

## V2021.11 user guide

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## AMENDMENT HISTORY

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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 – November 2021**

### **CUSTOMERS CAN AUTHENTICATE FROM 3RD PARTY WEBSITES**

We have enhanced our Customer Service to allow you to authenticate your customers securely

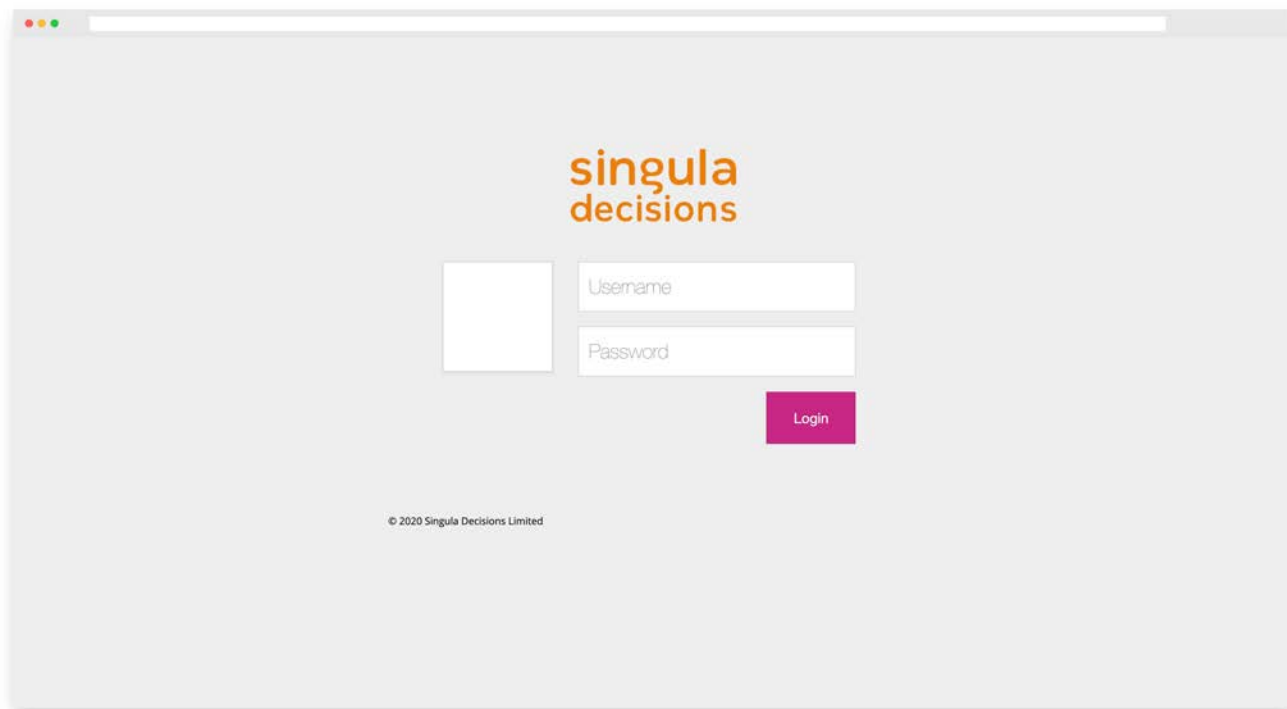
### **WHAT'S FIXED**

- We've added a fixed which occasionally prevented your logo appearing on the password reset screen
- We identified an issue that meant a customer could have more than one active subscription sub-contact
- We identified an issue which meant that subscription cancellations for the next renewal date, that are made on the subscription billing date, are cancelled immediately. We've now made sure the cancellation is scheduled.

## 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.



### 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



The screenshot shows the 'Create subscription' interface in the Singula Decisions system. The page title is 'Orange Vision | Create subscription'. The user 'Greg Herd' is logged in. The interface is divided into two main sections: 'Name your subscription' and 'Create pricing'.

**Name your subscription section:**

- Subscription name\*:** A text input field.
- Description\*:** A larger text area.
- Initial term\*:** A dropdown menu with 'Please select...' as the current selection.
- Group:** A dropdown menu with 'Please select...' and an 'Add group' button.

**Create pricing section:**

- Category\*:** A dropdown menu with 'Please select...'.
- Frequency\*:** A dropdown menu with 'Please select...'.
- Initial charge:** A text input field containing '0.00'.
- Price\*:** A text input field containing '0.00'.
- Currency:** A dropdown menu with 'Please select'.
- + Another currency:** A button to add more price points.

**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

The screenshot shows the Singula Decisions web interface. On the left is a dark sidebar with a menu containing: Home, Services (highlighted), Subscriptions, Crossgrades, One-off purchases, Catalogue, Marketing, CRM, Finance, Insight, Configuration, and Support. The main content area has a teal header with the Singula Decisions logo and the user name 'Greg Herd'. Below the header, there are several configuration sections:

- Frequency\*:** A dropdown menu with 'Please select...'.
- Initial charge:** A text input field with '0.00'.
- Price\*:** A text input field with '0.00' and a 'Please select' dropdown.
- + Another currency:** A button with a help icon.
- Would you like to apply a free trial period?:** Radio buttons for 'Yes' and 'No' (selected).
- Add a discount:** A section with a yellow warning box: 'Associating a discount with a status of 'TEMPLATE' to a product will activate the discount. Associating a discount with a status of 'INACTIVE' will hide it from view until the discount is activated.' Below this are radio buttons for 'Yes' and 'No' (selected).
- Select conditional access (CA) enablement:** Radio buttons for 'Yes' and 'No' (selected).
- Crossgrade eligibility criteria:** A section with the text 'By default, all subscriptions are eligible for crossgrade.' and two checked checkboxes: 'Allow this subscription to crossgrade to all other subscriptions' and 'Allow other subscriptions to crossgrade to this subscription'.

At the bottom right of the main content area are two buttons: 'Continue' (highlighted in teal) and 'Cancel'.

## 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



## CREATE A PAY PER VIEW

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

The screenshot shows the 'Create Item' form in the Singula Decisions interface. The form is titled 'Orange Vision Create item'. It is divided into three main sections: 'Name your item', 'Create pricing', and 'Select conditional access (CA) enablement'. The 'Name your item' section includes fields for 'Item name\*', 'Description\*', 'Category\*' (with a dropdown menu showing 'Please select...'), and 'Item type\*' (with a dropdown menu showing 'Digital item'). The 'Create pricing' section includes a 'Price\*' field with '0.00' entered, a currency dropdown menu showing 'Please select', and a '+ Another currency' button. The 'Select conditional access (CA) enablement' section includes a radio button for 'Item requires CA enablement\*' with 'No' selected. At the bottom right, there are 'Continue' and 'Cancel' buttons. A sidebar on the left contains navigation links: Home, Services (highlighted), Subscriptions, Crossgrades, One-off purchases, Catalogue, Marketing, CRM, Finance, Insight, Configuration, and Support. The top right corner shows the user's name 'Greg Herd'.

## 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

The screenshot shows the 'Create item' form in the Singula Decisions interface. The form is titled 'Orange Vision Create item' and is divided into three main sections: 'Name your item', 'Create pricing', and 'Select conditional access (CA) enablement'. The 'Name your item' section includes fields for 'Item name\*', 'Description\*', 'Category\*' (with a dropdown menu), and 'Item type\*' (with a dropdown menu). The 'Create pricing' section includes a 'Price\*' field (with a value of 0.00), a currency dropdown menu, and a '+ Another currency' button. The 'Select conditional access (CA) enablement' section includes a radio button for 'Item requires CA enablement\*' with 'Yes' and 'No' options, where 'No' is selected. At the bottom right, there are 'Continue' and 'Cancel' buttons. The left sidebar shows a navigation menu with 'Services' selected.

### 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

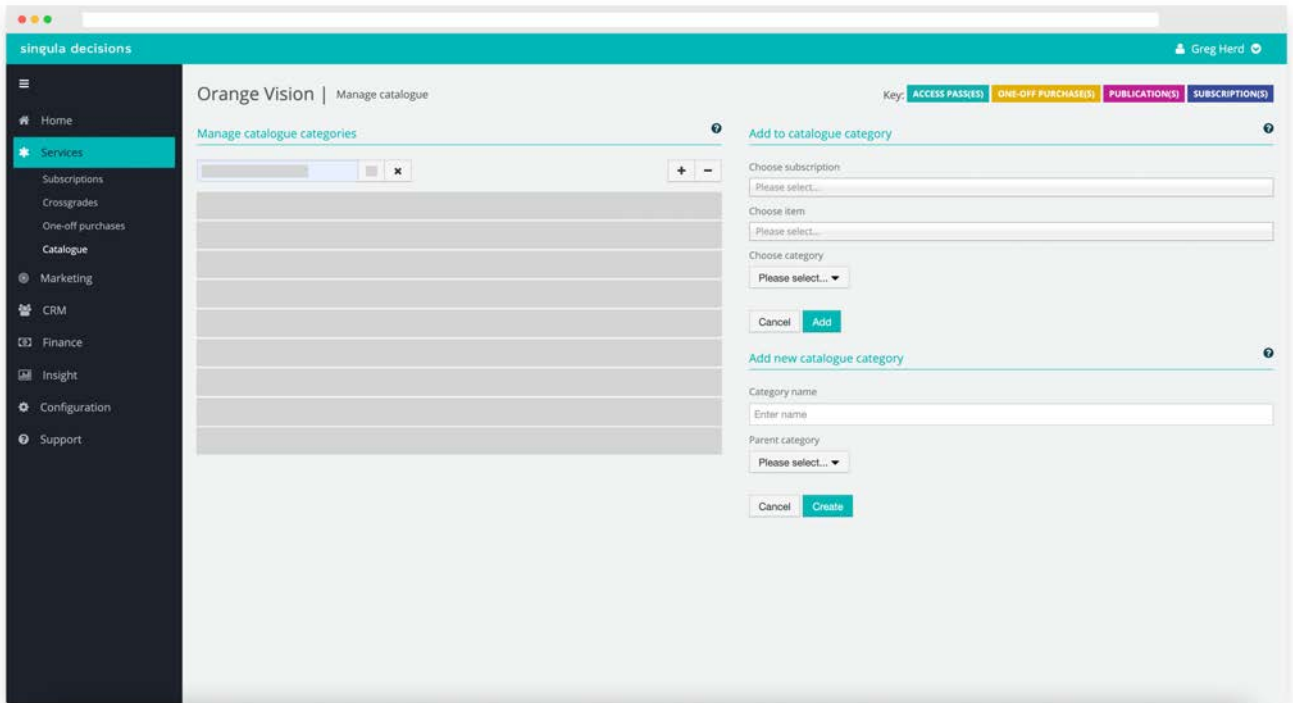
## CHANGE AN ACCESS PASS PRODUCT

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



## 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

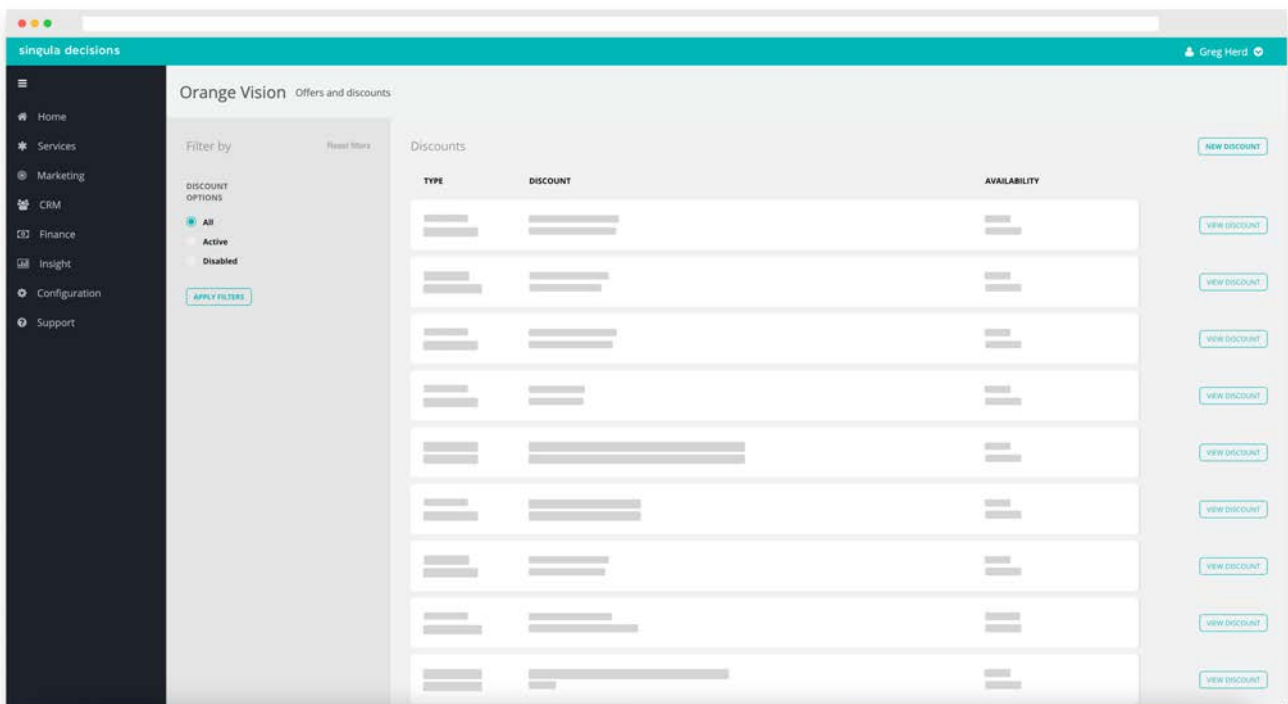
1. Select **Marketing**
2. Select **Offers and Discounts**

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



3. Select **New Discount**

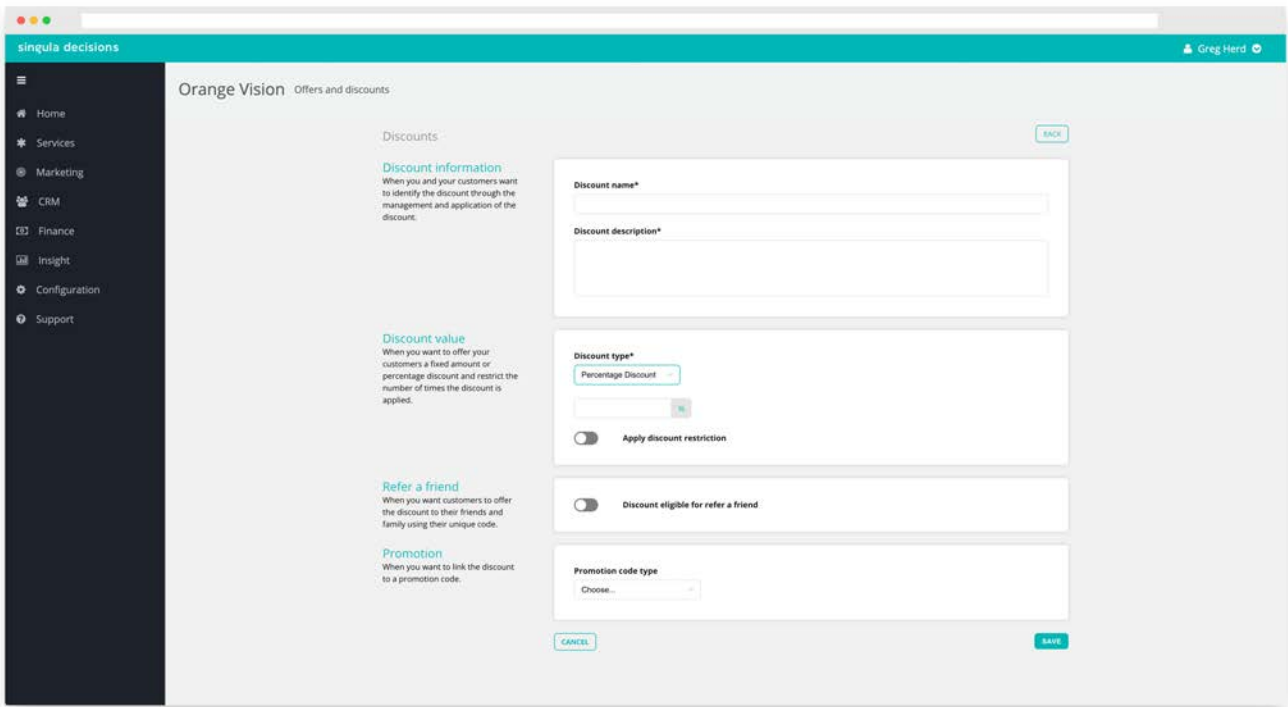


#### 4. Complete the discount form

- 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

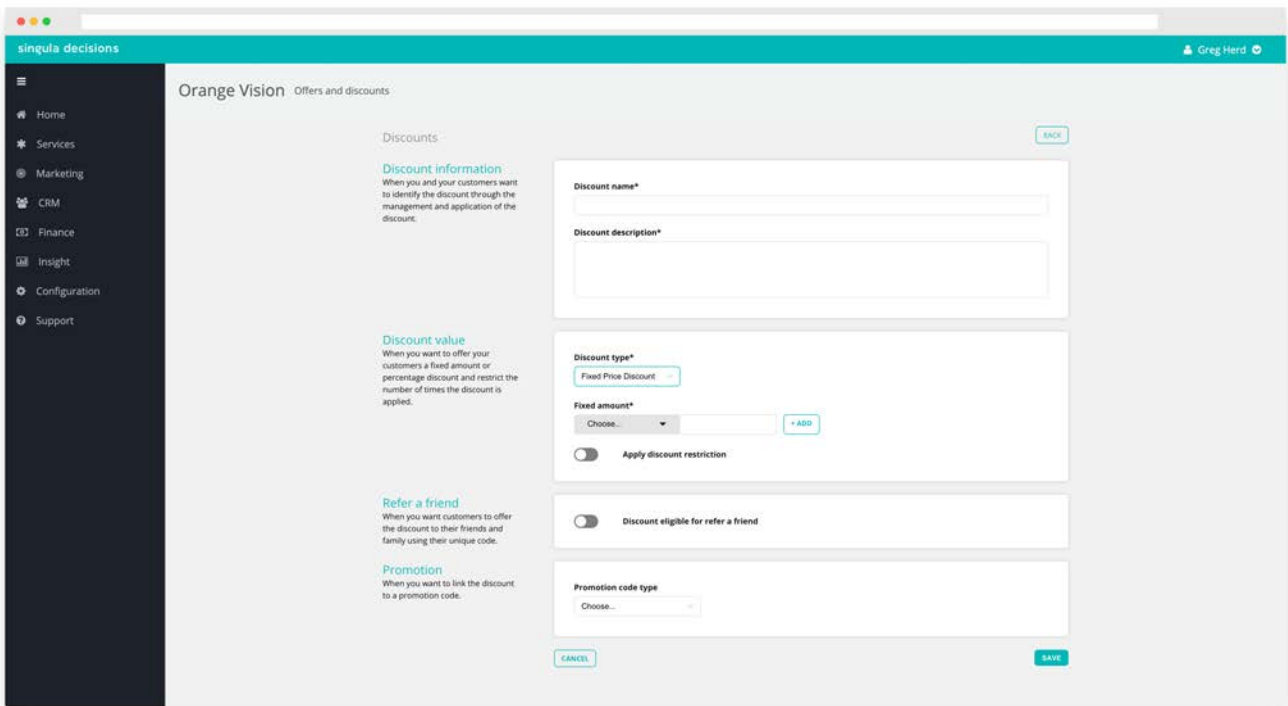
#### Percentage Discount:

- 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



## 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



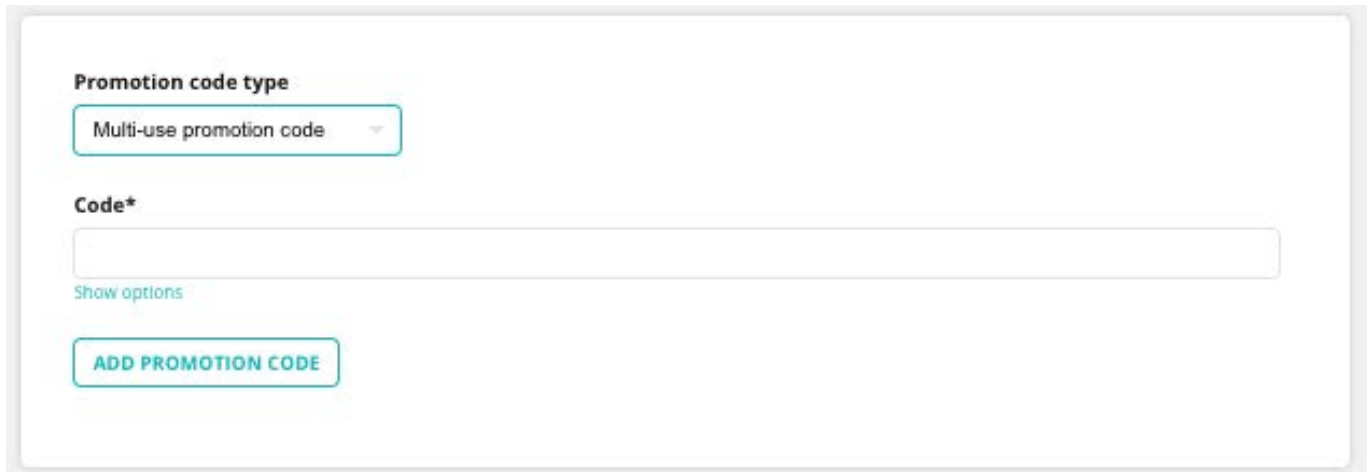
## Applying a Zero price discount

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



**Promotion code type**

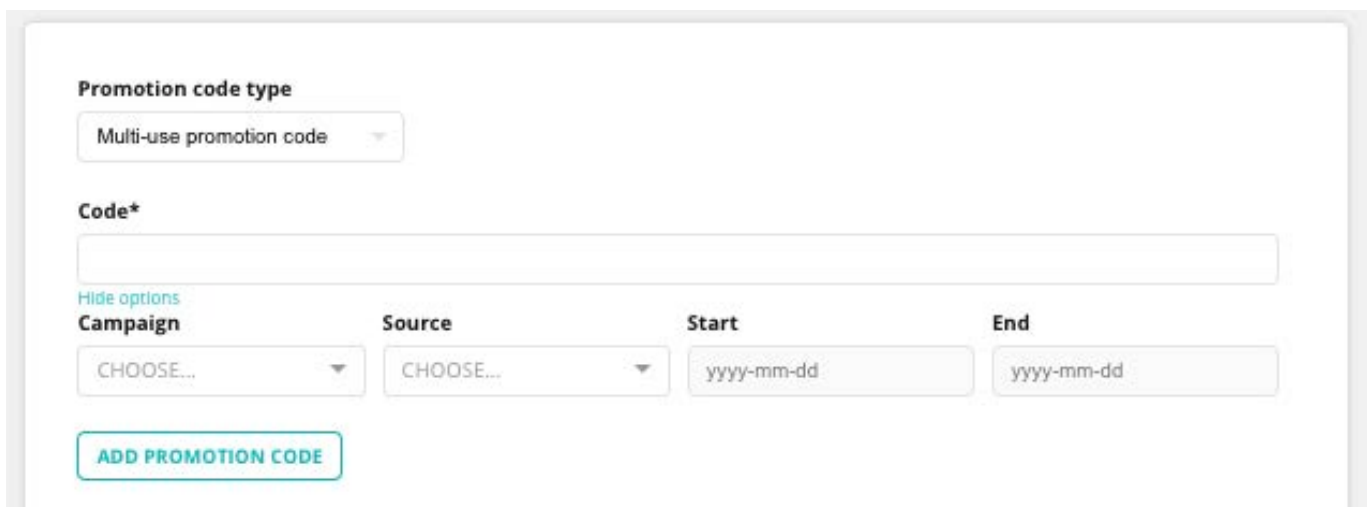
Multi-use promotion code

**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;



**Promotion code type**

Multi-use promotion code

**Code\***

Hide options

**Campaign**      **Source**      **Start**      **End**

CHOOSE...      CHOOSE...      yyyy-mm-dd      yyyy-mm-dd

ADD PROMOTION CODE

- 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.

## ADDING A SINGLE-USE PROMOTION CODE

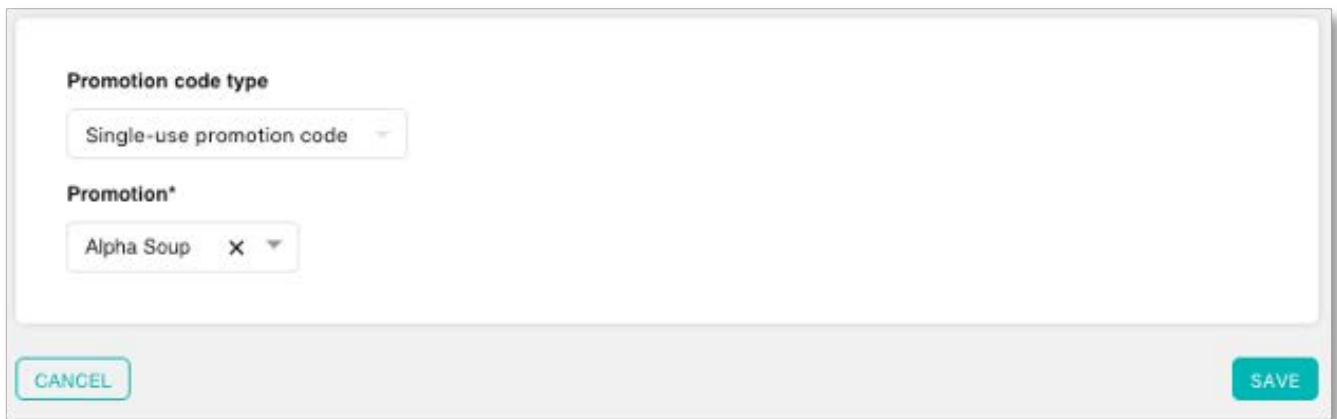
Single use promo code allows you to create a set amount of promotion codes which can then be given to prospective/existing customers to sign up to a new subscription with a promotional discount.

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).

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

- Select **Save**



The image shows a dialog box for configuring a promotion code. It has a light gray border and a white background. At the top left, the text "Promotion code type" is followed by a dropdown menu containing "Single-use promotion code". Below this, the text "Promotion\*" is followed by a dropdown menu containing "Alpha Soup" with a small 'X' icon and a downward arrow. At the bottom left, there is a light blue button labeled "CANCEL". At the bottom right, there is a teal button labeled "SAVE".

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.

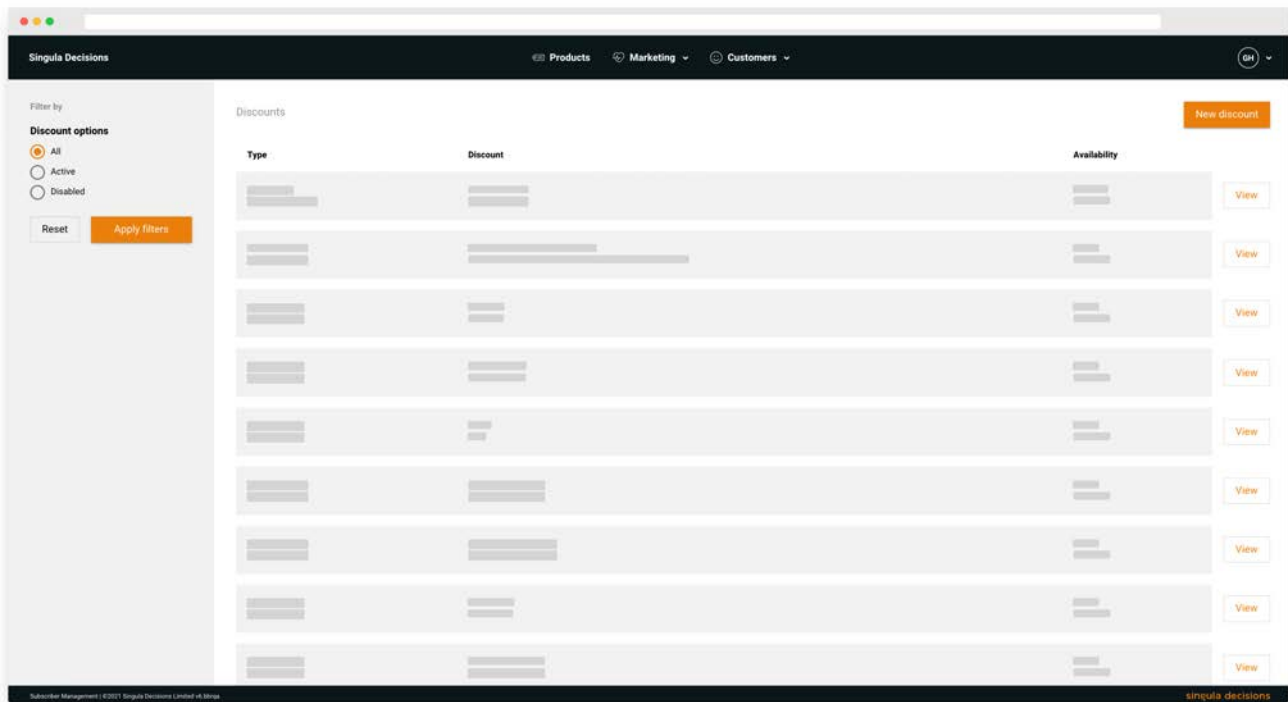
1. Select **Marketing**
2. Select **Offers and Discounts**
3. **Choose** the discount you want to view and edit

## 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.



### 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

**Discounts** Back

**Discount information**  
When you and your customers want to identify the discount through the management and application of the discount.

**Discount value**  
When you want to offer your customers a fixed amount or percentage discount and restrict the number of times the discount is applied.

**Refer a friend**  
When you want customers to offer the discount to their friends and family using their unique code.

**Promotion**  
When you want to link the discount to a promotion code.

Discount name \*

Discount description \*

Discount type \*

Discount eligible for refer a friend

Promotion code type

Cancel Save

Subscriber Management | ©2021 Singula Decisions Limited v4.01010 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

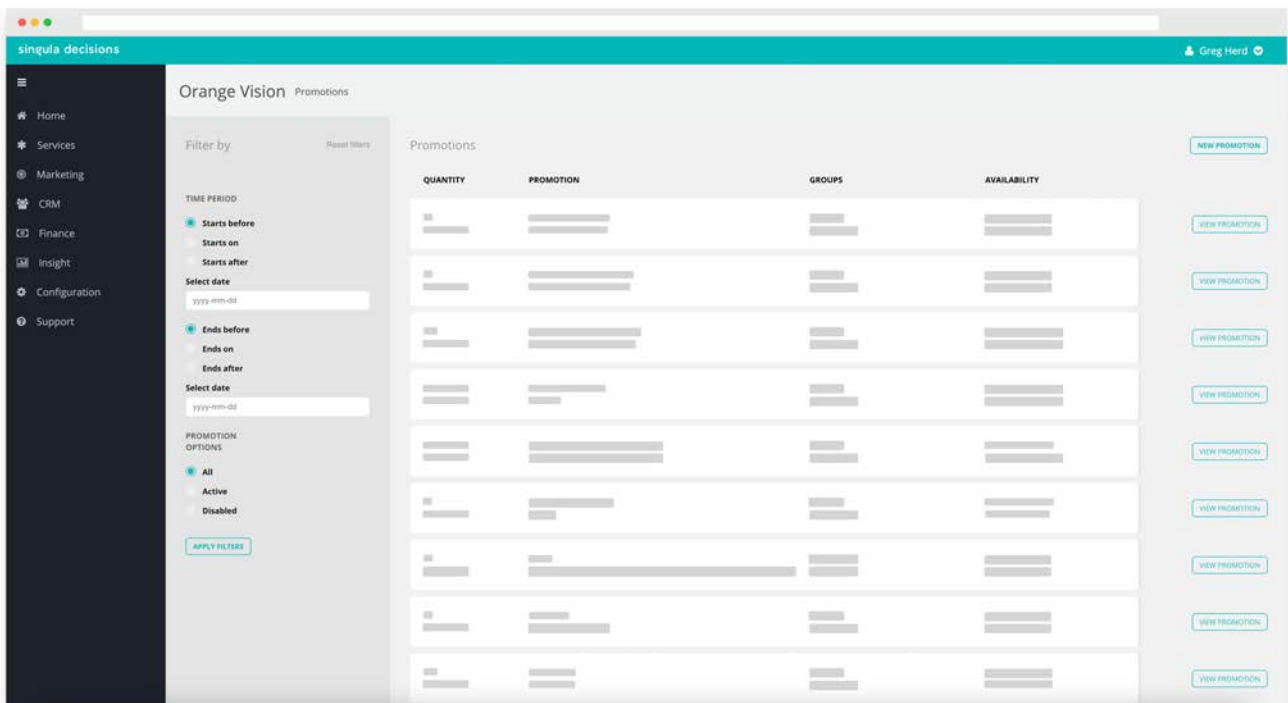
Create promotions that link to your marketing campaigns. Promotions allow you to link campaigns to product sales.

### 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



### CREATE A PROMOTION

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



- 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.

## Promotion groups

When you want to manage and monitor the codes currently applied to the promotion.

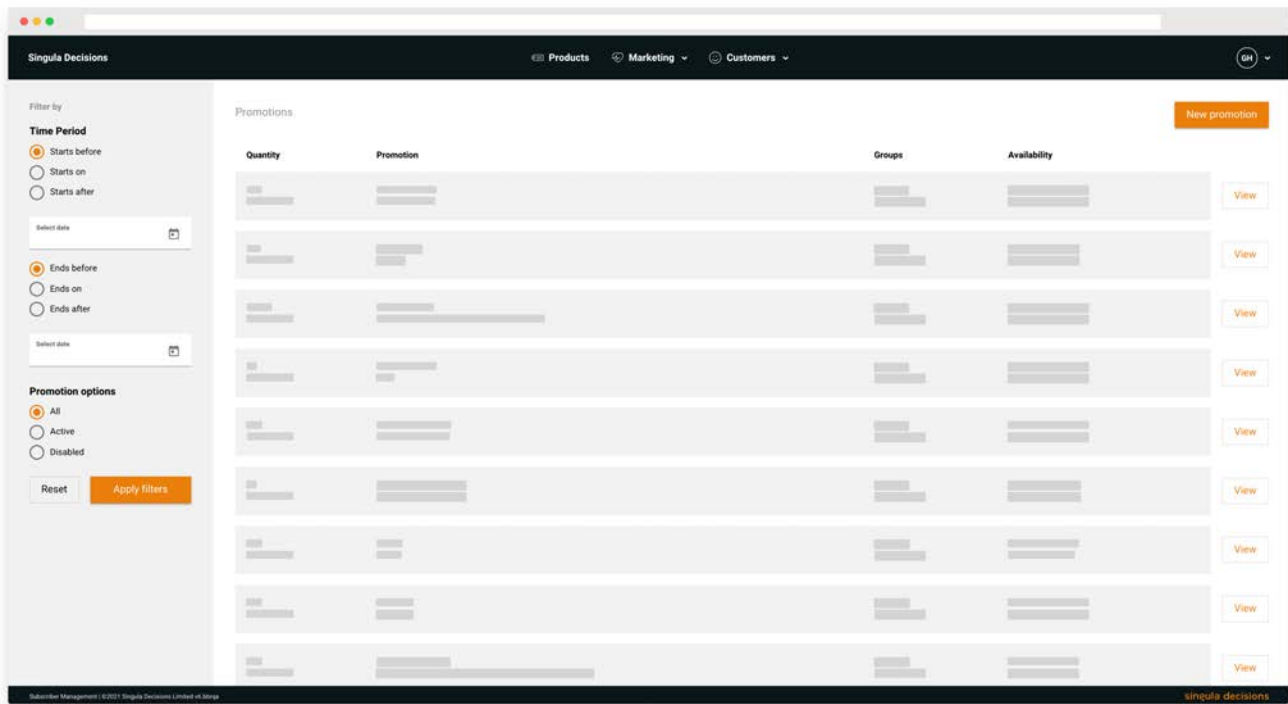
QUANTITY	GROUP	CREATED	LAST DOWNLOAD	
100 0 redeemed	57cef8df-96ea-4001-ac28-bd81d18c342a <a href="#">Download file</a>	Abs Hassan Tr... May 4, 2020	Abs Hassan Tr... May 4, 2020	<a href="#">DISABLE GROUP</a>
10 0 redeemed	d45b151b-a24d-4482-8dab-e6e137865f36 <a href="#">Download file</a>	Dennis Nowland May 4, 2020	Dennis Nowland May 5, 2020	<a href="#">DISABLE GROUP</a>
1000 0 redeemed	ee573cdb-144c-4b30-9719-a2c48d65da72 <a href="#">Download file</a>	Abs Hassan Tr... May 25, 2020		<a href="#">DISABLE GROUP</a>

## 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.



### 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

## 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

The screenshot shows the 'Promotions' management page in the Singula Decisions application. The page has a dark header with 'Singula Decisions' on the left and navigation tabs for 'Products', 'Marketing', and 'Customers' in the center. A 'Back' button is in the top right. The main content area is divided into three sections on the left and a form on the right. The 'Promotion information' section explains that it's for identifying a promotion through discount management. The 'Promotion code' section explains it's for offering unique codes, either generated or uploaded. The 'Promotion availability' section explains it's for setting when the promotion is used. The form on the right includes fields for 'Promotion name', 'Promotion description', 'Campaign name', and 'Source'. It also has a 'Create promo codes' dropdown with an 'Upload promotion codes' option, a 'Choose CSV file' button, and a link to 'Download an example of an upload file'. At the bottom of the form, there are 'Starts on' and 'Ends on' date pickers (set to 08/09/2021), and a 'Disable Promotion' toggle switch.

## 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.

**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

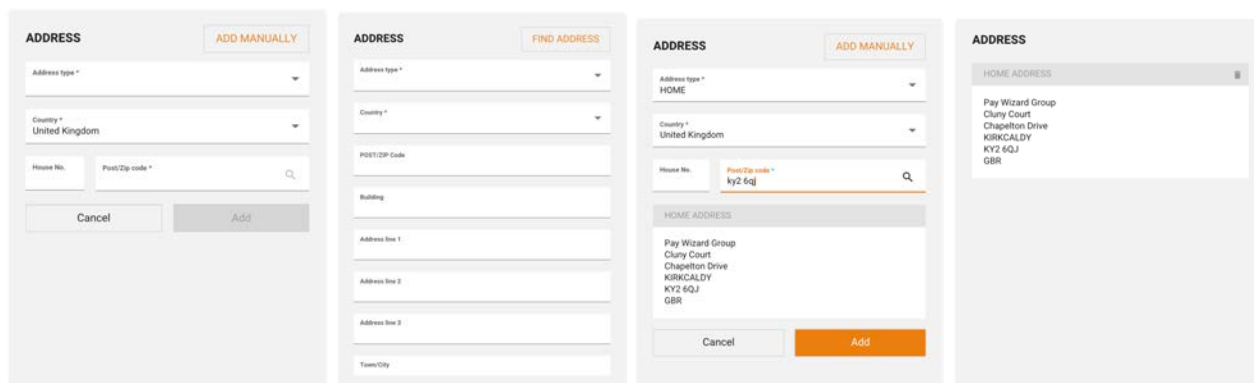
2. Complete the customers personal details. The email address you enter will automatically populate the username field. You have the option to change the username.

### 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



## CONTACT DETAILS

8. Complete the customers contact telephone numbers

## CUSTOMER CONSENTS

9. Select the relevant customer consents

## CUSTOMER ATTRIBUTES

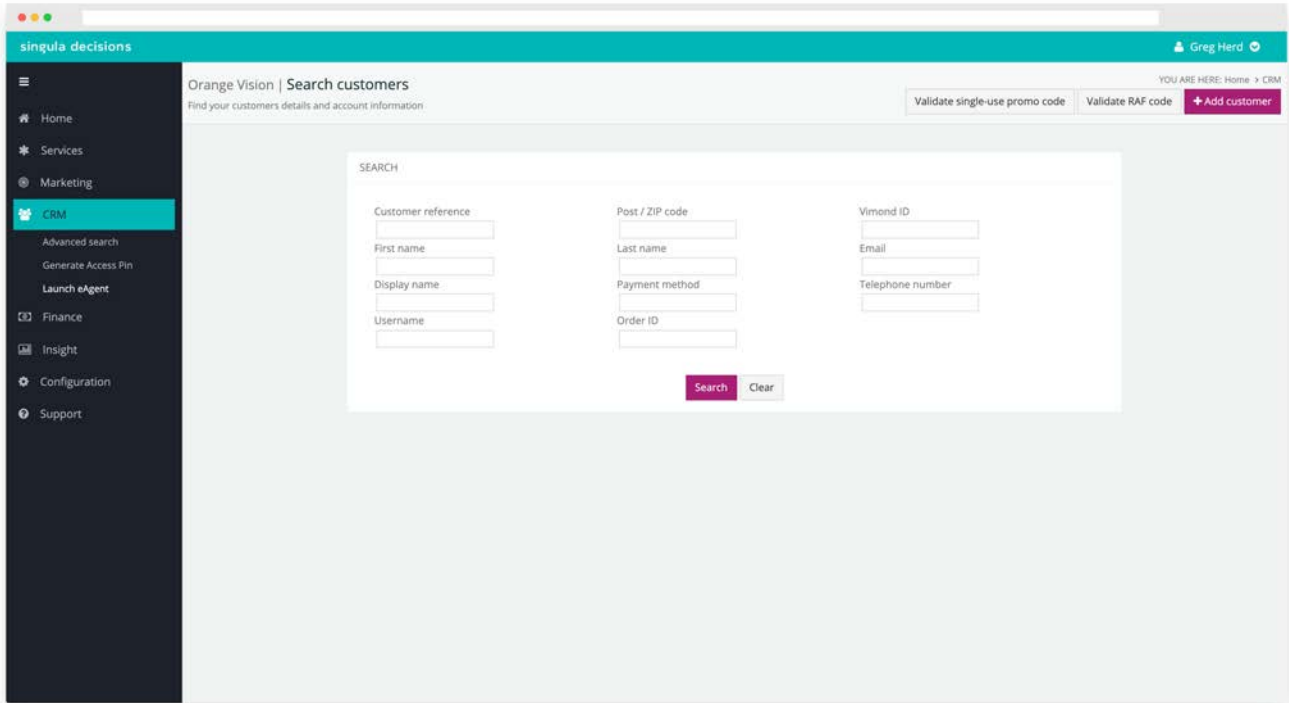
10. If available, enter the customer attributes required by your business.
11. Select 'Create customer' to save the customer. Any errors on the page will be highlighted.

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



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

### Partial search

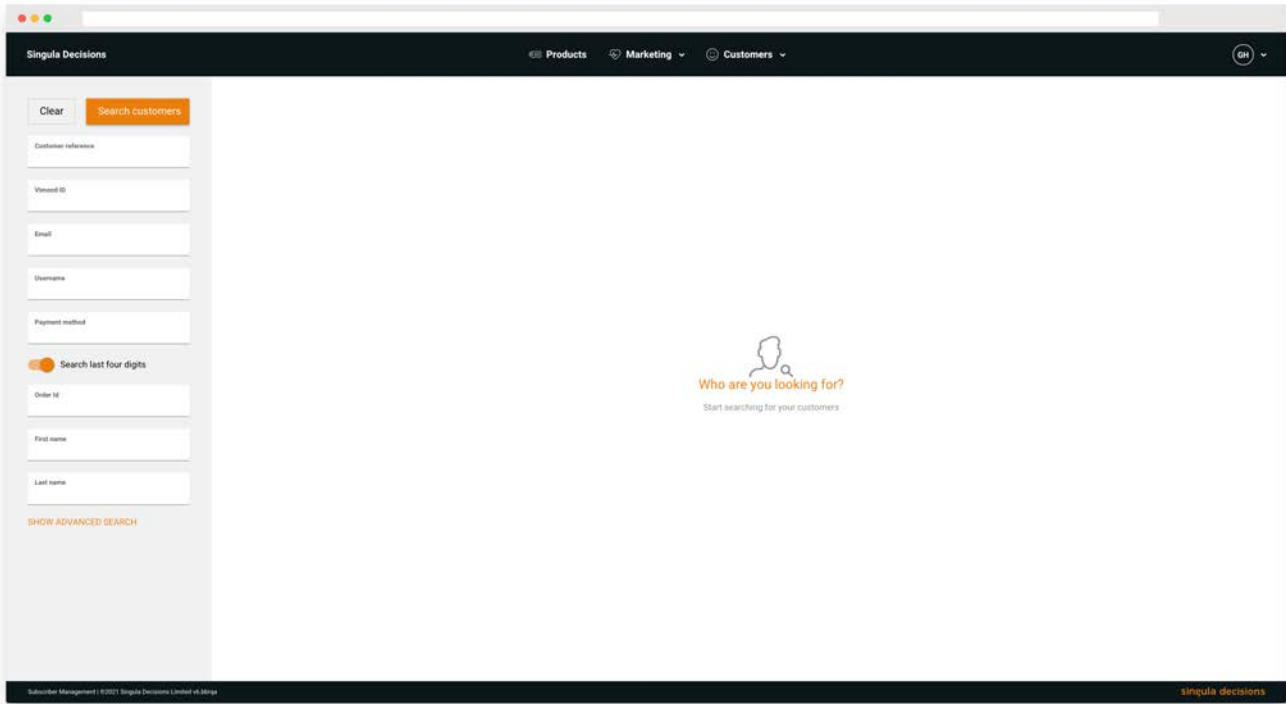
You have the option to do a partial search using a post/zip code, first name, last name, email, phone, username and payment details.

### 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**



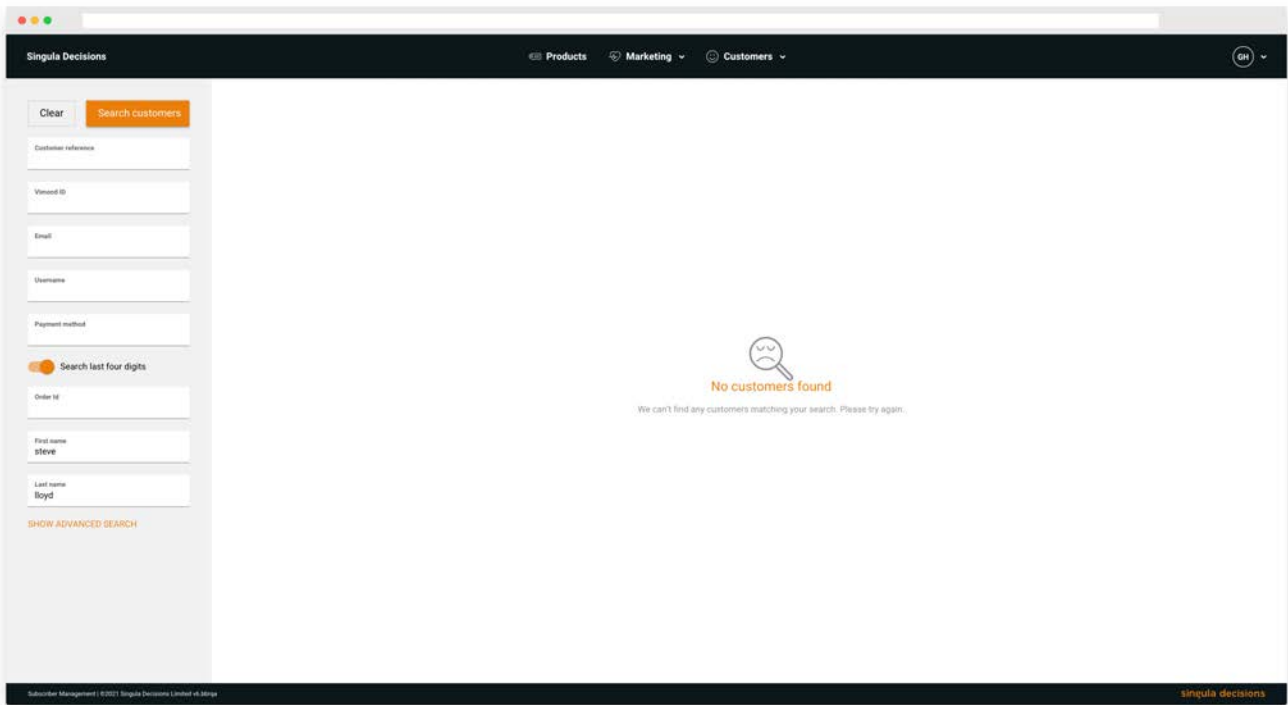
3. **Enter** the customer's details - you can choose to search using one or more fields. Select 'Show Advanced search' to display the advanced search options.
4. Press **Enter** or select 'Search customers'
5. If an exact match is found, the customer account will be displayed. If more than one account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

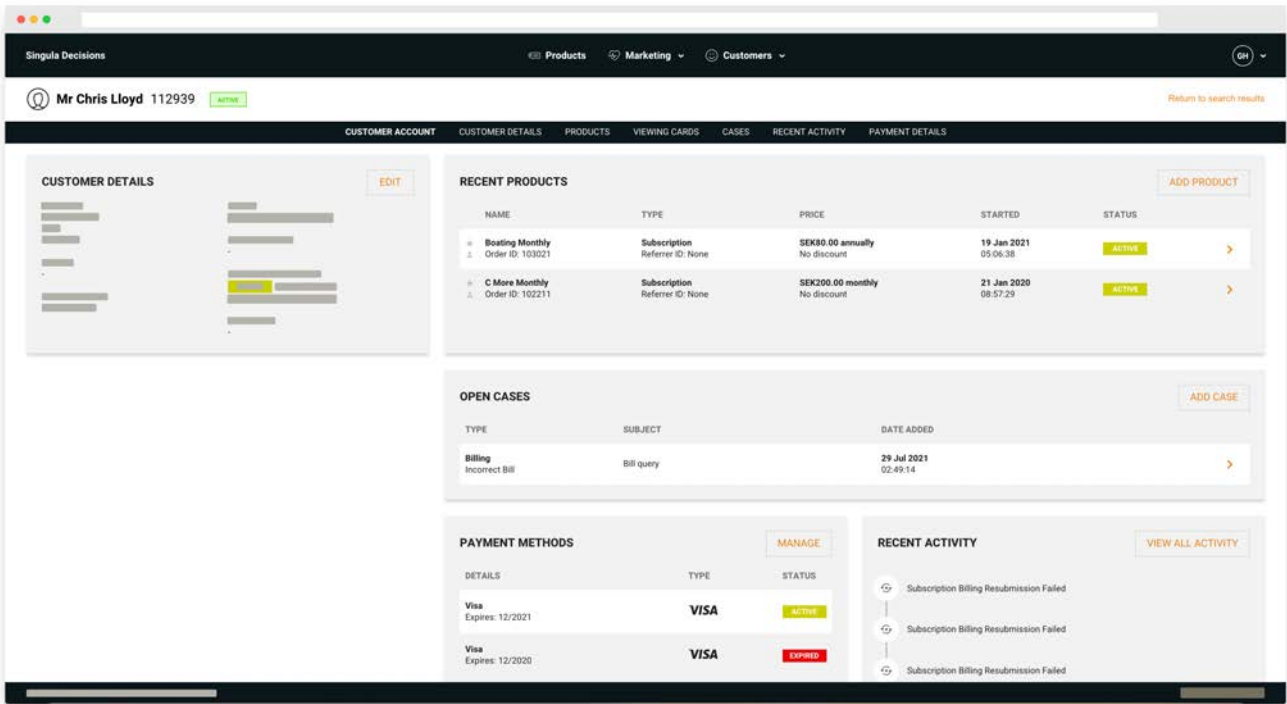
### NO SEARCH RESULTS

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.



## BETA Customer account

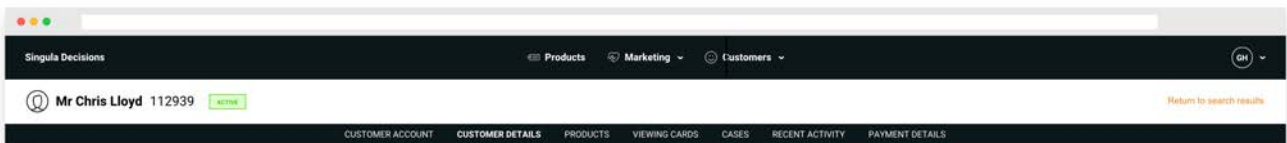
The customer account gives you a summary of the customer including their personal details, recent products, open cases, payment methods and recent activity.



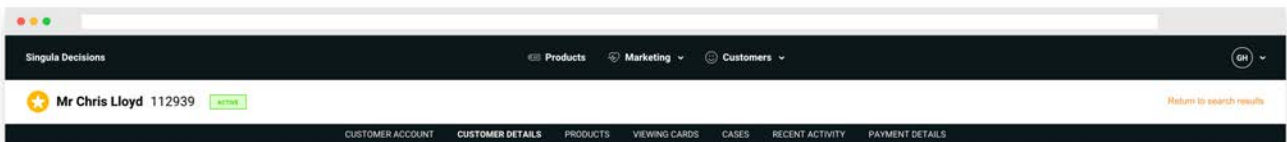
### CUSTOMER ACCOUNT HEADER

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

#### Standard

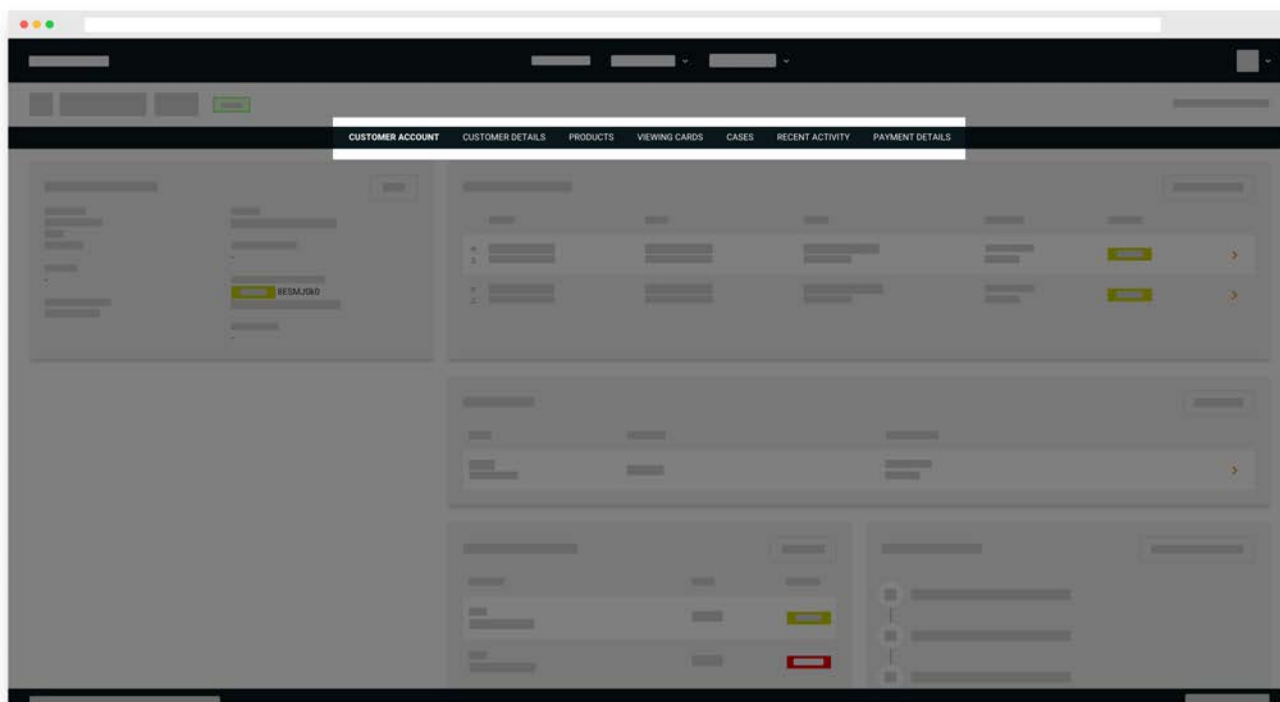


#### VIP



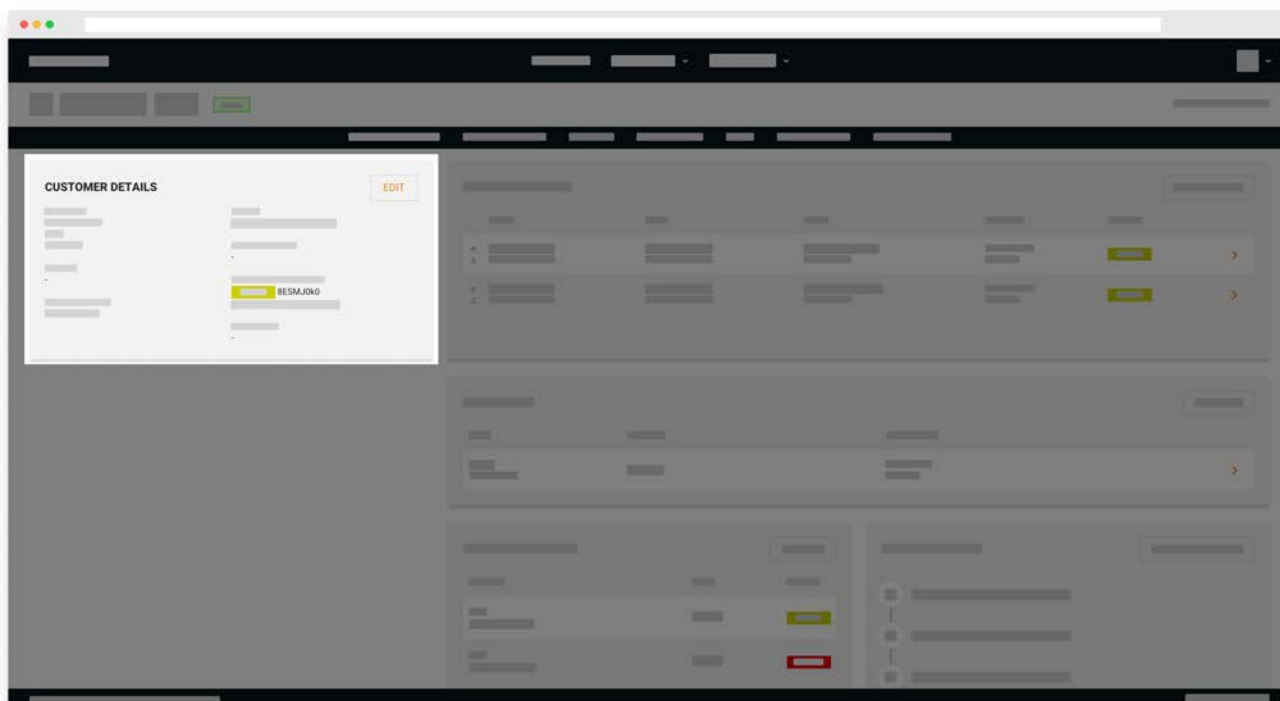
### CUSTOMER ACCOUNT MENU

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



## PERSONAL DETAILS

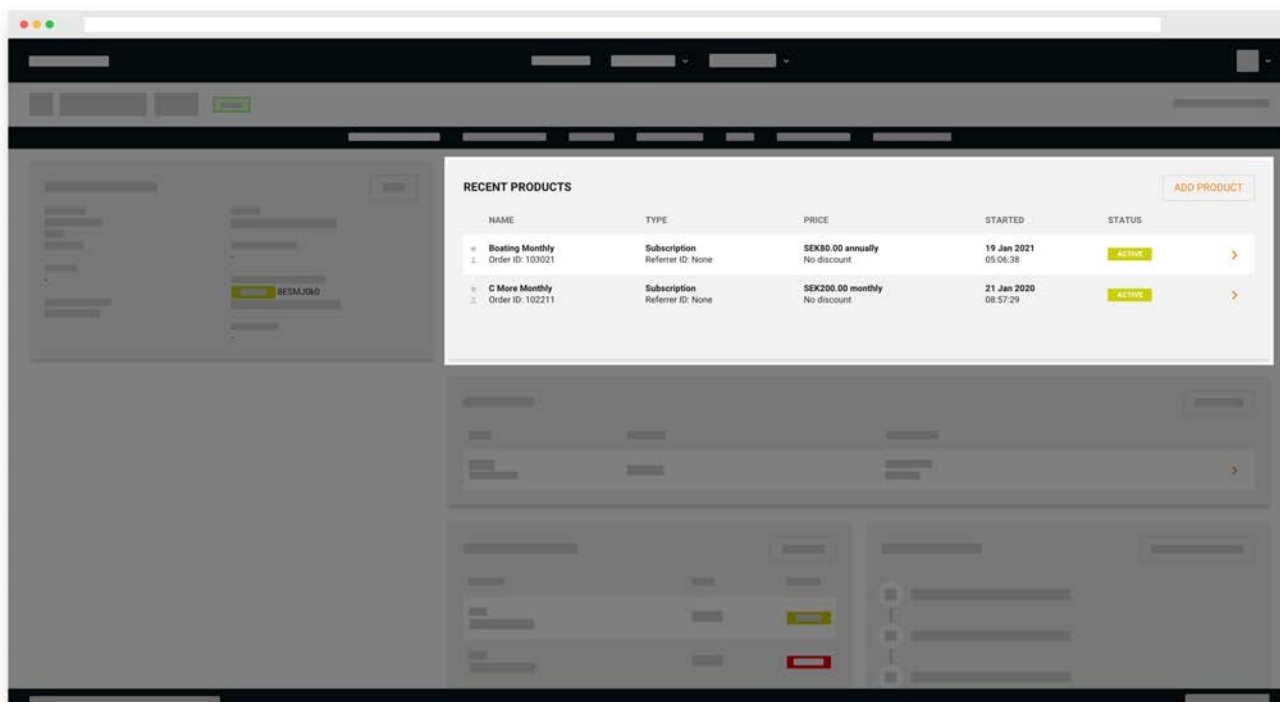
You will see the customers address, contact details, email address and refer a friend code. You may also see either display name or customer PIN depending on the system configuration.



## 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



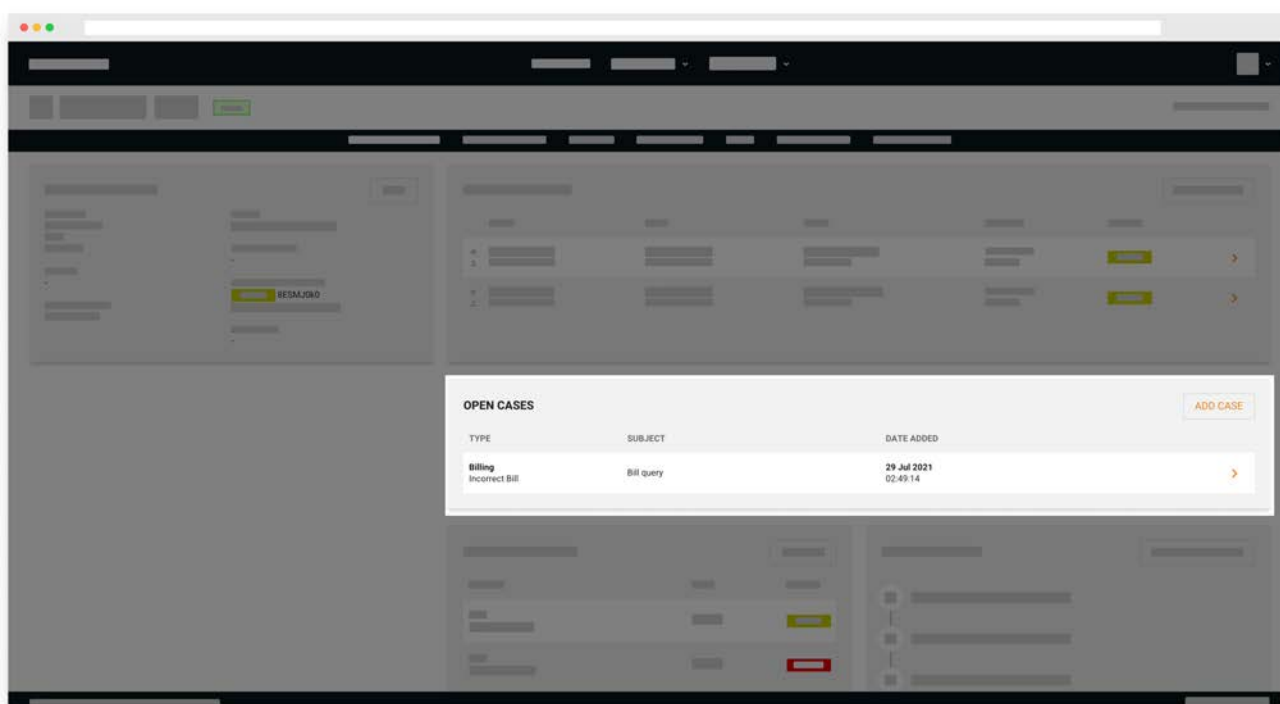
### Add product

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

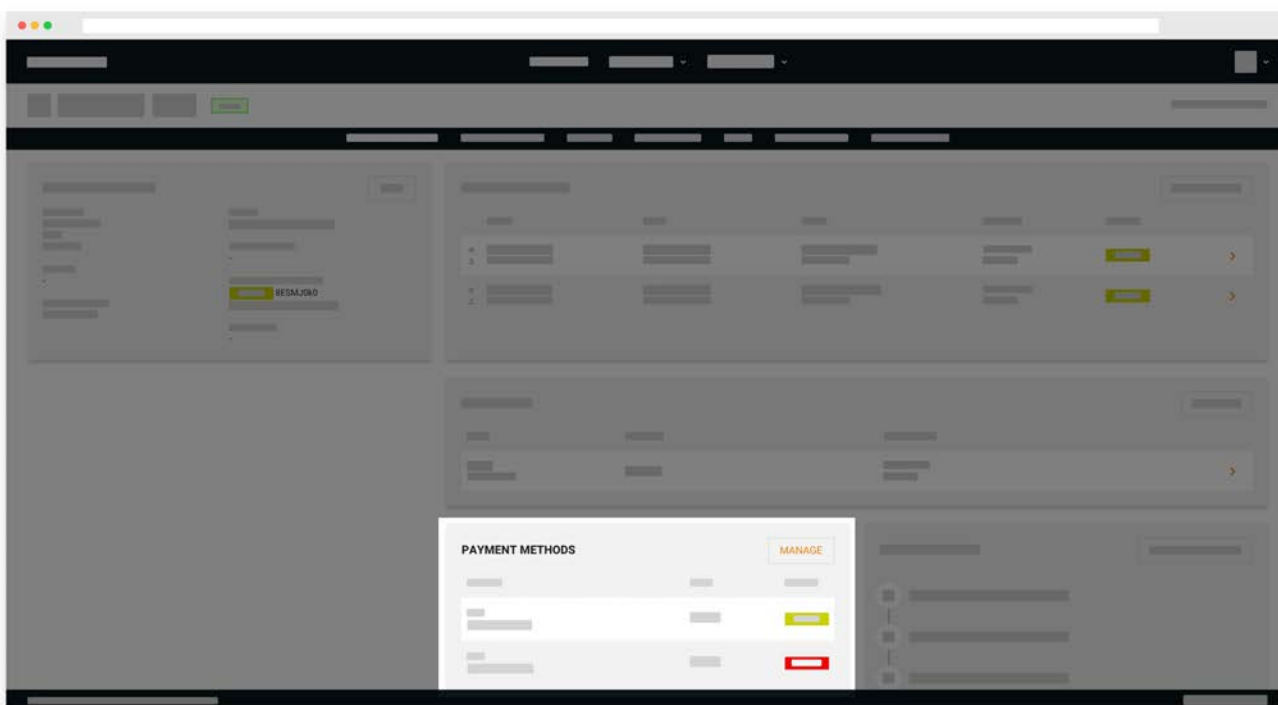


## View case

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.

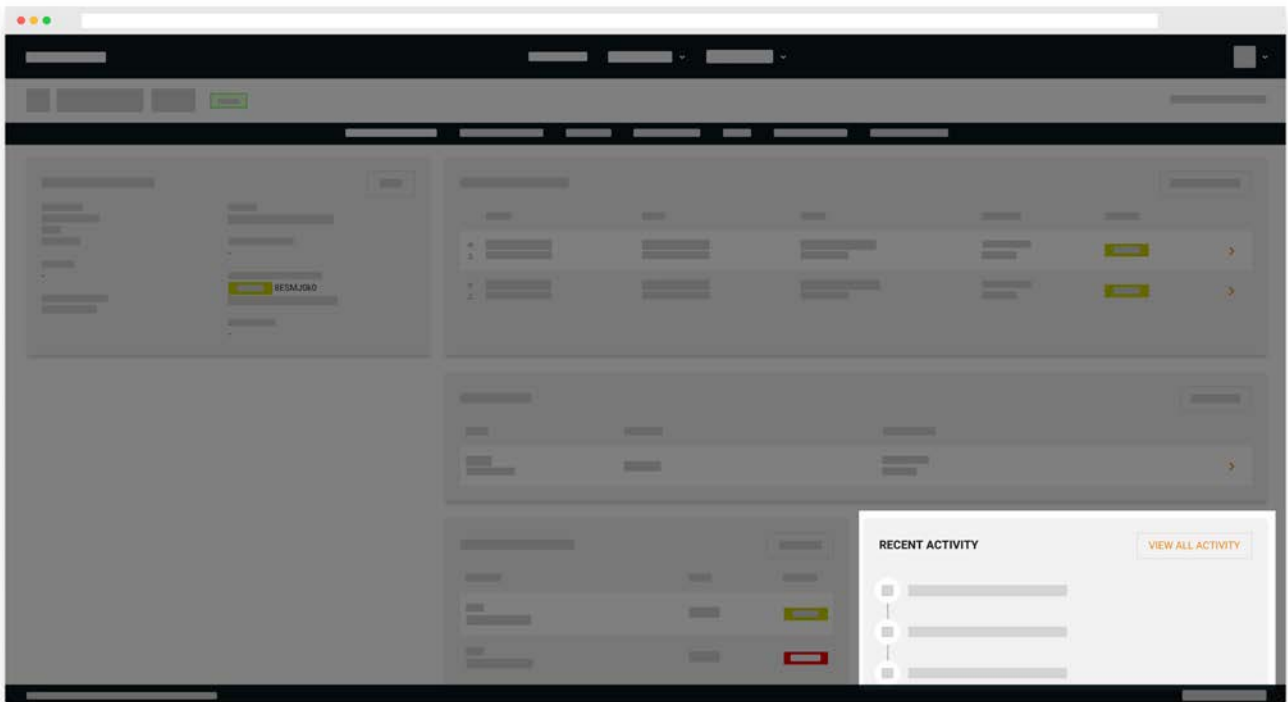


## Manage payment methods

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.



## EDIT A CUSTOMER

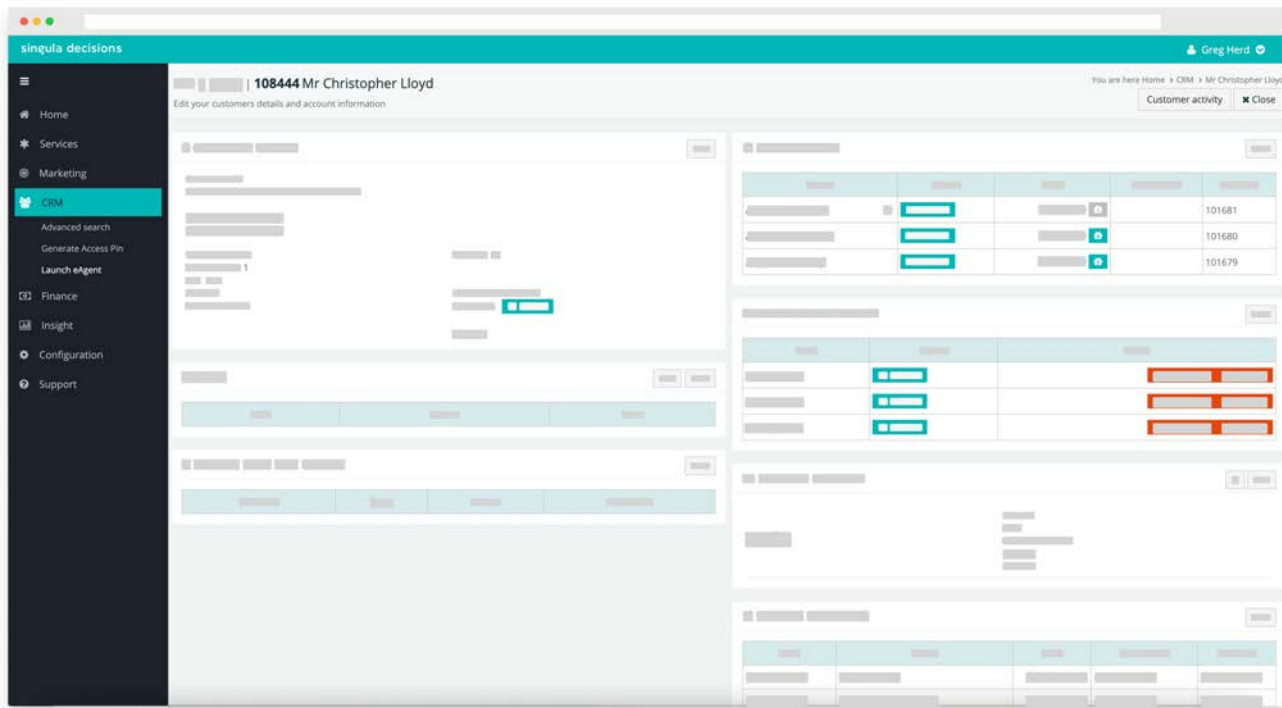
You can edit when you see the pen icon.





## Customer personal details

### VIEWING A CUSTOMER'S PERSONAL DETAILS



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

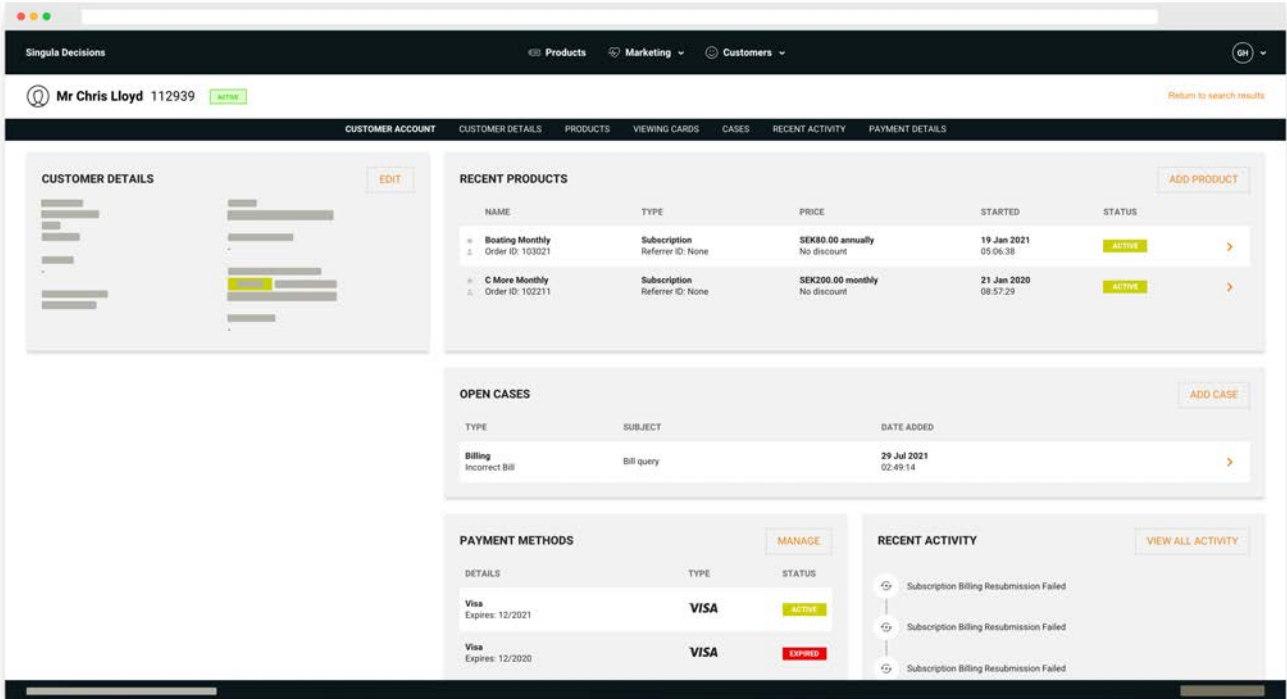
### UPDATING A CUSTOMER'S PERSONAL DETAILS

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

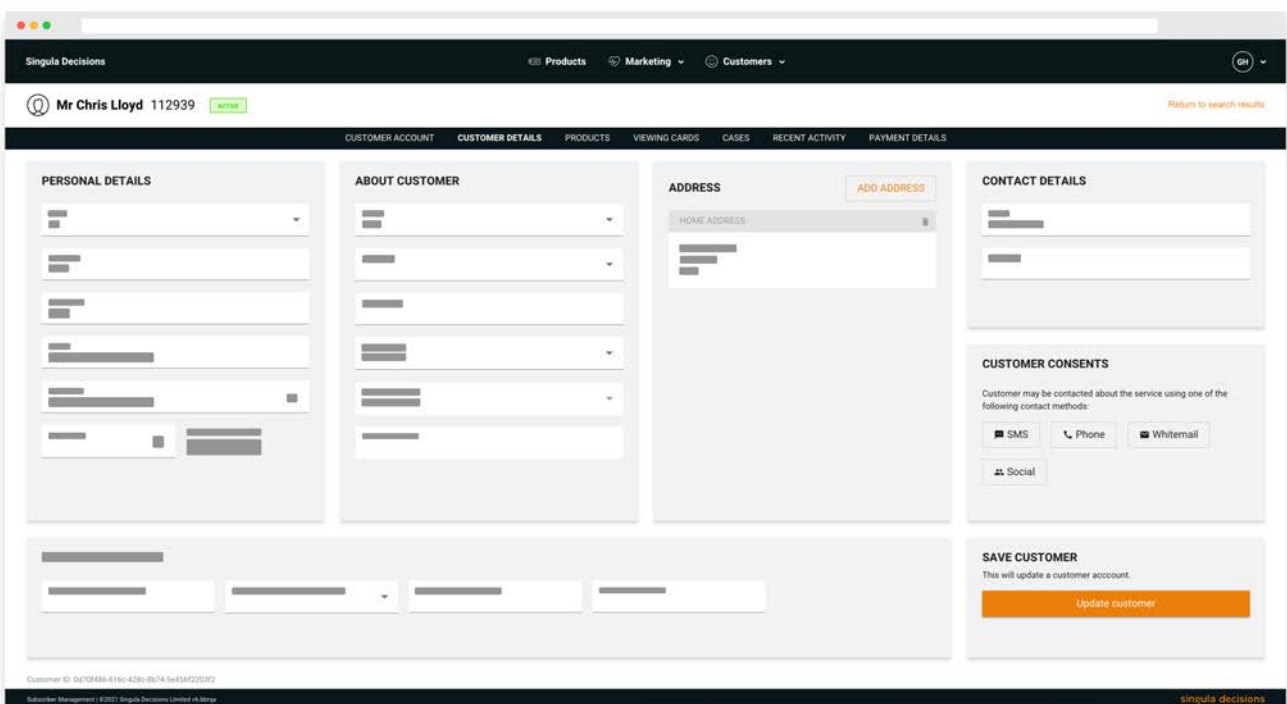
## BETA Customer personal details

### UPDATING PERSONAL DETAILS

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



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



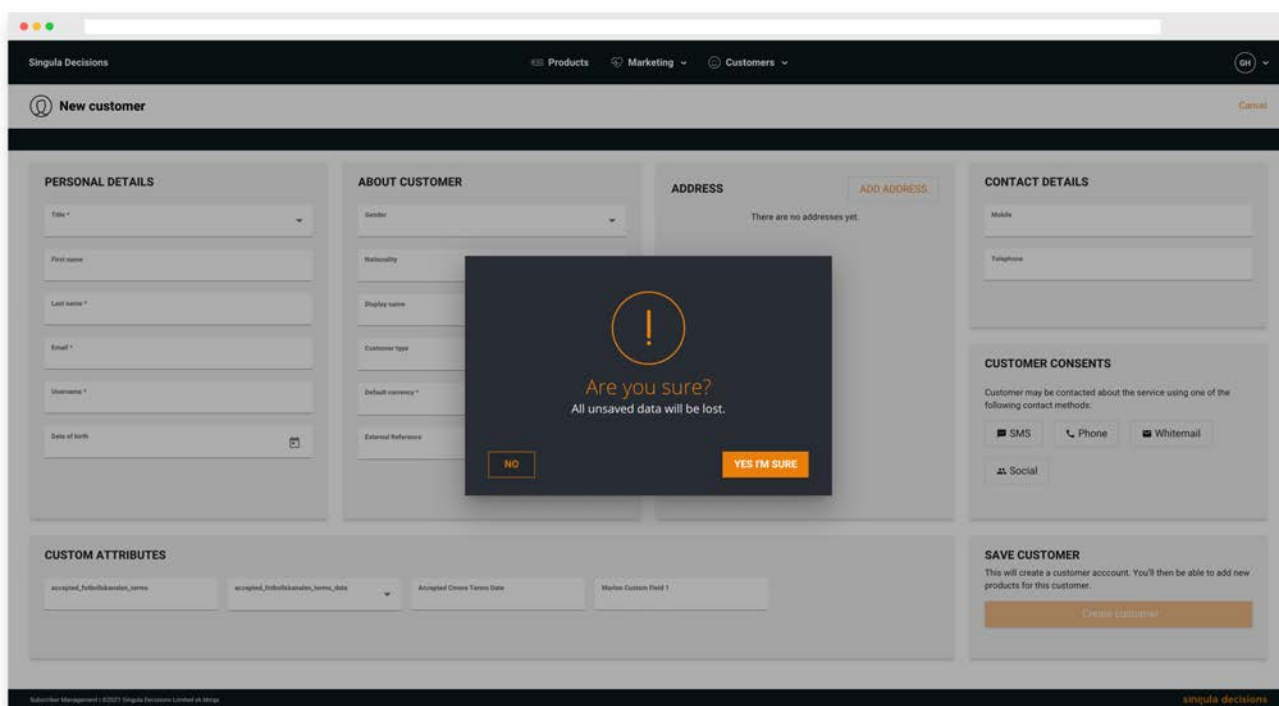
## CUSTOMER'S REFER A FRIEND CODE

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.



## 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-rated 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:

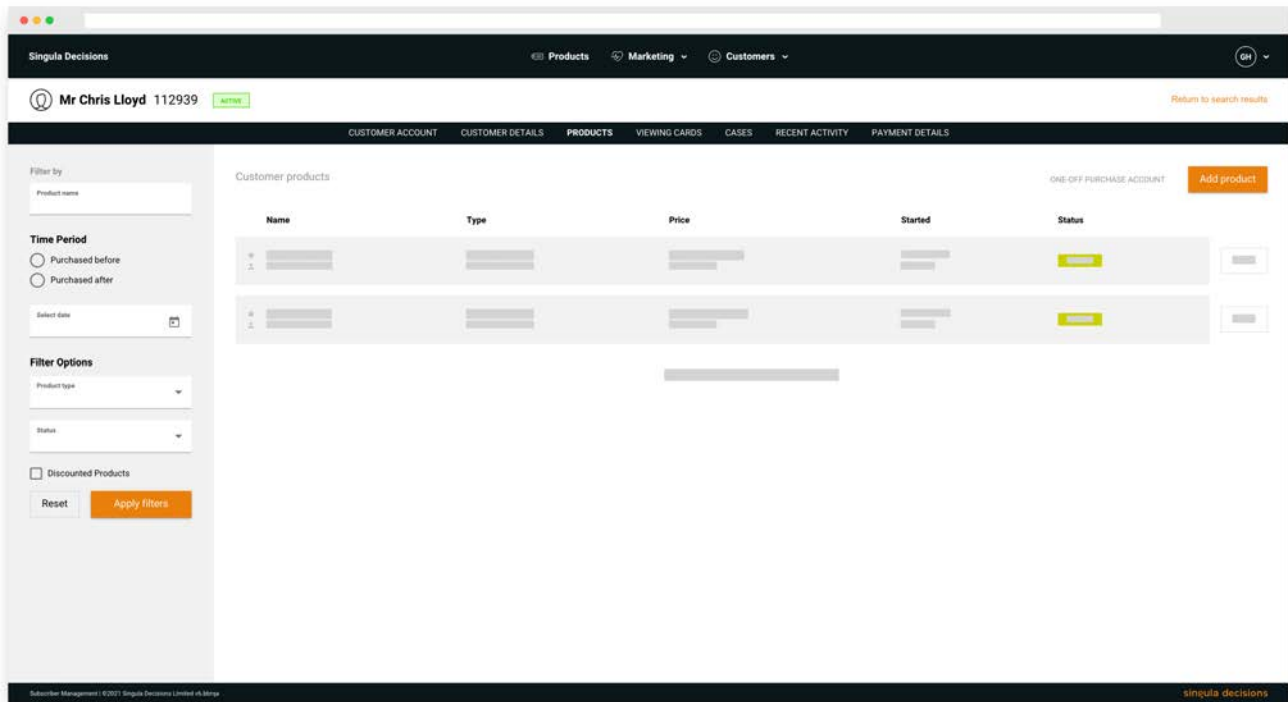
- Name;
- Status (e.g. cancelled, active);
- Movement (was the subscription cancelled, crossgraded etc);
- Start (when the subscription began);
- End (when did it end or is due to end);
- Price (how much the subscription is and if there were any discounts added).



## BETA Customer subscription products

### VIEW A SUBSCRIPTION PRODUCT

1. View a customer account
2. Select Products



### FIND A SUBSCRIPTION PRODUCT

1. View a [customer account](#)
2. Select Products
3. Locate a subscription product using search and filters
  - Search for a product name
  - Time period when the product was added to the customers account
  - Product type either subscription, pay per view or access pass
  - Status either active, inactive or expired
  - Discounted products show products with a discount

#### Good to know

You can only use the filters that are relevant to the products on the customers account. For example, if the customer has three active subscriptions, when viewing the status filter you will only see the 'Active' option available. You will be unable to select the other options in the list.

### VIEW SUBSCRIPTION ACCOUNT HISTORY

1. View a customer account
2. Select Products
3. Choose a subscription product. The subscription account history will be displayed.

A subscription account history can contain:

- Repeating charges
- Credits
- Charges
- Payments
- Refunds
- Initial charges

## CANCEL A SUBSCRIPTION

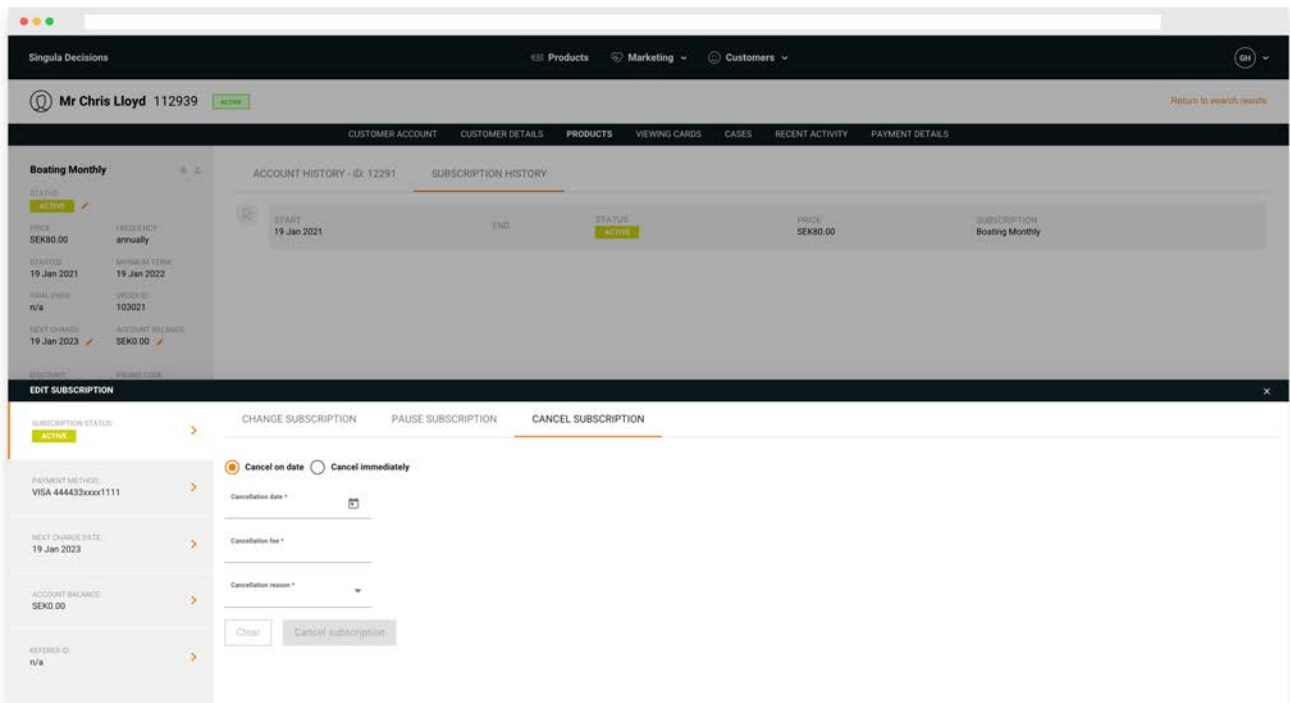
1. Choose the pen to edit the subscription product
2. Select subscription status
3. Select cancel subscription
4. Select cancel on date or cancel immediately
5. Select cancel subscription

### 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



## 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-rated billing applied and once the downgrade is complete the new subscription's minimum term will become active.**

The screenshot displays the Singula Decisions interface for a customer named Mr Greg Herd (ID: 114342). The main content area is titled 'A More Family' and shows subscription details. The subscription status is 'Downgrade Scheduled' with a due date of 24 Nov 2021. The account history table shows three transactions:

DATE	TRANSACTION ID	REPEATING CHARGE	CHARGE	CREDIT	BALANCE
18 NOV 2021 15:41:07		24 Oct 2021 to 23 Nov 2021	£10.00	-	£0.00
24 SEP 2021 12:44:27		Authorised	-	£10.00	£10.00
24 SEP 2021 12:41:10		24 Sep 2021 to 23 Oct 2021	£10.00	-	£0.00

The 'EDIT SUBSCRIPTION' section shows options to 'CHANGE SUBSCRIPTION' or 'PAUSE SUBSCRIPTION'. A red button labeled 'Withdraw scheduled downgrade' is visible. The subscription details on the left include: Price £10.00, Frequency monthly, Started 24 Sep 2021, Minimum Term 24 Oct 2021, Final Term n/a, Open ID 103511, Next Charge 24 Nov 2021, and Account Balance £0.00.

## CHANGE PAYMENT METHOD

1. Choose the pen to edit the subscription product
2. Select Payment method. The current payment method will be displayed.
3. Select Change payment method
4. Choose the new payment method. If no alternative payment method is available you can select New payment method
5. To apply the new payment method select Save
6. You will be asked to confirm this change. Select Yes, I'm sure

The screenshot shows the Singula Decisions interface for a customer named Mr Greg Herd (ID: 114342). The main content area displays the subscription details for 'Gardening Scotland Magazine'. The subscription is active, with a price of £4.99 and an annual frequency. The start date is 14 Sep 2021, and the next charge date is 21 Sep 2021. The payment method is a VISA card (426397xxxx5262) with an expiry date of 12/2023. The account balance is £0.00. The interface includes a navigation bar with options like Products, Marketing, and Customers, and a customer profile header.

## 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

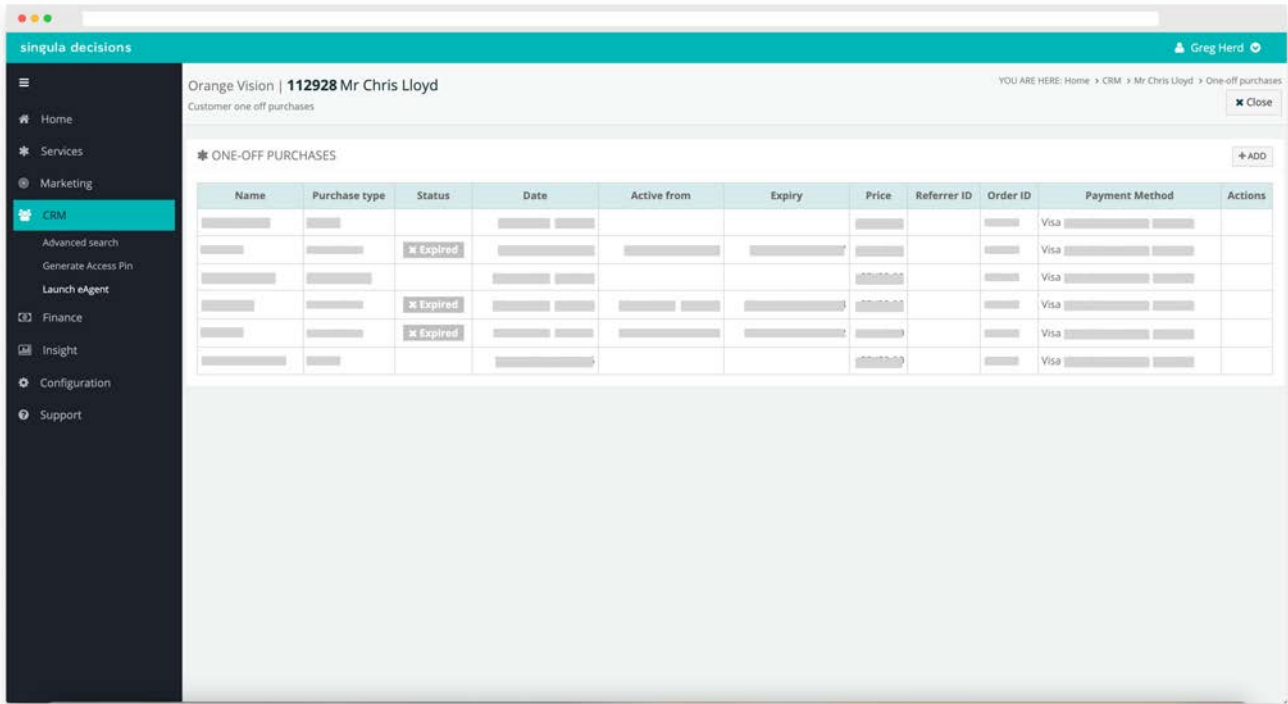
The screenshot shows the Singula Decisions interface for a customer named Mr Chris Lloyd (ID: 112939). The main content area displays the subscription details for 'Boating Monthly'. The subscription is active, with a price of SEK30.00 and an annual frequency. The start date is 19 Jan 2021, and the next charge date is 19 Jan 2023. The payment method is a VISA card (444433xxxx1111). The account balance is SEK0.00. The interface includes a navigation bar with options like Products, Marketing, and Customers, and a customer profile header. A dialog box titled 'Change referrer ID' is open, showing the current referrer ID as N/A and a field for entering a new referrer ID. The dialog has 'Clear' and 'Change' buttons.

## 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



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

1. 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

1. 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 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.

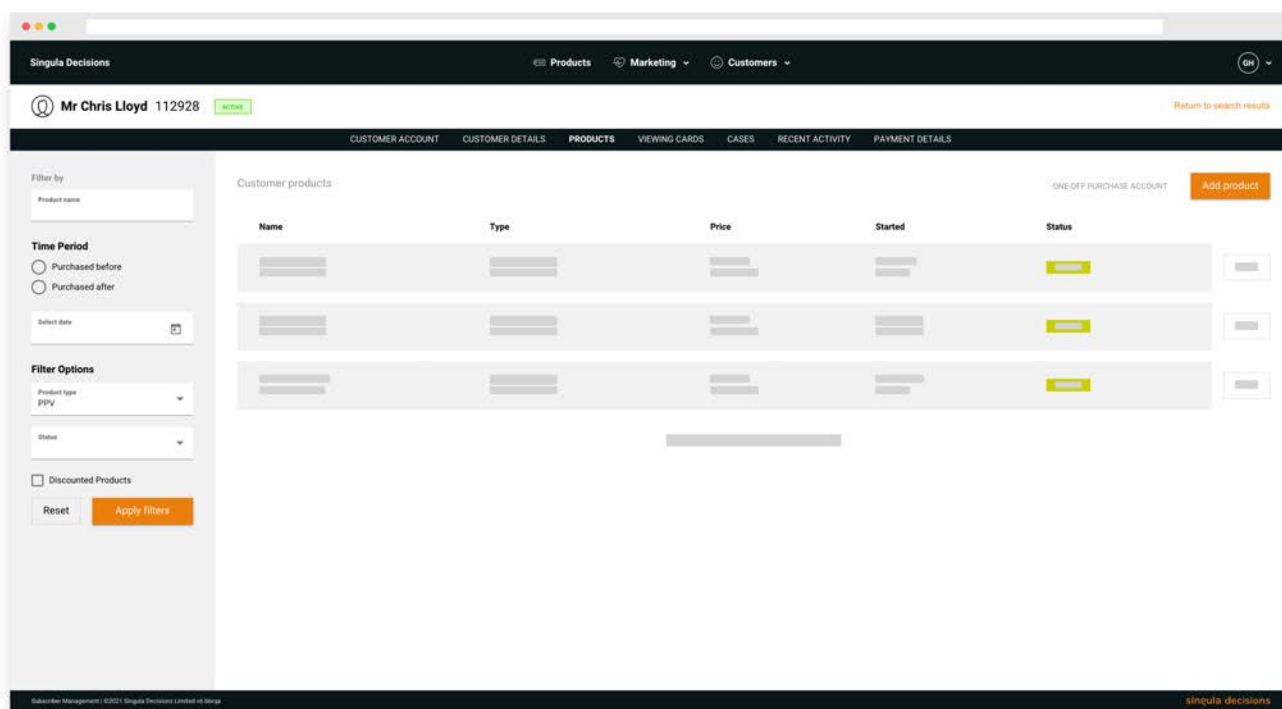
## BETA Customer one-off purchases

### FIND A ONE-OFF PURCHASE PRODUCT

1. View a customer account
2. Select Products
3. Locate a one-off purchase product using search and filters
  - Search for a product name
  - Time period when the product was added to the customers account
  - Product type either subscription, pay per view or access pass
  - Status either active, inactive or expired
  - Discounted products show products with a discount

### VIEW ONE-OFF PURCHASE PRODUCT

1. View a customer account
2. Select Products. You may see one-off purchases of type: pay per view, access pass and/or publication.
3. Optionally, you can filter products using the product type filter
4. Select View to see more product details



## **VIEW ONE-OFF PURCHASE ACCOUNT HISTORY**

1. View a customer account
2. Select Products
3. Choose a one-off purchase product. The one-off purchase account history will be displayed.

## **ONE-OFF PURCHASE ACCOUNT**

The one-off purchase account is a shared account incorporating all customer purchases. These purchases could be included pay per view, access passes and/or publications.

A one-off purchase account history can contain:

- Credits
- Charges
- Payments
- Refunds
- Initial charges

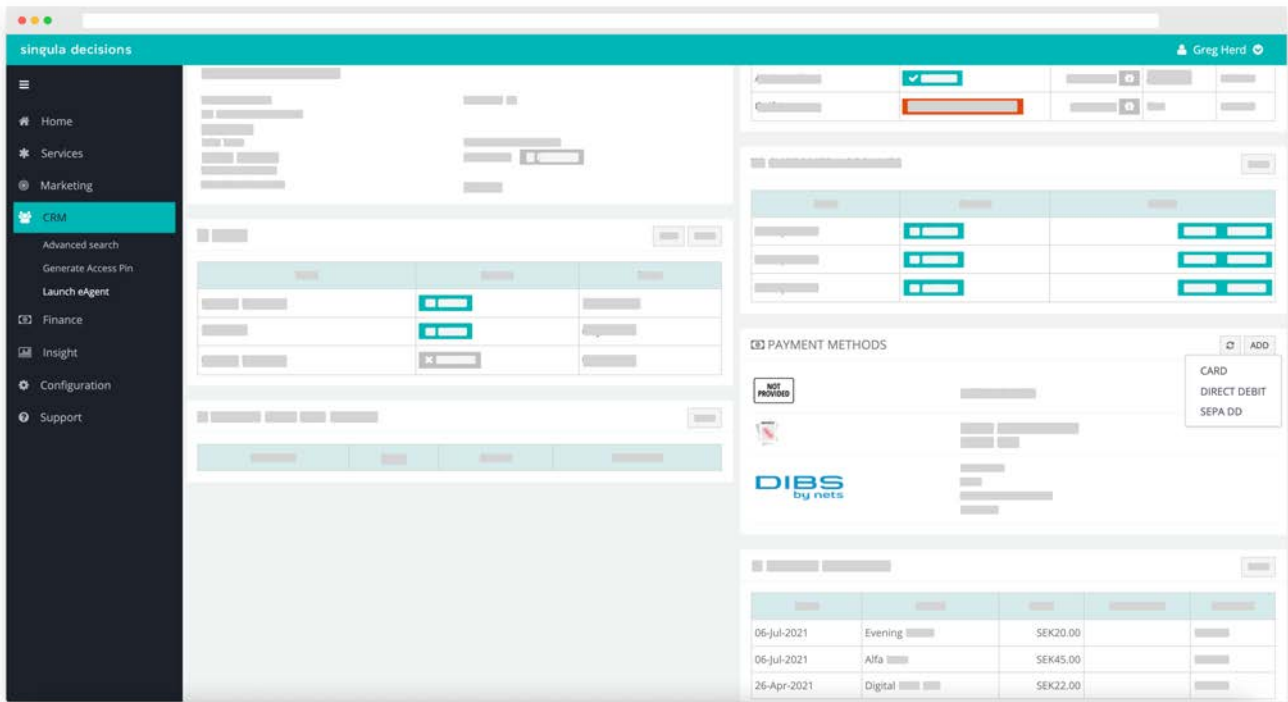


## Customer payment methods

### 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.



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).

Payment details ✕

Payment Details

Card Number VISA MASTERCARD

Card Number

Expiry

MM/YY

Security Code

Security Code  ?

Cardholder Name

Cardholder Name

PAY NOW

256-bit SSL encrypted
Secure payments by Global Payments

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)

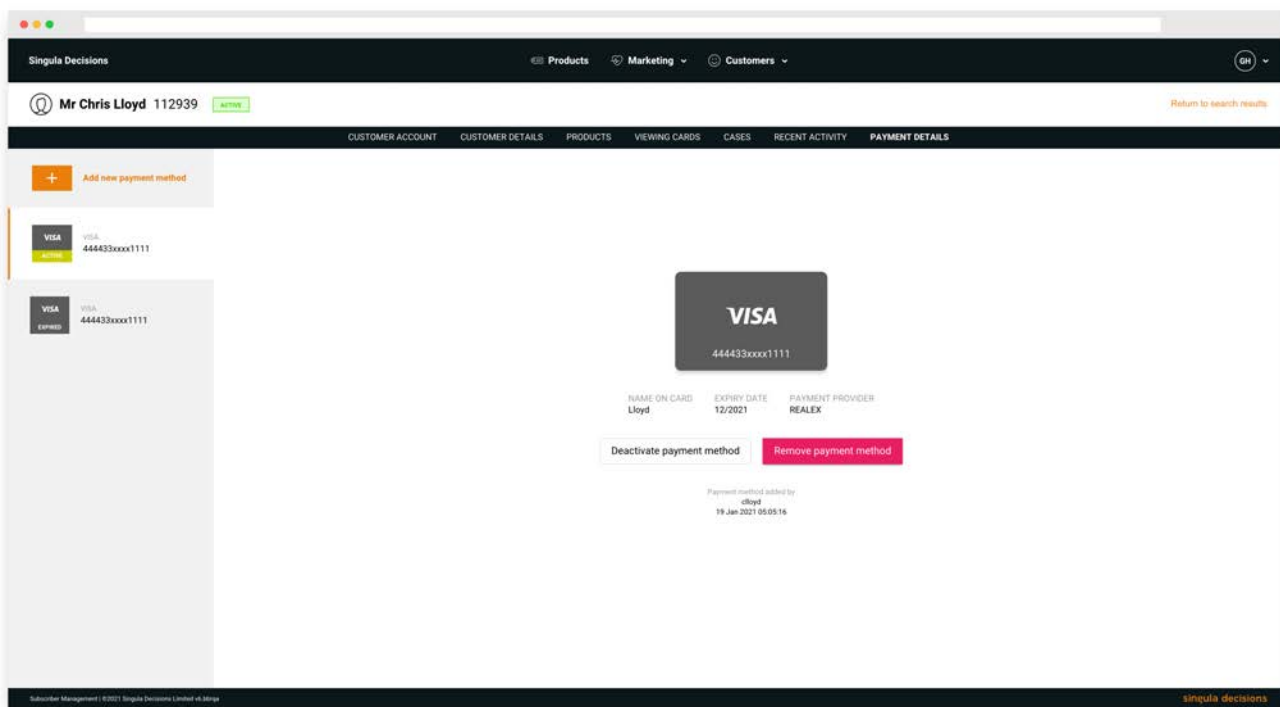
Klarna payments – You cannot add a Klarna payment method via SSM, the customer will need to do this through the website.

## BETA Customer payment methods

### VIEW PAYMENT METHODS

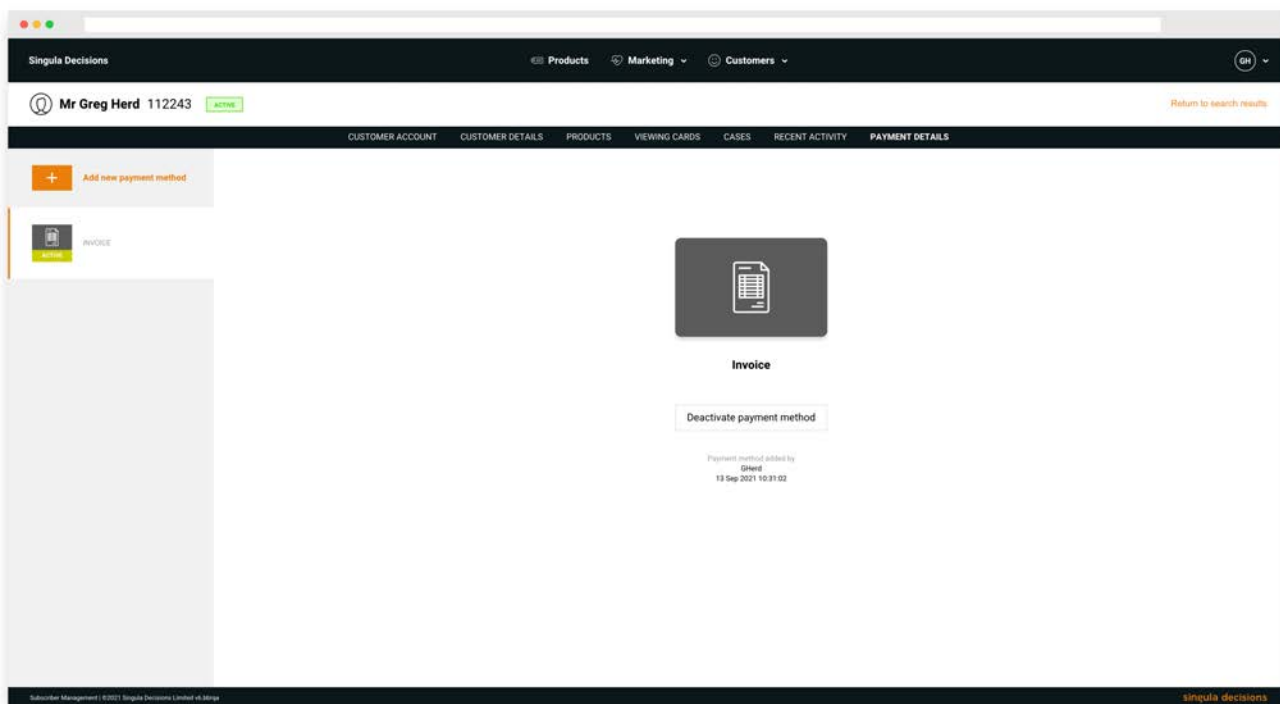
1. Select Payment details

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



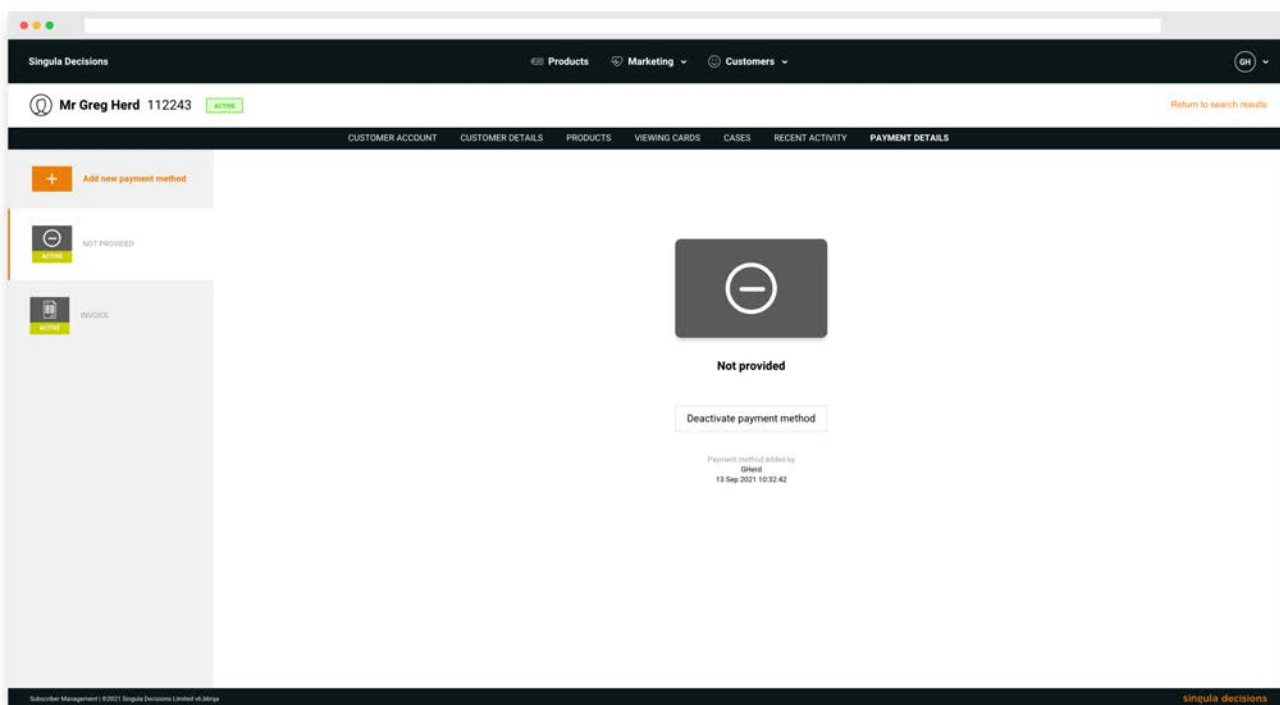
### ADD AN INVOICE PAYMENT METHOD

1. Select Payment details
2. Select + Add payment method
3. Select Invoice. This can only be added once.
4. Confirm you want to add Invoice



## ADD A NOT PROVIDED PAYMENT METHOD

1. Select Payment details
2. Select + Add payment method
3. Select Not provided. This can only be added once.
4. Confirm you want to add Not provided



## ACTIVATE A PAYMENT METHOD

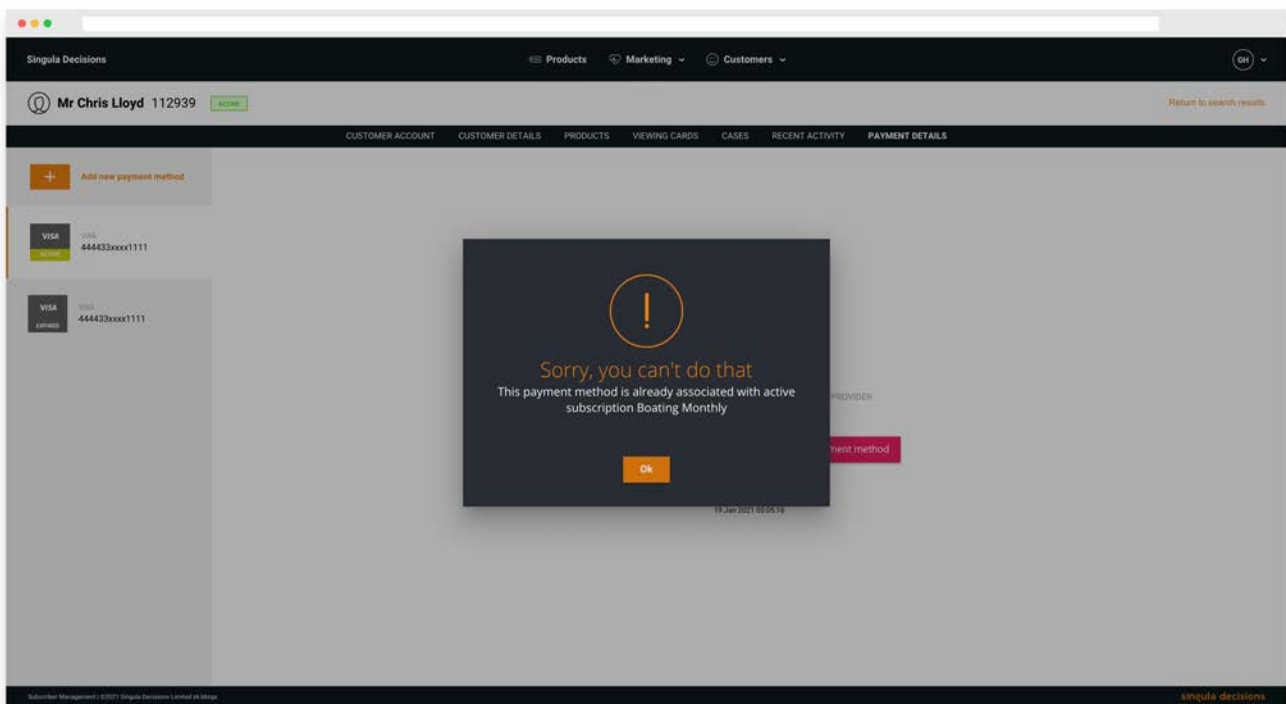
1. Select Payment details
2. Select the payment method to be activated
3. Select Activate payment method
4. Confirm the activation

## 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 AN INVOICE OR NOT PROVIDED 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 [Inboxes](#) 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:

Title	Status	Date
General Enquiries	✖ CLOSED	06-Nov-2020
Technical	✖ CLOSED	06-Nov-2020
General Enquiries	✖ 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

**ADD CASE** [CANCEL] [SAVE]

Case type\*  Case subtype  Case tag

Case Subject\*

Case description\*

Deadline  Status\*

Priority\*  Contact method\*

The Case will appear in the cases table.

CASES		
Title	Status	Date
General Enquiries	✓ 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

CASES		
Title	Status	Date
General Enquiries	✓ 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.

Customer notes | 108514 Mr Forename Smith

YOU ARE HERE: Home > CRM > Mr Forename Smith > Cases

Filter by case type

10481 General Enquiries, Enquiry **Open**

- Payment query
- Payment query, what action was taken?
- Email
- Medium

10463 General Enquiries, Enquiry **Closed**

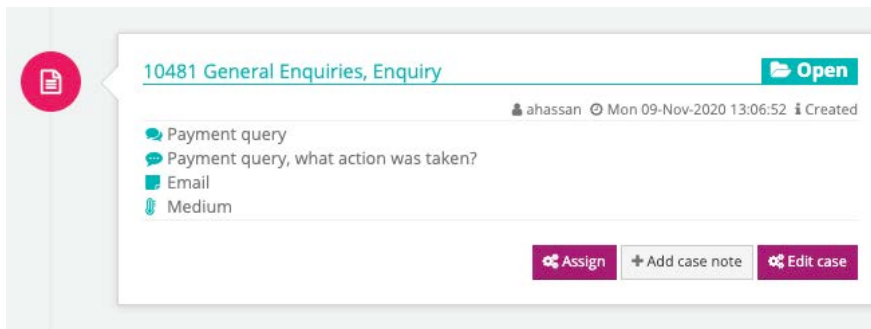
- Billing date query
- Customer called to query when billing date was. Advised the date, query resolved.
- Email
- Medium

10462 Technical, Investigation **Closed**

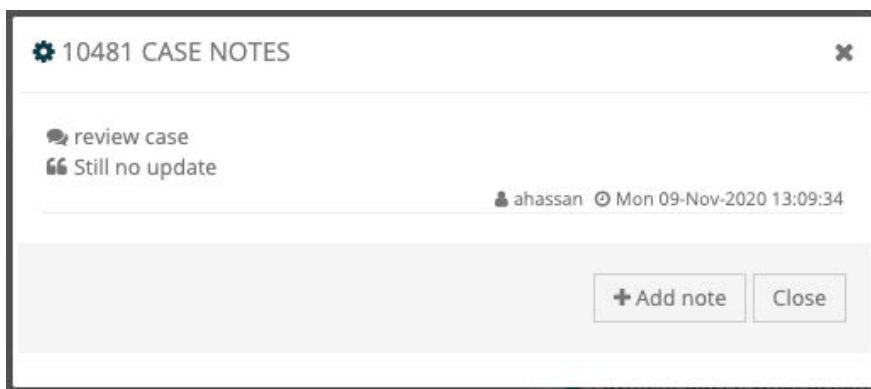
- Viewing Problems
- Customer called as could not view content. Rebooted device, issue is now resolved.
- Email
- Medium

3. Select Add case note button

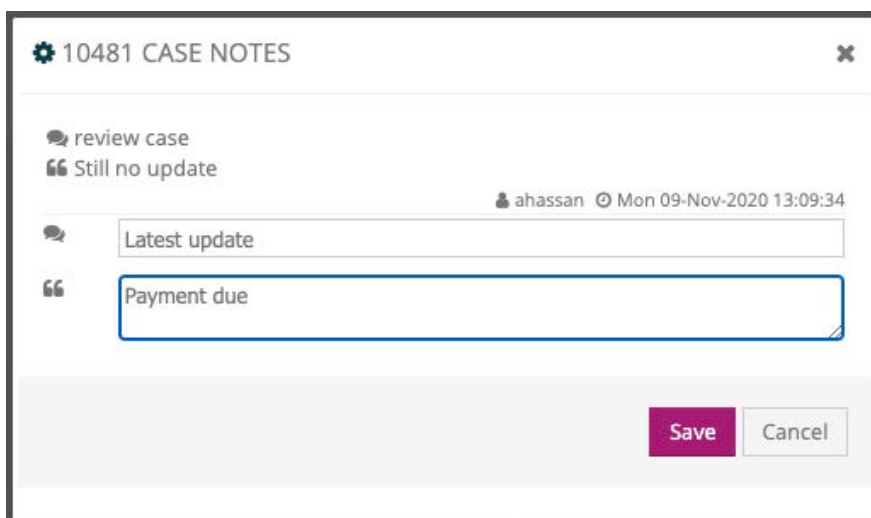
**Note – For a closed case, simply re-open the case to allow further notes to be added (re-opening cases is subject to your user role)**



Add case note button displayed



4. Complete the subject and description



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:



5. Select Save

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

## 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

10481 EDIT CASE

Case type\*  
General Enquiries

Case subtype  
Enquiry

Case tag  
Select a case tag

Case Subject\*  
Payment query

Case description\*  
Payment query, what action was taken?

Deadline

Status\*  
Open

Priority\*  
Medium

Contact method\*  
Email

Cancel Save

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

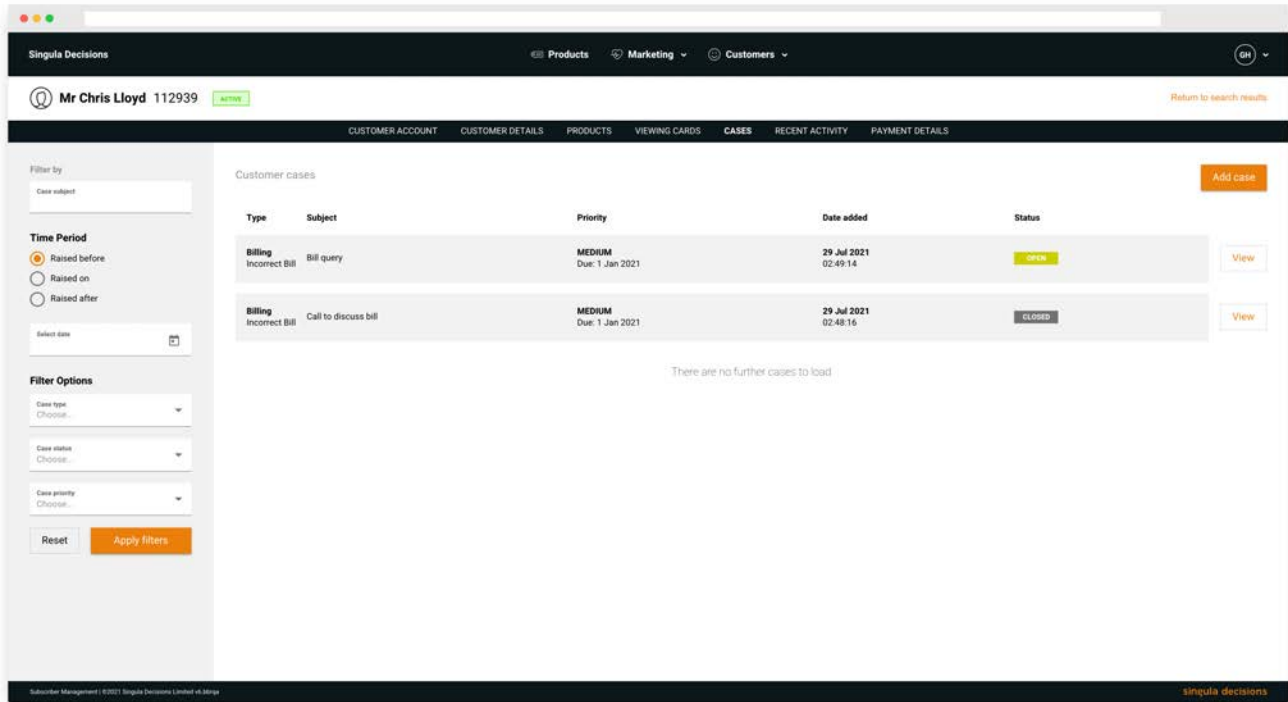
Clear filters Add

## BETA Customer cases

### VIEW CUSTOMER CASES

1. Select Cases

All cases, active and closed, will be displayed.



### 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.

### VIEW A CUSTOMER CASE

1. View a customer account
2. Select Cases. You may see a combination of open and closed cases
3. Optionally, you can filter case using the case status filter
4. Select View to see more case details

## 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

**108514 Mr Smith**
You are here Home > CRM > Mr Smith

Customer activity ✕ Close

**CUSTOMER DETAILS** EDIT

**Customer ID**  
78f34650-87f4-4841-b3a7-24760d3e9c41

**Mr Forename Smith**  
ahassan@singuladecisions.com

**Home address**  
TV Company  
Company Address  
Company Address  
Company Address  
ky58ea  
United Kingdom  
□ 000000000000

**Vimond ID**

**Refer a friend code**  
Scjg00t8 ✔ Active

[Manage](#)

**CASES** ADD VIEW

Title	Status	Date
General Enquiries	✕ CLOSED	06-Nov-2020
Technical	✕ CLOSED	06-Nov-2020
General Enquiries	✕ CLOSED	06-Nov-2020

**VIEWING CARD AND DEVICES** VIEW

Platform	Type	Status	Start date

**SUBSCRIPTIONS** VIEW

Name	Status	Price	Referrer ID	Order ID
Entertainment Monthly Subscription	✔ ACTIVE	£20.00 <span>↓</span>		101873

**CUSTOMER ACCOUNTS** VIEW

Date	Status	Value
06-Nov-2020	✔ ACTIVE	Credit <b>£0.00</b>

**PAYMENT METHODS** ↻ ADD

REALEX  
VISA  
444433xxxx1111  
Mr Smith  
01-2025

**ONE-OFF PURCHASES** VIEW

Date	Name	Price	Referrer ID	Order ID

This will open the Customer Activity in a new window:

Customer Interactions

Filter by Reset filters

View in legacy mode

View actions that are not yet available in this activity timeline. You won't be able to filter these actions.

Select from date

Select to date

ACTIVITY OPTIONS

Select type

[APPLY FILTERS](#)

Forename Smith (ahassan@singuladecisions.com) X

	<b>Email Sent</b> a120af51-967c-4b27-b4da-f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	<a href="#">VIEW SENT EMAIL</a>
	<b>Subscription Billing Success</b> f1b9a871-6ab0-4eff-835d-f24eeb98b44	<b>Action</b> Entertainment Monthly Subscription, Order ID 101873	<b>Subscription</b> Entertainment Monthly Subscription	<b>PW_SYSTEM</b> 6 Nov 2020 10:44:00	
	<b>New Purchase</b> b902e62a-bcf4-4c95-8dbd-70076845faf1	<b>Action</b> Subscription, Entertainment Monthly Subscription, Order ID 101873	<b>Subscription</b> Entertainment Monthly Subscription	<b>ahassan</b> 6 Nov 2020 10:44:00	
	<b>New Payment Method</b> c80fe5ca-a929-4f6b-a770-5f1e3ced5b55	<b>Action</b> VISA 444433xxxx1111	<b>PaymentMethod</b> -	<b>ahassan</b> 6 Nov 2020 10:41:00	
	<b>New Customer Created</b> 0e452688-769c-43d5-b399-c9dc0abed858	<b>Action</b> New Customer Created	-	<b>ahassan</b> 6 Nov 2020 10:39:00	

There are no further interactions to load

## CUSTOMER ACTIVITY

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

Customer Interactions

Filter by Reset filters

View in legacy mode

View actions that are not yet available in this activity timeline. You won't be able to filter these actions.

Select from date

Select to date

ACTIVITY OPTIONS

Select type

[APPLY FILTERS](#)

Forename Smith (ahassan@singuladecisions.com) X

	<b>Email Sent</b> a120af51-967c-4b27-b4da-f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	<a href="#">VIEW SENT EMAIL</a>
	<b>Subscription Billing Success</b> f1b9a871-6ab0-4eff-835d-f24eeb98b44	<b>Action</b> Entertainment Monthly Subscription, Order ID 101873	<b>Subscription</b> Entertainment Monthly Subscription	<b>PW_SYSTEM</b> 6 Nov 2020 10:44:00	
	<b>New Purchase</b> b902e62a-bcf4-4c95-8dbd-70076845faf1	<b>Action</b> Subscription, Entertainment Monthly Subscription, Order ID 101873	<b>Subscription</b> Entertainment Monthly Subscription	<b>ahassan</b> 6 Nov 2020 10:44:00	
	<b>New Payment Method</b> c80fe5ca-a929-4f6b-a770-5f1e3ced5b55	<b>Action</b> VISA 444433xxxx1111	<b>PaymentMethod</b> -	<b>ahassan</b> 6 Nov 2020 10:41:00	
	<b>New Customer Created</b> 0e452688-769c-43d5-b399-c9dc0abed858	<b>Action</b> New Customer Created	-	<b>ahassan</b> 6 Nov 2020 10:39:00	

There are no 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
Forename Smith (ahassan@singuladecisions.com) X

**View in legacy mode**

View actions that are not yet available in this activity timeline. You won't be able to filter these actions.

<b>Email sent</b>	Bonjour Forename - sent to "Forename Smith" <ahassan@singuladecisions.com>	47969ea4-c7d6-4732-8d8d-a0fb364e97b9 6 Nov 2020 00:00:00
<b>New Payment Details</b> 8186	VISA/444433xxxx1111	ahassan 6 Nov 2020 00:00:00
<b>New Customer Created</b> 108514	Mr Forename Smith	ahassan 6 Nov 2020 00:00:00

There are no further interactions to load

### OVERVIEW OF INTERACTIONS

Interactions are presented in order of newest first:

Forename Smith (ahassan@singuladecisions.com) X

<b>Email Sent</b> a120af51-967c-4b27-b4da-f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	<a href="#" style="border: 1px solid #00a08a; border-radius: 4px; padding: 2px 5px; font-size: 0.8em;">VIEW SENT EMAIL</a>
<b>Subscription Billing Success</b> f1b9a871-6ab0-4eff-835d-ff24eeb98b44	<b>Action</b> Entertainment Monthly Subscription, Order ID 101873	<b>Subscription</b> Entertainment Monthly Subscription	<b>PW_SYSTEM</b> 6 Nov 2020 10:44:00	
<b>New Purchase</b> b902e62a-bcf4-4c95-8dbd-70076845faf1	<b>Action</b> Subscription, Entertainment Monthly Subscription, Order ID 101873	<b>Subscription</b> Entertainment Monthly Subscription	<b>ahassan</b> 6 Nov 2020 10:44:00	
<b>New Payment Method</b> c80fe5ca-a929-4f6b-a770-5f1e3ced5b55	<b>Action</b> VISA 444433xxxx1111	<b>PaymentMethod</b> -	<b>ahassan</b> 6 Nov 2020 10:41:00	
<b>New Customer Created</b> 0e452688-769c-43d5-b399-c9dc0abed858	<b>Action</b> New Customer Created	-	<b>ahassan</b> 6 Nov 2020 10:39:00	

There are no further interactions to load

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

See the example below:

<b>Email Sent</b> a120af51-967c-4b27-b4da-f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	<a href="#" style="border: 1px solid #00a08a; border-radius: 4px; padding: 2px 5px; font-size: 0.8em;">VIEW SENT EMAIL</a>
<b>Email Sent</b> a120af51-967c-4b27-b4da-f175cb6eb5d6	<b>Action</b> Email Subject: Bonjour Forename, Customer To: "Forename Smith" <ahassan@singuladecisions.com>	<b>Email</b> Bonjour Forename	<b>ahassan</b> 6 Nov 2020 10:44:00	<a href="#" style="border: 1px solid #00a08a; border-radius: 4px; padding: 2px 5px; font-size: 0.8em;">VIEW SENT EMAIL</a>

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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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>-</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	<ul style="list-style-type: none"> <li>- Unique ID</li> <li>- Title of interaction = 'New Customer Created'</li> <li>- User ID (for Agent initiated action)</li> </ul>



	<ul style="list-style-type: none"> <li>- 'System' (for API or SSM initiated action)</li> <li>- Date/time stamp of Interaction</li> </ul>
New payment method is added to a Customer account	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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>

	<ul style="list-style-type: none"> <li>- Subscription product name that is paused</li> <li>- Subscription Order ID</li> </ul>
Customer's scheduled paused subscription is cancelled	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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:

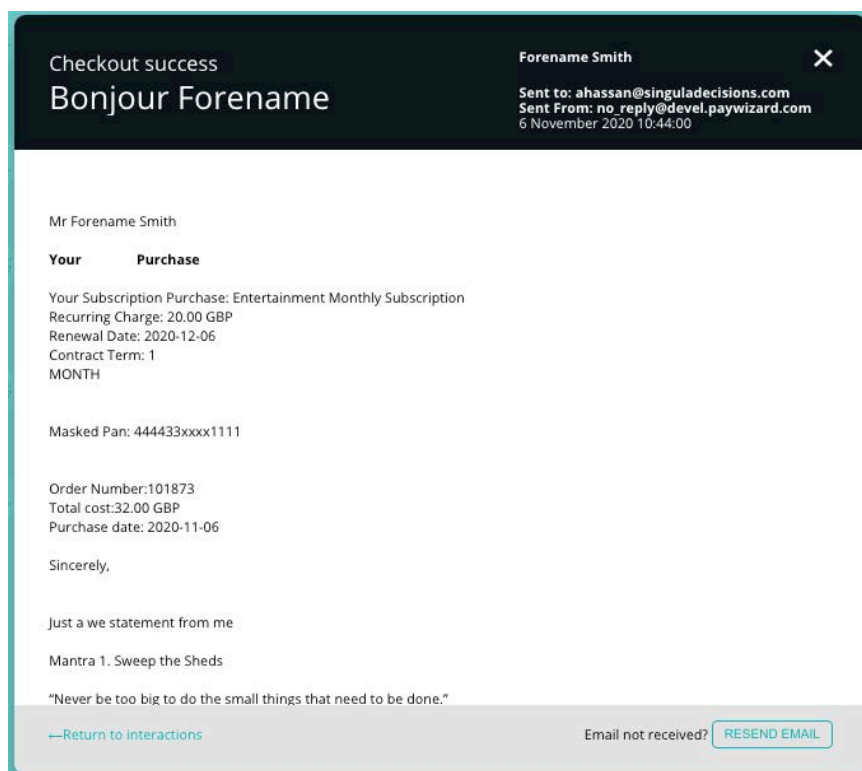
The screenshot shows a notification card with the following information:

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

A button labeled "VIEW SENT EMAIL" is located on the right side of the card.

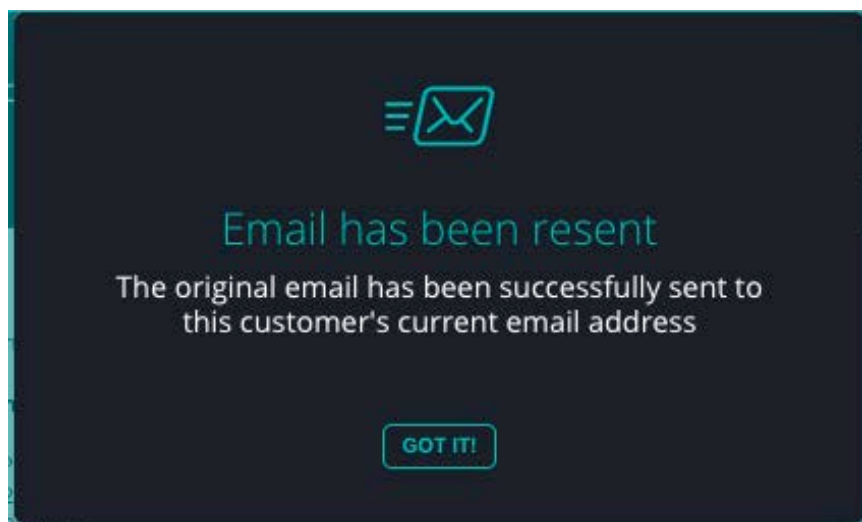
The sent email will be displayed in a pop-up window.

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':



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

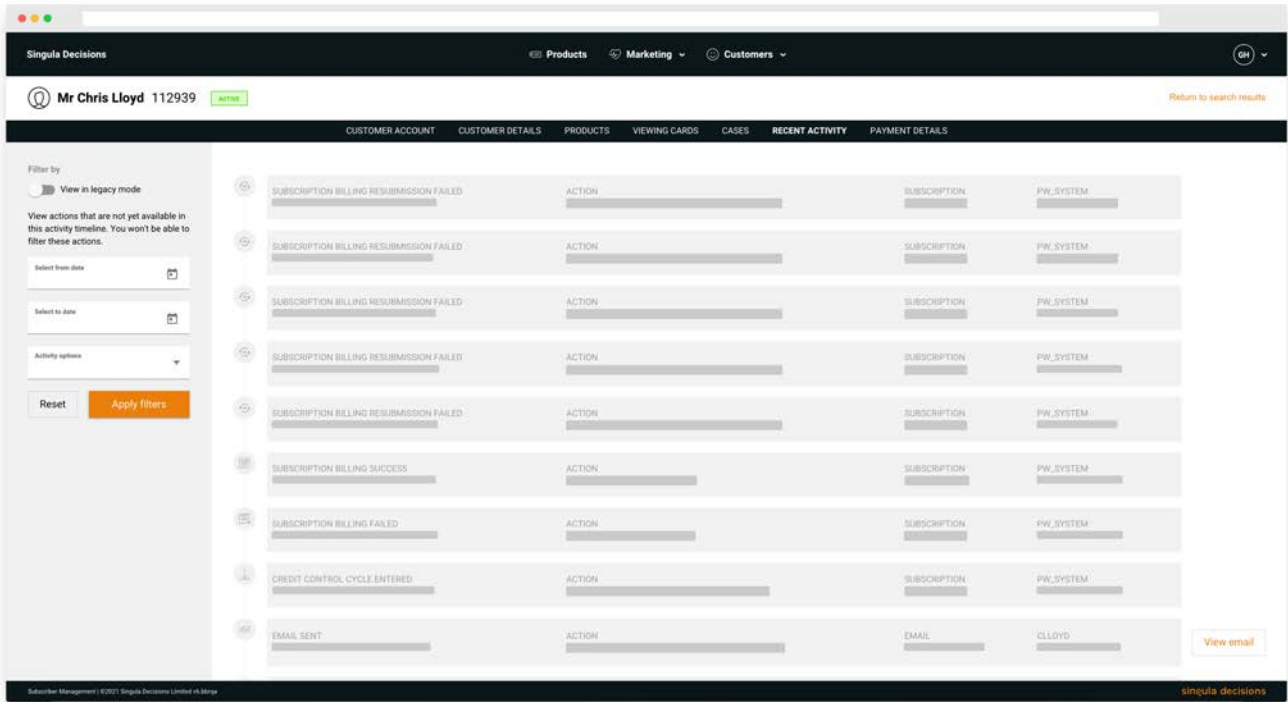
Emails will be sent out immediately to the customer's registered email address.



## 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



### 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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <li>- Unique ID</li> <li>- Title of interaction = 'Subscription Changed'</li> <li>- User ID (for Agent initiated action)</li> </ul>

	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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>-</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	<ul style="list-style-type: none"> <li>- Unique ID</li> <li>- Title of interaction = 'New Customer Created'</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>
New payment method is added to a Customer account	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <li>- Unique ID</li> <li>- Title of interaction = 'Manual Credit Added'</li> <li>- User ID (for Agent initiated action)</li> </ul>

	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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> </ul>

	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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>

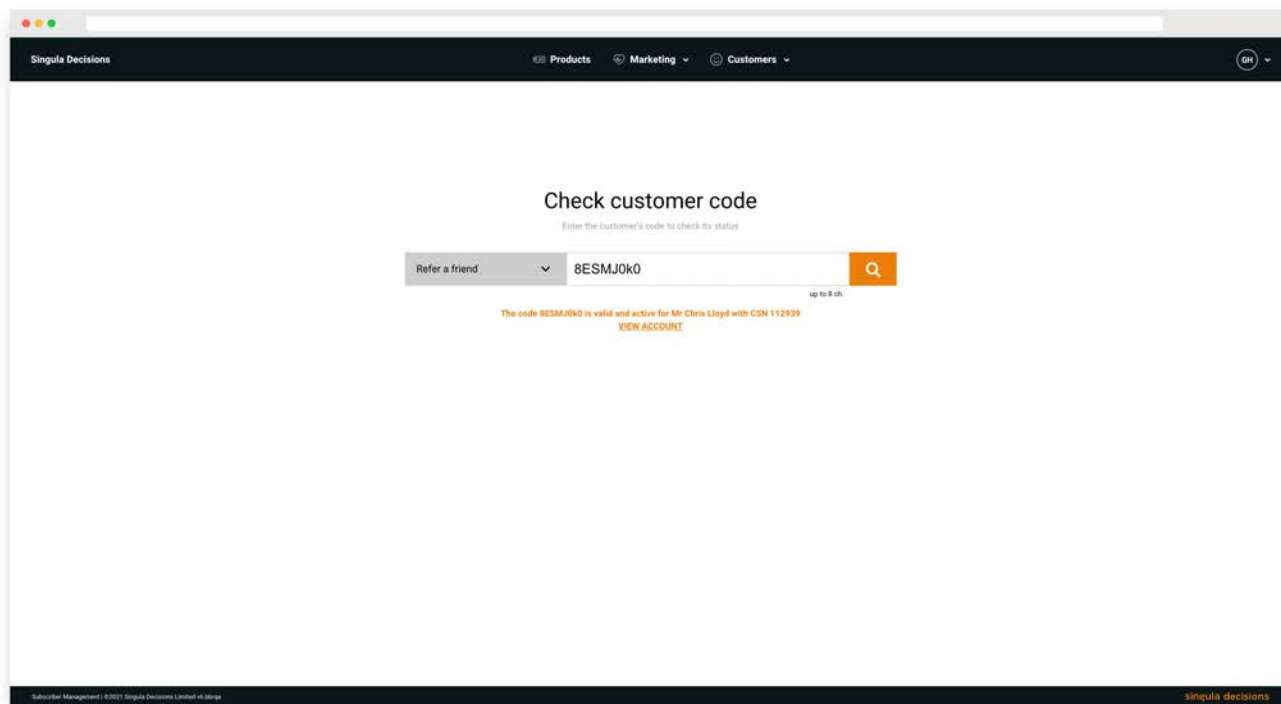


## Customer codes

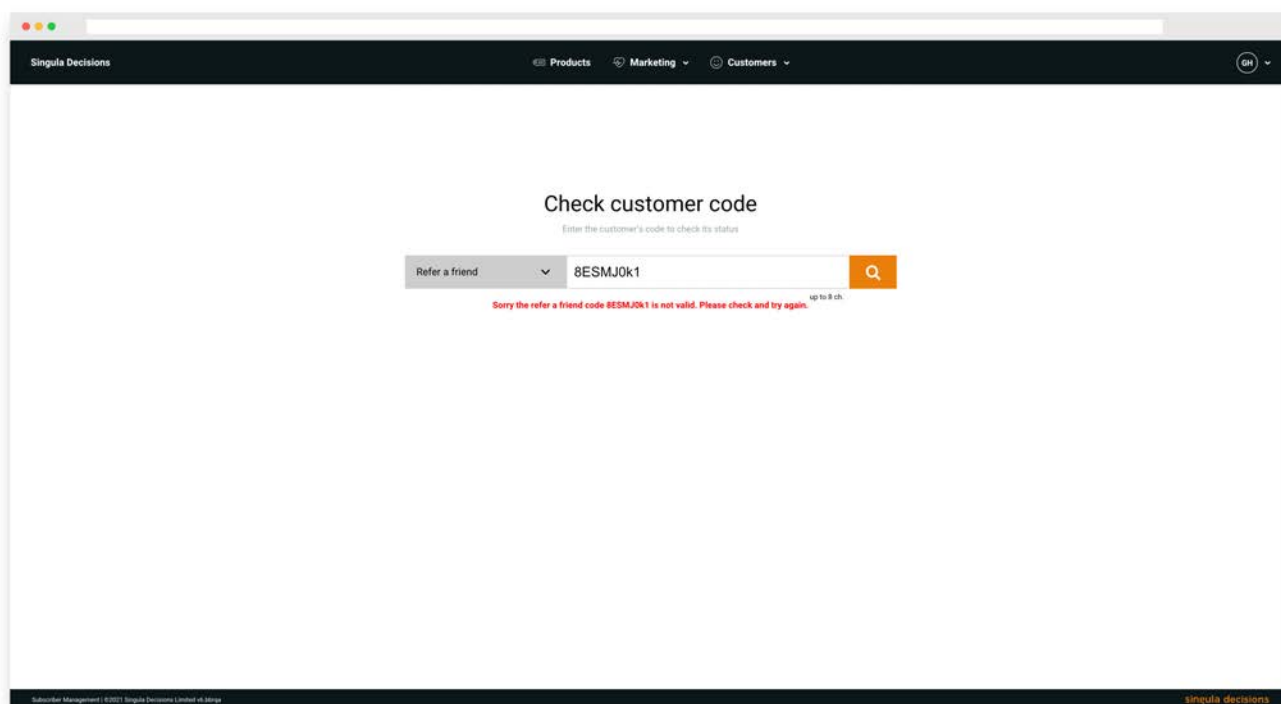
### REFER A FRIEND CODE

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.



A valid code



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

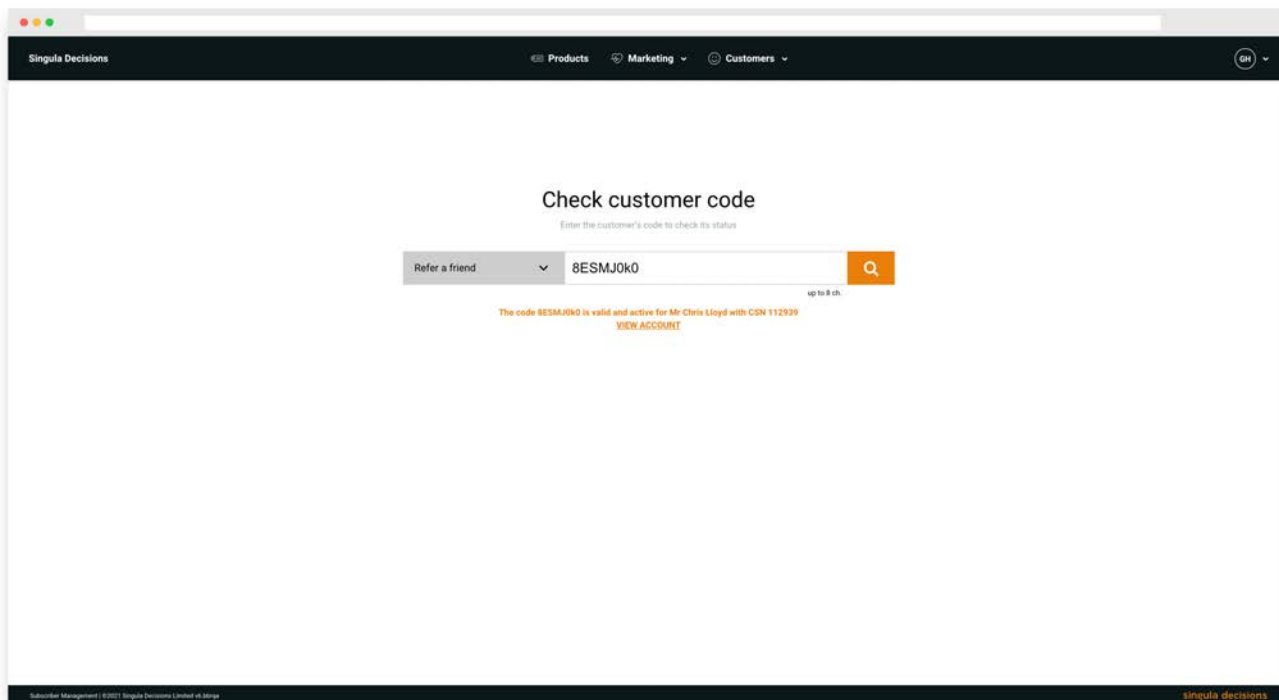
Your search results will be displayed.

## BETA Customer codes

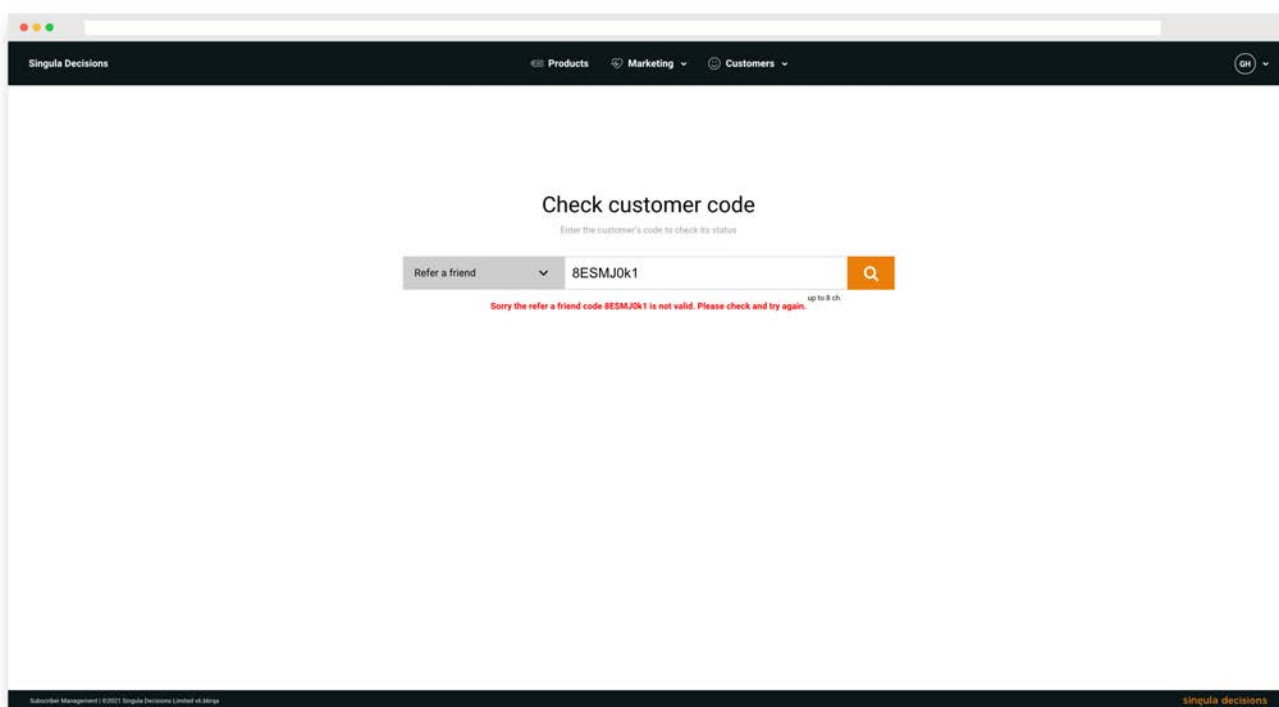
### REFER A FRIEND CODE

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.



An example of a valid refer a friend code



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 ACCOUNTS			VIEW
Date	Status	Value	
02-Dec-2019	ACTIVE	Credit £0.00	

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

CUSTOMER ACCOUNT SUMMARY								RESET FILTERS
Account ID	Last Activity	Account Type	Status	Balance	Product Name	Order ID	Actions	
14794	02-Dec-2019	Service	ACTIVE	£0.00	Monthly Sports Extra	101862		

ACCOUNT ID 14794: STATEMENT							CREDIT BALANCE: £0.00
Date	Description	Status	Charges	Credits	Balance	Actions	
02-Dec-2019	Repeating Charge for 02-12-2019 to 01-12-2020		£5.99		£0.00		
02-Dec-2019	Payment	AUTHORISED		£5.99	£(5.99)	Refund	



This will open the Refund Payment window

**REFUND PAYMENT** ✕

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:

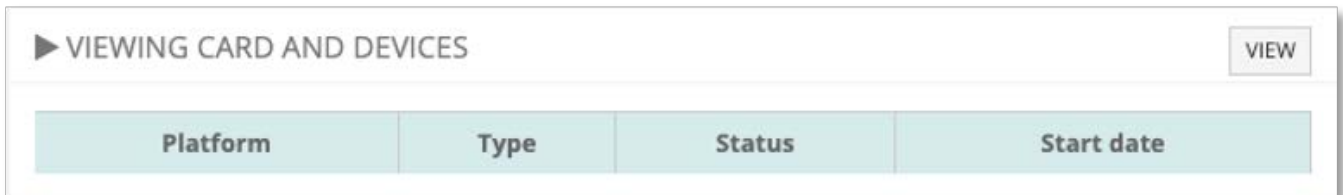
ACCOUNT ID 14794: STATEMENT						CREDIT BALANCE: £0.00
Date	Description	Status	Charges	Credits	Balance	
03-Dec-2019	Refund Credit	AUTHORISED		£5.99	£0.00	
03-Dec-2019	Refund Payment	AUTHORISED		£(5.99)	£5.99	
02-Dec-2019	Repeating Charge for 02-12-2019 to 01-12-2020		£5.99		£0.00	
02-Dec-2019	Payment	REFUNDED		£5.99	£(5.99)	

## Customer devices and platforms

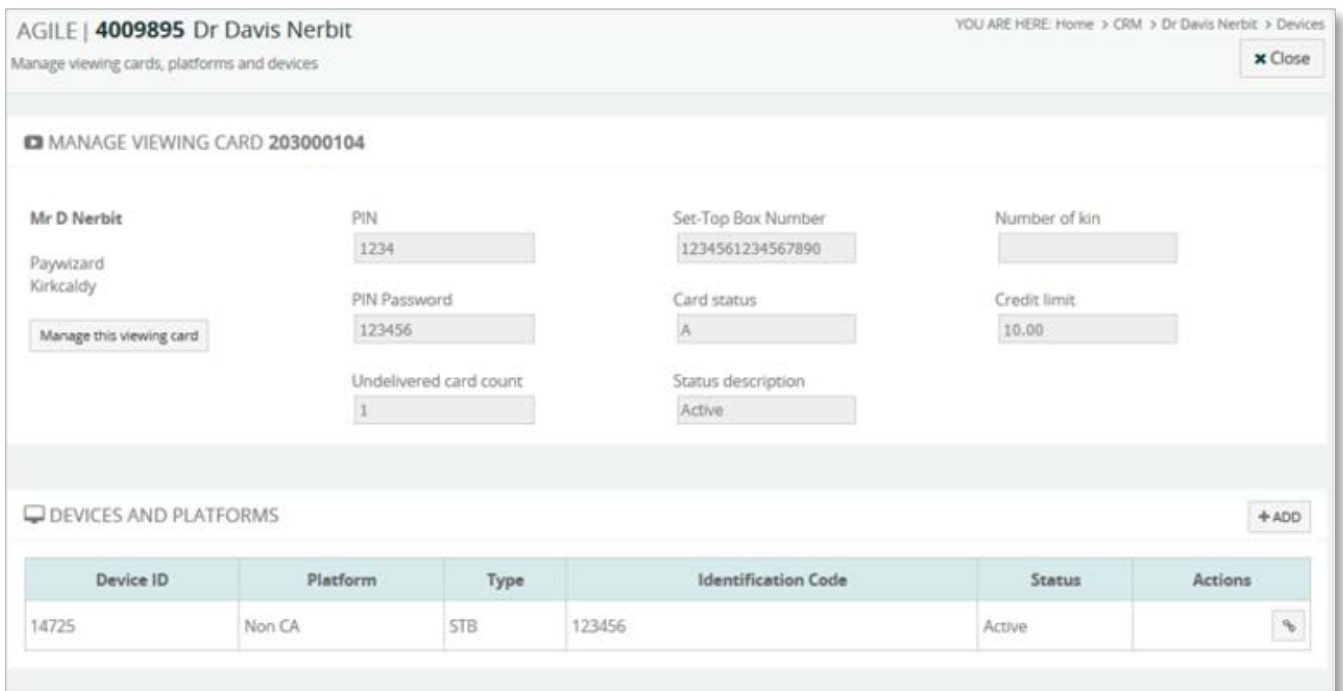
The Viewing card and devices box gives a quick glance of the customer’s viewing card number (VCN) and any devices associated to their account.

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:



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



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:

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:

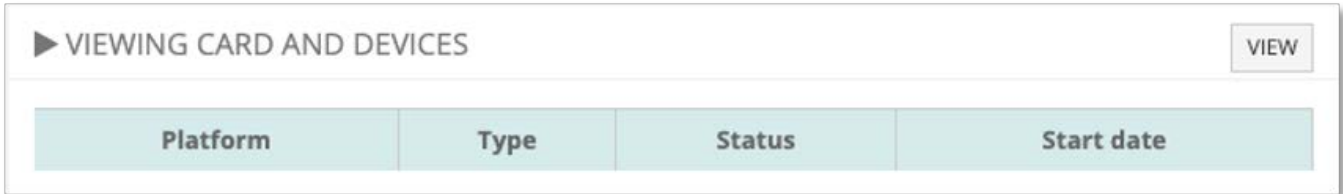
DEVICES AND PLATFORMS						+ ADD
Device ID	Platform	Type	Identification Code	Status	Actions	
13852	IPAD	IPAD	123456	Active		

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

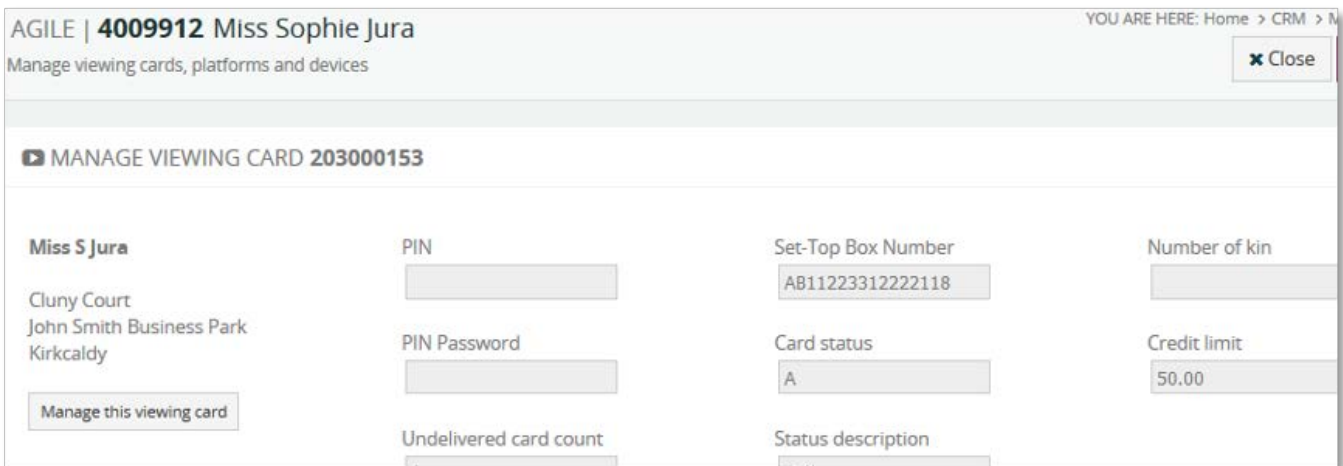
## Customer Sky viewing card

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

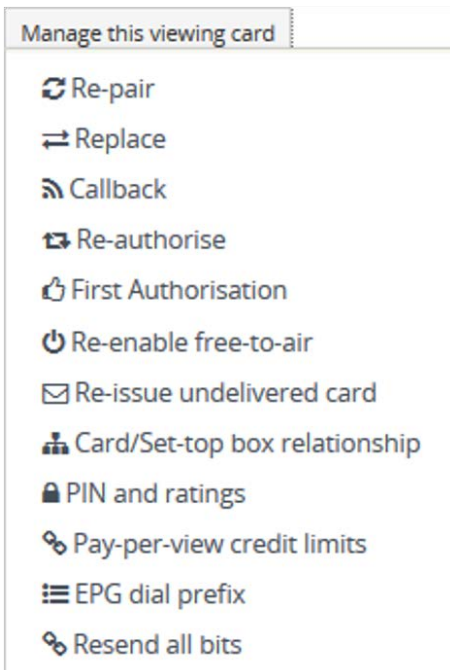
1. Click on View in the Viewing Card and Devices section:



Click on Manage this viewing card:



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





## 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.

1. 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'.

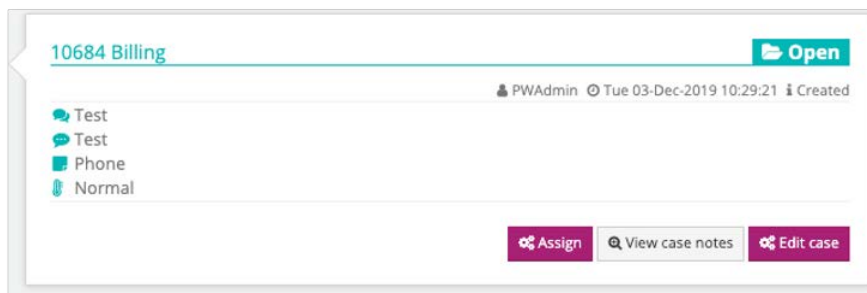
Cases can then be assigned to an Inbox where a User may take ownership and 'handle' the Case eg a Finance User might take ownership of a Case in the Finance Inbox that had been raised where a Customer had complained about poor video quality.

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:

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

C11 ENVIRONMENT | Search customers YOU ARE HERE: Home > CRM

Find your customers details and account information [+ Add customer](#)

SEARCH

Customer reference <input type="text"/>	Post / ZIP code <input type="text"/>	Viewing card number <input type="text"/>
First name <input type="text"/>	Last name <input type="text"/>	Email <input type="text"/>
Username <input type="text"/>	Payment method <input type="text"/>	Telephone number <input type="text"/>

[Search](#) [Clear](#)

ALL INBOXES

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

[View inbox](#)

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:

BONNIER | Inboxing YOU ARE HERE: Home > CRM > Inboxing

Maintain inboxed items [Manage inbox users](#) [Close](#)

MAINTAIN INBOX MESSAGES [Clear filters](#)

Filter inbox: All | Filter priority: All | Filter action: All | Filter importance: All | Filter owner: All | Filter box type: Inbox

Inbox name	Action id	Priority	Importance	Owned by	Action	Reference	Type	Date due	Actions
Customer Service	100118	HIGH	Overdue		INFORMATION	CASE 10121 Why have been cancelled?	Before	29-May-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>
Customer Service	100122	HIGH	Overdue		INFORMATION	CASE 10125 Payment Card Enquiry	Before	12-Jun-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>
Customer Service	100131	LOW	Overdue		REFUND	CASE 10261 new case	Before	24-Jun-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>
Customer Service	100128	HIGH	Overdue		CLAIM	CASE 10209 Mandatory!	Before	25-Jun-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>
Customer Service	100130	HIGH	Overdue		CLAIM	CASE 10260 Drp3 zero test 1		15-Aug-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>
Customer Service	100140	HIGH	Overdue	cloydBBR	REFUND	CASE 10482 Sort Billing	Before	09-Oct-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>
Customer Service	100146	HIGH	Overdue	cloydBBR	INFORMATION	CASE 10582 Payment Card Enquiry	Before	13-Nov-2019	<a href="#">i</a> <a href="#">l</a> <a href="#">d</a> <a href="#">x</a> <a href="#">p</a> <a href="#">b</a> <a href="#">o</a>

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.

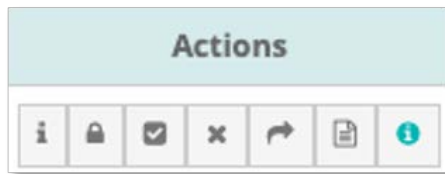
## Inbox actions

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:

Inbox name	Action id	Priority	Importance	Owned by	Action	Reference	Type
Customer Service	100124	HIGH	Overdue		CLAIM	CASE 10161 Cancel	Before

dloydBBR @ 29-May-2019: 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	Action
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.

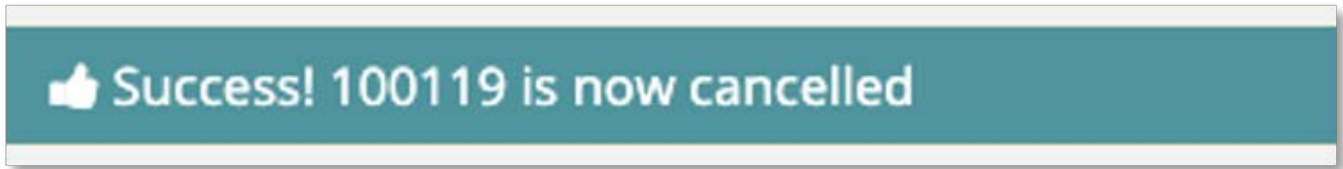
The inbox will now be removed from the 'Maintain inbox messages' table along with a success message at the top confirming the action.



## 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:

A screenshot of a web application window titled "FORWARD INBOX MESSAGE". The window contains three mandatory fields: "Inbox\*", "Due type\*", and "Due date\*", each with a dropdown arrow. The "Due date\*" field has a calendar icon to its right. Below these fields is a large text area labeled "Message". At the bottom right of the window are two buttons: "Cancel" and "Forward".

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;

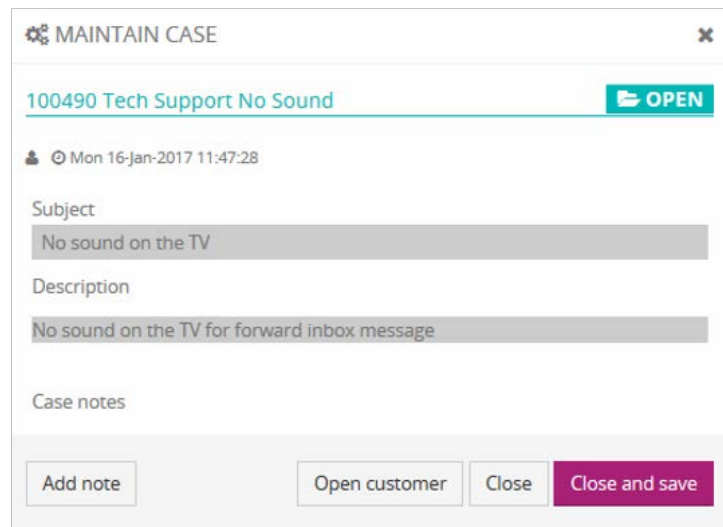
Message – Provide more detail about the inbox.

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:



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

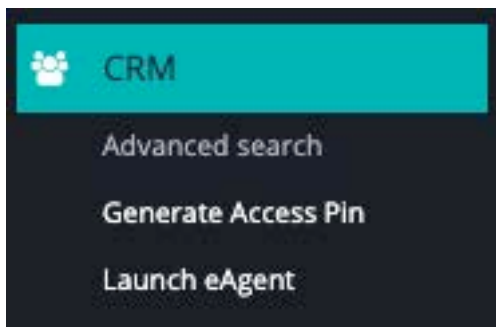
This functionality allows you to generate an Access PIN to give Non-DSAT Customers access to streaming services.

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.

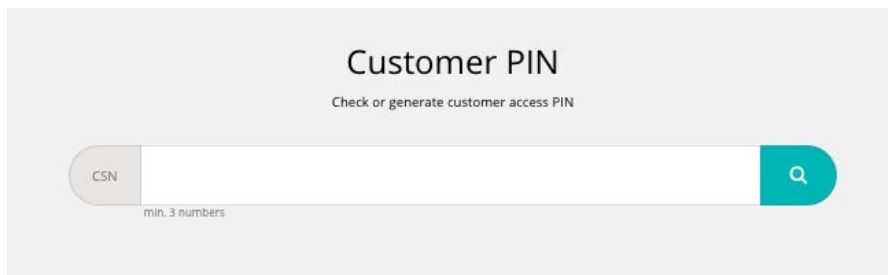
This Access PIN is unique to their Purchase or Subscription and they may get in touch to find out their Access PIN.

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.

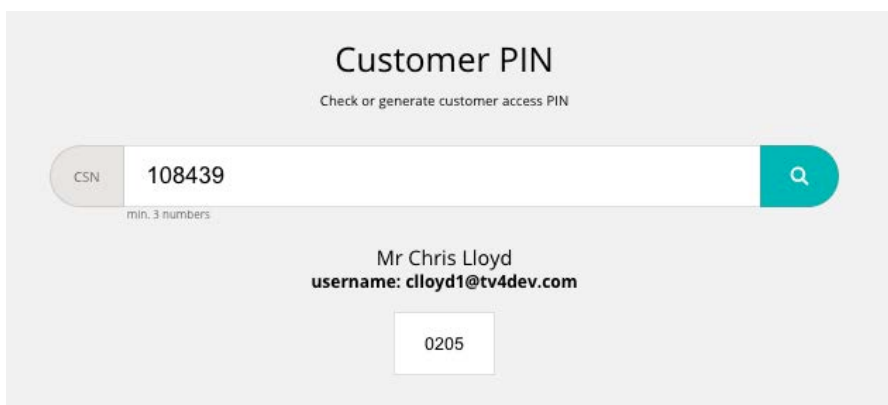
1. Select CRM
2. Select Generate Access PIN:



3. Search for the customer using their CSN

A screenshot of a web form titled 'Customer PIN' with the subtitle 'Check or generate customer access PIN'. The form features a search input field with a 'CSN' label on the left and a search icon on the right. Below the input field, there is a small text label 'min. 3 numbers'.


4. The customer's details will populate, if an Access PIN has already been generated it will appear here:
- 5.

A screenshot of the 'Customer PIN' form showing search results. The search input field now contains the value '108439'. Below the search bar, the customer's name 'Mr Chris Lloyd' and email 'username: cloyd1@tv4dev.com' are displayed. At the bottom of the form, a small box contains the Access PIN '0205'.

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

CSN  

min. 3 numbers

Mr Chris Lloyd  
username: **clloyd1@tv4dev.com**

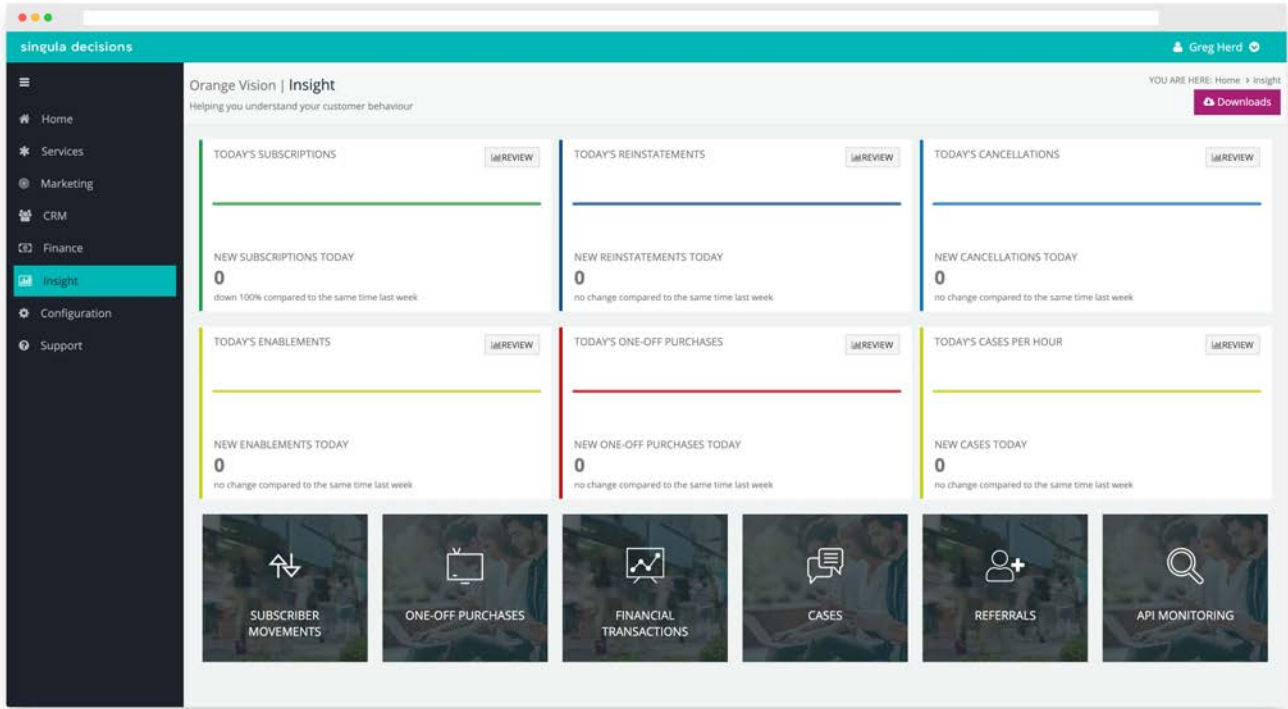
[Generate PIN](#)

## 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.



#### What can I see and do?

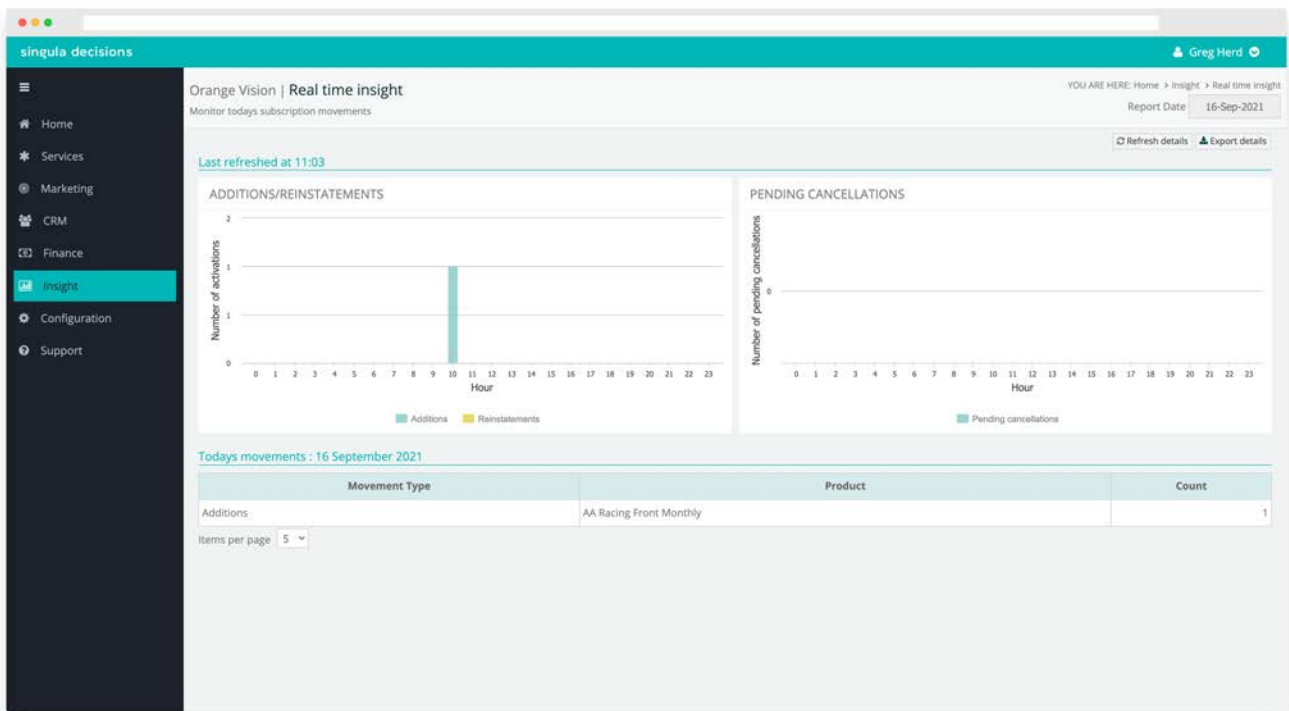
- Hovering your cursor over the graph line reveals statistics for that time period
- Comparisons of the day against the same day, last week
- Access detailed real-time reports
- Access a secure download area

#### 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

#### What can I see and do?

- 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

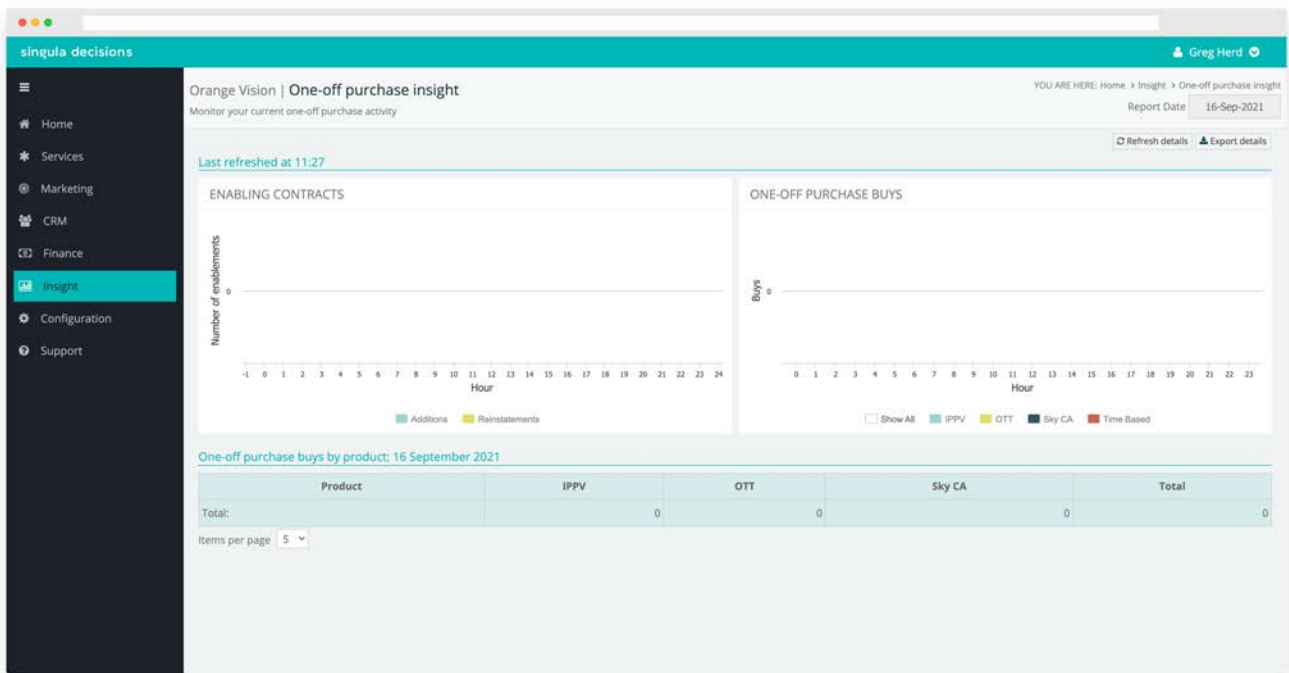


## ENABLEMENTS

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

### What can I see and do?

- 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

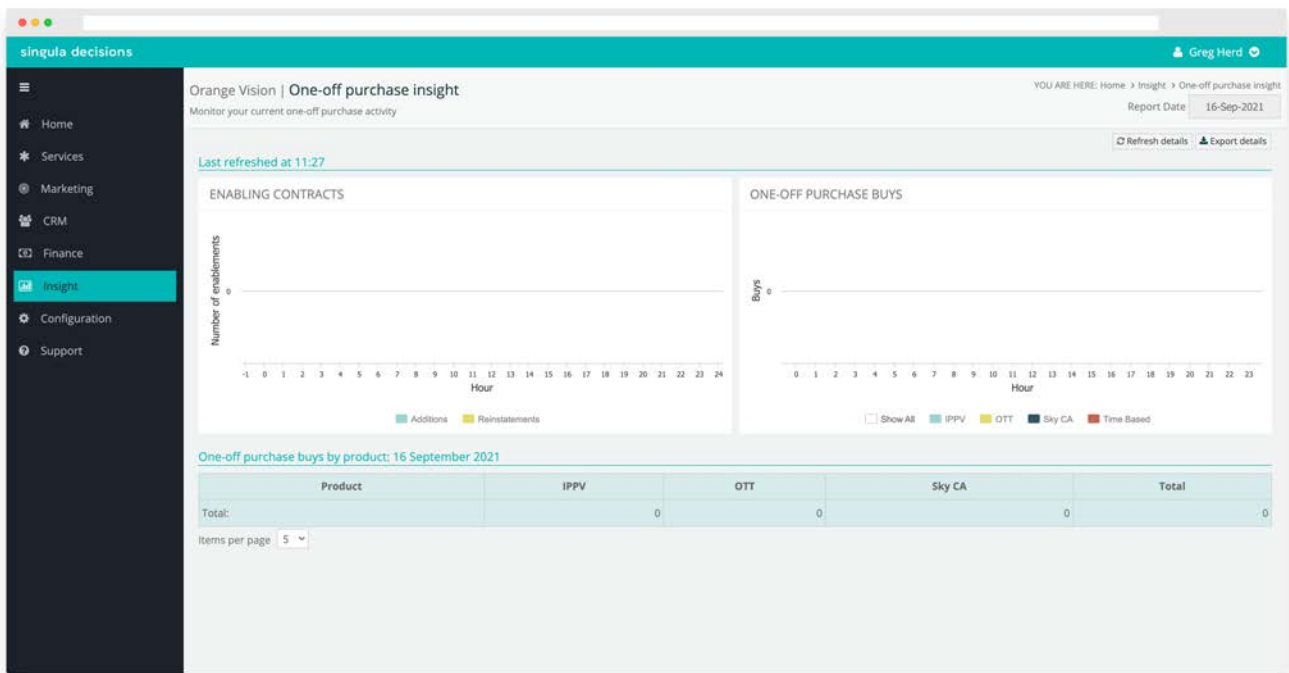


## ONE-OFF PURCHASES

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

### What can I see and do?

- 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

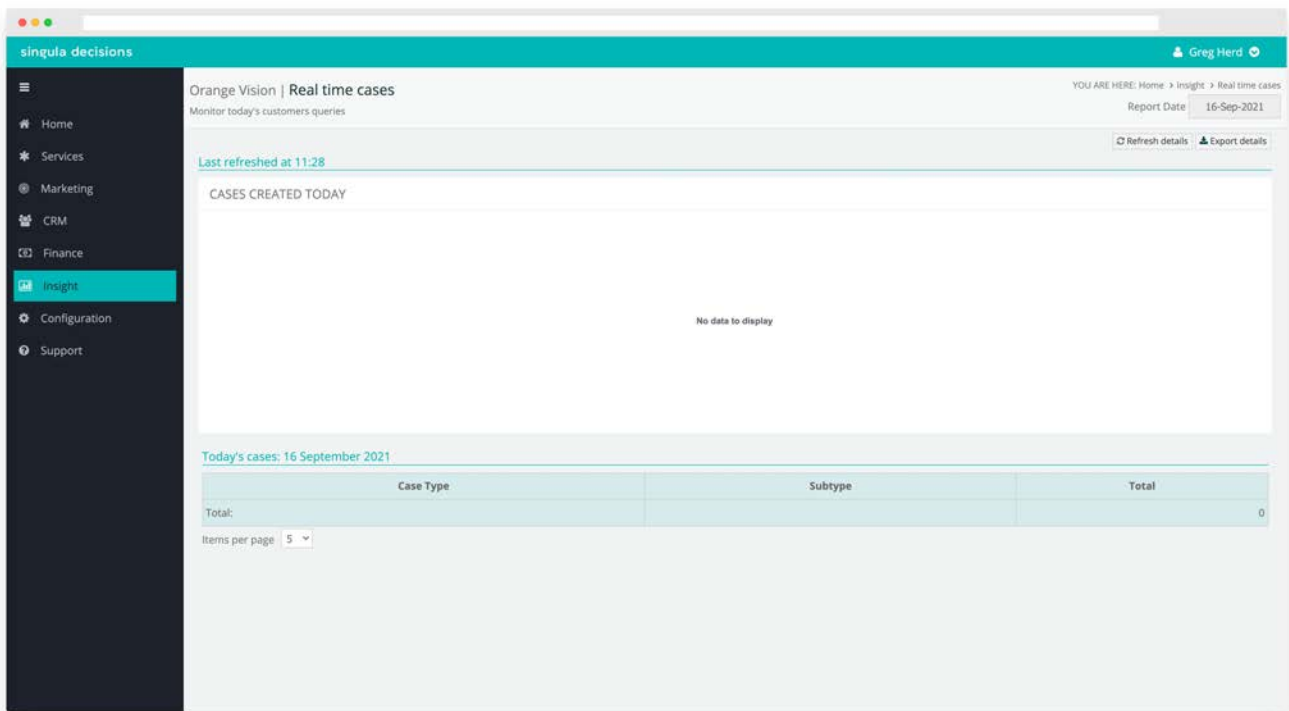


## CASES

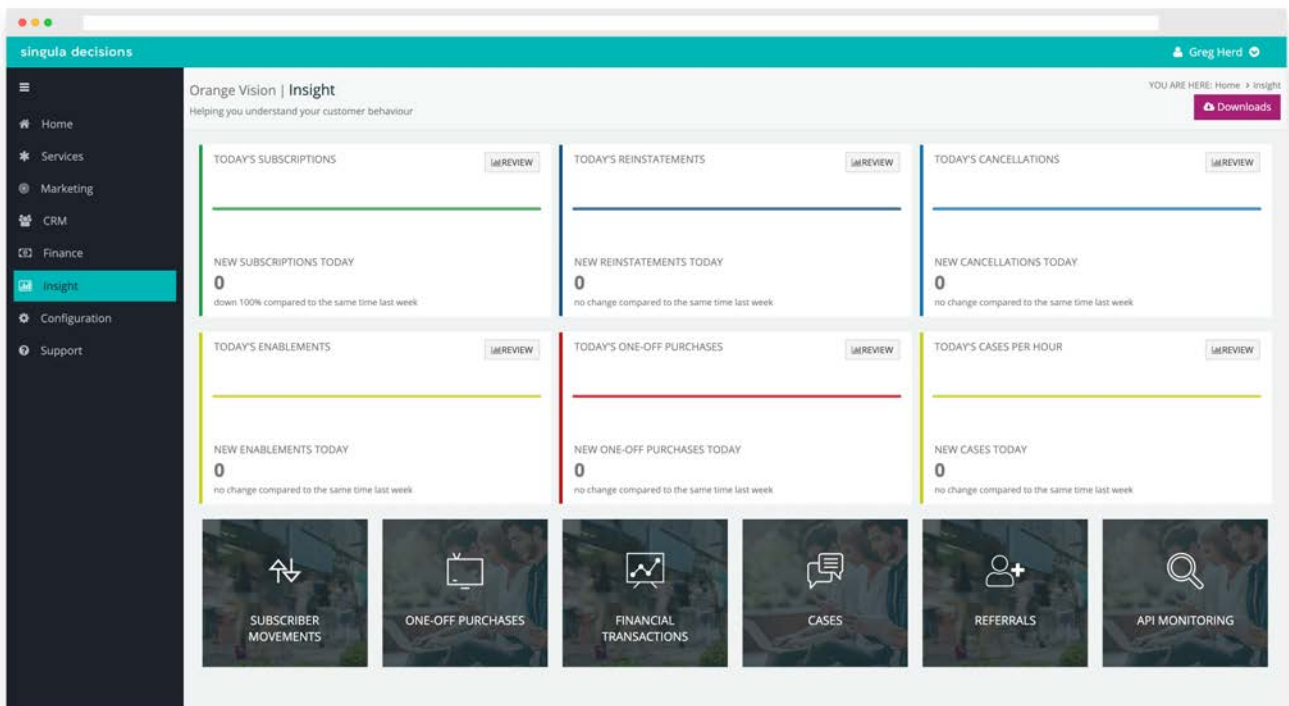
1. Select Insight in the main menu.
2. Select Review within the Cases widget

### What can I see and do?

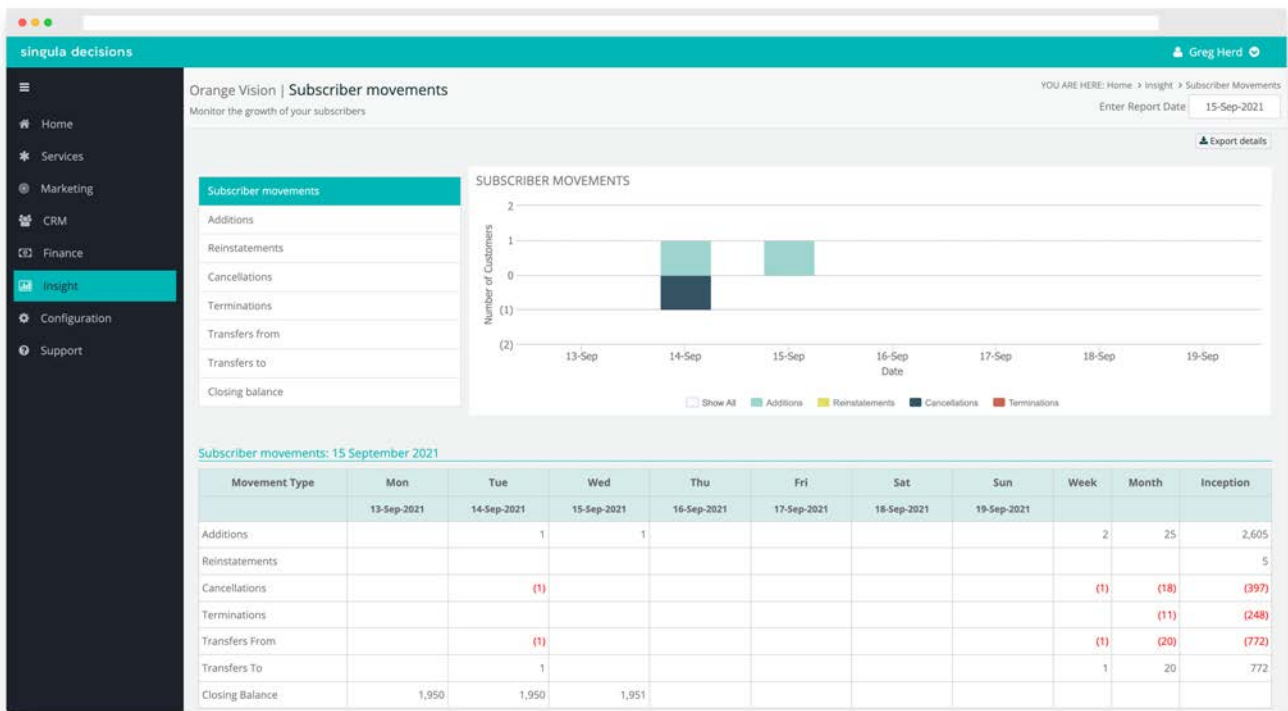
- The real-time case report details the number of new cases
- Cases are segmented by type for example this could be a technical issue or a billing enquiry
- A view showing 24-hours of activity
- Analyse your data further by downloading a detailed report in the either Excel or CSV. Select Export Details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



## HISTORICAL REPORTS



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



## DOWNLOAD AREA

1. Select Downloads
2. You will be required to login. You should have a separate 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.





## 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, alphanumeric and the following special characters are also allowed: ! £ \_ . \* ( ). 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.

The screenshot shows the 'Create new user' form in the Singula Decisions application. The form is titled 'Create new user' and is located within the 'Configuration' section of the application. The form is divided into several sections: 'USER DETAILS', 'ADVANCED CONFIGURATION', and 'ROLES'. The 'USER DETAILS' section contains fields for 'Full name', 'Email', 'Confirm email', 'Username', and 'Mobile telephone number'. The 'ADVANCED CONFIGURATION' section has a checkbox for 'Beta User'. The 'ROLES' section has radio buttons for 'System Administrator', 'Call Centre Supervisor', and 'Call Centre Agent'. The form also includes an 'Active' checkbox and 'Cancel' and 'Add user' buttons.

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 a 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'

Active 

## 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     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'

Beta 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	ADMINISTRATOR (NO CRM)	CUSTOMER SERVICE	SALES AGENT	FINANCE	MARKETING
Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
CRM	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Insight	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## **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

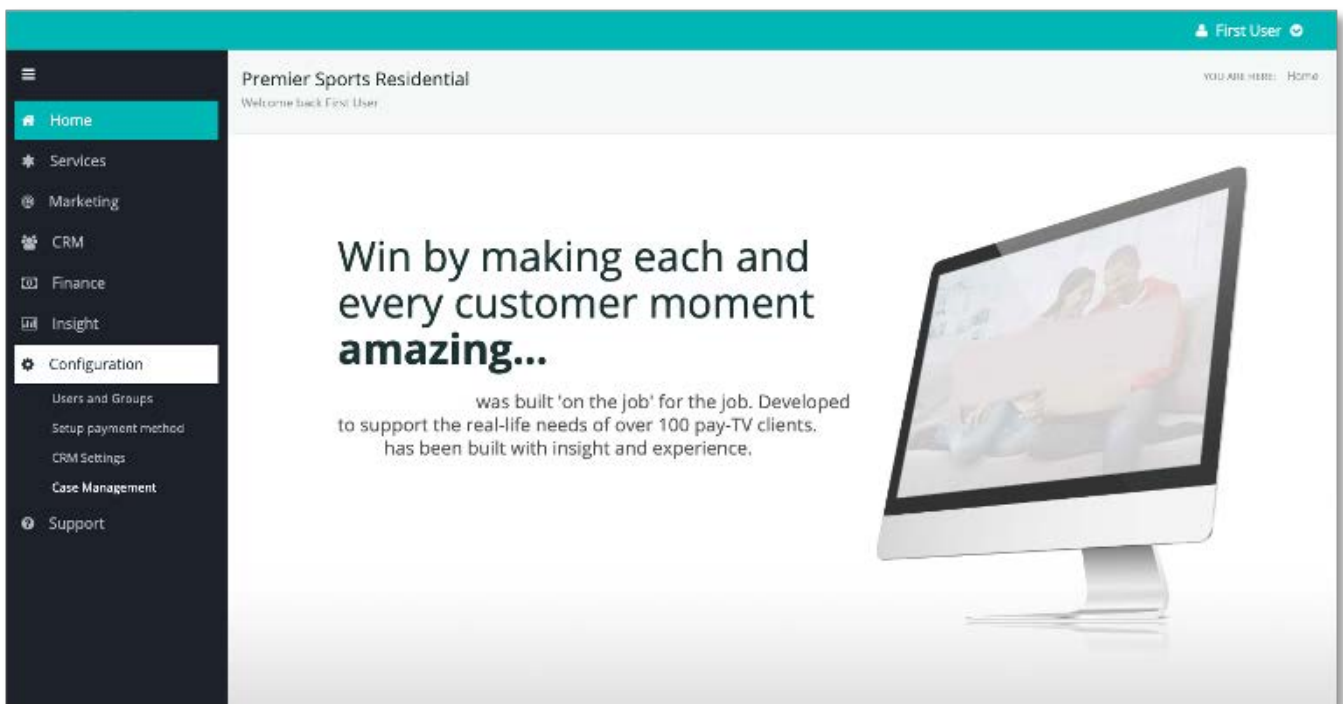
## Cases

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

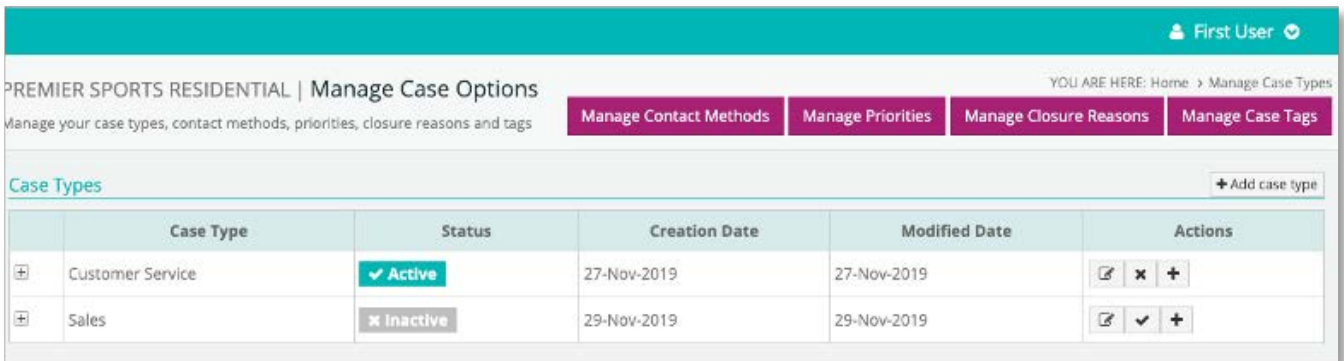


The Manage Case option screen will appear:

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



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

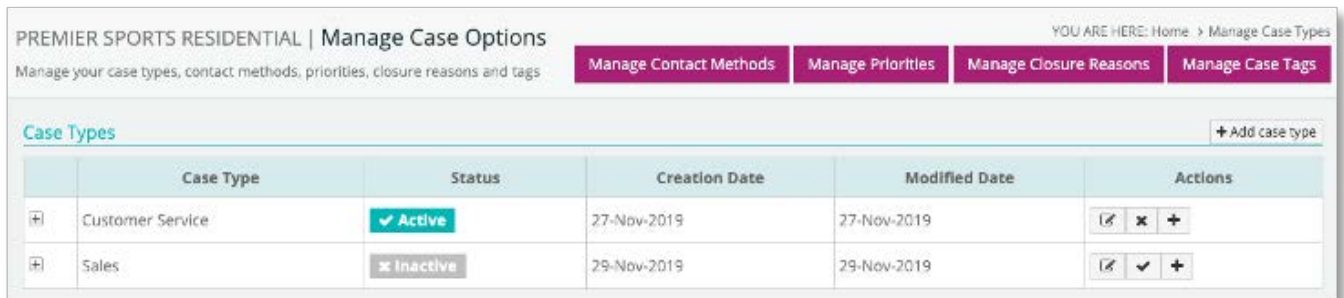
## CREATE AND MANAGE CASE TYPES

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



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

**MANAGE CASE TYPE** ✕

Enter the case type information

Name\*

Active

A Success confirmation message will appear on the screen

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

Success! New case type has been added

Case Types <span style="float: right;">+ Add case type</span>					
	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	✎ ✕ +
✚	Sales	✕ Inactive	29-Nov-2019	29-Nov-2019	✎ ✓ +

To edit the Case type click the 'pen' icon

✎ MANAGE CASE TYPE ✕

Enter the case type information

Name\*

Active

To deactivate the Case type click the 'cross' icon

✎ MANAGE CASE TYPE STATUS ✕

Are you sure you want to make **Customer Service** Inactive?

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

✎ MANAGE CASE TYPE ✕

Enter the case type information

Name\*

Active



## 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 <span style="float: right;">+ Add case type</span>					
	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	
⌵	Sales	Inactive	29-Nov-2019	29-Nov-2019	

**MANAGE CASE TYPE** ✕

Enter the case type information

Name\*

Active

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:

1. 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 <span style="float: right;">+ Add case type</span>					
	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	
⌵	Sales	Inactive	29-Nov-2019	29-Nov-2019	

2. Here you can see the:
  - Case Sub Type Name
  - Status
  - Creation date
  - Modified date
  - Actions; options to edit or deactivate

Case Types					<a href="#">+ Add case type</a>
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		
Case Subtype	Status	Creation Date	Modified Date	Actions	
Cancel	Active	29-Nov-2019	29-Nov-2019		
Sales	Inactive	29-Nov-2019	29-Nov-2019		

## 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:

PREMIER SPORTS RESIDENTIAL   Manage Case Options					YOU ARE HERE: Home > Manage Case Types			
Manage your case types, contact methods, priorities, closure reasons and tags					<a href="#">Manage Case Types</a>	<a href="#">Manage Contact Methods</a>	<a href="#">Manage Closure Reasons</a>	<a href="#">Manage Case Tags</a>
Case Priorities						<a href="#">+ Add priority</a>		
Case Priority	Status	Default	Ranking	Creation Date	Modified Date	Actions		
Normal	Active	Default	10000	27-Nov-2019	27-Nov-2019			
Urgent	Active		10001	27-Nov-2019	27-Nov-2019			

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

PREMIER SPORTS RESIDENTIAL   Manage Case Options					YOU ARE HERE: Home > Manage Case Types			
Manage your case types, contact methods, priorities, closure reasons and tags					<a href="#">Manage Case Types</a>	<a href="#">Manage Contact Methods</a>	<a href="#">Manage Priorities</a>	<a href="#">Manage Case Tags</a>
Case Closure Reasons						<a href="#">+ Add closure reason</a>		
Case Closure Reason	Status	Creation Date	Modified Date	Actions				
Resolved	Active	27-Nov-2019	27-Nov-2019					
Email	Inactive	27-Nov-2019	27-Nov-2019					

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

**MANAGE CLOSURE REASON** ✕

Enter the case closure reason information

Name\*

Active

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:

PREMIER SPORTS RESIDENTIAL | Manage Case Options YOU ARE HERE: Home > Manage Case Types

Manage your case types, contact methods, priorities, closure reasons and tags

Manage Case Types Manage Contact Methods Manage Priorities Manage Case Tags

**Case Closure Reasons** + Add closure reason

Case Closure Reason	Status	Creation Date	Modified Date	Actions
Resolved	Active	27-Nov-2019	27-Nov-2019	
Email	Inactive	27-Nov-2019	27-Nov-2019	

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 YOU ARE HERE: Home > Manage Case Types

Manage your case types, contact 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	
Urgent	Active		10001	27-Nov-2019	27-Nov-2019	

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

**MANAGE PRIORITY** ✕

Enter the case priority information

Name\*

Active

Ranking\*

Default

Cancel Confirm

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

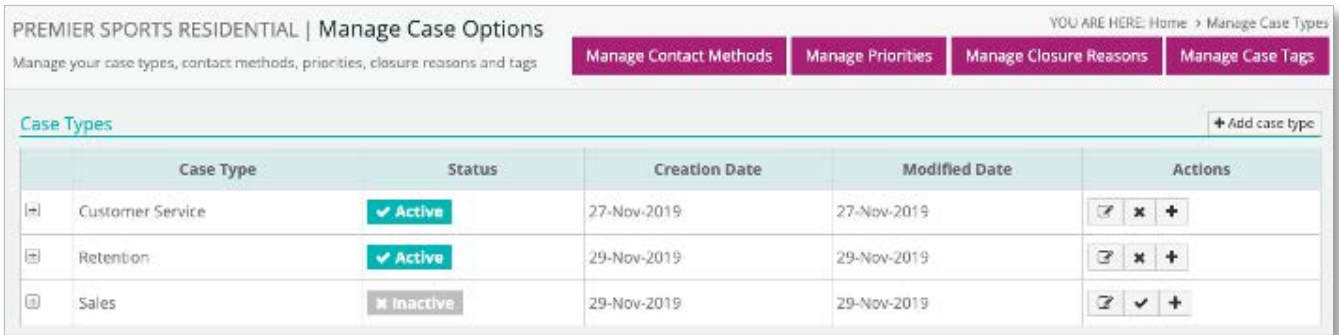
A confirmation message will appear on the Case Management screen

## 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.

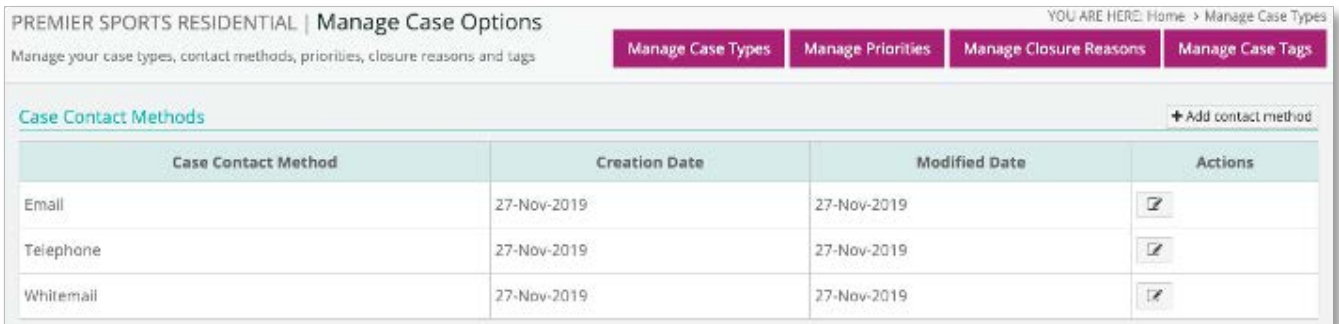
To create or edit Contact Methods:

1. Click the Manage Contact Methods button:



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



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

The dialog box is titled 'MANAGE CONTACT METHOD' and has a close button (X) in the top right corner. It contains the text 'Enter the case contact method information'. Below this is a label 'Name\*' followed by a text input field containing the text 'Social Media'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Confirm'.

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

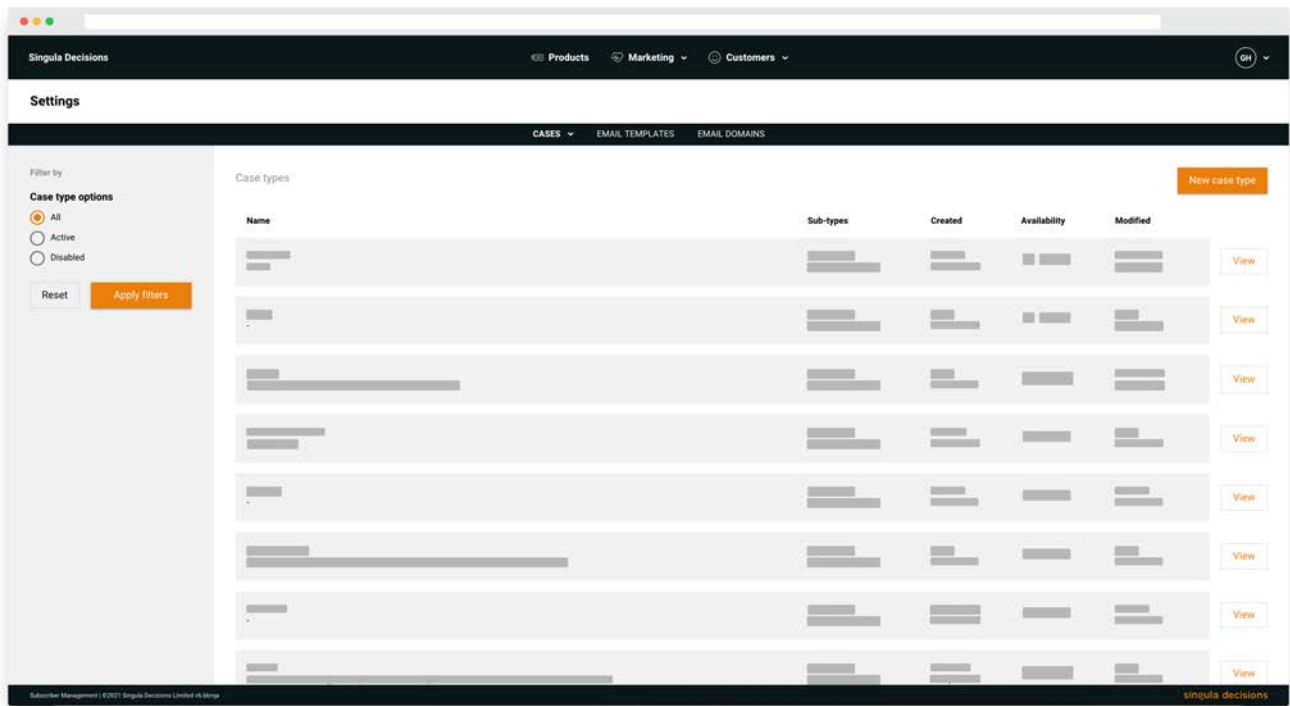
A confirmation message will appear on the Case Management screen

## 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.



### 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

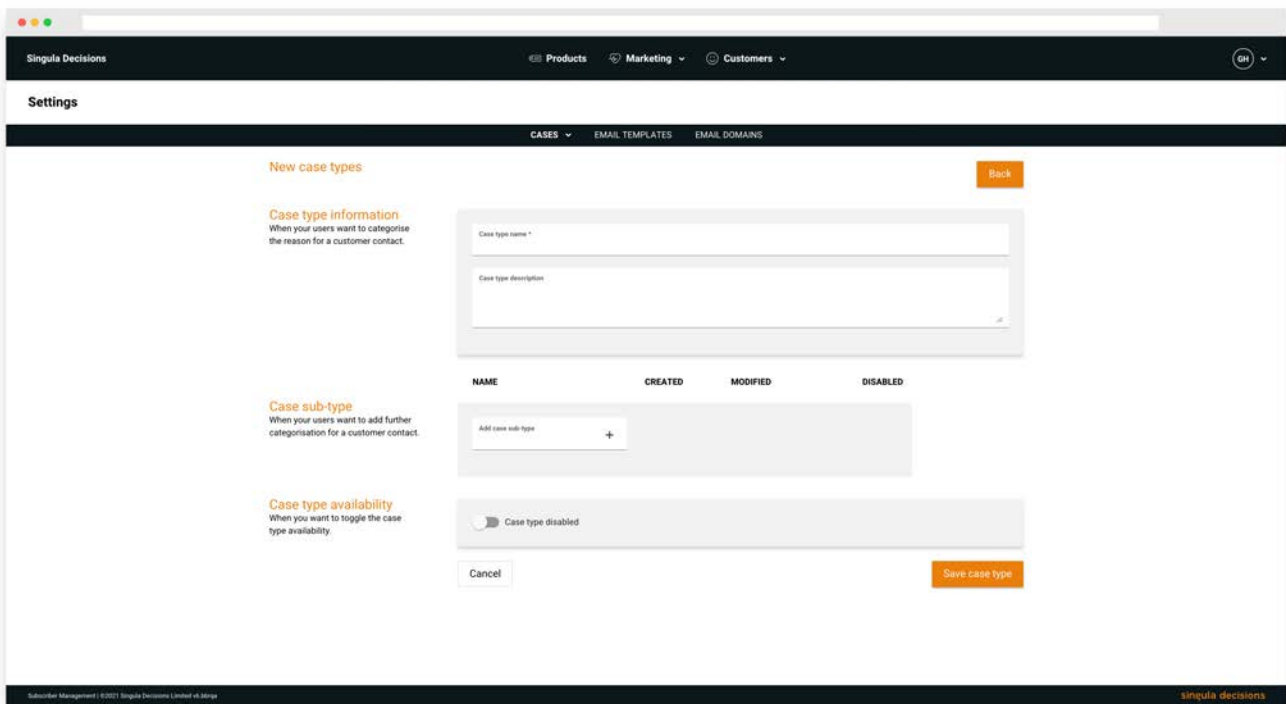
5. Enter Case type name
6. Enter Case description

#### 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



## MANAGE A CASE TYPE

1. From the user menu select Settings
2. Select Cases
3. Select Case Types
4. 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.

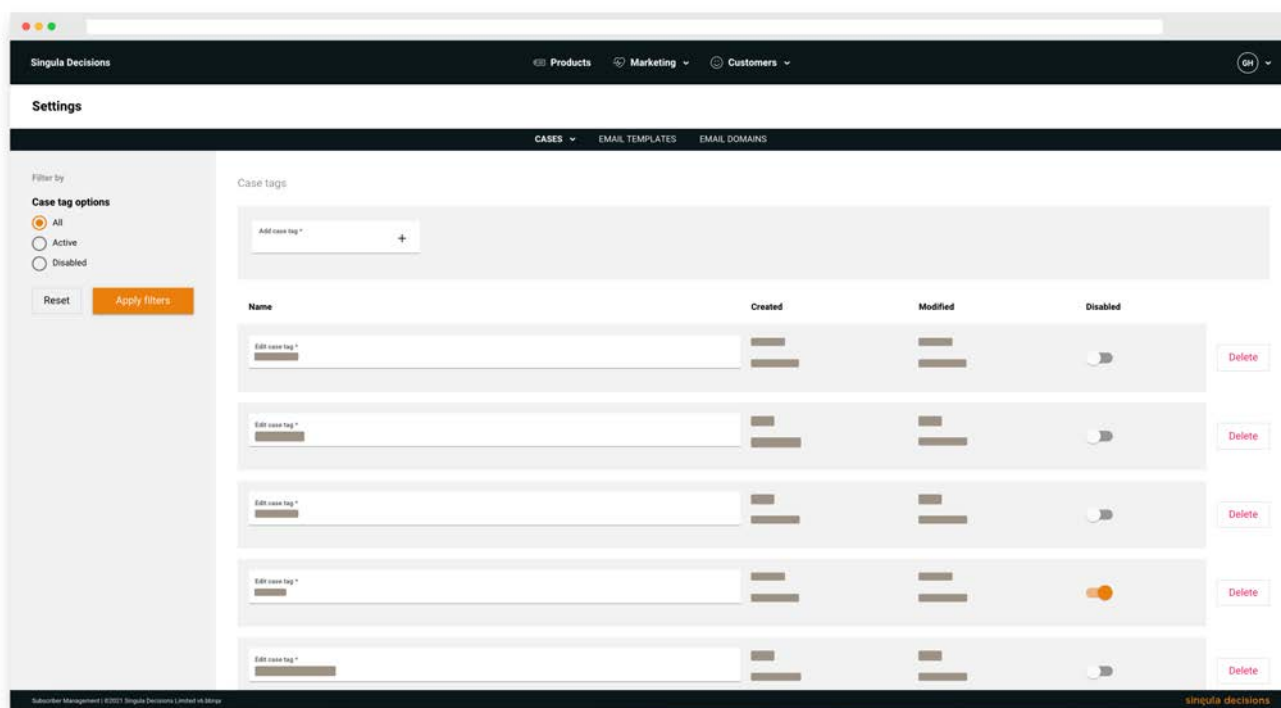
## CASE SUB-TYPES

1. From the user menu select Settings
2. Select Cases
3. Select Case Types
4. 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



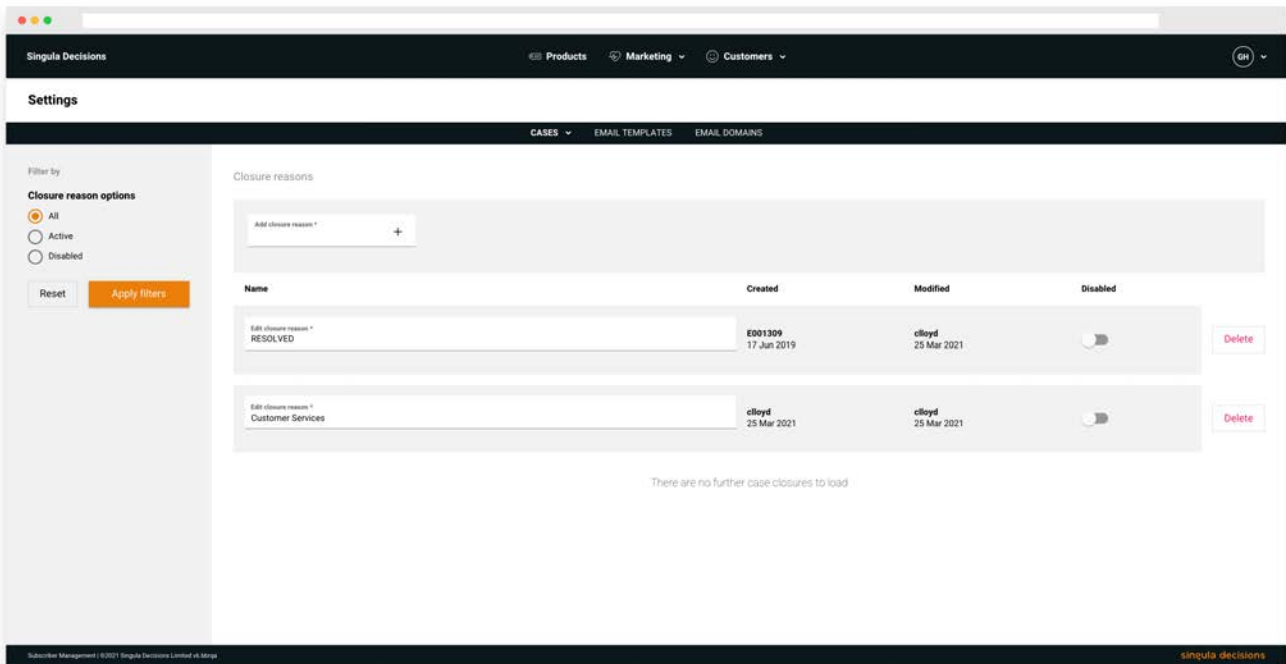
## ADD CASE TAG

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

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



## NEW CASE CLOSURE REASON

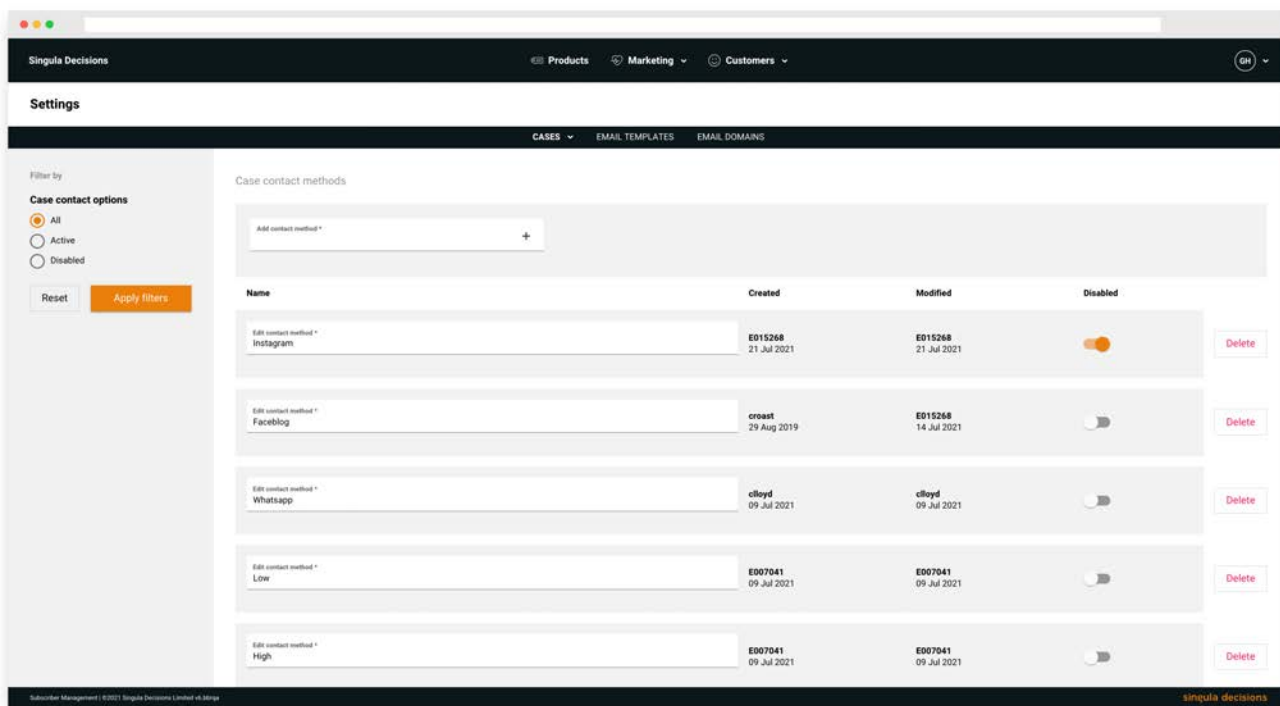
1. From the user menu select Settings
2. Select Cases
3. Select Case closure reasons
4. Enter your new case closure reason
5. Select + to add your case closure reason. Your new case closure reason will appear at the top of the list.

## 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





## NEW CASE CONTACT METHOD

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

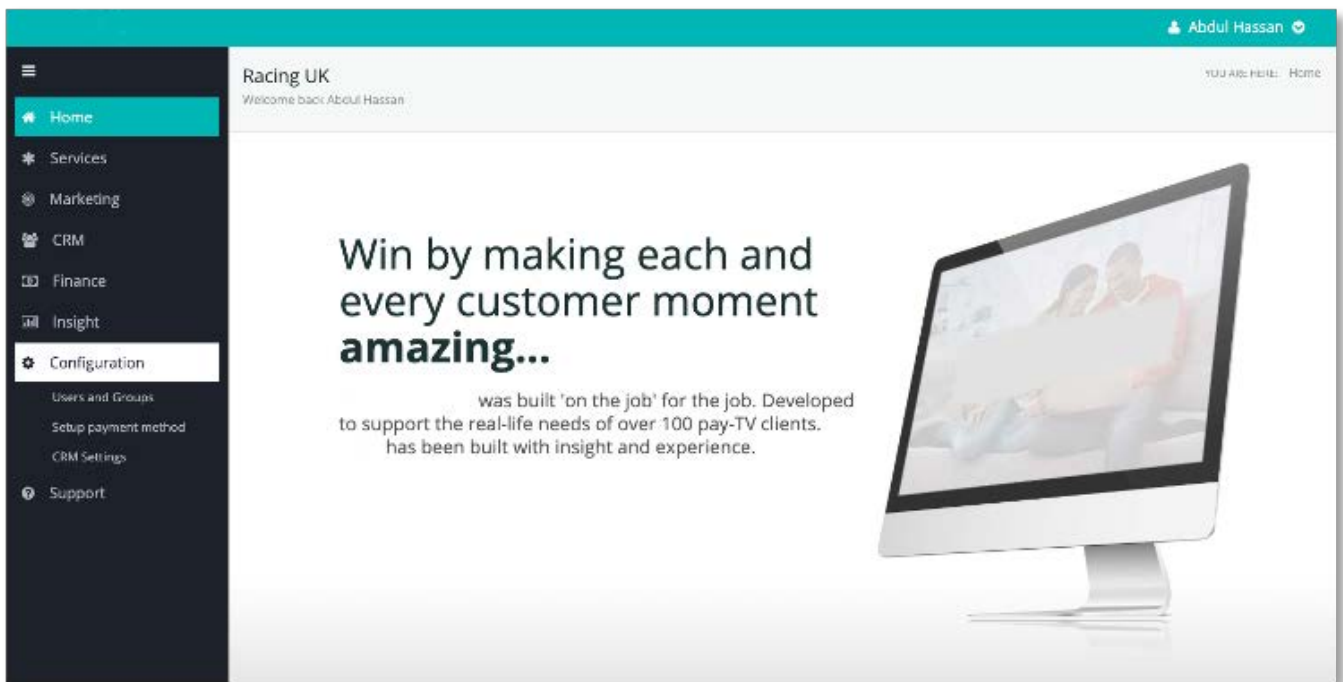
## Marketing consents

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:

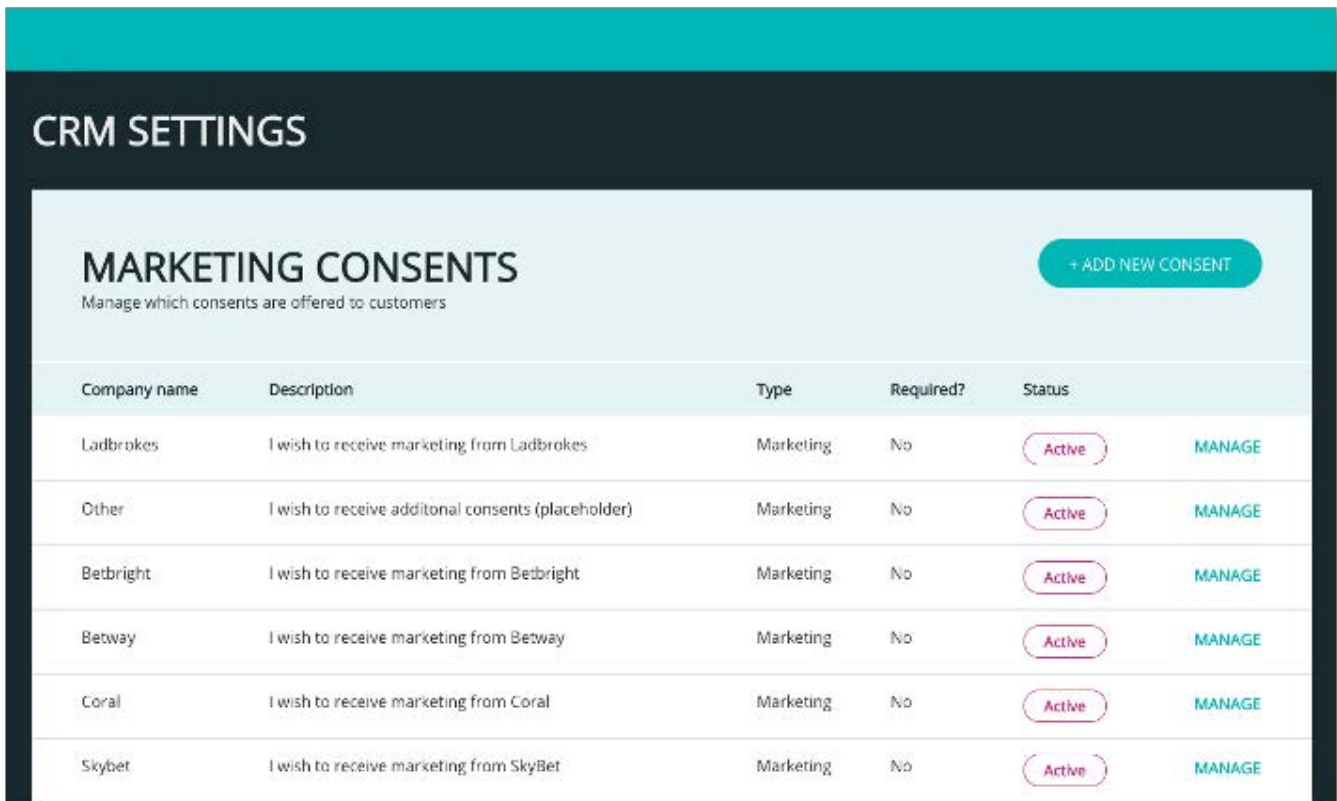
1. Click Configuration
2. Click CRM Settings



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



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



The following fields will then be displayed:



- 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

The screenshot shows a table titled 'MARKETING CONSENTS' with the subtitle 'Manage which consents are offered to customers'. A '+ ADD NEW CONSENT' button is in the top right. The table has columns: Company name, Description, Type, Required?, and Status. One row is visible for 'Ladbrokes' with description 'I wish to receive marketing from Ladbrokes', type 'Marketing', and required status 'No'. The status is 'Active' and there is a 'MANAGE' button to the right.

Company name	Description	Type	Required?	Status
Ladbrokes	I wish to receive marketing from Ladbrokes	Marketing	No	Active

The following fields will then be displayed:

The screenshot shows the 'MARKETING CONSENTS' form for editing. It has the same header and subtitle as the table. The form fields are: Company name (Ladbrokes), Description (I wish to receive marketing from Ladbrokes), Type (Marketing dropdown), Required? (checkbox for Yes), and Status (checkbox for Active). There are 'SAVE' and 'CANCEL' buttons at the bottom right.

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.

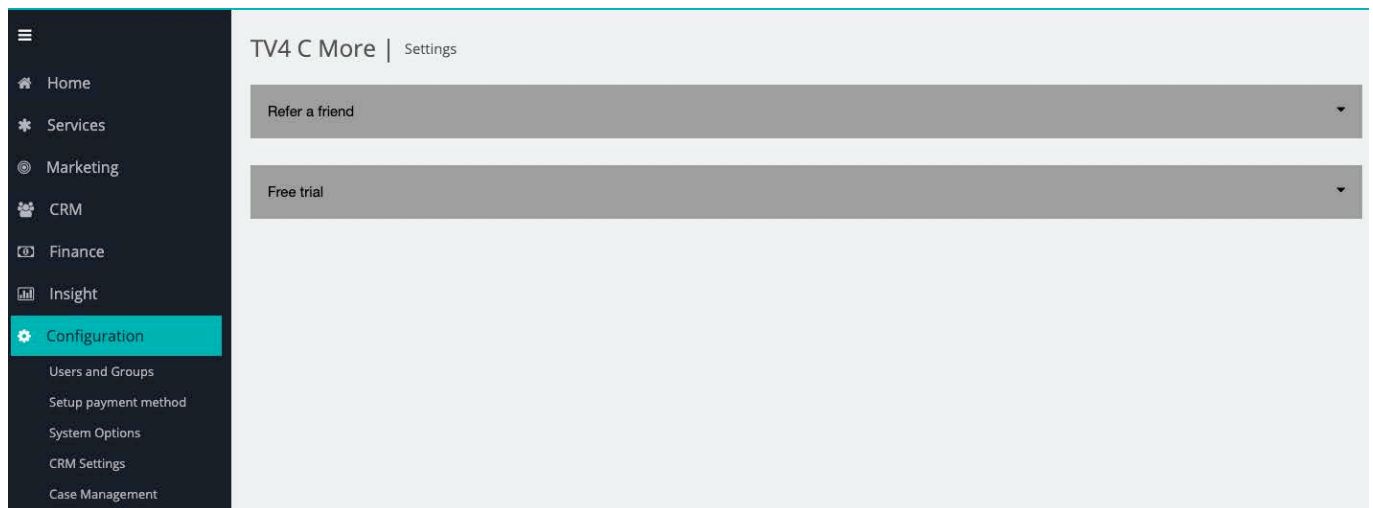
### WHAT RULES CAN I MANAGE?

- 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



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



4. 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.

month(s) before they can purchase a new Subscription using a refer a friend code.

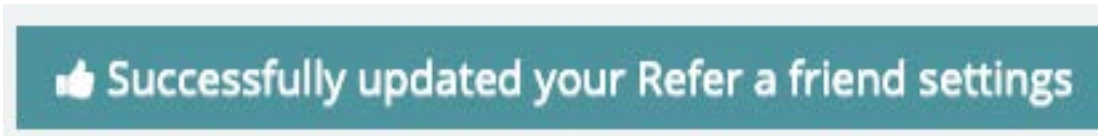
---

Activates 'Giver' customers refer a friend code after:

month(s) successful subsequent billings periods.

5. Click 'Save' to confirm the changes

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



**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 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.

month(s) before they can purchase a new Subscription using a refer a friend code.

---

Activates 'Giver' customers refer a friend code after:

month(s) successful subsequent billings periods.

**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':

**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.

month(s) before they can purchase a new Subscription using a refer a friend code.

---

Activates 'Giver' customers refer a friend code after:

month(s) successful subsequent billings periods.

[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:

👤 CUSTOMER DETAILS EDIT

---

**Customer ID**  
478bc599-cf33-4684-b998-63c877a03970

**- Forename Test**                      **Vimond ID**  
Test125@paywizard.com

**Home address**                      **Refer a friend code**  
Address Line 1                      iOj2bpWC ✖ Inactive  
Postcode  
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 code status successfully set

**CUSTOMER DETAILS** EDIT

**Customer ID**  
478bc599-cf33-4684-b998-63c877a03970

**- Forename Test**                      **Vimond ID**  
Test125@paywizard.com                      iOj2bpWC Active

**Home address**                      **Refer a friend code**  
Address Line 1                      iOj2bpWC Active  
Postcode                      [Manage](#)  
Sweden  
□ 000000000000



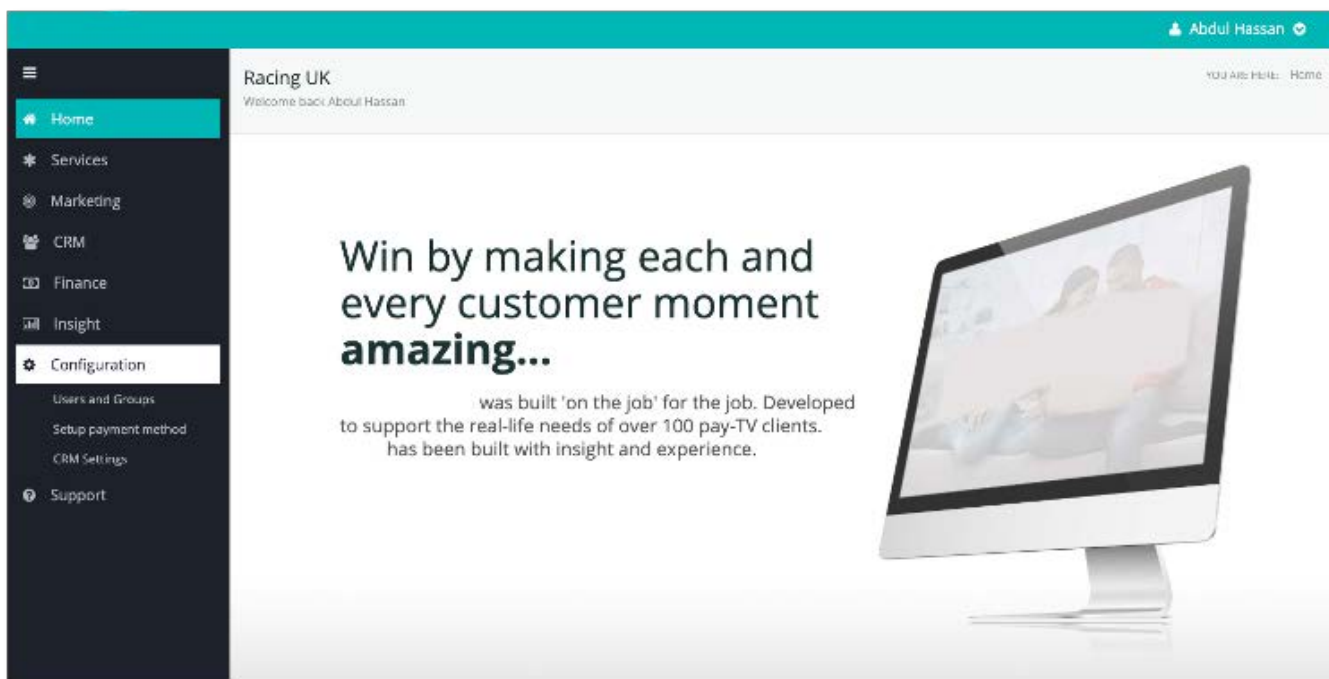
## Contact preferences

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.

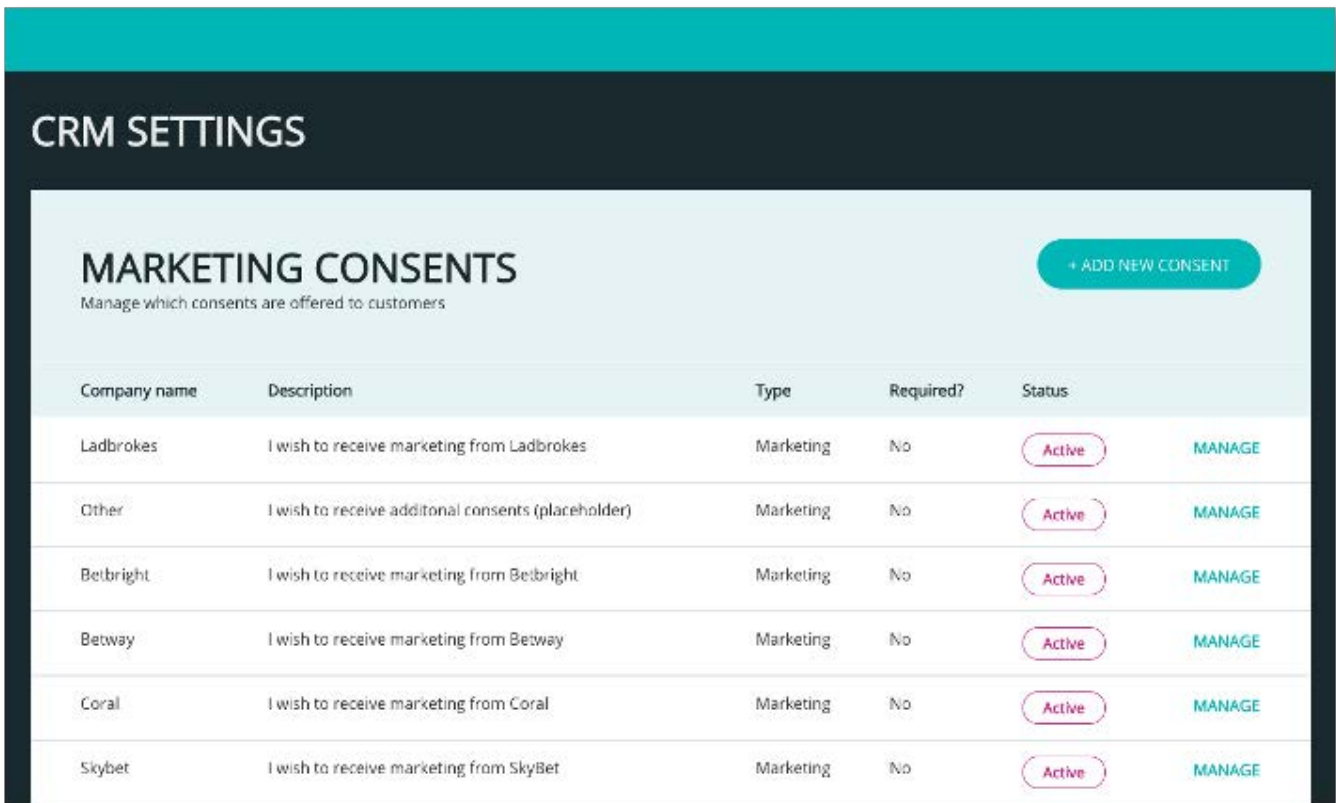
This would be captured at first contact with the customer and can then be used for effective customer engagement for both service and sales related contact.

### 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:



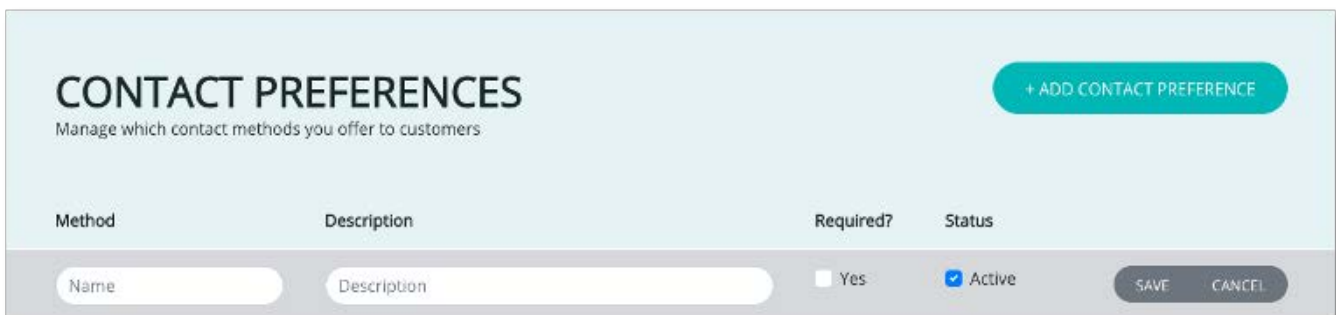
This will show:

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



The following fields will then be displayed:



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

The screenshot shows the 'CONTACT PREFERENCES' management interface. At the top, there is a header with the title 'CONTACT PREFERENCES' and a subtitle 'Manage which contact methods you offer to customers'. A teal button labeled '+ ADD CONTACT PREFERENCE' is located in the top right corner. Below the header is a table with the following columns: Method, Description, Required?, and Status. The table contains one row for 'Email' with the description 'Consent to receiving email', 'Required?' set to 'false', and 'Status' set to 'Active'. A teal 'MANAGE' button is positioned to the right of the 'Status' column for the 'Email' row.

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

The following fields will then be displayed:

The screenshot shows the 'CONTACT PREFERENCES' management interface in edit mode. The header and '+ ADD CONTACT PREFERENCE' button are the same as in the previous screenshot. The table now has a form for editing the 'Email' preference. The 'Method' column contains 'Email'. The 'Description' column has a text input field containing 'Consent to receiving email'. The 'Required?' column has a checkbox labeled 'Yes' which is currently unchecked. The 'Status' column has a checkbox labeled 'Active' which is currently checked. At the bottom right of the form, there are two buttons: 'SAVE' and 'CANCEL'.

Method	Description	Required?	Status
Email	<input type="text" value="Consent to receiving email"/>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> Active

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.

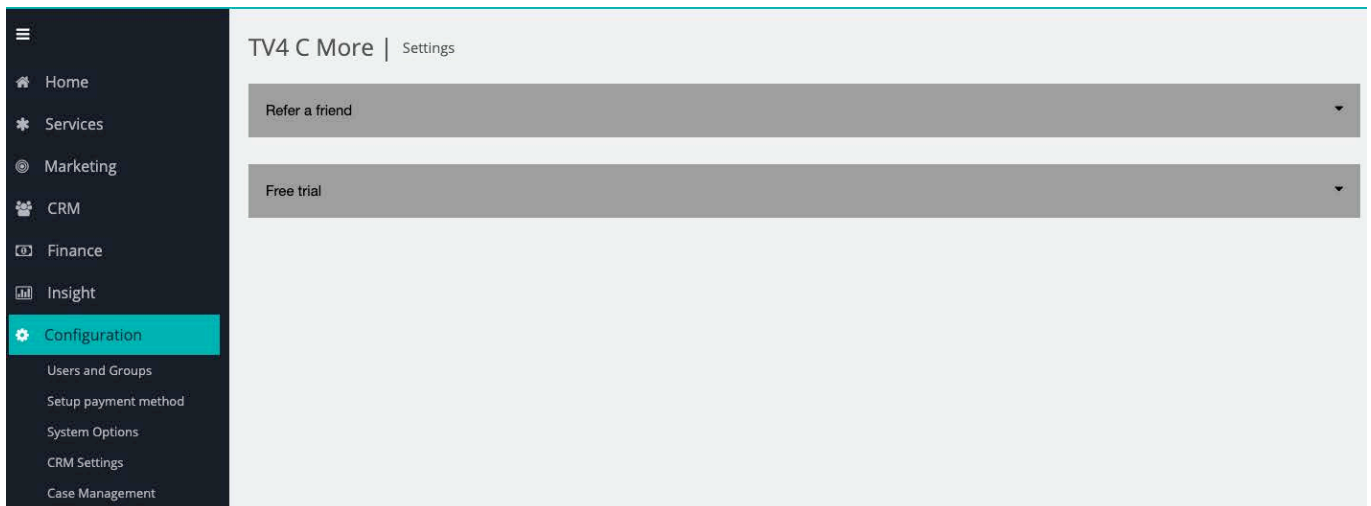
After the free trial expires the customer will be billed accordingly to the subscription.

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:



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



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':

**SEARCH**

Customer reference <input type="text"/>	Post / ZIP code <input type="text"/>	External unique ID <input type="text"/>
First name <input type="text"/>	Last name <input type="text"/>	Email <input type="text"/>
Display name <input type="text"/>	Payment method <input type="text"/>	Telephone number <input type="text"/>
Username <input type="text"/>	Order ID <input type="text"/>	Viewing card number <input type="text"/>

**ALL INBOXES**

Inbox	Overdue	Due today	Next three days	Next seven days	Not yet due
Finance	0	0	0	1	0

The Inboxing screen will appear:

PREMIER SPORTS RESIDENTIAL | Inboxing

YOU ARE HERE: Home > CRM > Inboxing

Maintain inboxed items

Manage inboxes Close

MAINTAIN INBOX USERS

Create inboxes Create Inbox users Clear filters

Filter Inbox: All Filter users: All Filter Status: All

Inbox name	User name	Read access	Forward access	Cancel access	Actions
Finance	Aroxburgh	✓ Yes	✓ Yes	✓ Yes	
Finance	BScott	✓ Yes	✓ Yes	✓ Yes	
Finance	Bscott	✓ Yes	✓ Yes	✓ Yes	
Finance	E014863	✓ Yes	✓ Yes	✓ Yes	
Finance	Gbyrne	✓ Yes	✓ Yes	✓ Yes	
Test	E015268	✓ Yes	✓ Yes	✓ Yes	
test1	E014863	✓ Yes	✓ Yes	✓ Yes	

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':

UPDATE USER ACCESS

Select access rights for **Aroxburgh** to access the **Finance**

Read access  Forward access  Cancel access

Cancel Update

2. Click Manage inboxes button or the Create inboxes button

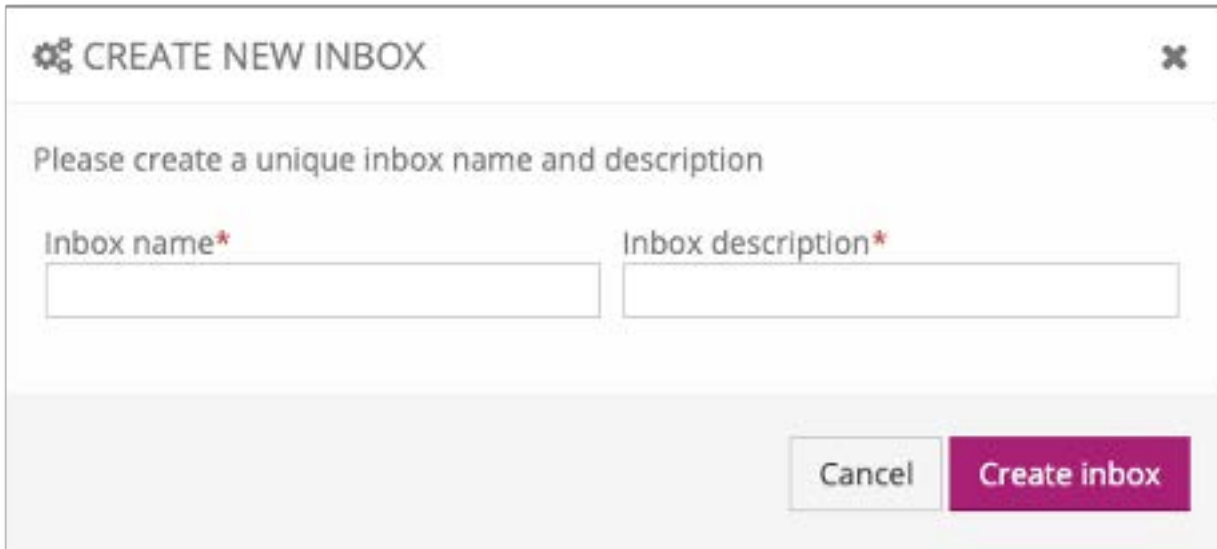
YOU ARE HERE: Home > CRM > Inboxing

Manage inboxes Close

Create inboxes Create inbox users Clear filters

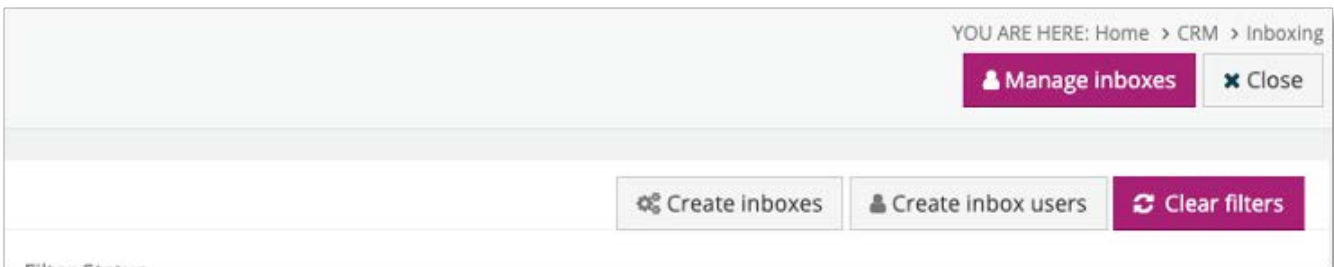
Filter Status: All

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



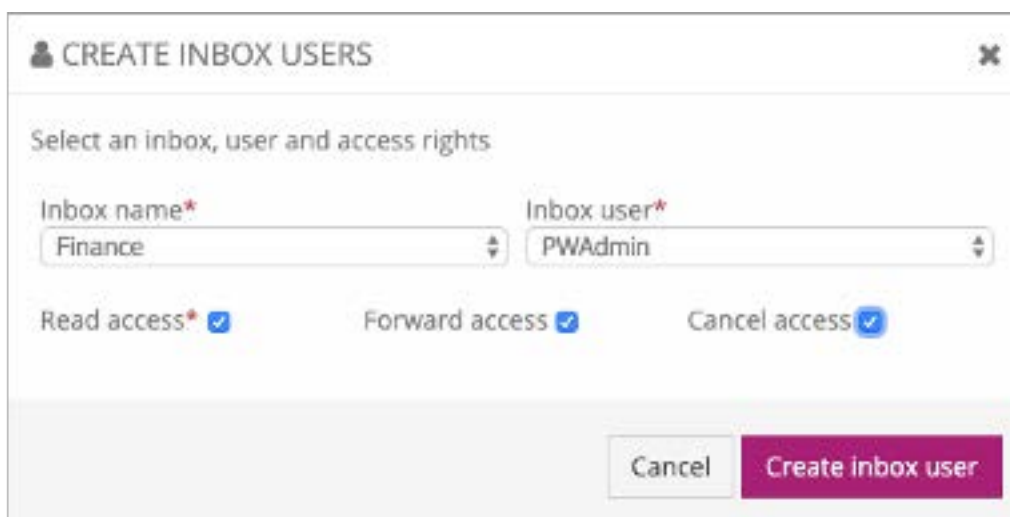
The screenshot shows a dialog box titled "CREATE NEW INBOX" with a close button (X) in the top right corner. Below the title, there is a prompt: "Please create a unique inbox name and description". There are two input fields: "Inbox name\*" and "Inbox description\*", both with asterisks indicating they are required. At the bottom right, there are two buttons: "Cancel" and "Create inbox".

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':



The screenshot shows a section of the CRM interface. At the top right, there is a breadcrumb trail: "YOU ARE HERE: Home > CRM > Inboxing". Below this, there are two buttons: "Manage Inboxes" and "Close". In the center, there are three buttons: "Create inboxes", "Create inbox users", and "Clear filters".

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':



The screenshot shows a dialog box titled "CREATE INBOX USERS" with a close button (X) in the top right corner. Below the title, there is a prompt: "Select an inbox, user and access rights". There are two dropdown menus: "Inbox name\*" (with "Finance" selected) and "Inbox user\*" (with "PWAdmin" selected). Below these, there are three checkboxes: "Read access\*" (checked), "Forward access" (checked), and "Cancel access" (checked). At the bottom right, there are two buttons: "Cancel" and "Create inbox user".

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 USERS
✕

👍 Inbox Finance is now associated with PWAdmin user

Select an inbox, user and access rights:

Inbox name\*

Inbox user\*

Read access\* 
Forward access 
Cancel access

Cancel
Create inbox user

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

MAINTAIN INBOX MESSAGES
Clear filters

Filter inbox:  | Filter priority:  | Filter action:  | Filter importance:  | Filter owner:  | Filter box type:

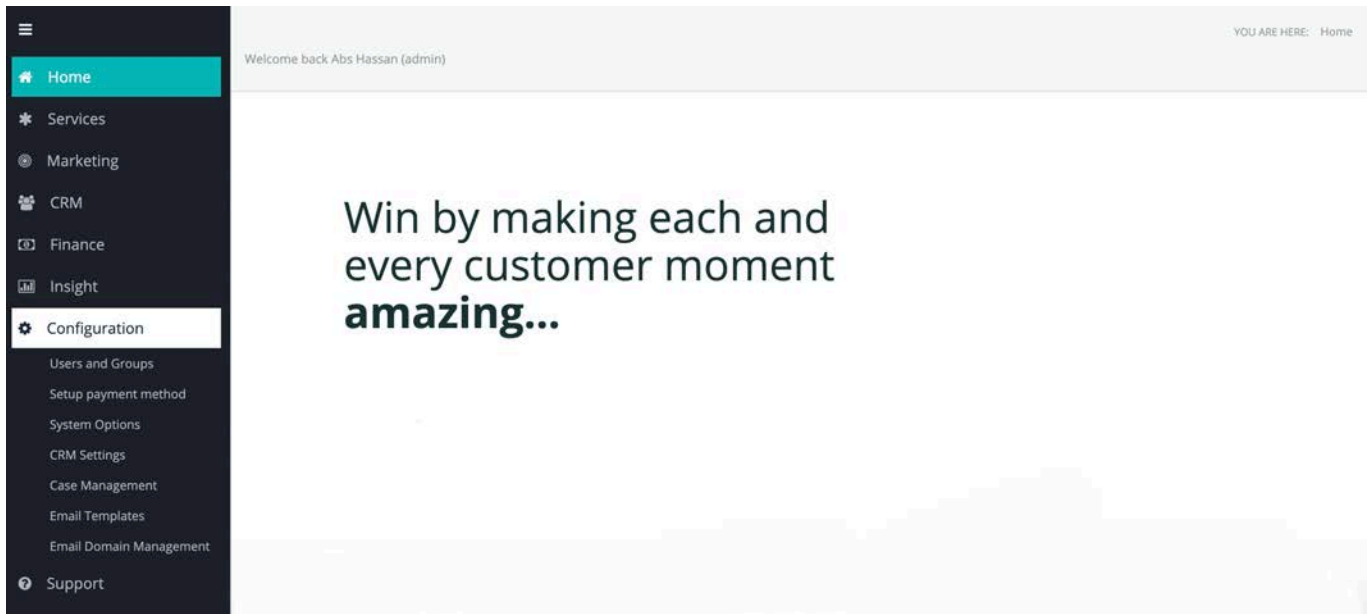
Inbox name	Action id	Priority	Importance	Owned by	Action	Reference	Type	Date due	Actions
Finance	100099	HIGH	DueSevenDays		INFORMATION	CASE 10040 Test	On	14-Jan-2020	<span>ⓘ</span> <span>🔒</span> <span>🗑️</span> <span>✕</span> <span>↶</span> <span>🔄</span> <span>🕒</span>

## Email templates

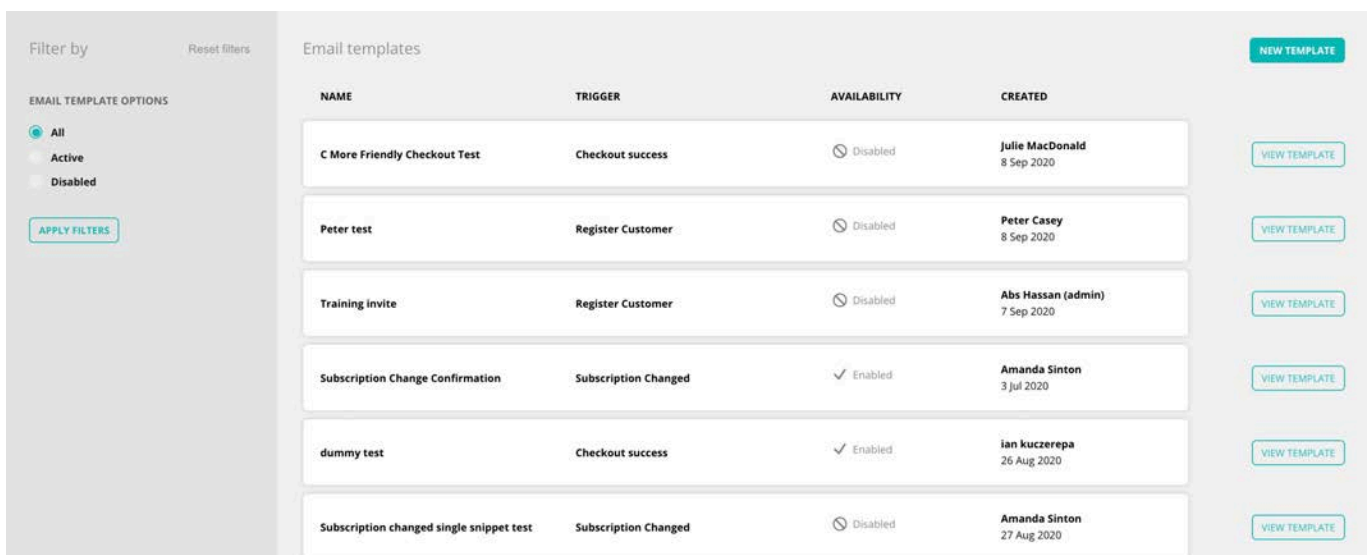
### HOW TO VIEW EMAIL TEMPLATES

Follow these simple steps to view existing Email Templates:

1. Select Configuration
2. Select Email Templates



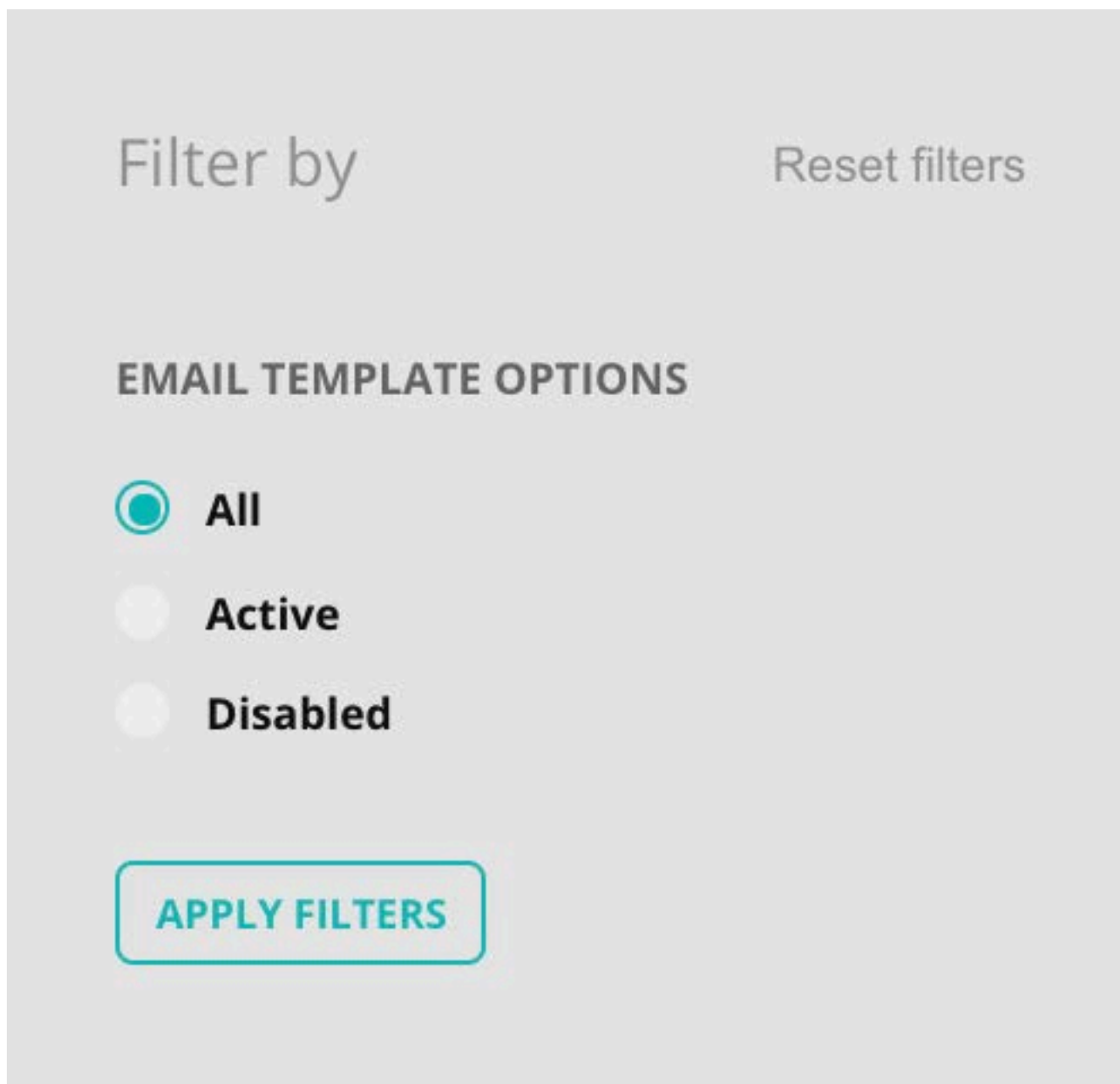
This will launch the Email Templates section:



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				<a href="#">NEW TEMPLATE</a>
NAME	TRIGGER	AVAILABILITY	CREATED	
Training invite	Register Customer	Disabled	<b>Abs Hassan (admin)</b> Created on 07 Sep 2020	<a href="#">VIEW TEMPLATE</a>

...

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 and control when it is sent based on the customer event trigger.

### 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.

**Select your template trigger before we can show you which attributes you can use.**

Template name\*

Template description\*

Template trigger\*

Email subject\*

Email sender friendly name

Email sender prefix\*

@

Default email template domain\*

Select default email template domain

HTML\*

Rich text editor toolbar with options for undo, redo, source code, preview, font (Verdana, 11pt), paragraph, image, link, unlink, and source code. Bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and insert link icons are also present.

## 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\*

### Template description\*

### Template trigger\*

## Email template details

When you want to identify the template and control when it is sent based on the customer event trigger.

### Template name\*

### Template description\*

### Template trigger\*

...

### 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.



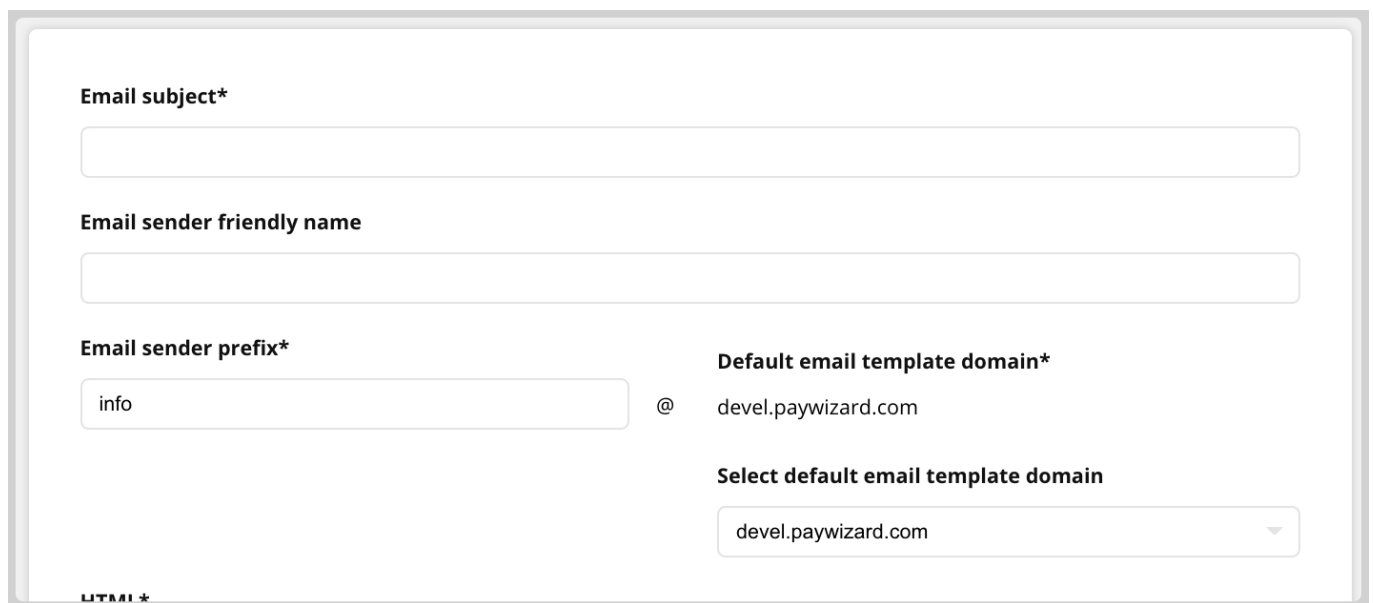
1. Complete the Email subject - this is the subject of the email that will be sent to your customer
2. Complete the Email sender friendly name - this is optional and if used you can add a name to the sender as opposed to just a default 'no reply'.

**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.



The screenshot shows a form for configuring email templates. It includes the following fields and options:

- Email subject\***: A text input field.
- Email sender friendly name**: A text input field.
- Email sender prefix\***: A text input field containing the value "info".
- Default email template domain\***: A text input field containing the value "devel.paywizard.com".
- Select default email template domain**: A dropdown menu with "devel.paywizard.com" selected.
- HTML \***: A label for the next step in the configuration process.

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)





**Test email type**

Choose... ▾

**Email recipient**

ahassan@singuladecisions.com

**SEND TEST EMAIL**

## CONFIRM THE EMAIL TEMPLATE AVAILABILITY

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

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 [Email Domains](#)). If their country is not available in the list, then the default email template domain will be used.

10. 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

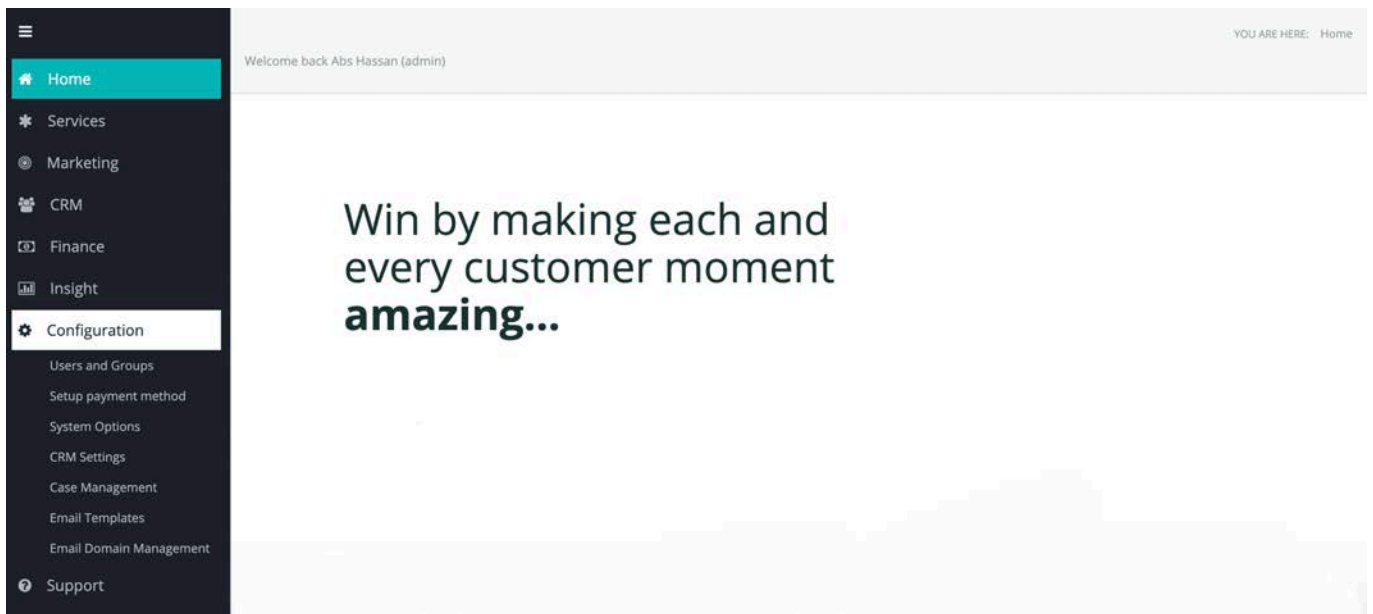
## Email domain management

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® Subscriber Management will automatically use either the default or the country specific domain email for a customer when sending emails.

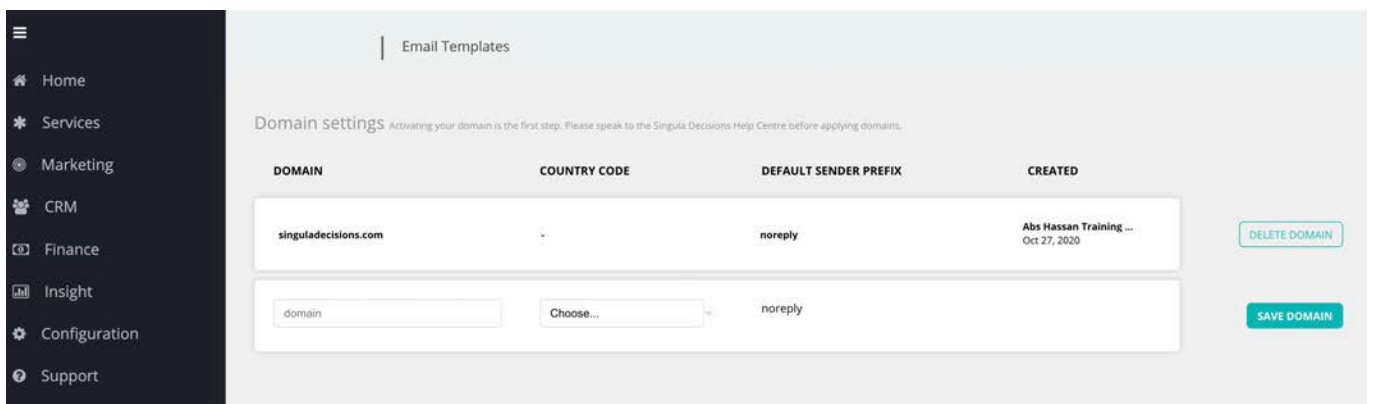
Note: Any new domains will need to be validated by Singula Decisions' Help Centre.

### HOW DO I ACCESS EMAIL DOMAIN MANAGEMENT?

1. Select Configuration
2. Select Email Domain Management



This will launch the Email Domain Management section:



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

Email Templates

Domain settings Activating your domain is the first step. Please speak to the Singula Decisions Help Centre before applying domains.

DOMAIN	COUNTRY CODE	DEFAULT SENDER PREFIX	CREATED	
singuladecisions.com	-	noreply	Abs Hassan Training ... Oct 27, 2020	DELETE DOMAIN
<input type="text" value="domain"/>	<input type="text" value="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

<input type="text" value="PayTV365"/>	<input type="text" value="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.

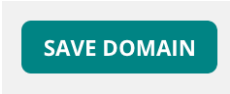
### Domain without a country code

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.

<input type="text" value="PayTV365"/>	<input type="text" value="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® 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.

Domain settings Activating your domain is the first step. Please speak to the Singula Decisions Help Centre before applying domains.

DOMAIN	COUNTRY CODE	DEFAULT SENDER PREFIX	CREATED	
singuladecisions.com	-	noreply	Abs Hassan Training ... Oct 27, 2020	DELETE DOMAIN
<input type="text" value="domain"/>	<input type="text" value="Choose..."/>	noreply		SAVE DOMAIN

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:

**PayTV365**

Please be aware that any email templates that use the domain you are about to delete will continue to use that domain until you manually change it.

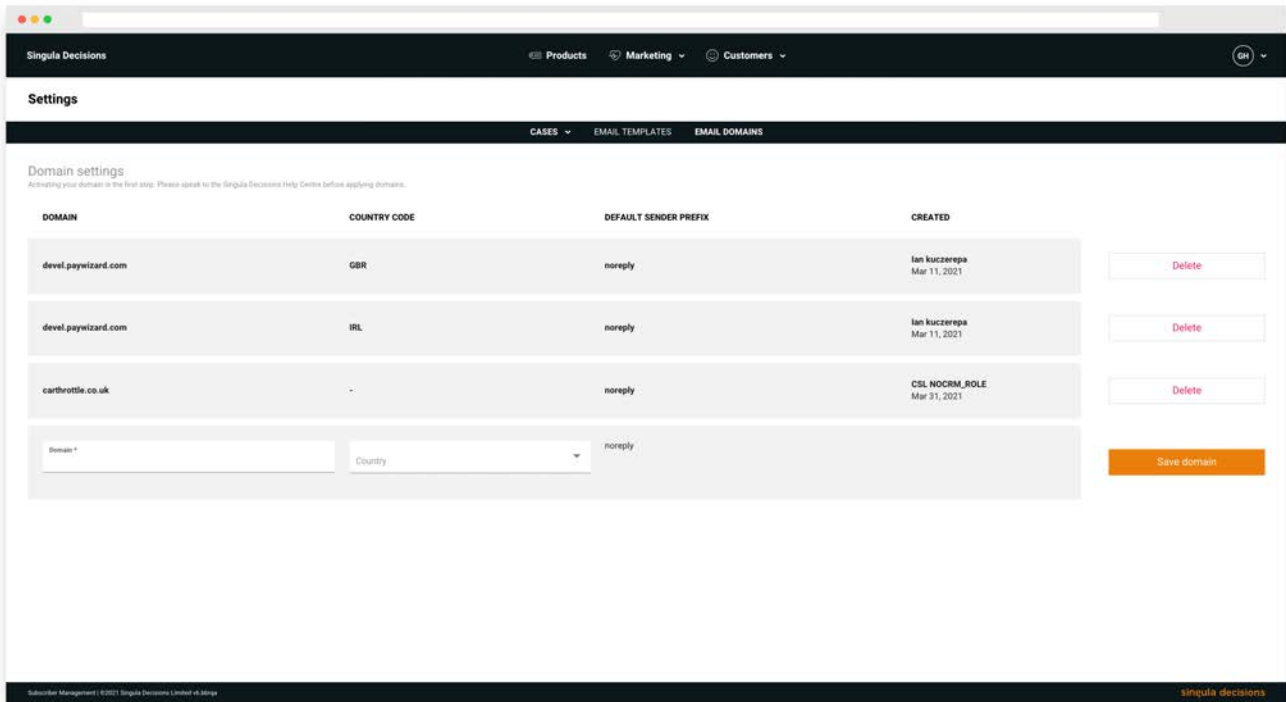
GOT IT!

## 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.



### 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

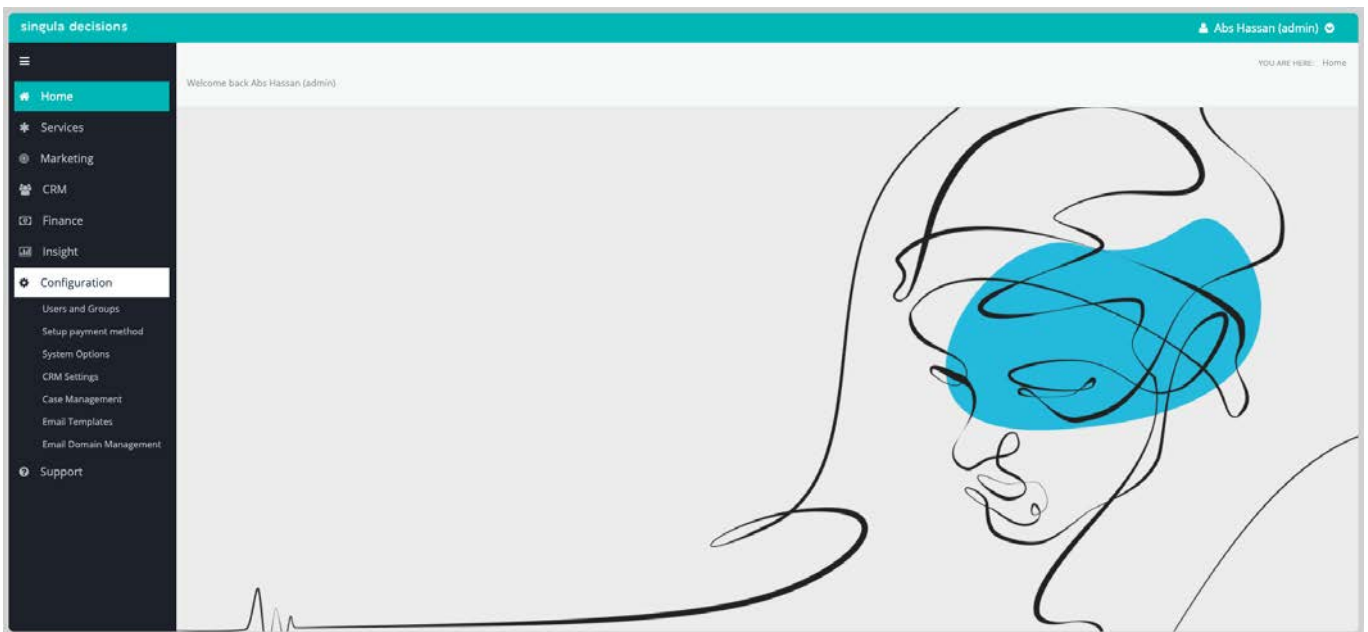
Setup Payment Method enables you to set up accounts along with any supporting metadata as well as configuring the necessary payment gateways in order to allow you to start using PSPs to take payments.

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

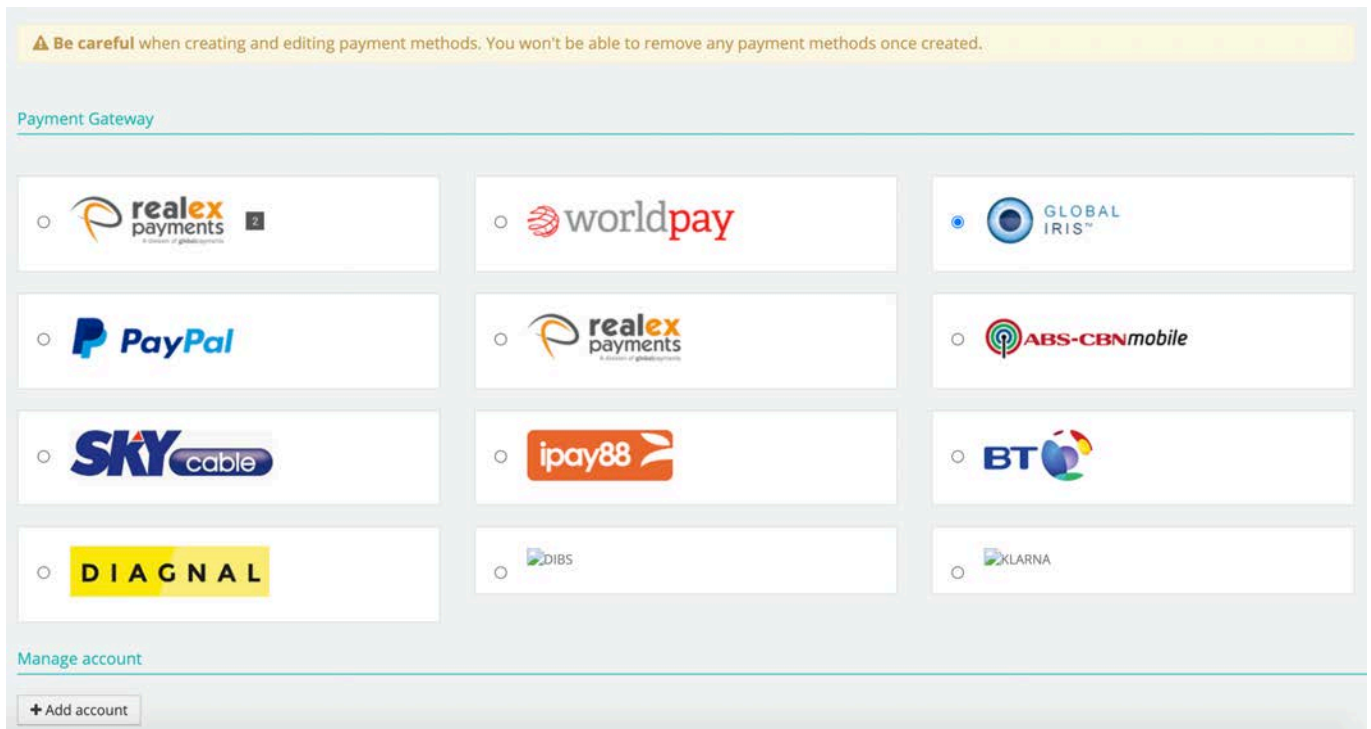
### GETTING STARTED

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';



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

**Add account** YOU ARE HERE: [Home](#) > [Configuration](#) > [Add account](#)

[Cancel](#) [Save](#)

---

**Add account**

Identifier: \* ?

Username: \* ? Password: \* ?

Success URL: \* ?

Failure URL: \* ?

HPP URL: \* ?

Service URL: \* ?

Refund password: \* ?

**Top tip!**

Did you know? Globaliris requires one MID per authorisation.

**Add currencies**

Currencies	Transaction Type		?
Please select... <span>▼</span>	<input type="checkbox"/> Recurring	<input type="checkbox"/> Initial	

[+ Add another](#)

5. Save changes;

The account can be edited if required.

## ADDING A REALEX PAYMENT ACCOUNT

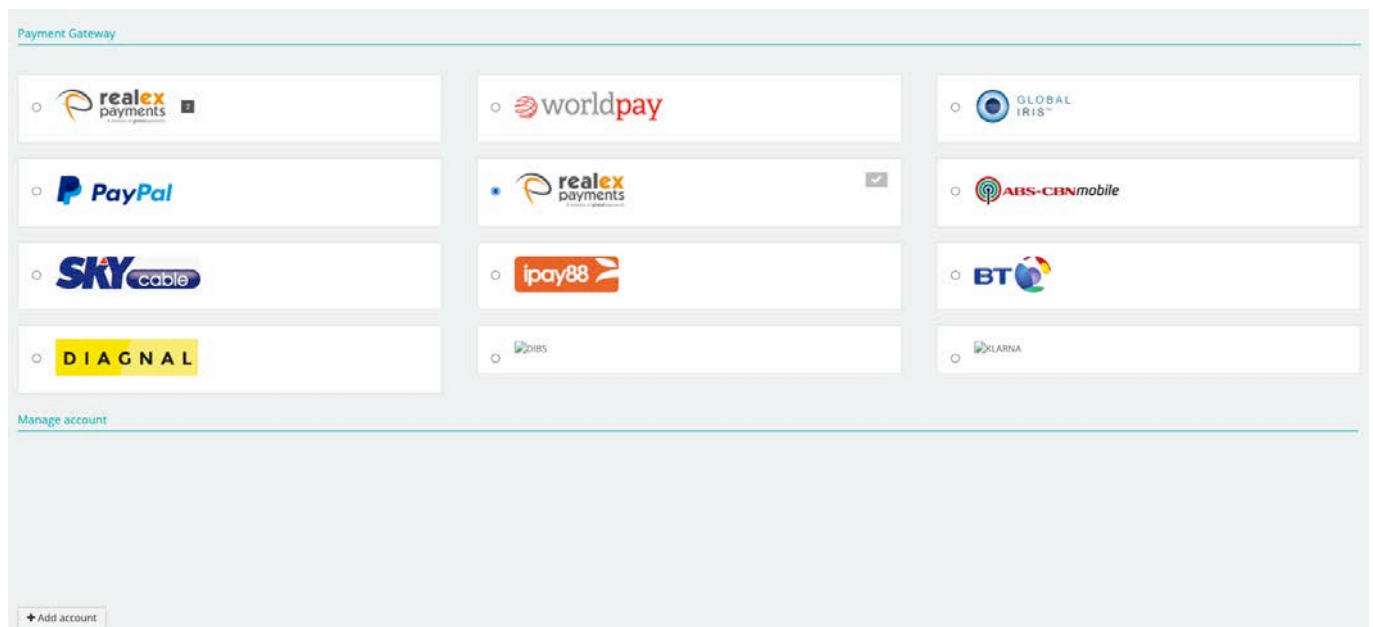
Realex Payments is an online payment processing solution. Realex Payments will capture and store your customers' tokenised payment details. You can also process payments during cart checkout and run regular billing cycles using the token provided by Realex Payments.

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

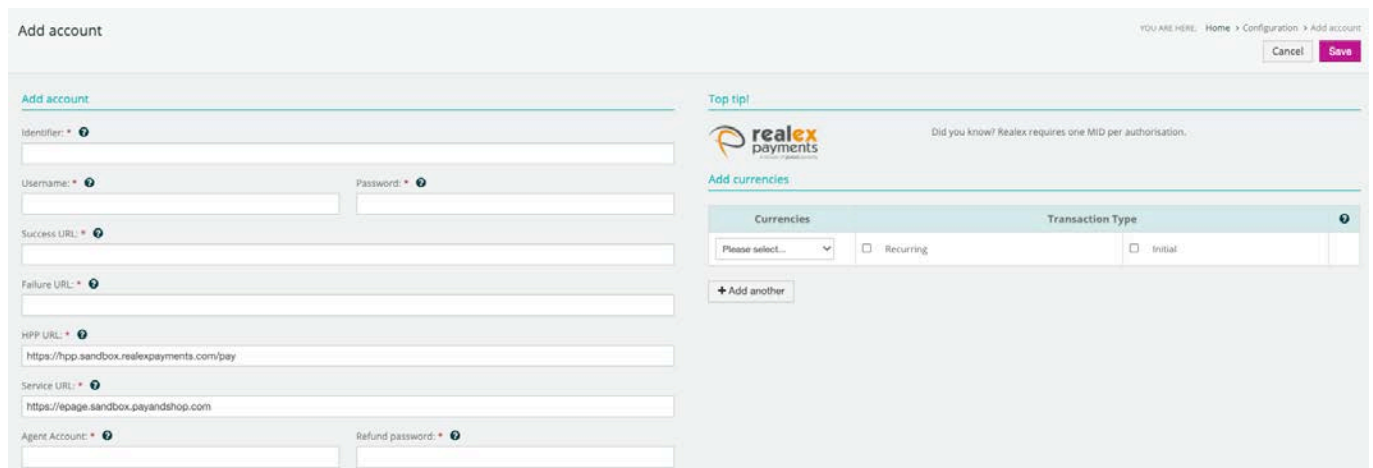
Realex Payments needs one identifier per transaction type. (This is provided by Realex)

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:



This opens up the 'Add account' section:



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;

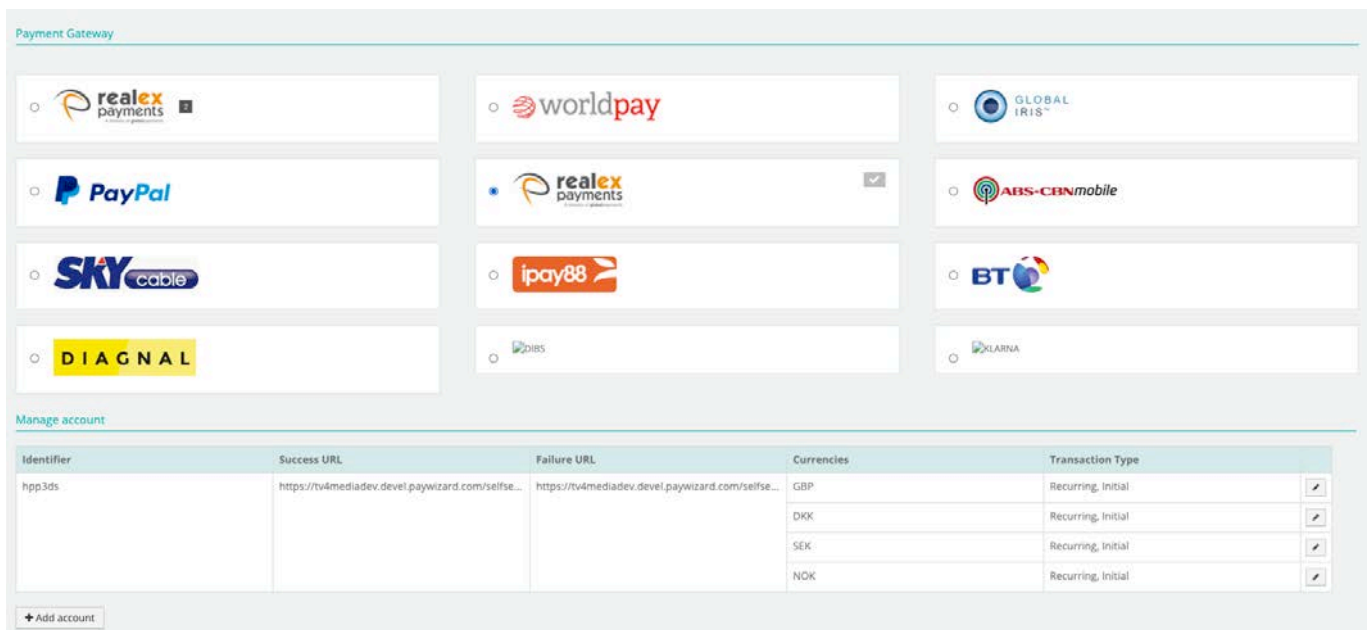
Once setup is complete, click the Save button at the bottom or Cancel to go back.

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.

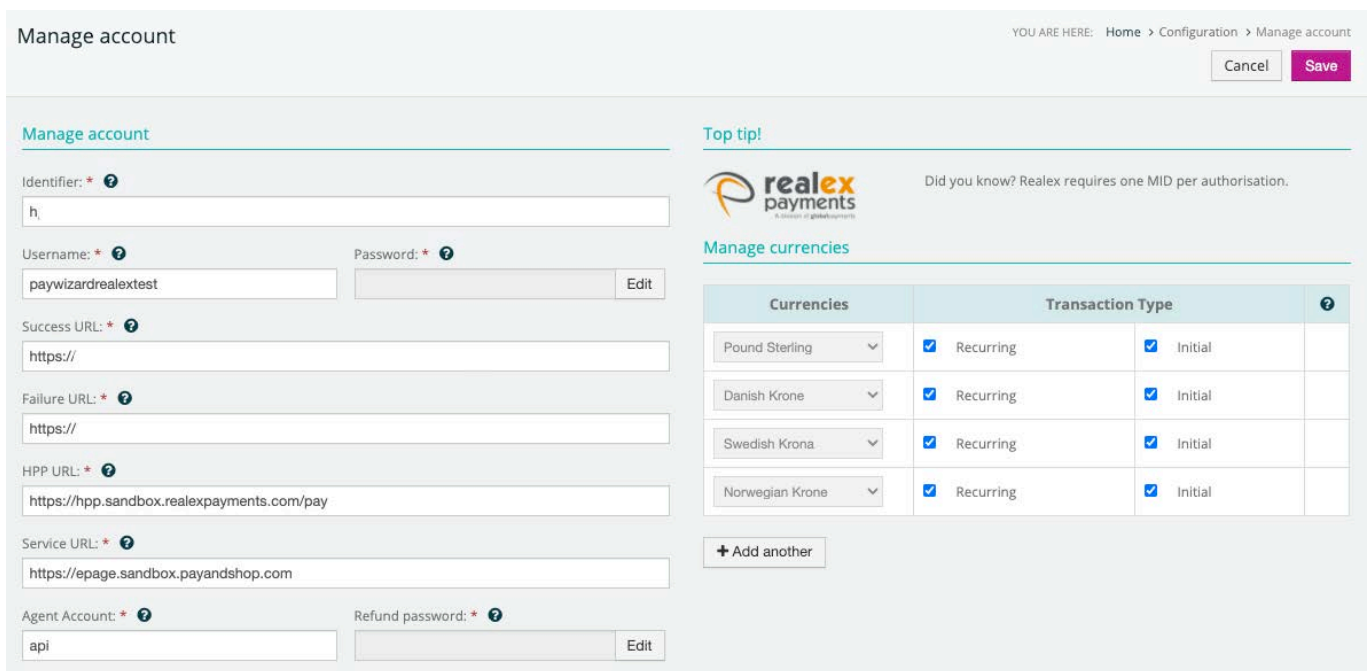
If you need to delete or deactivate a payment method please contact your Account Manager or Help Centre.

### 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.



This will display the 'Manage accounts' page:



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.

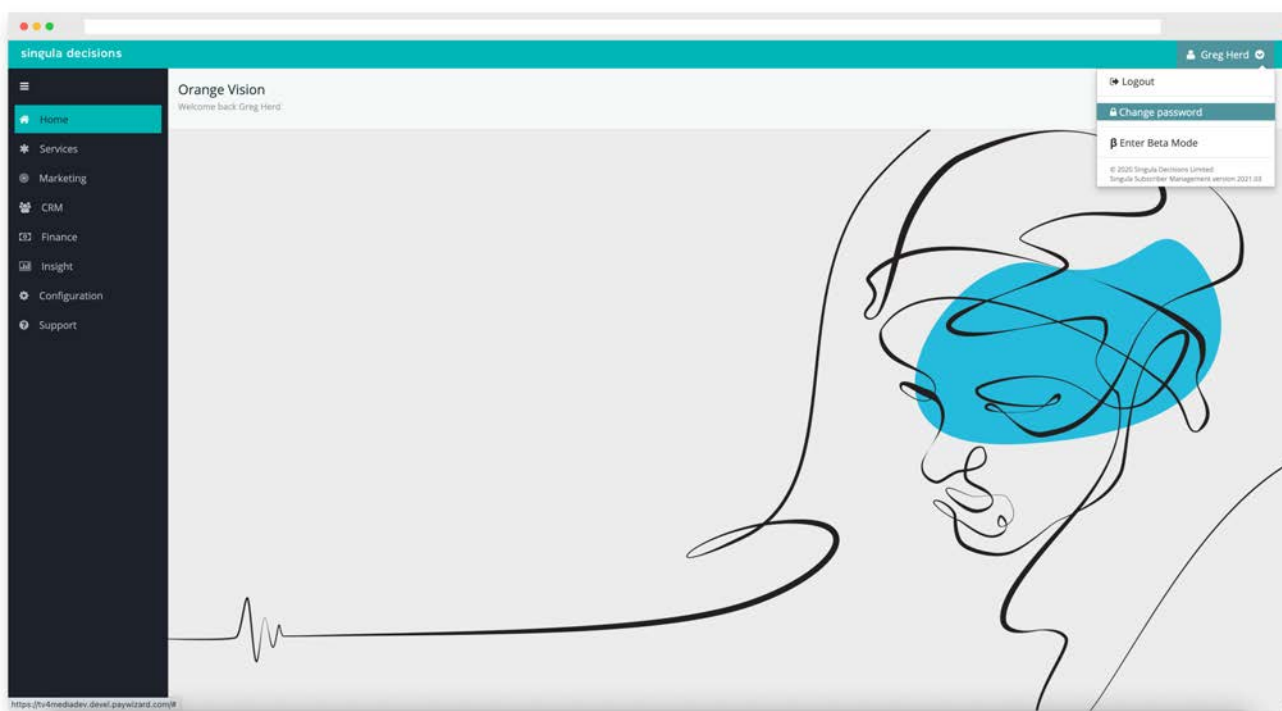
**Note:** If you click on a protected edit field (grey box) it will display a blank white box, if you click on this but don't wish to edit it, click the 'Cancel' button to go back, this will revert to your previous settings.

## 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](mailto: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.