Construction and some second	ome > Manage Case T
lanage your case types, contact methods, priori	ties, closure reasons and tags	Manage Case Types M	lanage Contact Methods	Manage Priorities	Manage Case Ta
Case Closure Reasons					+ Add closure reas
Case Closure Reason	Status	Creation Date	Modifi	ed Date	Actions
Resolved	✓ Active	27-Nov-2019	27-Nov-2019	(	X X
	* Inactive	27-Nov-2019	27-Nov-2019		3 1

3. Click + Add Closure Reason button. The Manage Closure Reason window will appear:

C MANAGE CLOSURE	REASON		×
Enter the case closure rea	ason information		
Name*			
Active			
		Cancel	Confirm

- 4. Enter a name for the Closure Reason
- 5. Choose the Active status
- 6. Click Confirm to save

A confirmation message will appear on the Case Management screen

#### **MANAGE CASE PRIORITIES**

You can create or edit your case priorities. This will allow you to make cases with different levels of priorities allowing you to filter and action them in an order to suit your business processes.

To create or edit Case Priorities:

#### 1. Click the Manage Priorities button:

REMIER SPORTS RESIDENTIAL   M	anage Case Options			YOU ARE HERE: H	ome. > Manage Case Typ
lanage your case types, contact methods, priori	ities, closure reasons and tags	Manage Case Types Man	age Contact Methods	Manage Priorities	Manage Case Tag
Case Closure Reasons					+ Add closure reason
Case Closure Reason	Status	Creation Date	Modifi	ed Date	Actions
Resolved	✓ Active	27-Nov-2019	27-Nov-2019	0	7 ×

#### 2. The Manage Priorities Reasons section will appear:

Any existing Priorities will appear in the table. These can be edited or activated/deactivated using the icons on the right of the table

PREMIER SPORTS RESIDENTIAL   Manage Case Options							
fanage your case types, coi		-	Manage Case Types	Manage Contact Methods	Manage Closure Reasons	Manage Case Tag	
Case Priorities						+ Add priority	
Case Priority	Status	Default	Ranking	Creation Date	Modified Date	Actions	
Normal	✓ Active	✓ Default	10000	27-Nov-2019	27-Nov-2019	<b>Z</b> ×	
Urgent	✓ Active		10001	27-Nov-2019	27+Nov-2019	8 ×	

3. Click + Add priority button. The Manage Priority window will appear:

3
mation
0
10002
Cancel Confirm
r

- 4. Enter a name for the Priority
- 5. Choose the Active status
- 6. Choose the ranking status against other priorities
- 7. Choose whether it is the default option in the form
- 8. Click Confirm to save

A confirmation message will appear on the Case Management screen

#### MANAGE CONTACT METHODS

You can create or edit your case contact methods. This allows you to get insight on how a customer has been in contact with you and can help with future insight and marketing campaigns.

To create or edit Contact Methods:

1. Click the Manage Contact Methods button:

fanage your case types, contact methods, priorities, closure reasons and tags			Manage Contact Methods	Manage Priorities	Manage Closure R	easons		Manage Case Tag
Case	Types							+ Add case typ
	Case Type	Status	Creation Date	Modifi	ed Date		A	ctions
ι <del>π</del> ι	Customer Service	🛩 Active	27-Nov-2019	27-Nov-2019		3 x	+	]
±	Retention	✓ Active	29-Nov-2019	29-Nov-2019	1	3 ×	+	
•	Sales	× inactive	29-Nov-2019	29-Nov-2019		2 1	+	

#### 2. The Manage Contact Methods section will appear:

Any existing Contact Methods will appear in the table. These can be edited or activated/deactivated using the icons on the right of the table

fanage your case types, contact methods, priorities, closure	es Manage Priorities M	anage Closure Reasons	Manage Case Tags	
Case Contact Methods				+ Add contact method
Case Contact Method	Creation Date	Modifie	i Date	Actions
Email	27-Nov-2019	27-Nov-2019	2	2
Telephone	27-Nov-2019	27-Nov-2019		E.
Whitemail	27-Nov-2019	27-Nov-2019		5

3. Click + Add Contact Method button. The Manage Contact Method window will appear:

C MANAGE CONTACT METH	OD	ж
Enter the case contact method in	ormation	
Name*	Social Media	
	Cancel	Confirm

- 4. Enter a name for the Contact Method
- 5. Click Confirm to save

A confirmation message will appear on the Case Management screen

#### **BETA Cases**

#### **VIEW CASE TYPES**

- 1. From the user menu select 'Settings'
- 2. Select 'Cases'
- 3. Select 'Case Types'
  - Any existing case types will be displayed.

Case types can be filtered by status either active or disabled.

Singula Decisions	💷 Products 🗧	Marketing 🗸 🔘 Customers 🗸		@ •
Settings				
	CASES 👻 EMAIL	TEMPLATES EMAIL DOMAINS		
Filtur by	Case types			New case type
Case type options  All  Active	Name	Sub-types	Created Availability	Modified
O Disabled	-			View
Reset Apply filters	-			View
				View
			= -	View
	-		= -	View
		_		View
			= -	View
Subscriber Management I 67027 Singula Decomera Lin	_		_	View

#### **NEW CASE TYPE**

- 1. From the user menu select 'Settings'
- 2. Select 'Cases'
- 3. Select 'Case Types'
- 4. Select 'New case type'

#### Case type information

- 5. Enter Case type name
- 6. Enter Case description

#### Case sub-types

7. Add any case sub-types. These are useful for categorising your cases and managing your workflows.

#### Case type availability

8. Choose to disable your case type for use later

Settings              (m) Point (m) Point (m)                 (m) Point (m)                 (m) Point (m)                                (m) Point (m)  <	Settings    Case value       Case types       Case type information       the reason for a custome contact.       The reason for a custome contact.      Nume          Nume             Nume        Case type to the reason for a custome contact.          Nume   Optimized in the reason for a custome contact.   <	• • •				
CASE • DAL TERFORT       DAL DOMAINS         New case types       Data         Case type information       The reason for a customer contact         We reason for a customer contact       The reason for a customer contact         Description       The	Next case types       Definition         Comparison       Image: the research for a customer contact:         Image: the research for a customer contact:       Image: the research for a customer contact:         Max: the research for a customer contact:       Image: the research for a customer contact:         Max: the research for a customer contact:       Image: the research for a customer contact:         Max: the research for a customer contact:       Image: the research for a customer contact:         Max: the research for a customer contact:       Image: the research for a customer contact:         Cose type availability:       Image: the research for a customer contact:	Singula Decisions	en Products	🕞 Marketing 🖌 🙄 Customers 🗸		
New case types     Case type information   When your users want to categorize the reason for a customer costact.     Image: the reason for a customer costact.     Make: Case type disabled     Image: the reason for a customer costact.     Make: Case type disabled     Image: the reason for a customer costact.     Make: Case type disabled     Image: the reason for a customer costact.     Image: the reason for a customer costact. <td< td=""><td>New case types     Case type information   When your users want to categorise     Image: the reason for a customer contact:     Image: the reason for a customer contact:     Make: Case type information     Image: the reason for a customer contact:     &lt;</td><td>Settings</td><td></td><td></td><td></td><td></td></td<>	New case types     Case type information   When your users want to categorise     Image: the reason for a customer contact:     Image: the reason for a customer contact:     Make: Case type information     Image: the reason for a customer contact:     <	Settings				
Creating the formation The reason for a customer contact The reason for a	Creating of the reason for a customer contact:  I function of the reason for a customer contact:  I function the reason for a customer contact: I function the reason for a customer contact: I function the reason for a customer contact: I function the reason for a customer contact: I function the reason for a customer contact: I function the reason for a customer contact: I function the reason for a customer contact: I function the reason for a		CASES 🛩 EMA	IL TEMPLATES EMAIL DOMAINS		
When your users want to categorise the reason for a customer contact.     Case sub-type   When your users want to add further composition for a customer contact.     Case sub-type   When your users want to add further composition for a customer contact.     Case type availability   When your users to toget the case type disabled	When your users want to categorise     the reason for a cuttomer contact.     Case sub-type     When your users want to add further currigentiation for a cuttomer contact.     Case sub-type   When your users want to add further currigentiation for a cuttomer contact.     Case type availability   When you want to togice the case type disabled     Case type availability	New case type	S		Bac	
Case sub-type order point unter want to add further categorisation for a customer contract:     NAME     CREATED     MODIFIED     DISABLED       Add rank und hype type availability     +     +     +     +     +     +	Case sub-type categorisation for a countomer contract.     NAME     CREATED     MODIFIED     DISABLED       Aff case sub-type categorisation for a countomer contract.     +     +     +     +       Case type availability type availability.     Case type disabled     -     -     -	When your users want	to categorise mer contact.			
Case sub-type When your users want to add further categorisation for a customer contract. Case type availability When you want to toggie the case type availability. Case type disabled	Case sub-type When your users want to add further categorisation for a customer contact. Case type availability When you want to togic the case type availability. Case type disabled				2	
Case type availability When you want to toggie the case type availability.	Case type availability When you want to toget the case type availability. Case type disabled	When your users want	to add further		DISABLED	
When you want to toggie the case type availability. Case type disabled	When you want to togide the case type availability. Case type disabled					
Cancel Save case type	Cancel Save case type	When you want to top				
			Cancel		Save case typ	
		Subscriber Mangentert i 62021 Singula Dervenis Limbel et Strage				

#### **MANAGE A CASE TYPE**

- 1. From the user menu select Settings
- 2. Select Cases
- Select Case Types
   Select View
- 5. You can now update the case type, manage case sub-types, enable or disable and delete case types.
- 6. Select Save to save any changes.

#### **CASE SUB-TYPES**

- 1. From the user menu select Settings
- 2. Select Cases
- Select Case Types
   Select View
- 5. You can now manage case sub-types
- 6. Select Save to save any changes.

#### **VIEW CASE TAGS**

- 1. From the user menu select 'Settings'
- 2. Select 'Cases'
- 3. Select 'Case Tags'
- 4. Any existing case tags will be displayed.

You can use the filters to view active and/or disabled case tags

ngula Decisions		💷 Products 🐨 Marketing 🖌 🙄 C	Customers 🛩			ঞ
ettings						
		CASES - EMAIL TEMPLATES EMAIL D	IOMAINS			
lter by ase tag options	Case tags					
All Active Disabled	Add cases tog * +					
Reset Apply filters	Name		Created	Modified	Disabled	
	Edit over lag 4		=	=	.0	Delet
	Edit most tag*		-	=		Delet
	fall mart top *		-	-		Delete
	Edit more log *		=	=	•	Defet
	fall rate by *		-			Deleti

#### **ADD CASE TAG**

- 1. From the user menu select 'Settings'
- 2. Select 'Cases'
- Select 'Case Tags'
   Enter your new case tag
- 5. Select + to add your tag. Your new tag will appear at the top of the list.

#### **VIEW CASE CLOSURE REASONS**

- 1. From the user menu select Settings
- 2. Select Cases
- Select Case closure reasons
   Any existing case closure reasons will be displayed.

You can use the filters to view active and/or disabled case closure reasons

ingula Decisions		🕾 Products 🛛 🕤 Marketi	ng ~ 💿 Customers ~			œ
Settings						
		CASES - EMAIL TEMPLAT	ES EMAIL DOMAINS			
itter by Closure reason options	Closure reasons					
All     Active     Disabled	Add closer researt *					
Reset Apply filters	Name		Created	Modified	Disabled	
	falt closer reases * RESOLVED		E001309 17 Jun 2019	clioyd 25 Mar 2021		Delete
	fall classes essens 4 Customer Services		cilloyd 25 Mar 2021	cilioyd 25 Mar 2021		Deleb
			tere are no further case closures to load			

#### **NEW CASE CLOSURE REASON**

- 1. From the user menu select Settings
- 2. Select Cases
- 3. Select Case closure reasons
- 4. Enter your new case closure reason
- 5. Select + to add your case closure reason. Your new case closure reason will appear at the top of the list.

#### **VIEW CASE CONTACT METHOD**

- 1. From the user menu select Settings
- 2. Select Cases
- 3. Select Case contact methods
- 4. Any existing case contact methods will be displayed.

You can use the filters to view active and/or disabled case contact methods

ingula Decisions		🕮 Products 🕤 Ma	rketing 🖌 😳 Customers 🤟			œ
Settings						
		CASES - EMAIL TEN	PLATES EMAIL DOMAINS			
itter by	Case contact methods					
All     Active     Disabled	Add contact method *	*				
Reset Apply filters	Name		Created	Modified	Disabled	
	falt sontaet norfiod * Instagram		E015268 21 Jul 2021	E015268 21 Jul 2021	•	Delete
	Edit united toutlod * Faceblog		croast 29 Aug 2019	E015268 14 Jul 2021		Delete
	Efficient earlier value * Whatsapp		<b>clicyd</b> 09 Jul 2021	<b>cilloyd</b> 09 Jul 2021		Delete
	Edit contact method * LOW		<b>E007041</b> 09 Jul 2021	E007041 09 Jul 2021		Delete
	failt conduct method * High		E007041 09 Jul 2021	E007041 09 Jul 2021		Delete

#### **NEW CASE CONTACT METHOD**

- 1. From the user menu select Settings
- 2. Select Cases
- 3. Select Case contact method
- Enter your new case contact method
   Select + to add your case contact method. Your new case contact method will appear at the top of the list.

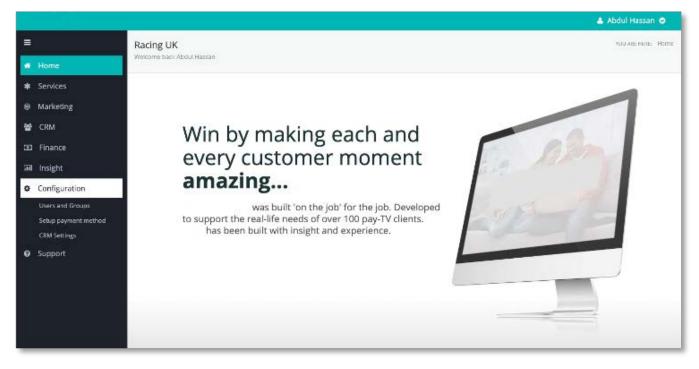
#### **Marketing consents**

Capturing Marketing consents not only is a key part of Data Protection but also allows you to share a customer's details with parties that may be of interest to the customer.

The consent would be captured at first contact with the customer and can then be used for data insight and marketing campaigns.

To create a new Marketing consent:

- 1. Click Configuration
- 2. Click CRM Settings



The CRM Settings will open in a new browser window screen will appear:

#### This will show:

- Marketing Consents; both existing ones and option to add a new consent
- Contact Preferences; both existing ones and option to add a preference

### **CRM SETTINGS**

Manage which conse	ents are offered to customers				
Company name	Description	Туре	Required?	Status	
Ladbrokes	I wish to receive marketing from Ladbrokes	Marketing	No	Active	MANAGE
Dther	l wish to receive additonal consents (placeholder)	Marketing	No	Active	MANAGE
Betbright	I wish to receive marketing from Betbright	Marketing	No	Active	MANAGE
Betway	I wish to receive marketing from Betway	Marketing	No	Active	MANAGE
Coral	I wish to receive marketing from Coral	Marketing	No	Active	MANAGE

3. Click '+ Add new consent' button on the top right corner

	TING CONSENTS ents are offered to customers			+ ADD NEV	
Company name	Description	Туре	Required?	Status	
Ladbrokes	I wish to receive marketing from Ladbrokes	Marketing	No	Active	MANAGE

The following fields will then be displayed:

	NG CONSENTS s are offered to customers				+ ADD NEW CONSENT
Company name	Description	Туре	Required?	Status	
Name	Description		\$ Yes	Active	SAVE CANCEL

4. Complete each of the fields;

Company Name Description Type; choose either Marketing or Processing Required; choose to make it a requirement to consent Status; choose make the status active

5. Click 'Save' to confirm the new consent. The new marketing consent will appear in the list of existing consents and can be managed just like any existing consent

#### MANAGE AN EXISTING MARKETING CONSENT

1. Click 'Manage' on the right of the consent you want to manage

	TING CONSENTS ents are offered to customers			+ ADD NEW	CONSENT
Company name	Description	Туре	Required?	Status	

#### The following fields will then be displayed:

	TING CONSENTS sents are offered to customers				+ ADD NEW CO	NSENT
wanage which con	sents are unered to customers.					
Company name	Description	Туре	Required?	Status		

2. Complete any updates to the consent as required and click 'Save'

Note: In this section you can change the description of the consent, the type, required status and change the active status.

#### **Refer a friend**

Allows an existing customer to supply a code to a friend to then use to sign up to a product or service at a promotional rate/discount.

When a customer uses a refer a friend code, we can check if it is valid and available and when it is entered during a sales subscription, it will be validated and any promotion/discount will be applied at checkout to the subscription.

The refer a friend rules and eligibility are managed within Singula® Subscriber Management.

#### WHAT IS REFER A FRIEND?

Allows an existing customer to supply a code to a friend to then gain a discount to a product or service. When a customer uses a refer a friend code, we can check it is valid and available and apply any promotion/discount at checkout.

#### WHAT RULES CAN I MANAGE?

- Set the status of the customer's Refer a Friend based on a period of consecutive months where the subscription is Active
- Set the period of months before a customer can purchase a new Subscription using a Refer a Friend code
- Set the rules for new and existing customers who can use a Refer a Friend code
- Manually activate a Refer a Friend code outside of the automated rules
- Connect Refer a Friend codes to one or more offers (See Discounts section)

#### Set the period of months where a subscription has to be active before the customer can give out a Refer a Friend code:

- 1. Click 'Configuration'
- 2. Click 'System Options'

#### The Settings page will now appear

		TV4 C More   Settings
ŵ	Home	
*	Services	Refer a friend
0	Marketing	
썉	CRM	Free trial
٥	Finance	
ш	Insight	
٠	Configuration	
	Users and Groups	
	Setup payment method	
	System Options	
	CRM Settings	
	Case Management	

3. Click the 'Expand' icon on Refer a Friend:

F	Refer a friend	•	
,	Choose the number of months of successful billing periods required before the customer can give out a Refer a Fri	iond	

 Choose the number of months of successful billing periods required before the customer can give out a Refer a Friend code

# Refer a friend • Refer a friend offers available to 'Receivers': • New customer - a customer with a registered account who has never purchased a subscription before. • Existing customer - a customer with a registered account who has bought a subscription before. • 18 month(s) before they can purchase a new Subscription using a refer a friend code. Activates 'Giver' customers refer a friend code after: • 3 • Save •

5. Click 'Save' to confirm the changes

A success message will appear at the top of the screen:

# Successfully updated your Refer a friend settings

#### Set the period of months before a customer can purchase a new subscription using a Refer a Friend code:

- 1. Click 'Configuration'
- 2. Click 'System Options'

The Settings page will now appear

- 3. Click the 'Expand' icon on Refer a Friend
- 4. Choose the number of months before a customer can purchase a new subscription using a Refer a Friend code
- 5. Click 'Save' to confirm the changes

Refer a friend	
Refer a friend o	ffers available to 'Receivers':
	- a customer with a registered account who has never purchased a subscription before.
18	month(s) before they can purchase a new Subscription using a refer a friend code.
Activates 'Giver	' customers refer a friend code after:
3	month(s) successful subsequent billings periods.
Save	
Gave	

Set the rules for new and existing customers who can purchase a subscription using a Refer a Friend code:

- 1. Click 'Configuration'
- 2. Click 'System Options'

The Settings page will now appear

- 3. Click the 'Expand' icon on Refer a Friend
- 4. Choose the rules for New customer and Existing customer and 'tick' the rules that you want applied
- 5. Click 'Save' to confirm the changes

# Refer a friend Refer a friend offers available to 'Receivers': Place Refer a friend code at subscription before. Table month(s) before they can purchase a new Subscription using a refer a friend code. Activates 'Giver' customers refer a friend code after: Image: Save Save Save

#### Manually activate a Refer a Friend code outside of the automated rules:

- 1. Click 'CRM'
- 2. Search for the customer's account
- 3. Once in the customer's account, click 'Manage' within the Customer Details section:

LUSTOMER DETAILS	EDIT
<b>Customer ID</b> 478bc599-cf33-4684-b998-63c877a03970	)
- Forename Test Test125@paywizard.com	Vimond ID
<b>Home address</b> Address Line 1 Postcode	Refer a friend code           iOj2bpWC         X Inactive
Sweden 00000000000	Manage

Note: If the code is manually changed then the automated rules will not revert setting later.

#### For example:

If you manually make the code active and the parameters are changed later meaning the code should be made inactive, it will not be made inactive.

#### 4. Click the checkbox for 'Active' and click 'Save'

REFER A FRIEND CODE	×
iOj2bpWC	
Active Inactive	
	Cancel Confirm

A Success confirmation message will appear and the Refer a friend code status will show as 'Active' in the Customer Details section:

Success! Refer a friend cod	e status successfully set
CUSTOMER DETAILS	EDIT
<b>Customer ID</b> 478bc599-cf33-4684-b998-63c87	7a03970
- Forename Test Test125@paywizard.com	Vimond ID
<b>Home address</b> Address Line 1 Postcode	Refer a friend code iOj2bpWC <b>✓ Active</b>
Sweden 🛛 00000000000	Manage

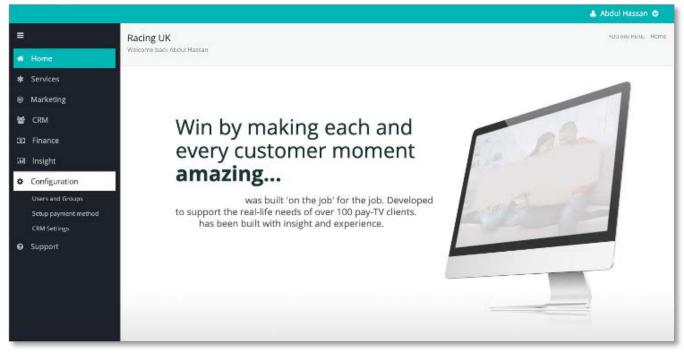
#### **Contact preferences**

Capturing Contact preferences is crucial for any business as you want to make sure you can engage with your customer's effectively and importantly with the method they have agreed to.

This would be captured at first contact with the customer and can then be used for effective customer engagement for both service and sales related contact.

#### To create a new Contact preference:

- 1. Click Configuration
- 2. Click CRM Settings



The CRM Settings will open in a new browser window screen will appear:

### **CRM SETTINGS**

	TING CONSENTS ents are offered to customers				
Company name	Description	Туре	Required?	Status	
Ladbrokes	I wish to receive marketing from Ladbrokes	Marketing	No	Active	MANAGE
Other	I wish to receive additonal consents (placeholder)	Marketing	No	(Active )	MANAGE
Betbright	I wish to receive marketing from Betbright	Marketing	No	Active	MANAGE
Betway	I wish to receive marketing from Betway	Marketing	No	Active	MANAGE
Coral	I wish to receive marketing from Coral	Marketing	No	Active	MANAGE

This will show:

Marketing Consents; both existing ones and option to add a new consent Contact Preferences; both existing ones and option to add a preference

3. Click '+ Add Contact Preference' button on the top right corner of Contact Preferences

Method Description Required? Status	
Email Consent to receiving email false Active	MANAGE

#### The following fields will then be displayed:

	T PREFERENCES tt methods you offer to custamers		+ AD	D CONTACT PREFERENCE
Method	Description	Required?	Status	

4. Complete each of the fields;

- Method
- Description
- Required; choose to make it a requirement
- Status; choose make the status active
- 5. Click 'Save' to confirm the new contact preference.

#### MANAGE AN EXISTING CONTACT PREFERENCE

1. Click 'Manage' button on the right of the contact preference you want to manage

	CONTACT PREFERENCES Manage which contact methods you offer to customers		+ ADD CONTACT PREFERENCE		
Method	Description	Required?	Status		
Email	Consent to receiving email	false	Active	MANAGE	

#### The following fields will then be displayed:

	ACT PREFERENCES			ADD CONTACT PREFERENCE
Manage which	i contact methods you offer to customers			
Method	Description	Required?	Status	

2. Complete any updates as required and click 'Save'

Note: In this section you can change the description, required status and change the active status.

#### **Free trials**

This functionality allows you to create a Free Trial promotion offering that can be applied to a new subscription. A customer could use a free trial to sign up to a new subscription giving them a free trial period to that subscription without being billed.

After the free trial expires the customer will be billed accordingly to the subscription.

The free trial gives a customer access to the subscription free of charge for a period of time, (which is set within the Subscription itself; see Create Subscription section for more information) so that they can experience the service and to encourage them to continue with a paid subscription after the free trial.

#### NUMBER OF TIMES A FREE TRIAL CAN BE USED BY A CUSTOMER

- 1. Click 'Configuration'
- 2. Click 'System Options'

The Settings page will now appear:

		TV4 C More   Settings	
*	Home		
*	Services	Refer a friend	•
0	Marketing		
쑵	CRM	Free trial	•
۲	Finance		
	Insight		
٠	Configuration		
	Users and Groups		
	Setup payment method		
	System Options		
	CRM Settings		
	Case Management		

- 3. Click the 'Expand' icon on Free Trial
- 4. Choose the number of redemptions allowed and the set period number of months within which redemptions can be made

Free trial				•
Number of redemptions: C	)	time(s) every	12	month(s)
Save				

5. Click 'Save' to confirm the changes

This rule will then be applied to all Free Trials across your catalogue of subscriptions



#### **Pause and resume**

The Pause and Resume parameters can be managed by an Advanced Administrator through E-Agent. You can manage the number of times a customer can pause their subscription within a set period of time.

#### Inboxes

Inboxes are used to handle Cases. System Users can be assigned to Inboxes such as 'Finance', 'Customer Service' or 'Technical'.

Cases can then be assigned to an Inbox where a User may take ownership and 'handle' the Case eg a Finance User might take ownership of a Case in the Finance Inbox that had been raised where a Customer had complained about poor video quality.

Note: Only the Administrator Role and Contact Centre Supervisor Role can create inboxes and manage inbox users.

To create a new Inbox:

1. In the Customer Search screen click 'View Inbox':

Customer r	eference	Post / Z	IP code	External unique ID	
First name		Last na	me	Email	-
Display nar	ne	Paymer	nt method	Telephone number	
Username		Order I	D	Viewing card number	
LL INBOXES	Overdue	Due today	Next three days	Next seven days	Not yet due
		0	0	1	

The Inboxing screen will appear:

REMIER SPORTS RES	IDENTIAL   Inboxing				Manage i	nboxes CRM > Inbo
MAINTAIN INBOX U	SERS			ଷ୍ଟି Create inboxes	Create inbox users	Clear filters
Filter inbox	Filter users	Filter Status				
All	\$ All	¢) Ali	•			
inbox name	User name	Read access	Forward access	Ca	ncel access	Actions
Finance	Aroxburgh	🗸 Yes	🛩 Yes		🗸 Yes	- 0
Finance	BScott	✓ Yes	🖌 Yes		✓ Yes	1 0
Finance	Bscott	✓ Yes	🗸 Yes		✓ Yes	/ 0
Finance	E014863	V Yes	🛩 Yes		V Yos	/ 0
Finance	Gbyrne	🛩 Yes	✓ Yes		¥ Yes	/ 0
Teest	E015268	¥ Yes	✓ Yes		¥ Yes	/ 0
test1	E014853	V Yes	✓ Yes		✓ Yes	1 0

You can update users access for inboxes they are assigned to by clicking the 'pen' icon alongside the Inbox in the table of Inboxes:



Then make any changes to access rights and click 'Update':

inance
Cancel access 🖉
Cancel Update

2. Click Manage inboxes button or the Create inboxes button

		YOU ARE HERE: H	iome > CRM > Inboxing
		👗 Manage in	nboxes 🗙 Close
	Ø <sup>®</sup> <sub>6</sub> Create inboxes	🛔 Create inbox users	Clear filters
Filter Status			
All	\$		

3. A Create new inbox window will appear, enter the Inbox Name and Inbox Description, then click 'Create Inbox':

and description	
Inbox description*	
Cancel Create inbo	24

4. The New inbox has now been created. The next step is to create Inbox Users so that the inbox can be managed accordingly. Click 'Create Inbox users'':

	YOU ARE HERE: H	lome > CRN	A > Inboxing
	👗 Manage in	nboxes	× Close
Create inboxes	Create inbox users	Clea	

5. A Create new inbox users window will appear, choose the Inbox Name you want to add a user to and then add Inbox User from the populated list. Tick the User rights to the inbox from the 3 options (Read, Forward and Cancel) and then select 'Create inbox user':

CREATE INBOX U	ISERS		3
select an inbox, user a	nd access rights		
Inbox name*	In	box user*	
Finance	¢) (1	PWAdmin	¢
Read access* 🛛	Forward access	Cancel access	
			iser

A success message will appear showing the Inbox is now associated with the user. You can add more Users to inboxes from the same window using the same process as above:

CREATE INBOX L	ISERS			>
Inbox Finance is	now associated	with PW	Admin user	
Select an inbox, user a	nd access rights			
lebox name*		Inbox use	er*.	
Select inbox	1	Select u	ser name	4
Read access*	Forward acce		Cancel access 🗇	
			Cancel Create inbox	

On the Maintain Inboxes Screen, you will then see the new Inbox summary and can manage the inbox and actions from there:

A MAINTAIN IN	NBOX MESSA	AGES										Clear	fiters
Fiter inbox		Filter priority		Filter action	Fili	er importance		Filter owner	e	Fiber	box type	ŝ	
All	4	All	¢]	All	\$ ( A	0	+	Al		tinba	ж		
inbox name	Action id	Priority	Importance	Owned by	Action	Ref	erence	Туре	Date due		Act	ions	



#### **Email templates**

#### HOW TO VIEW EMAIL TEMPLATES

Follow these simple steps to view existing Email Templates:

- 1. Select Configuration
- 2. Select Email Templates

=	
🖶 Home	Welcome back Abs Hassan (admin)
* Services	
Marketing	
🗑 CRM	Win by making each and
D Finance	will by making each and
🖬 Insight	every customer moment
Configuration	amazing
Users and Groups	
Setup payment method	
System Options	
CRM Settings	
Case Management	
Email Templates	
Email Domain Managem	
<b>∂</b> Support	

#### This will launch the Email Templates section:

Tilter by Reset litters	Email templates				NEW TEMPLA
MAIL TEMPLATE OPTIONS	NAME	TRIGGER	AVAILABILITY	CREATED	
All Active Disabled	C More Friendly Checkout Test	Checkout success	O Disabled	Julie MacDonald 8 Sep 2020	VIEW TEMPLA
APPLY FILTERS	Peter test	Register Customer	O Disabled	Peter Casey 8 Sep 2020	VIEW TEMPLA
	Training invite	Register Customer	O Disabled	Abs Hassan (admin) 7 Sep 2020	VIEW TEMPLA
	Subscription Change Confirmation	Subscription Changed	✓ Enabled	Amanda Sinton 3 Jul 2020	
	dummy test	Checkout success	✓ Enabled	ian kuczerepa 26 Aug 2020	VIEW TEMPLA
	Subscription changed single snippet test	Subscription Changed	O Disabled	Amanda Sinton 27 Aug 2020	VIEW TEMPLA

Here you'll see all the templates created.

All templates will be displayed along with the option to filter to only view the Active or Disabled ones.

You can filter the templates using the left hand menu:

You can create and view templates from this screen.

Email Templates will be listed in order of most recent created first. The list will show the template's Name, Trigger, Availability and who created it and when:

Email templates				NEW TEMPLATE
NAME	TRIGGER	AVAILABILITY	CREATED	
Training invite	Register Customer	O Disabled	Abs Hassan (admin) Created on 07 Sep 2020	VIEW TEMPLATE

•••

Selecting 'View Template' will launch the manage template screen, where you can edit the template along with enabling or disabling it:

Email templates	BACK						
Email template details When you want to identify the	Template name*						
template and control when it is sent based on the customer event trigger.	Successful Purchase 1						
	Template description*						
	successful purchase with billing date added						
	Template trigger*						
	Checkout Successful						
Design email template Design the content for your email by pasting your custom html and styles. You can personalise your template using a set of attributes which are based on the template trigger.	Email subject* Your Purchase {{#if firstName}}{{firstName}}{{/if}} TESTSUBJECTTESTSUBJEC						
Personalise your template using the following attributes:							
Customer (+) Customer's first name (+) Customer's full name	Email sender prefix*     Default email template domain*       no_reply     @       devel.paywizard.com						
Order	Select default email template domain						
+ Total cost	Choose						
+ Purchase date + Order number	HTML*						
Subscription	* * * * Verdana ~ 11pt ~ Paragraph ~ 区 印 2 (;)						
Subscription initial charge							
+ Next billing date							

#### One Active Email Template for each trigger

When you create an email template you can only have one Active email Template for each trigger at any one time.

If there is one active at present you will need to save the one you are creating as inactive then turn the other one off first. Or disable the active one first before you begin creating a new email template.

#### HOW TO CREATE AN EMAIL TEMPLATE

1. Select 'New Template' in the Templates section:

Email templates				NEW TEMPLATE
NAME	TRIGGER	AVAILABILITY	CREATED	
Training invite	Register Customer	O Disabled	Abs Hassan (admin) Created on 07 Sep 2020	VIEW TEMPLATE

This will launch the Email Template creation screen:

Email templates	(	BACK					
Email template details When you want to identify the template and control when it is sent based on the customer event	Template name*						
trigger.	Template description*						
	Template trigger* Choose						
Design email template Design the content for your email by pasting your custom html and styles. You can personalise your template	Email subject*						
using a set of attributes which are based on the template trigger.	Email sender friendly name						
Select your template trigger before we can show you which attributes you can use.	Email sender prefix* Default email template domain*						
	Select default email template domain						
	Choose	9					

### COMPLETE THE EMAIL TEMPLATE DETAILS

This section allows you to identify the template and control when it is sent based on the customer event trigger you link it to.

Note: Any fields marked with an \* are required

- 1. Create the Template name
- 2. Complete the Template description
- 3. Choose the trigger for this template from the drop down list.

Email template details When you want to identify the template and control when it is sent based on the customer event trigger.	Template name* Training invite
	Template description*
	Training invite email - time, locations etc
	Template trigger* Choose
Email template details When you want to identify the template and control when it is sent	Template name*
based on the customer event trigger.	Training invite
	Template description*
	Training invite email - time, locations etc
	Template trigger*

Choose	
Checkout Successful	
Security Key Created	
Security Key Updated	
Security Key Revoked	
Security Key Roles Updated	
Subscription Changed	

Note: You can only use one of 2 triggers; Checkout Successful or Subscription Changed.

### COMPLETE THE DESIGN EMAIL TEMPLATE SECTION

This section is for you to design the content for your email by adding your custom html and styles. You can personalise your template using a set of attributes populated on the left which are based on the template trigger.

#### Design email template Design the content for your email by Email subject\* pasting your custom html and styles. You can personalise your template using a set of attributes which are Email sender friendly name based on the template trigger. Select your template trigger before we can show you which Email sender prefix\* attributes you can use. Default email template domain\* @ Select default email template domain Choose ... HTML\* -8 (;) 4 A () () -Verdana 11pt Paragraph E - E - M ¶∢ 亚语 $\underline{T}_{x}$ B T U S EEE HΩ 0 WORDS

You should use the HTML Editor to edit your email style. This includes options to add images, links and videos

HTML\* P **{;}**  $\langle \rangle$  $\odot$ ► Verdana 11pt Paragraph Ξ  $T_{x}$ U S Ξ ₹ P ٩ł Ω B E = 븜

HTML Editor

#### Adding undocumented attributes to your Email Template

#### You can add attributes that do not appear on the left-hand side or with the default trigger attributes.

To do this, you have to extract the attribute from the Event Stream and then once formatted include it in the plain text section of your Email Template.

The Event stream for "eventType": "SERVICE\_CHECKOUT\_SUCCESS" has additional attributes such as Username or Masked PAN, which are not included in the email template for Successful Purchase. You can however add this manually to your template.

- Simply find the event from the Event Stream
- Format this using a JSON formatter (use hierarchy notation to expose the data not shown in template)
- Locate and copy the Username or Masked PAN attribute text, using JSON hierarchy
- Add the Username or Masked PAN attribute text to your template within the plain text section

Once you have saved the changes this, the Username or Masked PAN will appear on all Successful Purchase emails.

#### Note: Any fields marked with an \* are required

- 1. Complete the Email subject this is the subject of the email that will be sent to your customer
- 2. Complete the Email sender friendly name this is optional and if used you can add a name to the sender as opposed to just a default 'no reply'.

### An example of this could be:

Instead of seeing an email come from noreply@singula.com you could add the email sender friendly name as Singula Customer Support, so the customer would see the email has come from Singula Customer Support. (Only in the detail of the sender, would they see the email address it was sent from)

#### 3. Choose the **Email sender prefix** and the **email template domain** from the drop down.

The 'email template domain' can be set to a specific country manually within this drop down. By default, Email Templates will identify the customer's country through their registered address and default to that country if it has been setup (see Email Domain Management Guide). If their country is not available in the list, then the default 'email template domain' will be used.

Email sender friendly name		
Email sender prefix*		Default email template domain*
info	@	devel.paywizard.com
info	@	devel.paywizard.com Select default email template domain

- 4. Add your HTML code for your formatting of the email template.
- 5. Add your Text for your Email template (this can be copied from HTML)

ITML'	*																					
4	¢	$\langle \rangle$	۲	Ver	dana			11pt		v	Par	agra	iph	~		Þ	d	P	<b>{;}</b>			
B	I	U	S	E	Ħ			4		~	:=	~	Я	¶	<u></u> ×	Ļ		Ω				
[0]. {{# {{/i {{/i {{/i {{/i {{/i {{/i {{/i	<pre>{#if purchasedSubscriptions}} Your Subscription Purchase: {{purchasedSubscriptions. [0].itemName}} {{#if initialCharge}Initial Charge: {{initialCharge}} {{currency}}{{/if}} {{#if recurringCharge}Recurring Charge: {{recurringCharge}} {{currency}} {{/if}} {{#if renewalDate}Next Billing Date: {{renewalDate}} {{/if}} {{#if discount.amount}Your Discount: {{discount.amount}} {{currency}} {{/if}} {{#if discountedRecurringCharge}Recurring Cost with Discount: {{discountedRecurringCharge}} {{currency}} {{/if}} {{#if discount.duration}Discount Occurrences: {{discount.duration}} {{/if}} {{#if minimumTerm}Contract Term: {{minimumTerm.minimumTermDuration}} {{/if}} {{/if}} {{#if purchasedPPVs}} Your PPV Purchase: {{#each purchasedPPVs}}</pre>																					
			{this																	180 W	ORDS	.:

#### Plain text\*

{{#if title}} {{title}}{{{title}}{{#if firstName}} {{firstName}}{{#if lastName}} {{lastName}}{{/if}}
Your C More Purchase
{{#if purchasedSubscriptions}}
Your Subscription Purchase: {{purchasedSubscriptions.[0].itemName}}{{#if initialCharge}Initial Charge: {{initialCharge}}
{{currency}}{{/if}}
{{#if recurringCharge}Recurring Charge: {{recurringCharge}} {{currency}}{{/if}}
{{#if renewalDate}Next Billing Date: {{renewalDate}}{{/if}}
{{#if discount.amount}Your Discount: {{discount.amount}} {{currency}}{{/if}}
<{#if discountedRecurringCharge}Recurring Cost with Discount: {{discountedRecurringCharge}} {{currency}}{{/if}}
</pre>

{{#IT discountedRecurringCharge}}Recurring Cost With Discount: {{discountedRecurringCharge}} {{currency}}{{/IT

Copy from HTML

#### COMPLETE THE TEST EMAIL TEMPLATE SECTION

We recommend testing your email before sending to any of your customers. This will give you a real view of what a customer will see when they receive the email and will help you identify and resolve any template issues before you enable the template.

Note: It will use default data setup for each email template type but take the layout of the current email template you are editing.

- 1. Choose the 'Test email type' from the drop down
- 2. Enter your recipient's email address and then select 'Send Test Email'

est email type	
Choose	
mail recipient	

### **CONFIRM THE EMAIL TEMPLATE AVAILIBILITY**

Finally you need to confirm the template availability.

This is set to enabled by default however, if you want to disable it to use at a later date, select 'Template disabled" button Once you're happy with the template, select 'Save' to create the email template.

Template availability When you want to stop the email being sent to your customers.	Template disabled	
	CANCEL	SAVE

Remember you can view and edit any templates you create within the Email Templates section.

## **BETA Email templates**

### **VIEW EMAIL TEMPLATES**

- 1. Select Settings
- 2. Select Email Templates

All templates will be displayed along with the option to filter to only view the active or disabled ones.

One active template for each trigger

When you create an email template you can only have one active email template for each trigger.

### **CREATING AN EMAIL TEMPLATE**

- 1. Select Settings
- 2. Select Email Templates
- 3. Select New Template

#### Email template details

- 4. Enter the Template name
- 5. Enter the Template description
- 6. Choose the trigger for this template

ettings			
		CASES - EMAIL TEMPLATES EMAIL DOMAINS	
	Email templates	Back	
	Email template details When you want to identify the template and control when it is sent based on the custome event trigger.	Tangkon name *	
		Templete discription*	
		Templet tigger*	
	Design email template Design the content for your email by pasting your custom htmi and styles.	Ered adject*	
	You can personalise your template using a set of attributes which are based on the template trigger.	Ereal sender Neutly same	
	Select your template trigger before we can show you which attributes you	Email sender prefex * Ortault ensul lampiate domain *	
	can use.		
	can use.	Select default anal template docum	

Design email template

- 7. Enter the Email subject this is the subject of the email that will be sent to your customer
- 8. Enter the Friendly sender name this is optional and if used you can add a name to the sender as opposed to just a default 'no reply'
- 9. Enter the Email prefix and choose the email domain

The 'email template domain' can be set to a specific country manually within this drop down. By default, Email Templates will identify the customer's country through their registered address and default to that country if it has been setup (see <u>Email Domains</u>). If their country is not available in the list, then the default email template domain will be used.

 Design your email using the HTML editor. You can also paste your HTML a code editor. You can personalise your template using a set of attributes populated on the left which are based on the template trigger.

#### Adding undocumented attributes to your Email Template

You can add attributes that do not appear on the left-hand side or with the default trigger attributes.

To do this, you have to extract the attribute from the Event Stream and then once formatted include it in the plain text section of your Email Template.

The Event stream for "eventType": "SERVICE\_CHECKOUT\_SUCCESS" has additional attributes such as Username or Masked PAN, which are not included in the email template for Successful Purchase. You can however add this manually to your template.

- Simply find the event from the Event Stream
- Format this using a JSON formatter (use hierarchy notation to expose the data not shown in template)
- Locate and copy the Username or Masked PAN attribute text, using JSON hierarchy
- Add the Username or Masked PAN attribute text to your template within the plain text section

Once you have saved the changes this, the Username or Masked PAN will appear on all Successful Purchase emails.

11. Add your Plain Text version - this can be copied from the HTML version

#### Test your email template

We recommend testing your email before sending to any of your customers.

Note: It will use default data setup for each email template type but take the layout of the current email template you are editing.

- 12. Choose the Test email type from the drop down
- 13. Enter your recipient's email address and then select Send Test Email

#### **Email availability**

- 14. This is set to enabled by default however, if you want to disable it to use at a later date, select Template disabled
- 15. Select 'Save' to create the email template

### EDIT AN EMAIL TEMPLATE

- 1. Select Settings
- 2. Select Email Templates
- 3. Choose the template you want to edit

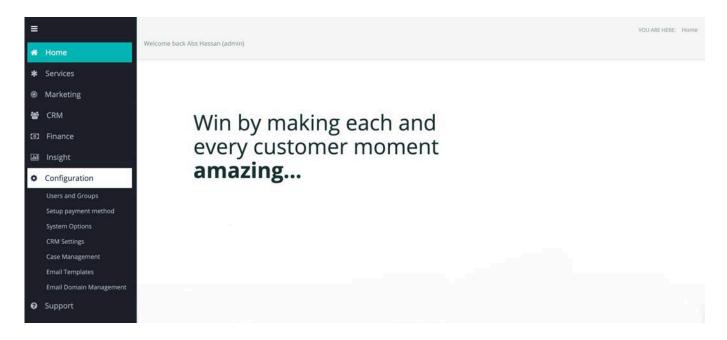
## **Email domain management**

This feature puts you in control of which domain is used as when sending emails to customers based on where they reside. You can setup a default domain or multiple domains and Singula<sup>®</sup> Subscriber Management will automatically use either the default or the country specific domain email for a customer when sending emails.

Note: Any new domains will need to be validated by Singula Decisions' Help Centre.

### HOW DO I ACCESS EMAIL DOMAIN MANAGEMENT?

- 1. Select Configuration
- 2. Select Email Domain Management



#### This will launch the Email Domain Management section:

=		Email Te	mplates				
ñ	Home						
*	Services	Domain settings activating your	domain is the first step. Please speak to the Sing	ula Decisions H	ep Centre before applying domains.		
۲	Marketing	DOMAIN	COUNTRY CODE		DEFAULT SENDER PREFIX	CREATED	
씋	CRM					Abs Hassan Training	
ø	Finance	singuladecisions.com	5		noreply	Oct 27, 2020	DELETE DOMAIN
	Insight	( Second			noreply		
٥	Configuration	domain	Choose		носру		SAVE DOMAIN
0	Support						

\*\*Here you'll see all the Domains created with options to delete or create a new one:

Email Ter	mplates			
Domain settings Activating your of	domain is the first step. Please speak to the Singula De	ccisions Help Centre before applying domains.		
DOMAIN	COUNTRY CODE	DEFAULT SENDER PREFIX	CREATED	
singuladecisions.com	875.	noreply	Abs Hassan Training Oct 27, 2020	DELETE DOMAIN
domain	Choose	- noreply		SAVE DOMAIN

The default domain will be listed at the top and then any additional domains will be below this . The list will show the domain's Domain, Country Code, Default Sender prefix and who created it and when:

DOMAIN	COUNTRY CODE	DEFAULT SENDER PREFIX	CREATED
singuladecisions.com	÷	noreply	Abs Hassan Training Oct 27, 2020

### HOW TO ADD A NEW DOMAIN

Follow these simple steps to add a new domain:

1. Enter your domain name into the 'domain' field

PayTV365	Choose	noreply	SAVE DOMAIN

2. Select the 'country code' from the drop down list:

✓ Choose	
DNK	
GBR	
NOR	
SWE	

The country codes will need to be added by Singula Decisions Help Centre for it to appear in the drop down list. The list will show any country codes that have been setup and have not already been used.

This means the drop down update according to which country codes you have already used and so will only show ones which have not been used.

#### Domain without a country code

You can setup a domain without a country code allowing you to use it as a default domain in the email template.

3. The 'Default Sender Prefix' is managed within Email Templates and you can used Sender friendly names instead of the default.

PayTV365	SWE	noreply	

### 4. Select 'Save Domain'



Once the domain has been saved it will appear in the list:

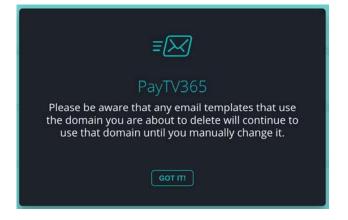
PayTV365	GBR	noreply	Abs Hassan (admin) Oct 1, 2020	DELETE DOMAIN
PayTV365	DNK	noreply	Abs Hassan (admin) Oct 1, 2020	DELETE DOMAIN
PayTV365	NOR	noreply	Abs Hassan (admin) Oct 1, 2020	DELETE DOMAIN
PayTV365	SWE	noreply	Abs Hassan (admin) Oct 1, 2020	DELETE DOMAIN

Any domains listed here can be used with the Email templates.

By default Singula<sup>®</sup> Subscriber Management will use the country code that customer resides in. If the country code is not setup then the default domain will automatically used.

≡		Email Ter	nplates				
ñ	Home						
*	Services	Domain settings Activating your of	fomain is the first step. Please speak to the Singula C	lections Help	Centre before applying domains.		
۲	Marketing	DOMAIN	COUNTRY CODE		DEFAULT SENDER PREFIX	CREATED	
썉	CRM					Abs Hassan Training	
0	Finance	singuladecisions.com			noreply	Oct 27, 2020	DELETE DOMAIN
	Insight	for an			noreply		
٥	Configuration	domain	Choose		norch3		SAVE DOMAIN
0	Support						

When deleting a domain, you'll be presented with a pop-up highlighting that any templates that use that domain will continue to do so unless you manually change it within the Email Template:



## **BETA Email domains**

#### We need to verify your domains

- 1. Select Settings
- 2. Select Email Domains

The default domain will be listed at the top and then any additional domains.

				-
ngula Decisions		💷 Products 🐨 Marketing 🖌 🙄 Customers 🗸		œ
ettings				
		CASES ~ EMAIL TEMPLATES EMAIL DOMAINS		
omain settings teating your domain in the first step. Please splat to the first	sús Discenses Hely Centre befors applying domains.			
DOMAIN	COUNTRY CODE	DEFAULT SENDER PREFIX	CREATED	
devel.psywizard.com	GBR	noreply :	tan kuczerepa Mar 11, 2021	Delete
devel.paywizard.com	18L	noreply	tan kuczerepa Mar 11, 2021	Delete
carthrottle.co.uk	*	norephy	CSL NOCRM, ROLE Mar 31, 2021	Delete
Domain 1	Countily	norephy		Save domain
rsorber Management i 02021 Singula Decisiona Lambelt vil Atriga				singula decisi

#### **ADD A NEW DOMAIN**

- 1. Select Settings
- 2. Select Email Domains
- 3. Enter your domain name into the domain field
- 4. Choose the country code

The country codes will need to be added by Singula Decisions Help Centre. The list will show any country codes that have been setup and have not already been used. You can setup a domain without a country code allowing you to use it as a default domain in the email template.

- 5. The Default Sender Prefix is managed within Email Templates and you can use Sender friendly names instead of the default noreply.
- 6. Select Save Domain

## **Payment methods**

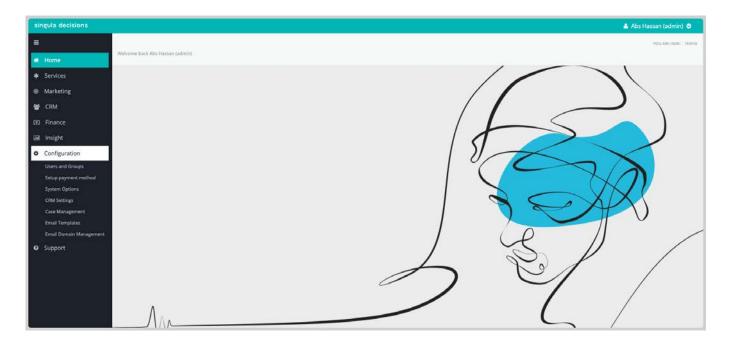
Setup Payment Method enables you to set up accounts along with any supporting metadata as well as configuring the necessary payment gateways in order to allow you to start using PSPs to take payments.

This also supports the bypassing of 3DS2 when payments are processed by an agent.

### **GETTING STARTED**

When setting up payment methods you'll need to complete these steps:

- 1. Contact one of our supported PSPs (e.g. Realex Payments, PayPal, DIBS, Klarna) and obtain the information that's required for setting up an account with them;
- 2. Log into Singula® Subscriber Management and select 'Configuration' then 'Setup payment method';



3. Choose the PSP from the Payment Gateway section by clicking the radio button to the left of its icon and then click 'Add account';

A Be careful when creating and editing payment methods. You won't be able to remove any payment methods once created. Payment Gateway realex payments • 
worldpay GLOBAL 0 0 realex payments PayPal (ABS-CBNmobile 0 0 · SKY cable ipay88 > · BT 0 2 O KLARNA DIAGNAL 0 0 Manage account + Add account

4. Set up the account using the information provided by the PSP;

Add account			YOU	ARE HERE: Home > Configuration	_
Add account		Top tip!			
Identifier: * 😧		GLOBAL IRIS"	Did you know? Globaliri	s requires one MID per authoris	ation.
Username: * 😧	Password: * 😧	Add currencies			
Success URL:* 👔		Currencies	Tra	nsaction Type	0
Success ORE		Please select ¥	Recurring	🗆 Initial	
Failure URL: * 🛛		+ Add another			
HPP URL: * 0					
https://hpp.sandbox.globaliris.co	m/pay				
Service URL: * 🚱					
https://remote.sandbox.globaliris	.com				
Refund password: * 😧					

5. Save changes;

The account can be edited if required.

### **ADDING A REALEX PAYMENT ACCOUNT**

Realex Payments is an online payment processing solution. Realex Payments will capture and store your customers' tokenised payment details. You can also process payments during cart checkout and run regular billing cycles using the token provided by Realex Payments.

When creating a Realex Payments account you'll need to be aware of the following:

Realex Payments needs one identifier per transaction type. (This is provided by Realex)

Follow these steps to add an account:

1. Click the radio button next to Realex and then click +Add account button to add a Realex Payments account:

Payment Gateway		
• Payments	∘ ⊚world <b>pay</b>	O O GLOBAL
PayPal	• Prealex payments	• PABS-CENmobile
	<ul> <li>ipay88 &gt;</li> </ul>	• <b>BT</b>
O DIAGNAL	O Dons	O DELARMA
Manage account		
+ Add account		

#### This opens up the 'Add account' section:

Add account		TOU ARE HERE. Home > Configuration > Add account Cancel Serve
Add account		Top fip!
identifier: * 0		Did you know? Realex requires one MID per authorisation.
Username: * 🛛	Password: * 🙆	Add currencies
Success URL: * O		Currencies         Transaction Type         Image: Currencies         I
Failure URL * 0		+ Add another
HPP URL + 0		
https://hpp.sandbox.realexpayments.com/pa	9	
Service URL * 0		
https://epage.sandbox.payandshop.com		
Agent Account: * 😡	Refund password: * 🛛	

When creating a new Realex Payments account you will need to enter following:

Identifier – The Merchant ID (MID); the Realex sub-account identifier. This allows transactions to be grouped and to identify transaction type;

Username - The username credentials used to communicate with Realex Payments system;

**Password** – The encrypted password used to communicate with Realex Payments system. Please ensure you have entered the exact password provided by Realex Payments;

**Success URL** – The success page URL that the customer will be redirected to if they've successfully completing the PSP payment capture phase;

**Failure URL** – The failure page URL that the customer will be redirected to if they've been unable to complete the PSP payment capture phase;

HPP URL – The hosted payment page (HPP) for payment card capture;

Service URL – Your recurring payment URL, used for all authorisation and refunds.

**Agent Account** - The Agent Account ID allows you to use a non 3DS2 enabled sub-account for agents to capture payment details while bypassing 3DS verification checks;

### Bypassing 3DS2 using Agent Account ID

3DS2 enabled requires two sub accounts; one for online customer initiated payments and one for Agent capture. To allow bypassing of 3DS2 for Agent capture, you will need to:

- 1. Create a non 3DS2 sub account with Realex. (This is to allow agents to bypass 3DS2 when taking payments from a customer). Once created you will be given an Agent Account ID by Realex.
- 2. Create or update an existing Realex payment method in Singula® Subscriber Management, making sure to include the correct Identifier and the Agent Account ID provided by Realex.
- 3. Complete any other required fields and then click 'Save' to finalise the changes.

Refund Password – This ensures that requests for refunds are genuine;

**Currencies** – You must add a row for each currency associated with the identifier. Note: The currencies shown are the ones set up in our system and aren't specific to the PSP;

**Transaction Type** – Select either a recurring and/or initial transaction type. Note: your default account has to be set to recurring;

Once setup is complete, click the Save button at the bottom or Cancel to go back.

Note: Once you've added an account in Setup payment method you are unable to delete/deactivate it, as this is financial data that may have an impact on customer transaction.

If you need to delete or deactivate a payment method please contact your Account Manager or Help Centre.

### **MANAGING REALEX PAYMENT ACCOUNTS**

Click the pen button next to the account you wish to edit in '**Manage accounts**' section. The pen buttons displayed below are against different currencies, clicking any of them will take you to the same account.

○ Prealex ■		<b>⊘worldpay</b> ∘		O O GLOS	GLOBAL	
o 🦻 PayPal	• 3	payments	.121	o PABS-C	BNmobile	
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Manage account						
Identifier	Success URL	Failure URL	Currencies		Transaction Type	
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			DKK		Recurring, Initial	* * *
			SEK		Recurring, Initial	1
			NOK		Recurring, Initial	

### This will display the 'Manage accounts' page:

Manage account			YOU ARE HER	E: Home > Configuration > Man	age account
Manage account		Top tip!			
Identifier: * 💡		nealex	Did you know? Realex rec	quires one MID per authorisatior	۱.
h,		payments			
Username: * 🕜	Password: * 😧	Manage currencies			
paywizardrealextest	Edit	Currencies	Tree		0
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https://		Swedish Krona 🗸	Recurring	Initial	
HPP URL: * 😧					
https://hpp.sandbox.realexpayments	s.com/pay	Norwegian Krone 🗸	Recurring	Initial	
Service URL: * 🔞		+ Add another			
https://epage.sandbox.payandshop.	com				
Agent Account: * 📀	Refund password: * 🔞				
api	Edit				

All fields can be edited except for identifier and currencies.

To edit the Password and/or Refund Password click the **'Edit'** button attached to those fields.

**Note**: If you click on a protected edit field (grey box) it will display a blank white box, if you click on this but don't wish to edit it, click the 'Cancel' button to go back, this will revert to your previous settings.



## **MY PROFILE**

### My password

#### **CHANGE MY PASSWORD**

- 1. From the User menu, select 'Change my password'
- 2. Enter your current password
- 3. Enter your new password
- 4. Confirm your new password
- 5. Select 'Save'



### **RESET MY PASSWORD**

Contact your administrator who can reset your password. You will receive an email with instructions to reset your password. The link within the email expires after 1 hour.

## SUPPORT

## **Contact support**

### **CONTACTING THE HELP CENTRE**

You can email the Help Centre directly using the following email address helpcentre@singuladecisions.com or call on +44 (0)844 855 2975. The Help Centre is available 24 hours a day, 7 days a week, 365 days a year.

### **RAISING A TICKET**

You can raise a ticket, view an incident or make a request on the Singula Decisions ticket management system portal.

Instructions on how to raise a ticket will be supplied by your account manager. Your email domain will be whitelisted to use this site.

In the event you are unable to access the portal, you can contact the Help Centre.