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Subscriber Intelligence

# V2022.08.01 user guide

**PREPARED BY:** Greg Herd

**DATE:** Wednesday 17 August 2022

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# DOCUMENT INFORMATION

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# AMENDMENT HISTORY

| VERSION | DATE | DESCRIPTION OF AMENDMENT | AUTHOR |
|---|---|---|---|
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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 – August 2022

**BETA CUSTOMER CASES**

You can now easily find customer cases using a selection of filters.

**BETA APIS**

We have introduced new internal APIs for customer inbox messages.

**CUSTOMER WEB APP**

We're supporting a new endpoint to enable a customer's viewing based on their eligibility

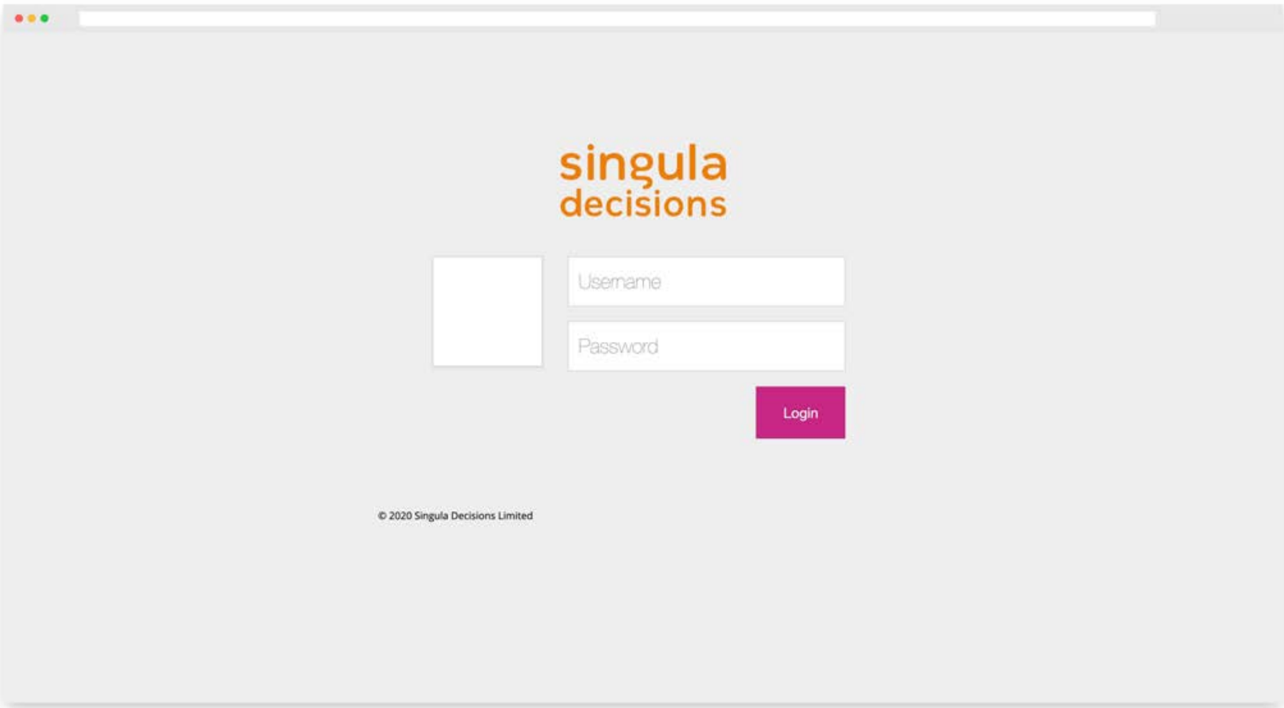
**KLARNA TEST**

Our CRM screens now indicates a test Klarna or NETS payment method

# 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.

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# Our BETA

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

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

## HOW DO I ACCESS THE BETA?

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

# SERVICES

## Subscriptions

### ABOUT SUBSCRIPTIONS

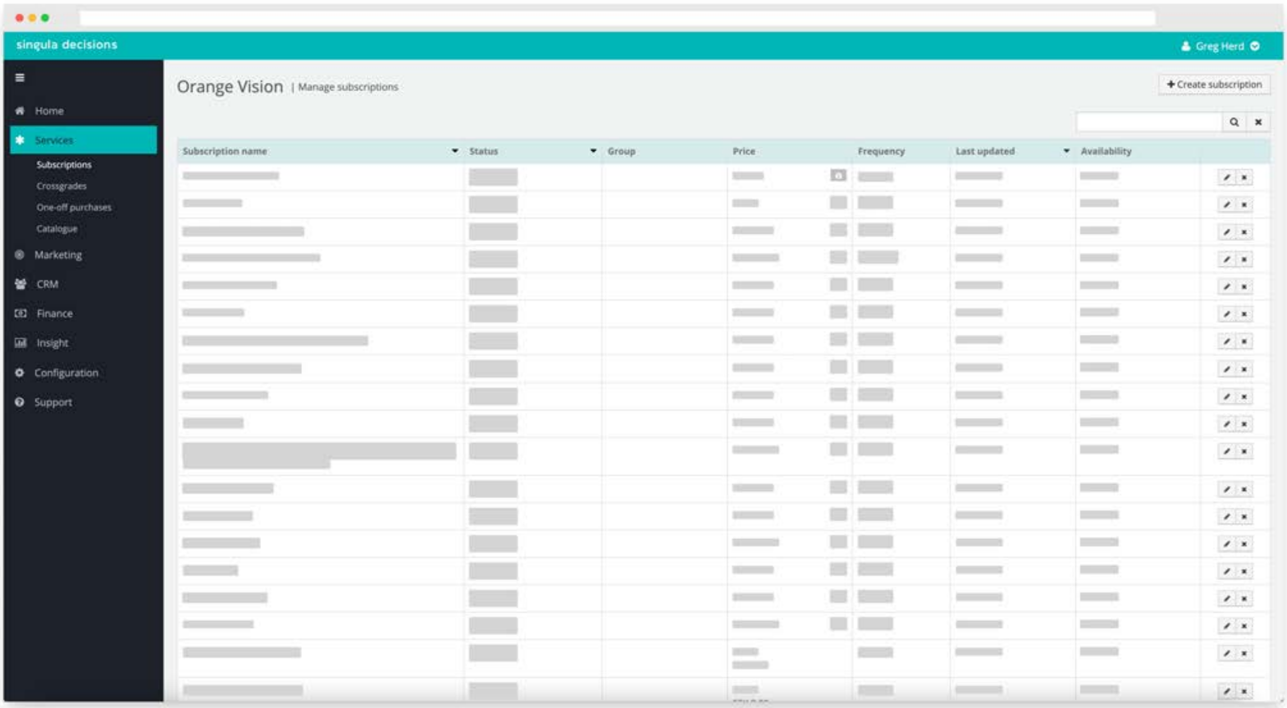
A subscription is a contract in which a person pays a fee for a product or to access a service on a regular basis.

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

### VIEWING SUBSCRIPTION PRODUCTS

1. Select **Services**
2. Select **Subscriptions**

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

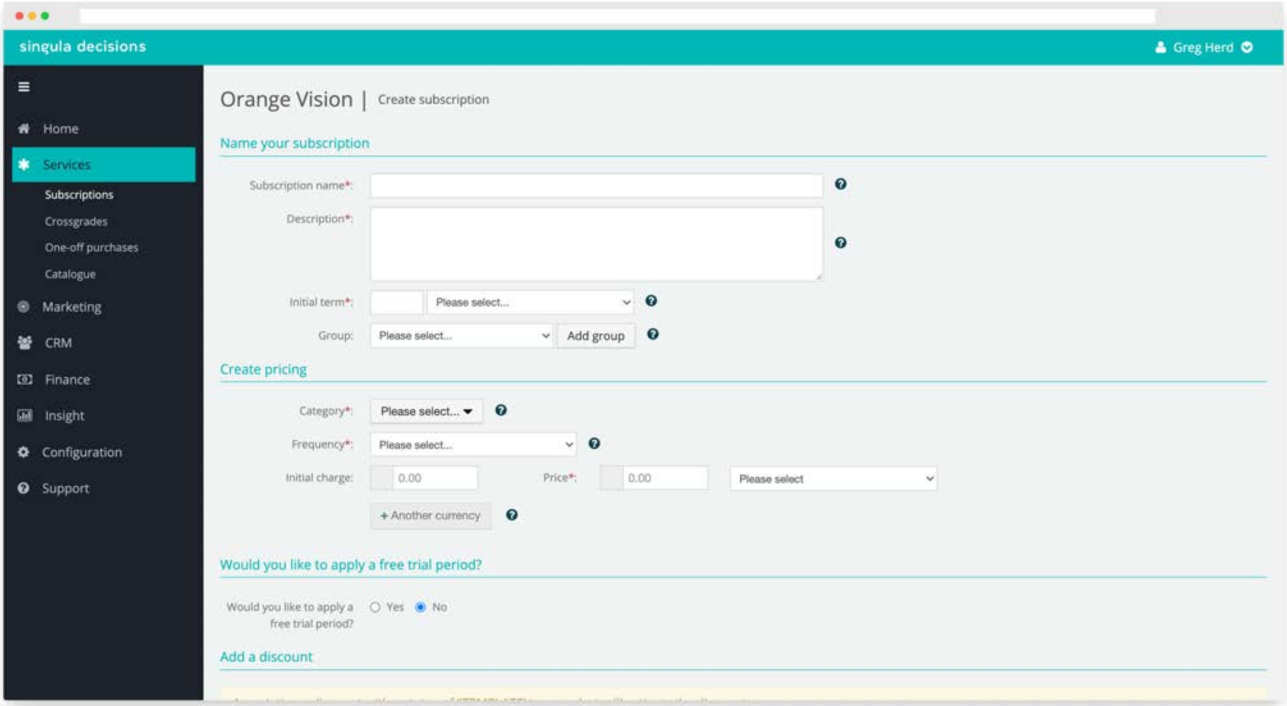



### CREATE A SUBSCRIPTION

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

### NAME YOUR SUBSCRIPTION

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




### 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

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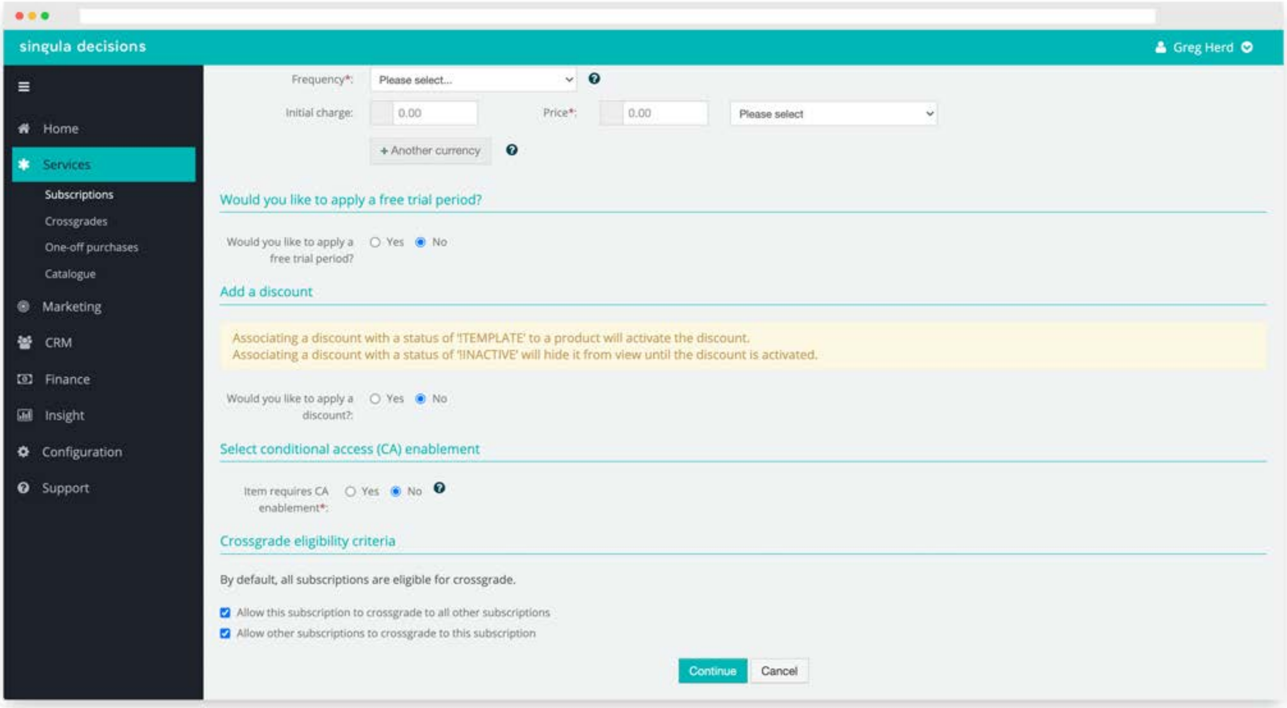


## ADDING A CONDITIONAL ACCESS ENTITLEMENTS - THIS IS OPTIONAL

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

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## 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

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# Pay per view

## ABOUT PAY PER VIEW

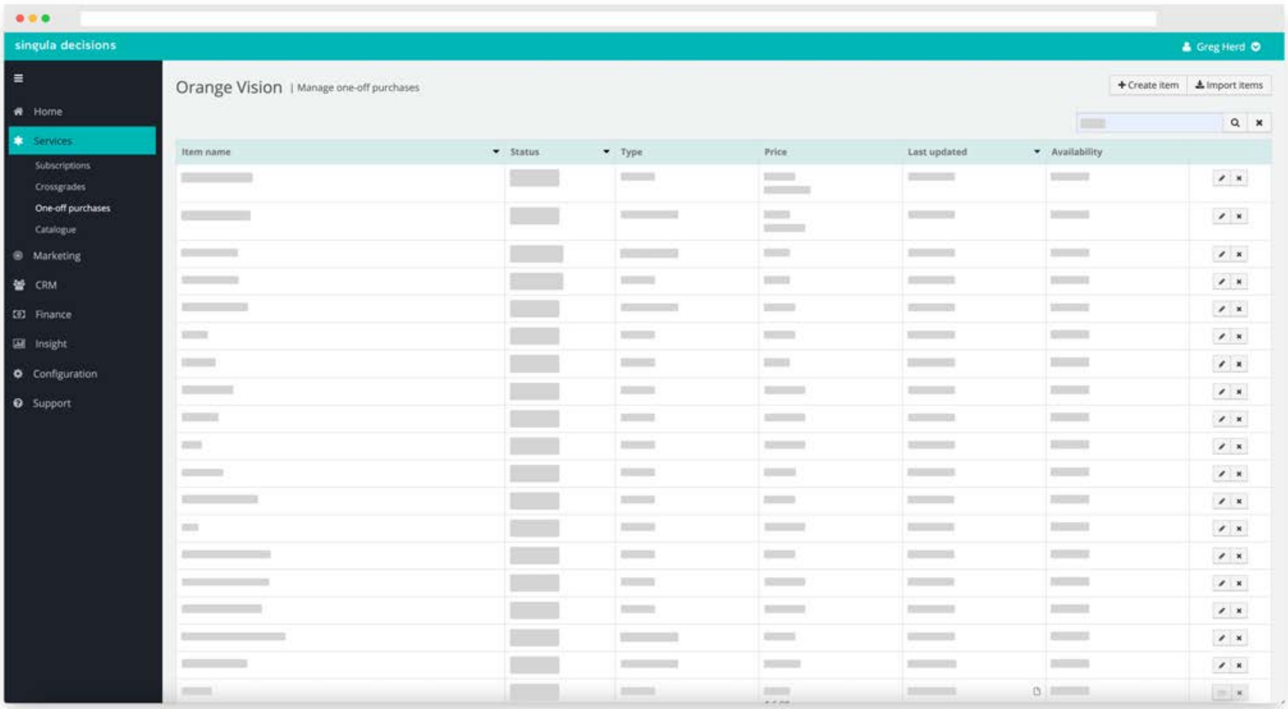
A pay per view is usually a premium piece or set of content in which a customer pays a fee to watch.

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

## VIEW PAY PER VIEW PRODUCTS

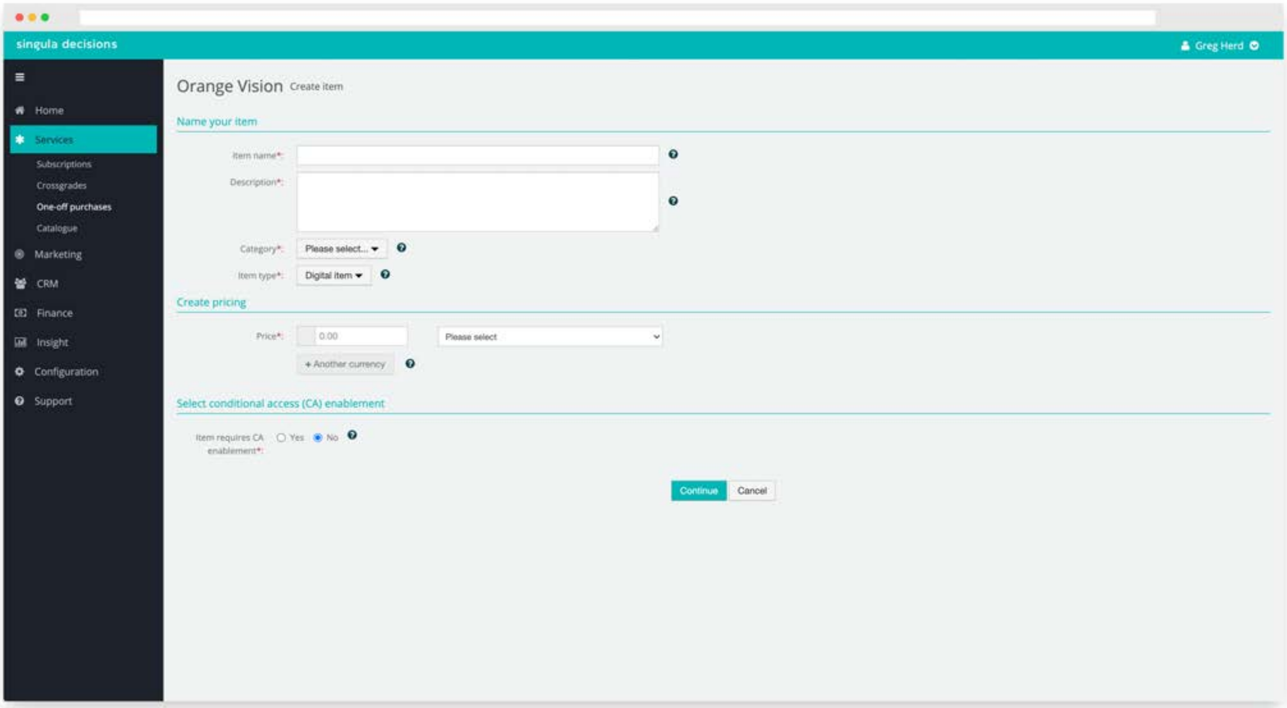
1. Select **Services**
2. Select **One-off purchases**

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



## CREATE A PAY PER VIEW

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




### 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

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## 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

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# 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.

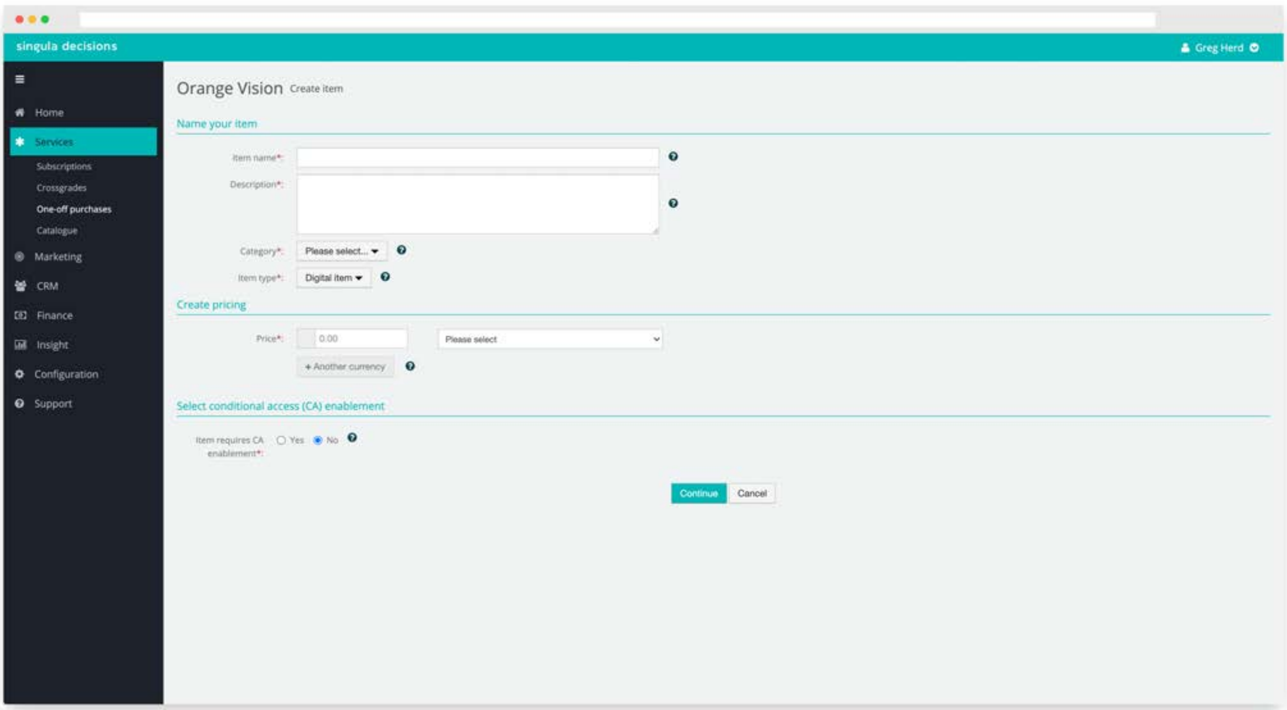
## VIEW ACCESS PASS PRODUCTS

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




### 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

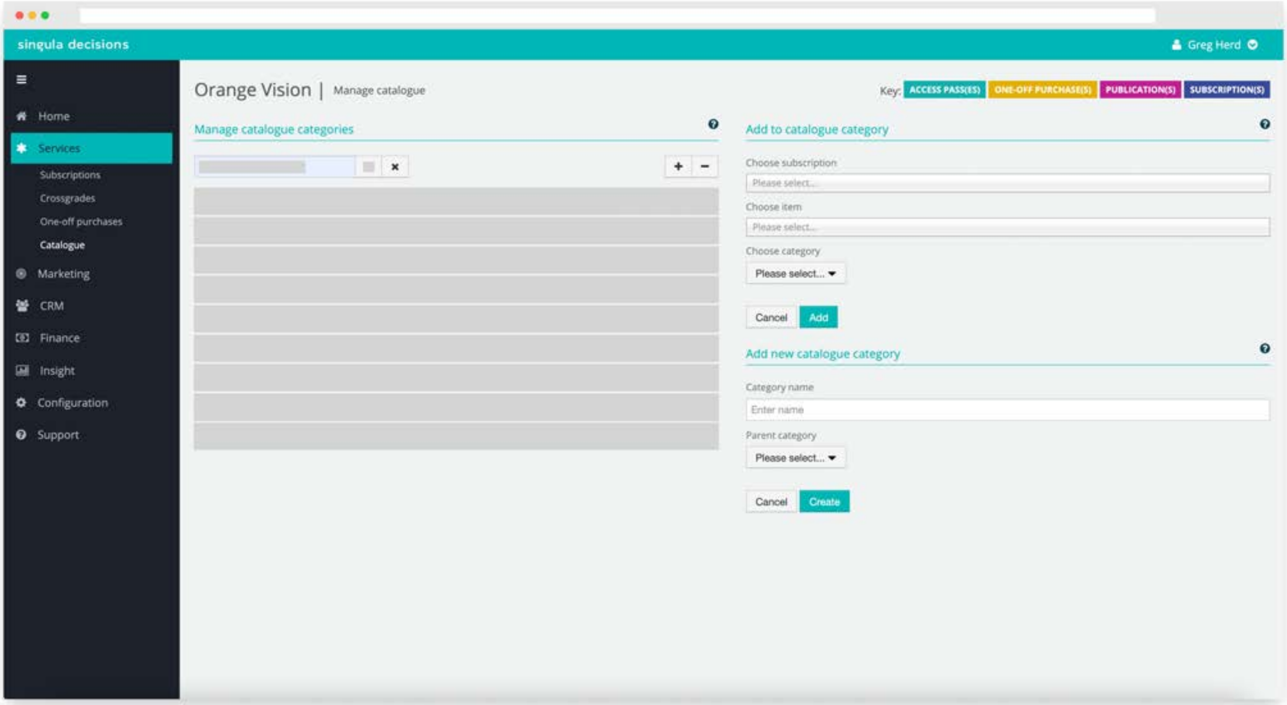
### CHANGE AN ACCESS PASS PRODUCT

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



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Home
Services
Subscriptions
Crossgrades
One-off purchases
Catalogue
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CRM
Finance
Insight
Configuration
Support
Orange Vision | Manage catalogue
Key:
ACCESS PASS(ES)
ONE-OFF PURCHASE(S)
PUBLICATION(S)
SUBSCRIPTION(S)
Manage catalogue categories
Add to catalogue category
Choose subscription
Please select...
Choose item
Please select...
Choose category
Please select...
Cancel
Add
Add new catalogue category
Category name
Enter name
Parent category
Please select...
Cancel
Create

# 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

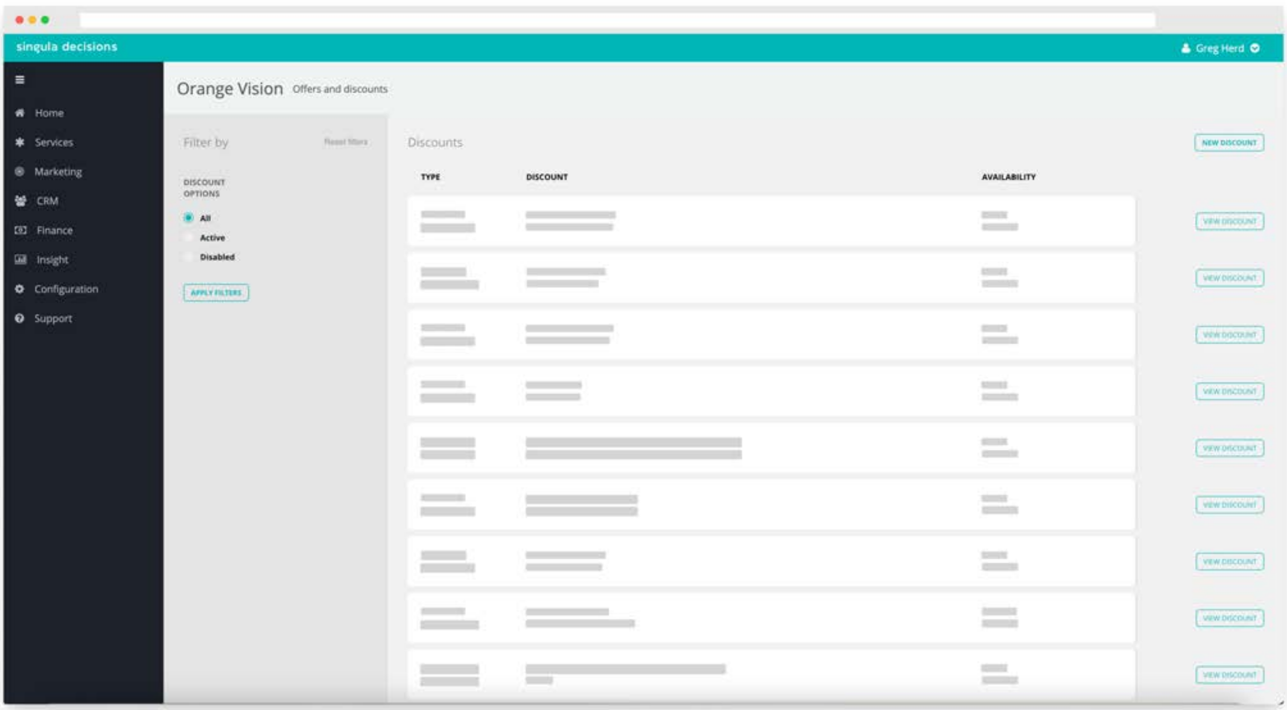
1. Select **Marketing**
2. Select **Offers and Discounts**

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**

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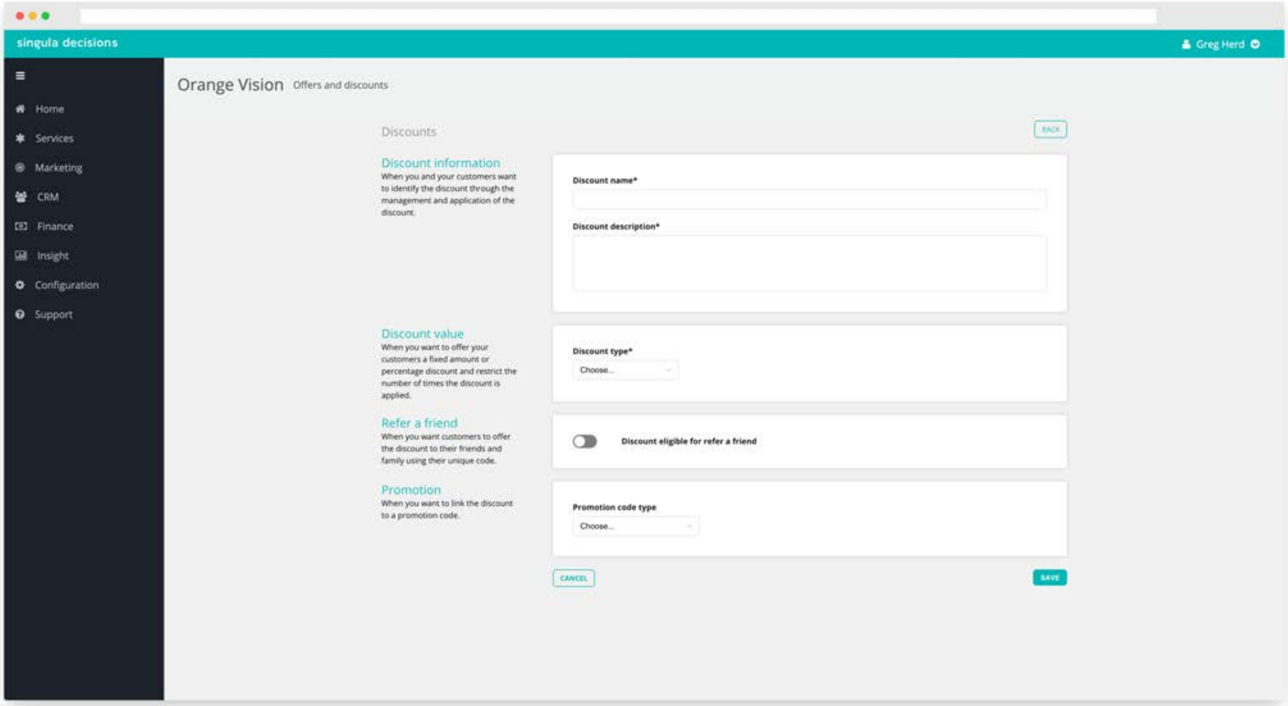
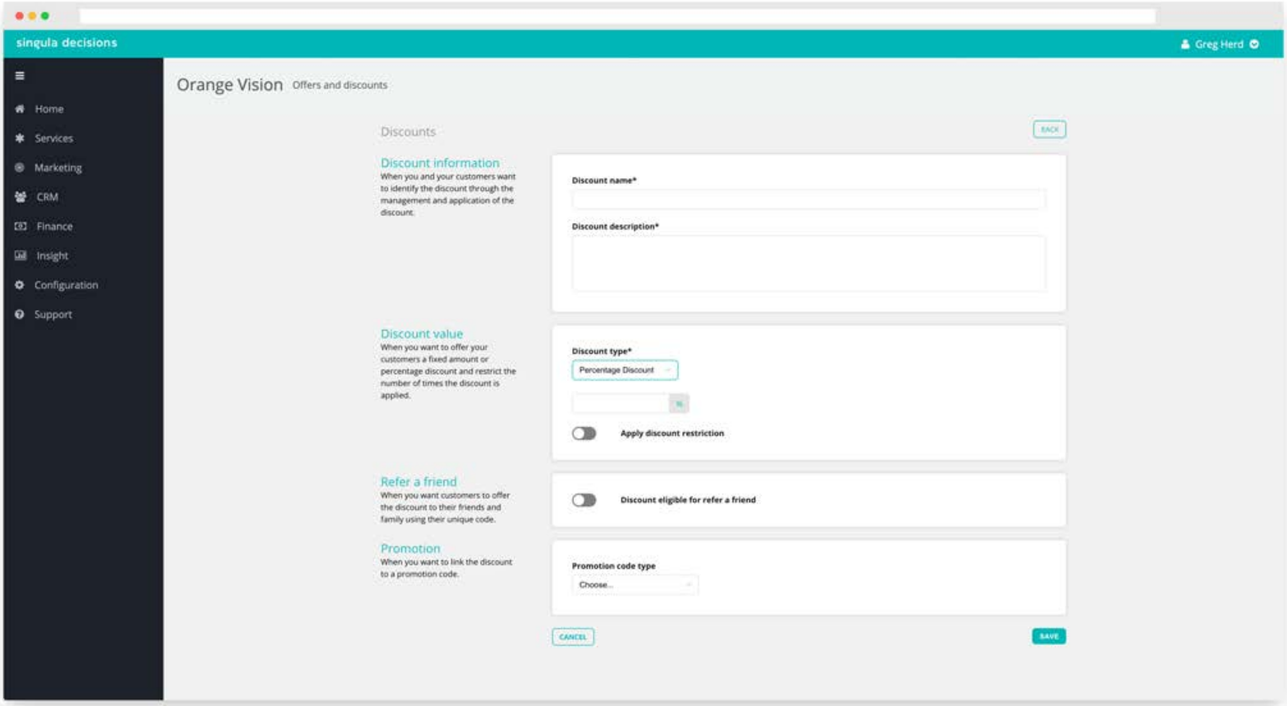



4. Complete the discount form
   - Discount Name: Choose a name for your discount
   - Discount Description: Provide more detail about the discount you are creating, e.g. "10% discount for three months".
   - Discount value: Choose if the discount will be a percentage or a fixed price discount

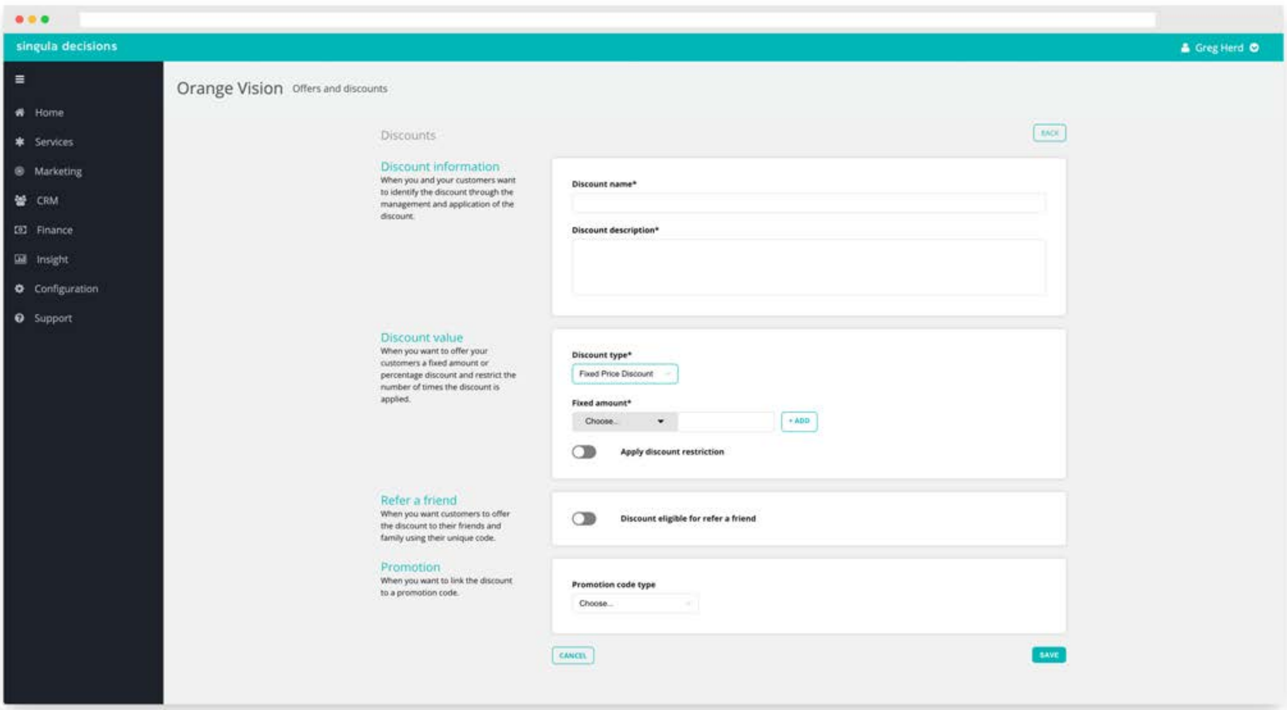
**Percentage Discount:**

- 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



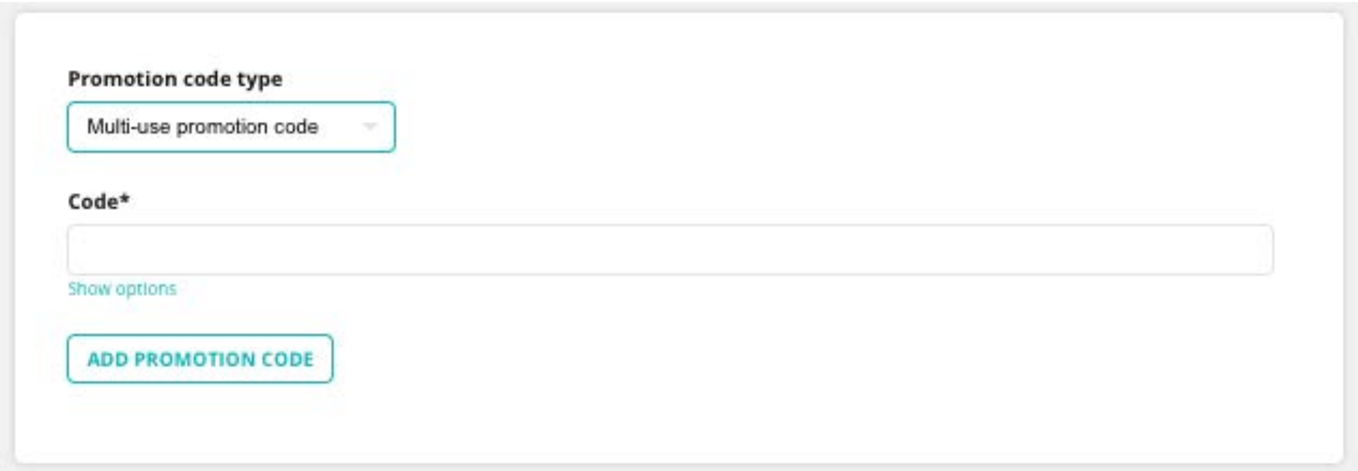

**Applying a Zero price discount**

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

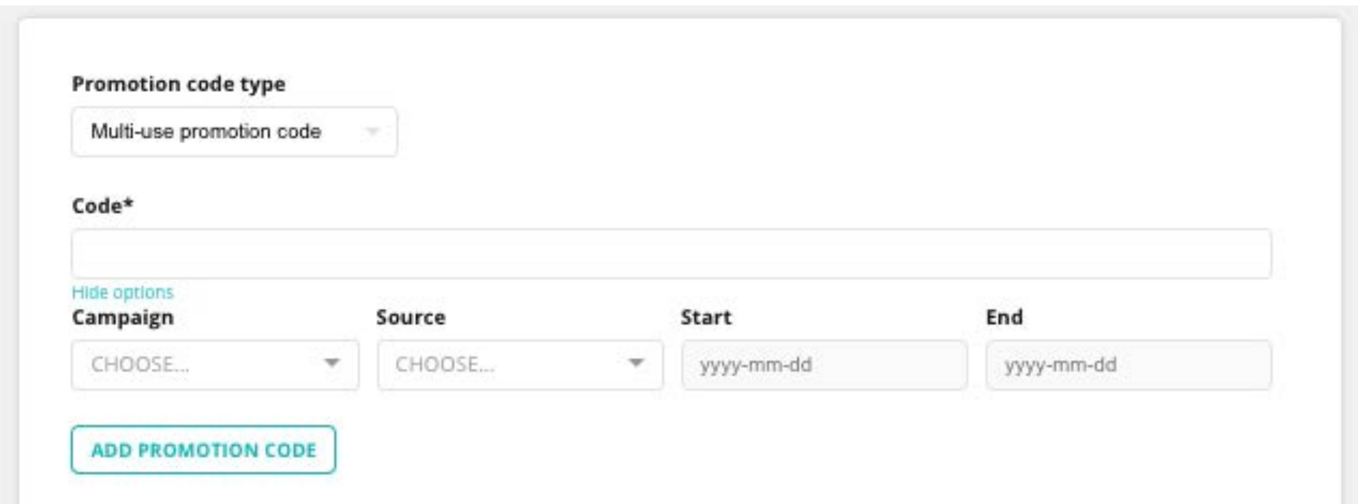
- Refer a friend: Mark this as Yes if you want to make the discount available as part of a Refer a Friend code, otherwise leave as No
- Promotion: Select from the drop down which type of promotion code you want to use:

## ADDING A MULTI-USE PROMOTION CODE

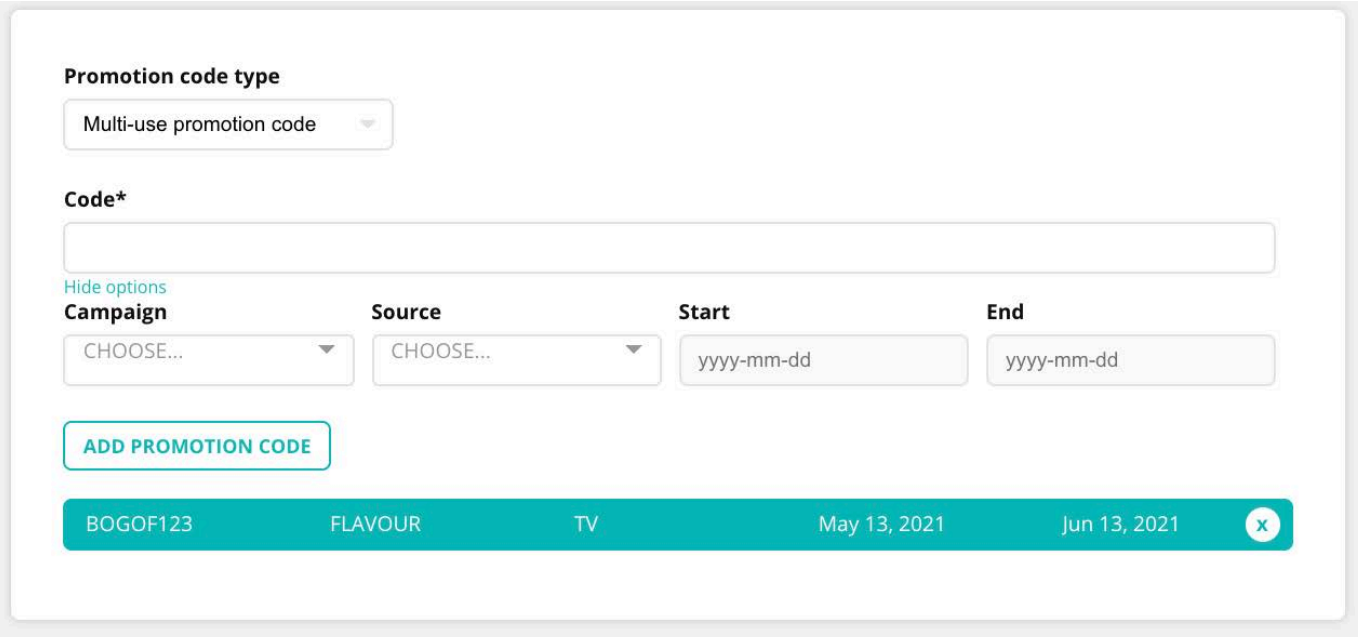
1. Select Multi-use promotion code
2. Add your code here




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;



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




## ADDING A SINGLE-USE PROMOTION CODE

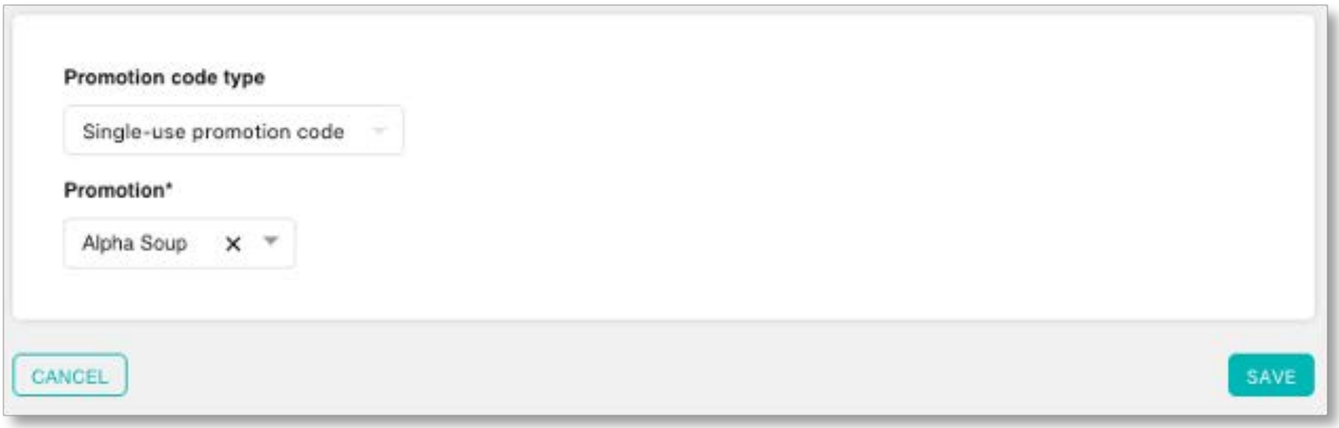
Single use promo code allows you to create a set amount of promotion codes which can then be given to prospective/existing customers to sign up to a new subscription with a promotional discount.

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

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

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


3. Select **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.

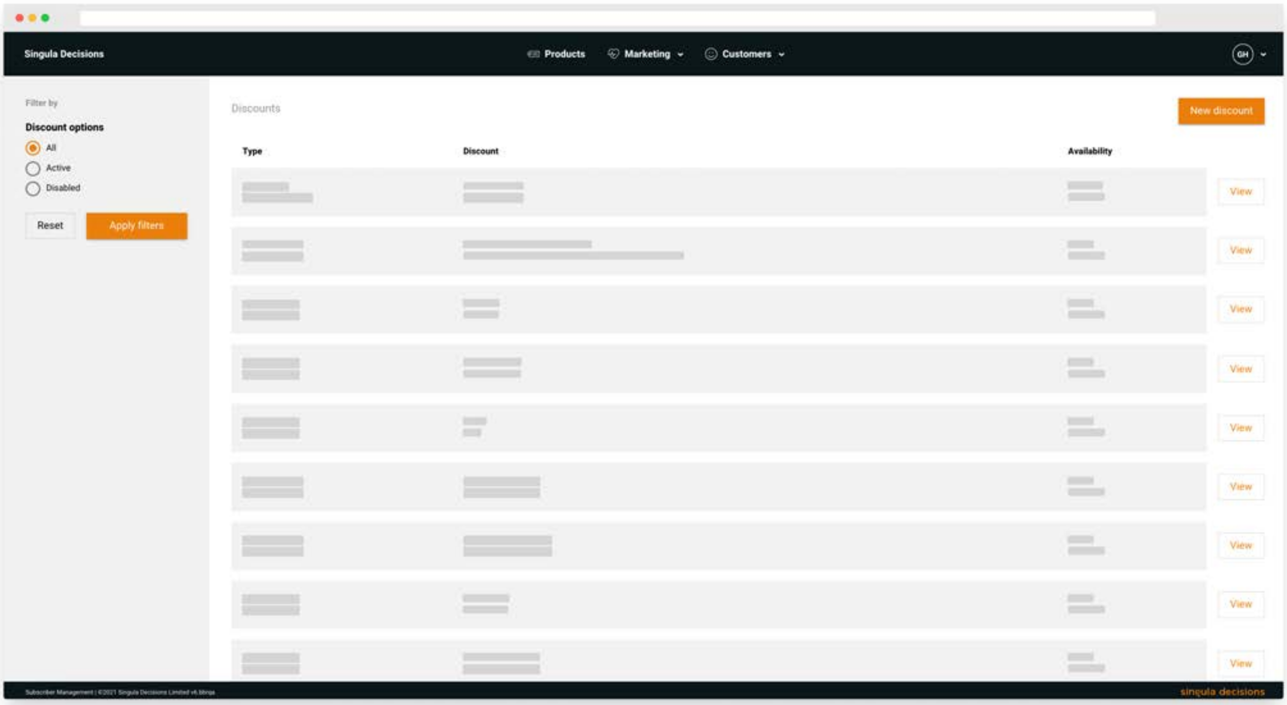
1. Select **Marketing**
2. Select **Offers and Discounts**
3. **Choose** the discount you want to view and edit

# 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

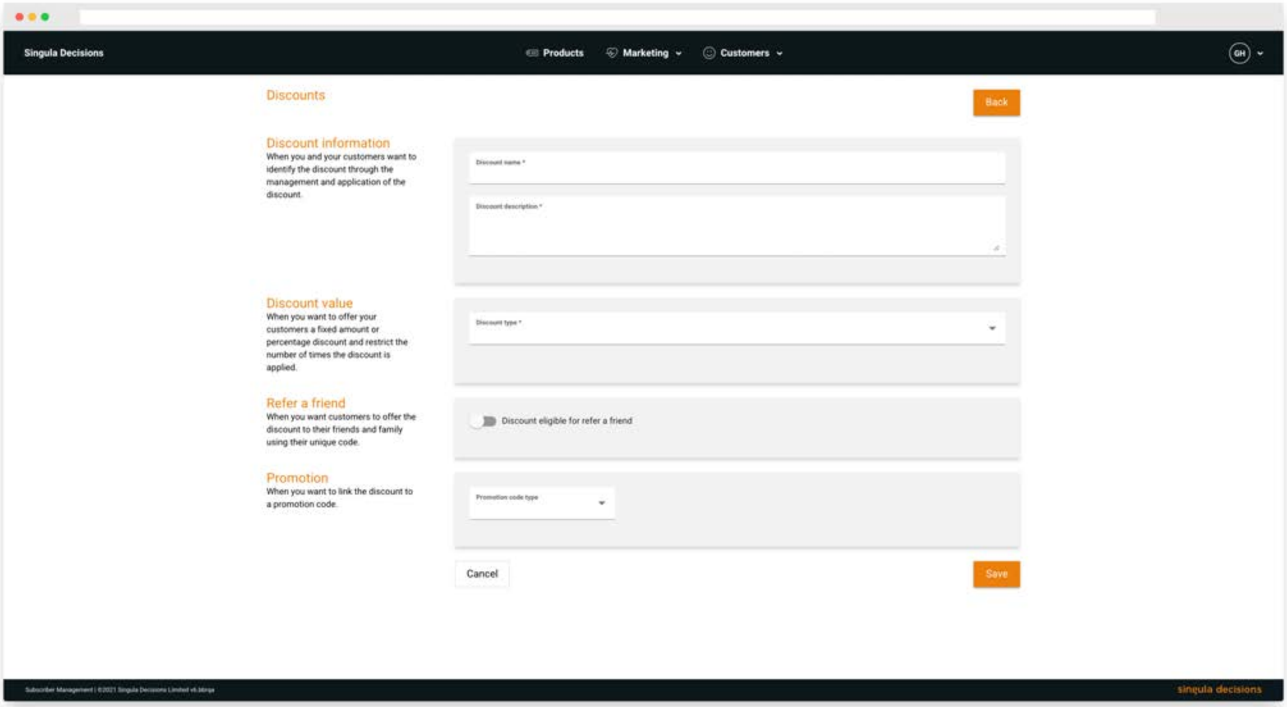
   **Percentage discount**

   - 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




## 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

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# Promotions

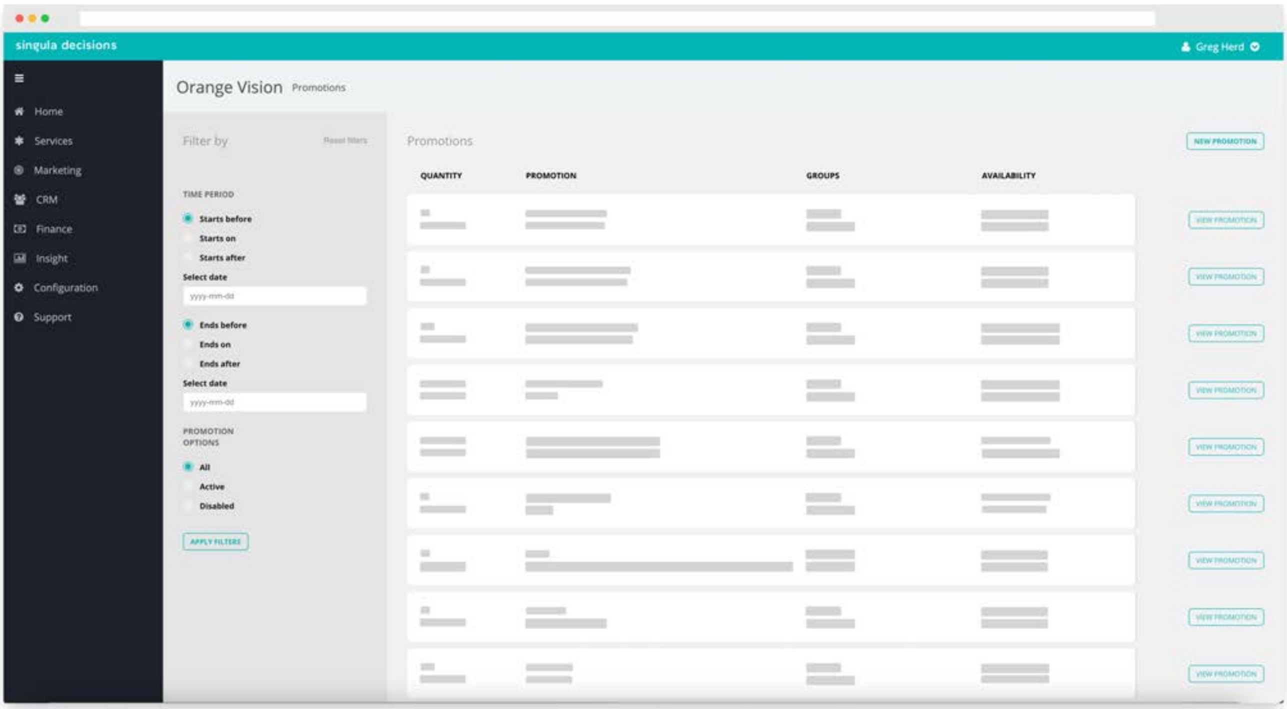
Create promotions that link to your marketing campaigns. Promotions allow you to link campaigns to product sales.

## 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.

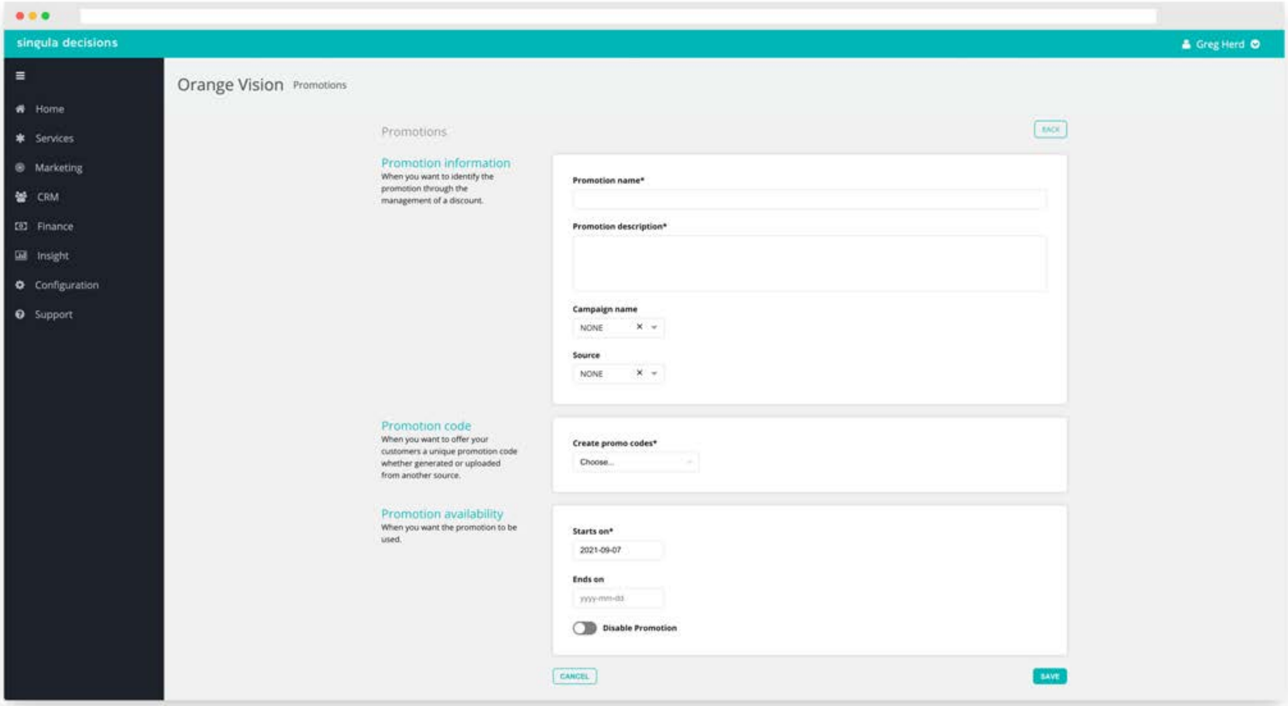
You can also filter the Promotions using:

- 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.

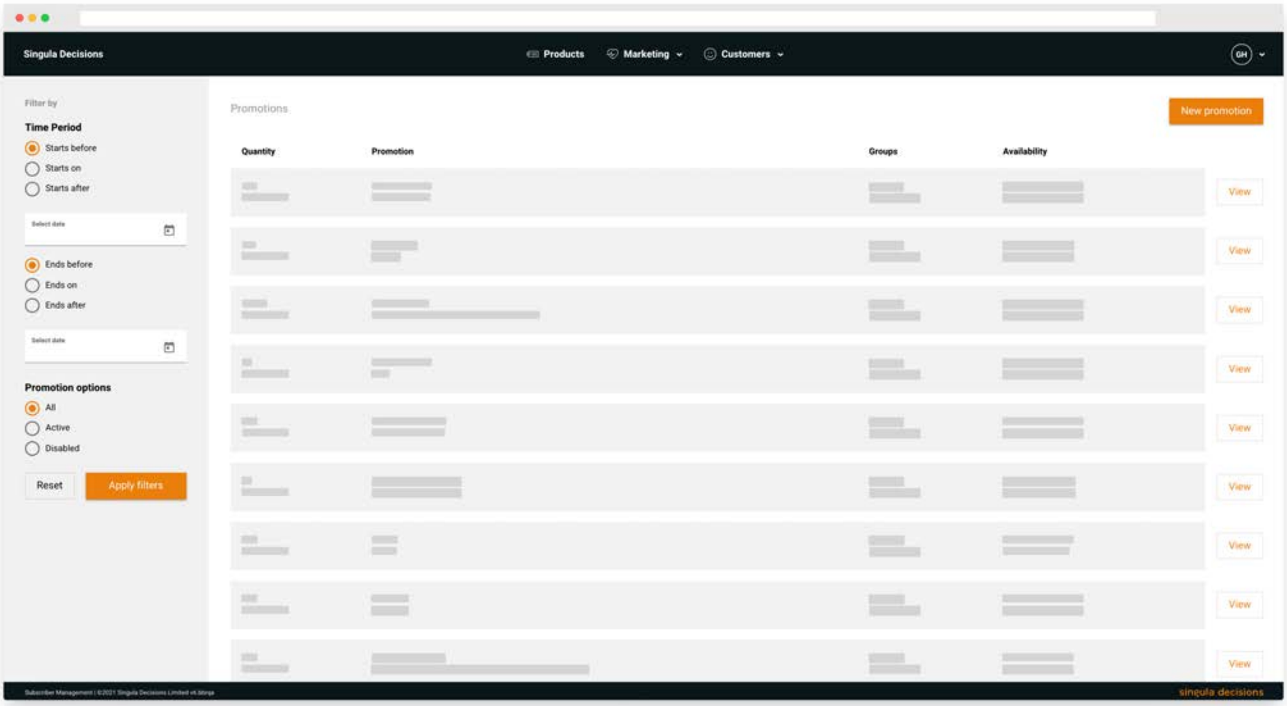
| QUANTITY | GROUP | CREATED | LAST DOWNLOAD | |
|---|---|---|---|---|
| 100<br>0 redeemed | 57cef8df-96ea-4001-ac28-bd81d18c342a<br>Download file | Abs Hassan Tr...<br>May 4, 2020 | Abs Hassan Tr...<br>May 4, 2020 | DISABLE GROUP |
| 10<br>0 redeemed | d45b151b-a24d-4482-8dab-e6e137865f36<br>Download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

# 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

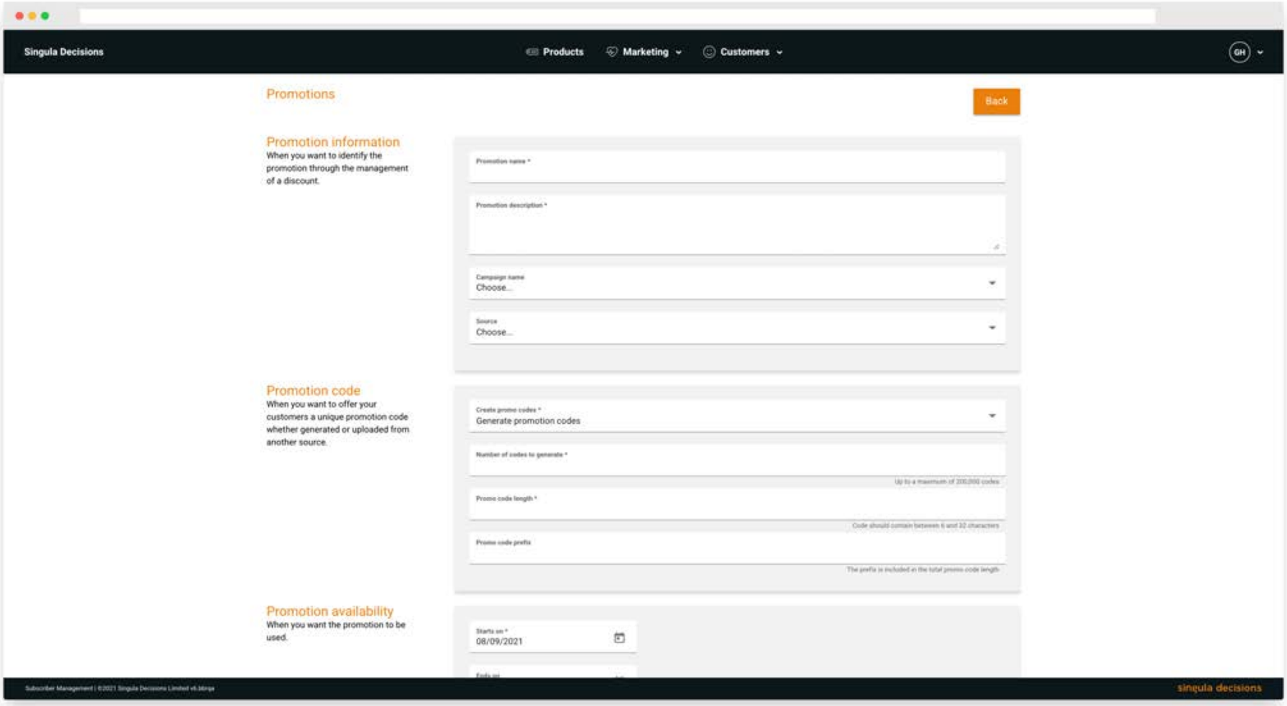
3. Complete the promotion name and promotion description - this will be presented to your customers.
4. Choose to link your promotion to a campaign and source.

### 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

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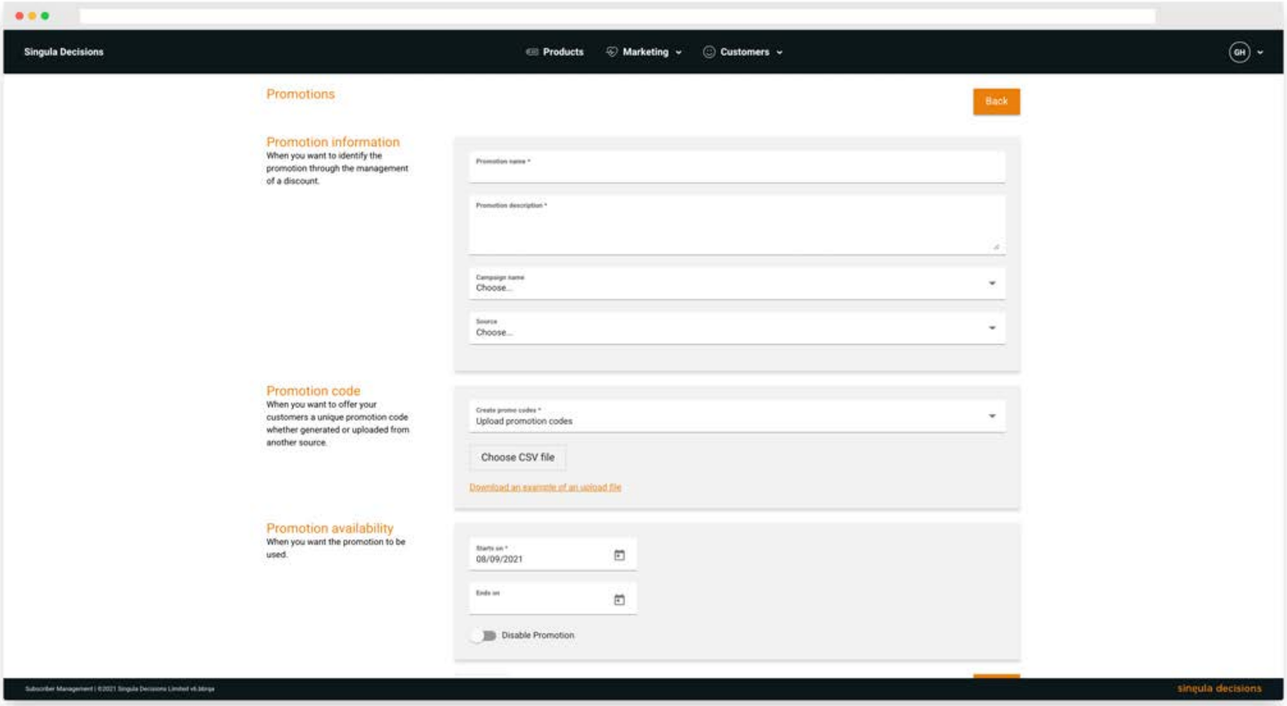



## EDIT A PROMOTION

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

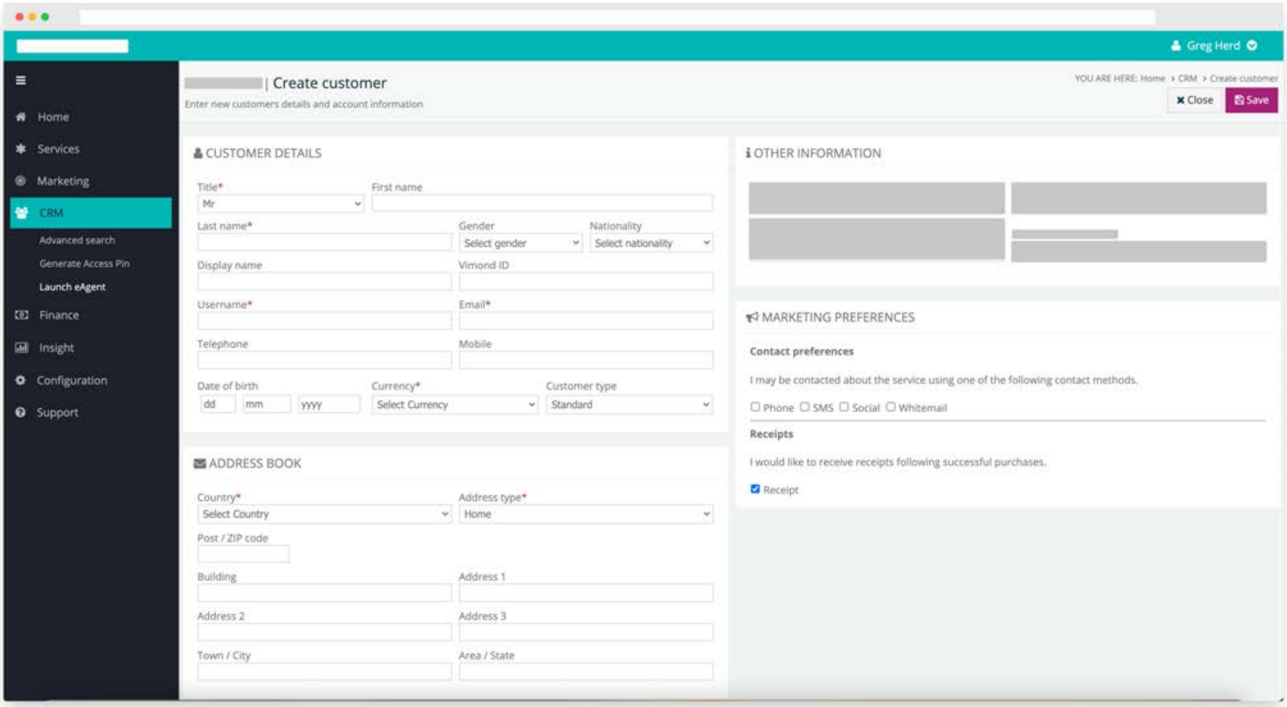
## CRM

# 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

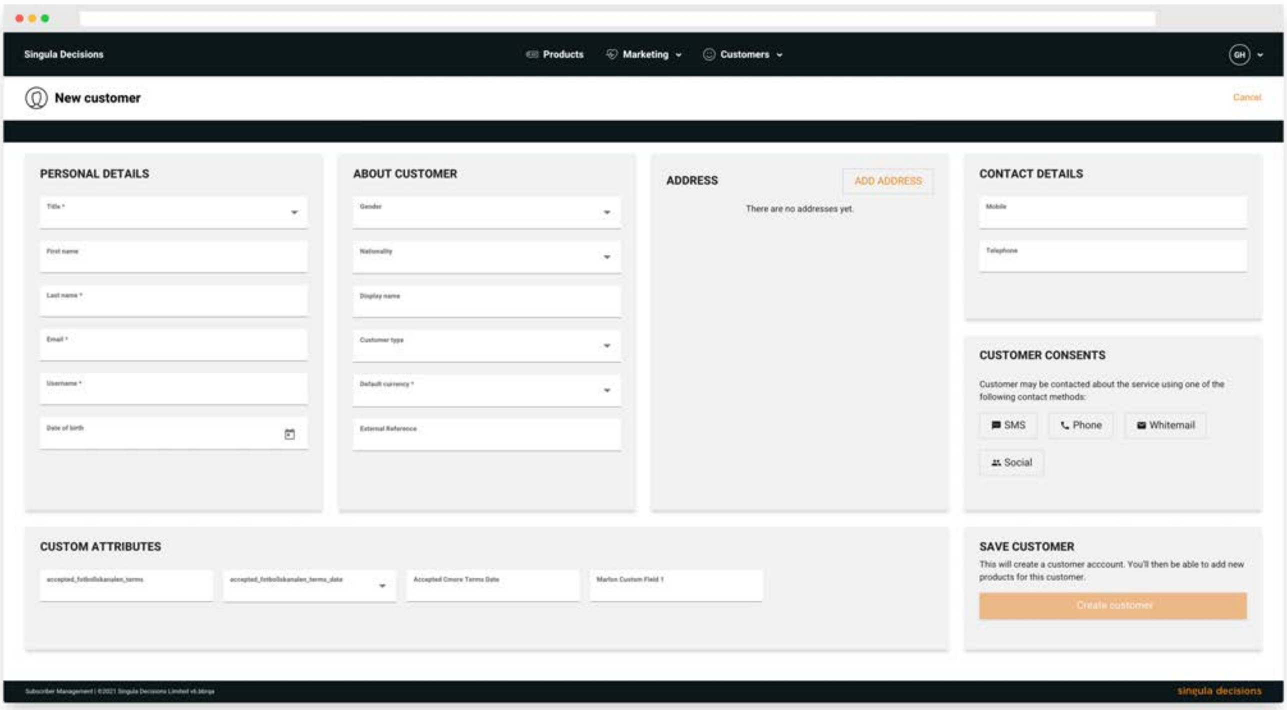
4. Select **Save** to create the customer.
5. Once saved, the customer will be **allocated a unique Customer Reference number**. The customer has been created as a prospect as no products are associated with their account.

# 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

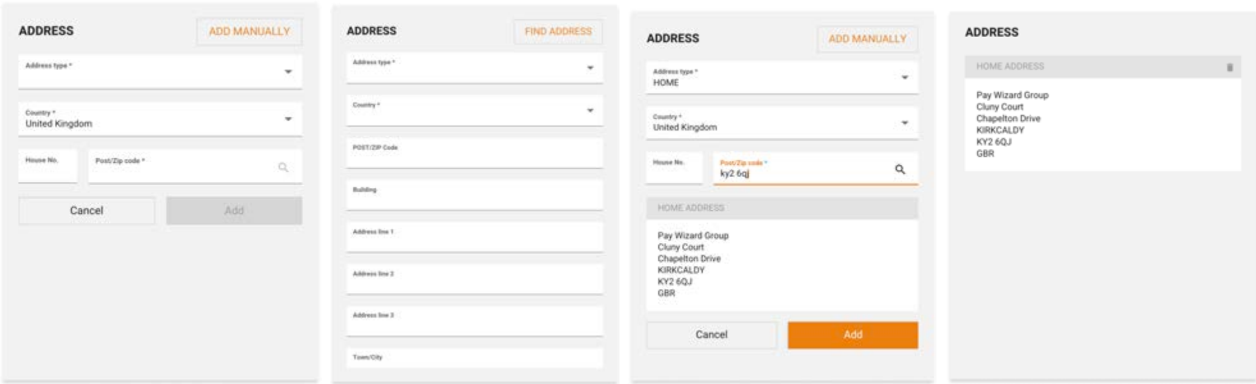
2. Complete the customers personal details. The email address you enter will automatically populate the username field. You have the option to change the username.

## 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.

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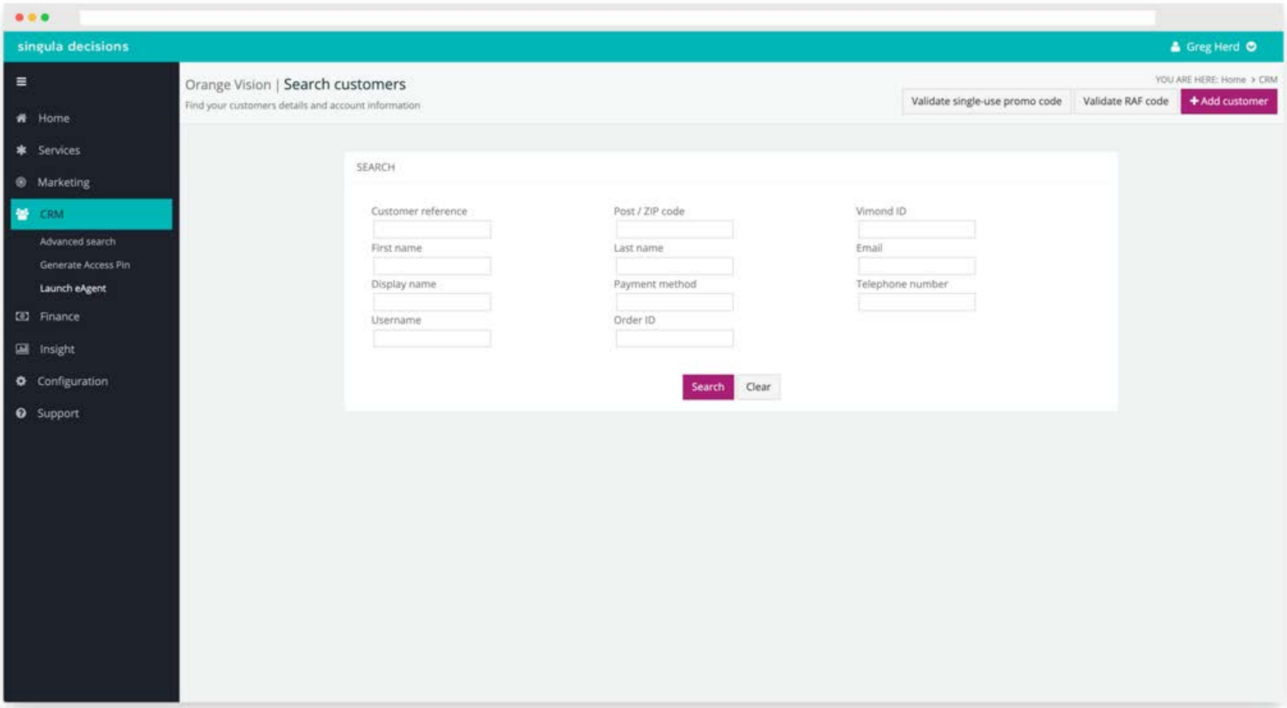
# Finding a customer

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.

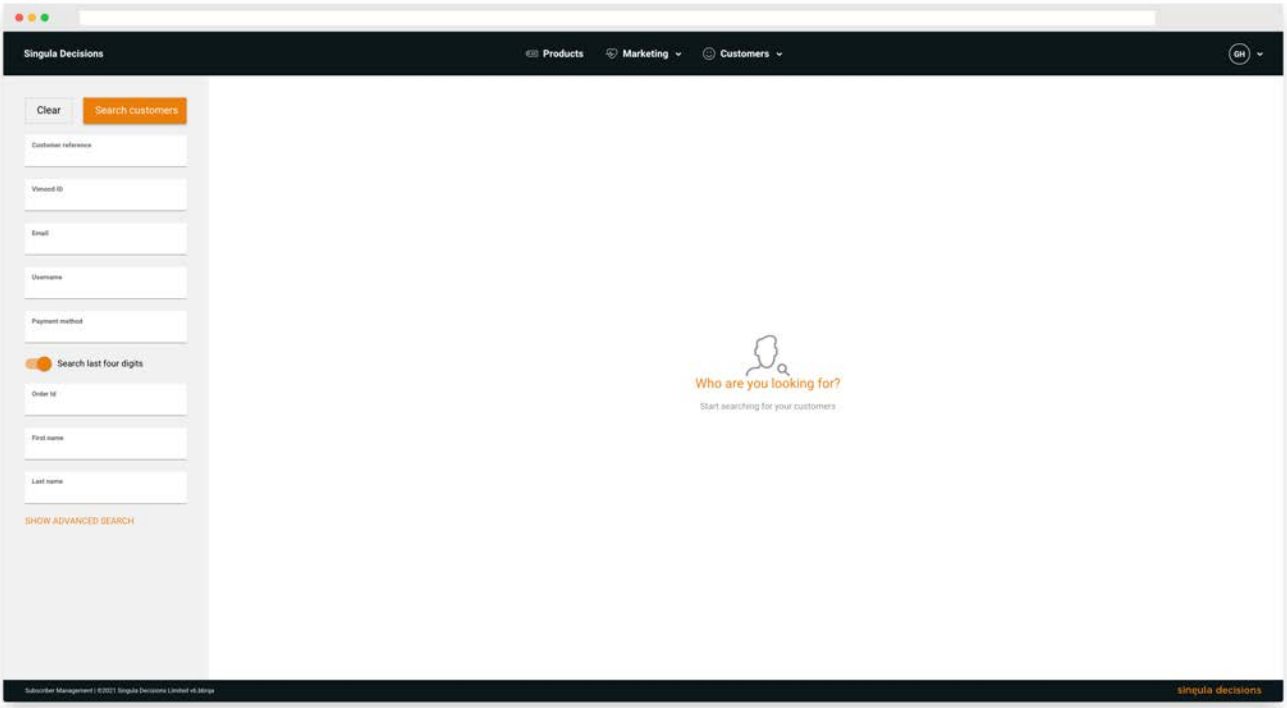
## USING ADVANCED SEARCH

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**



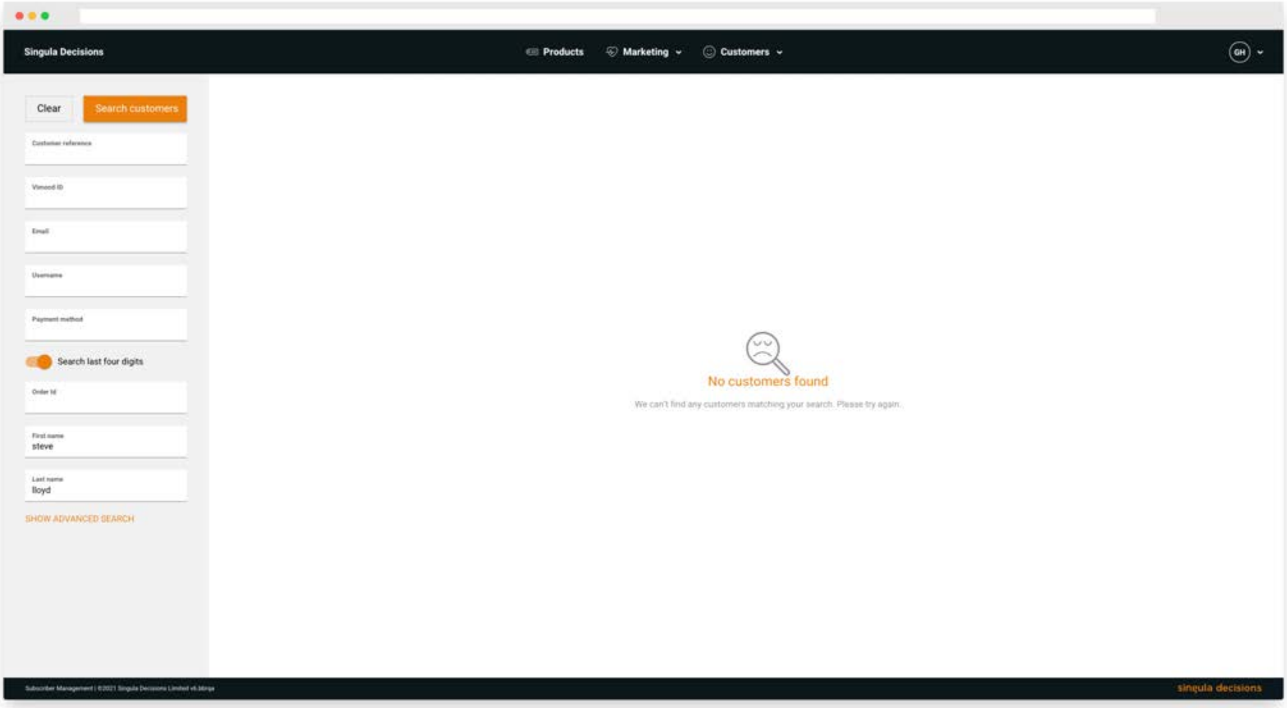

3. **Enter** the customer's details - you can choose to search using one or more fields. Select 'Show Advanced search' to display the advanced search options.
4. Press **Enter** or select 'Search customers'
5. If an exact match is found, the customer account will be displayed. If more than one account 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.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Products
Marketing
Customers
GH
Clear
Search customers
Customer reference
Email
Username
Payment method
Search last four digits
Order Id
First name
steve
Last name
Boyd
SHOW ADVANCED SEARCH
No customers found
We can't find any customers matching your search. Please try again.
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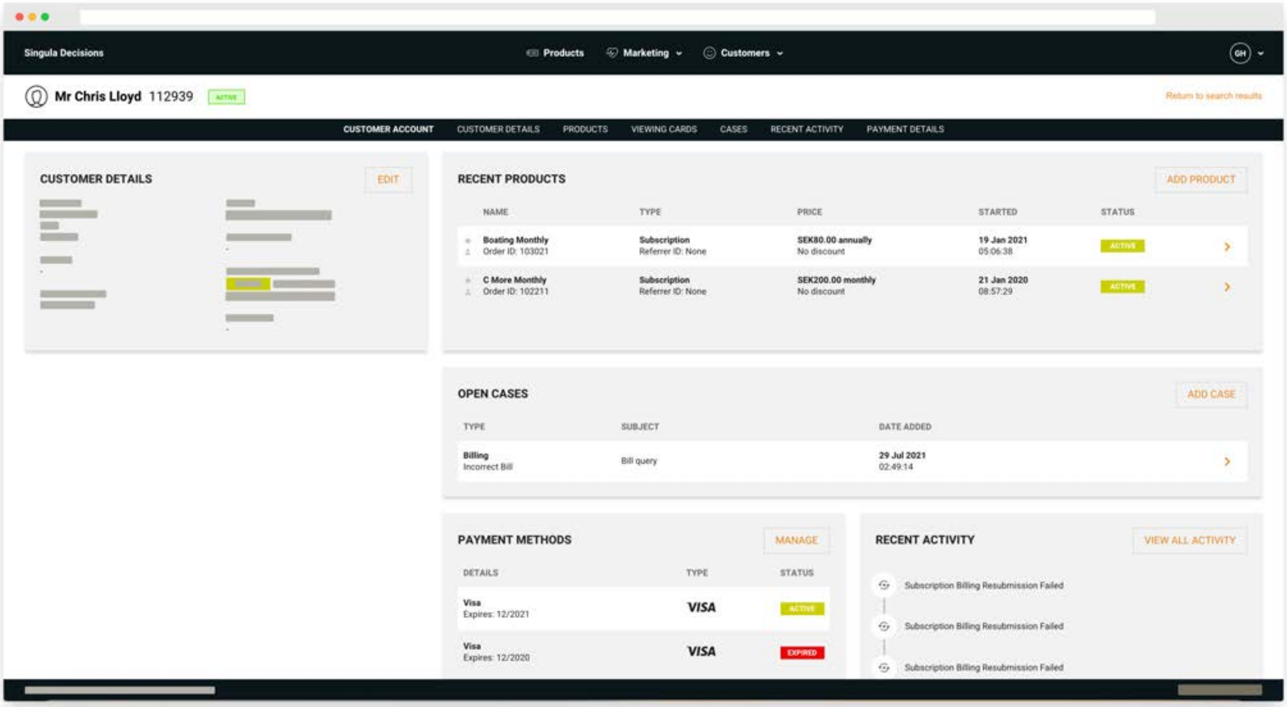
BETA Customer account

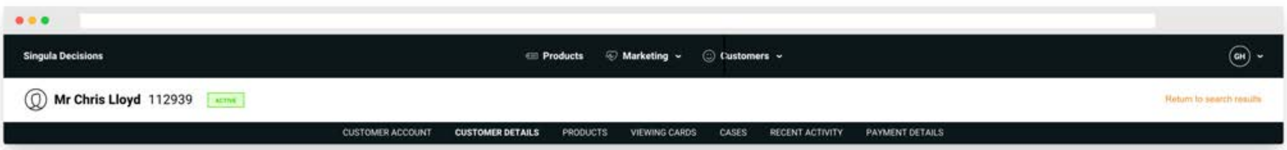
The customer account gives you a summary of the customer including their personal details, recent products, open cases, payment methods and recent activity.



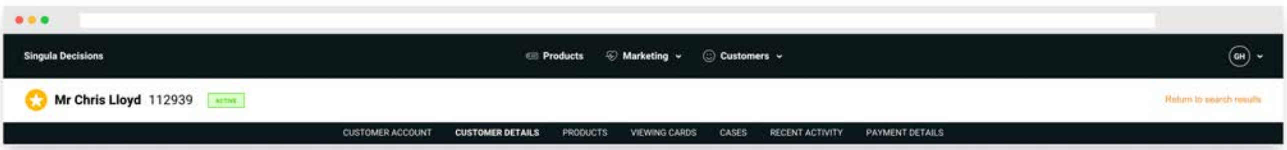

## CUSTOMER ACCOUNT HEADER

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

### Standard

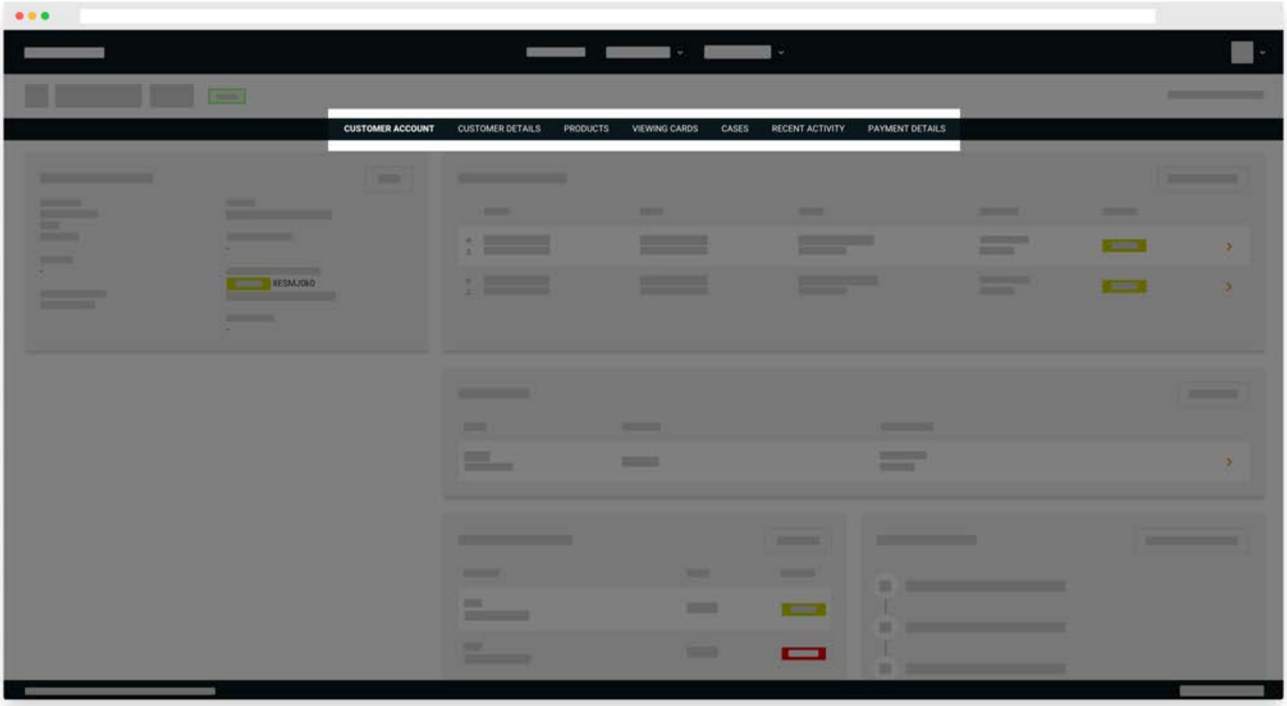



### VIP



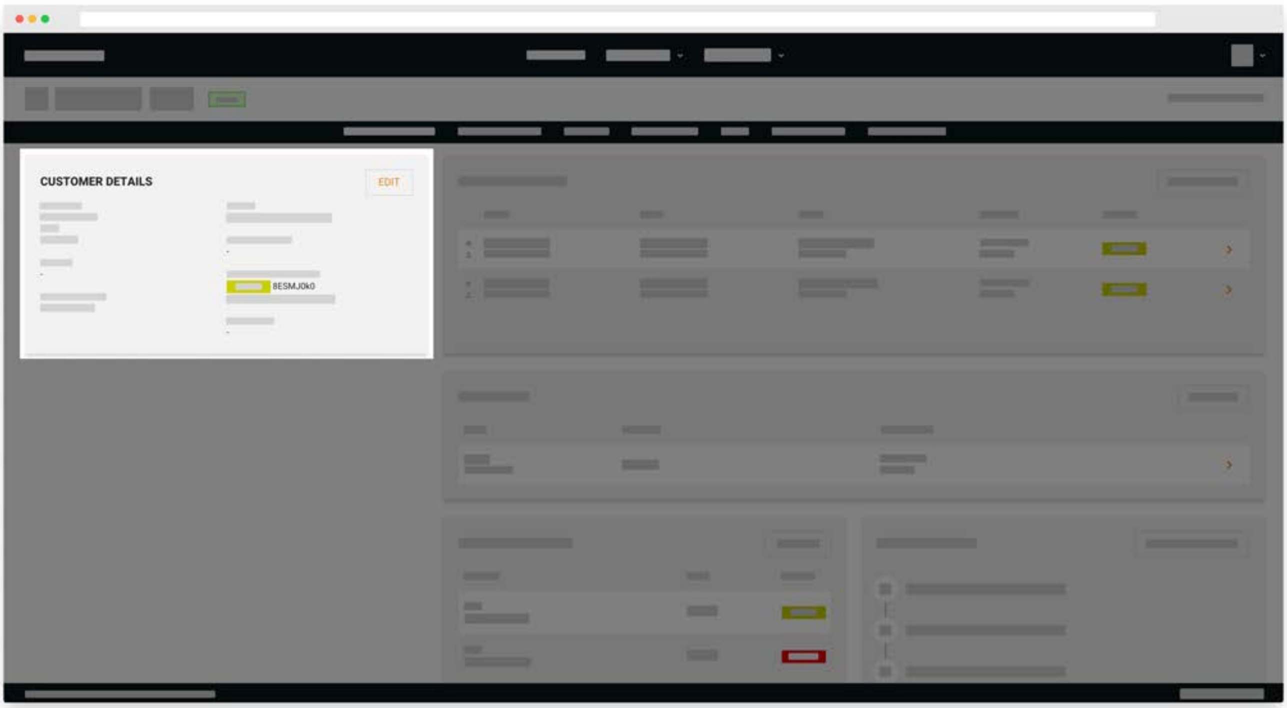

## CUSTOMER ACCOUNT MENU

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




## PERSONAL DETAILS

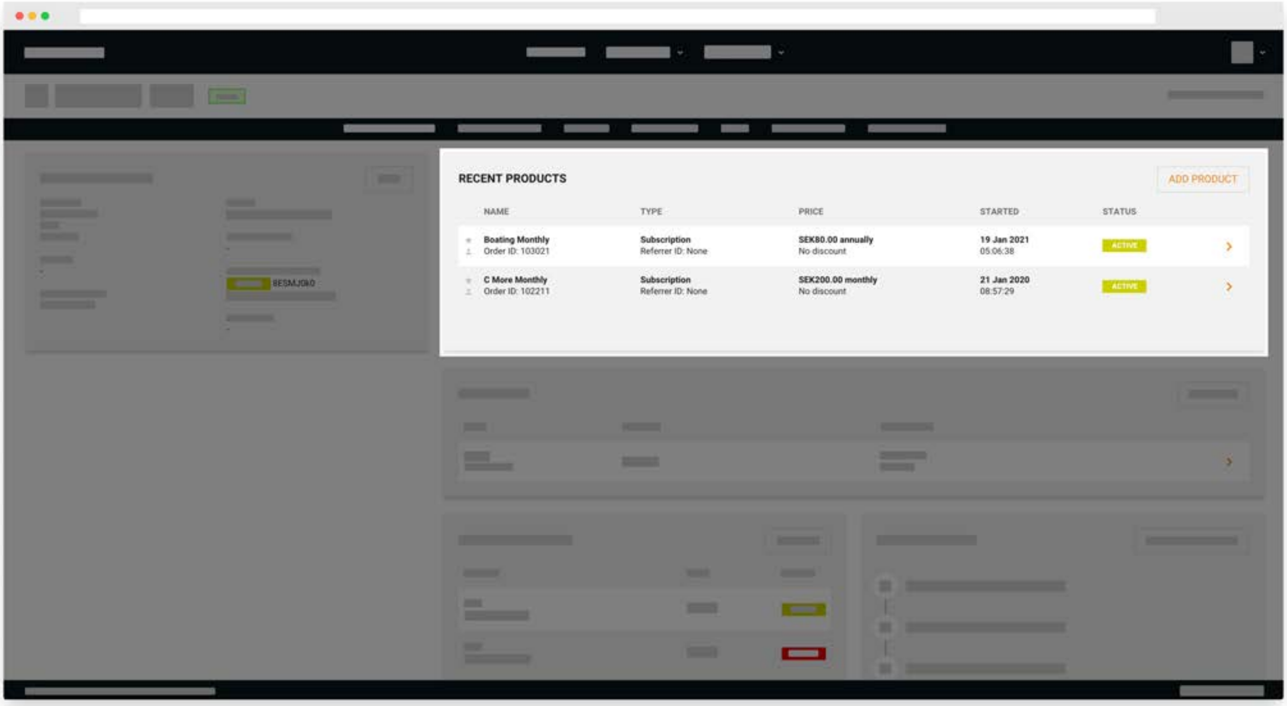
You will see the customers address, contact details, email address and refer a friend code. You may also see either display name or customer PIN depending on the system configuration.




## 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



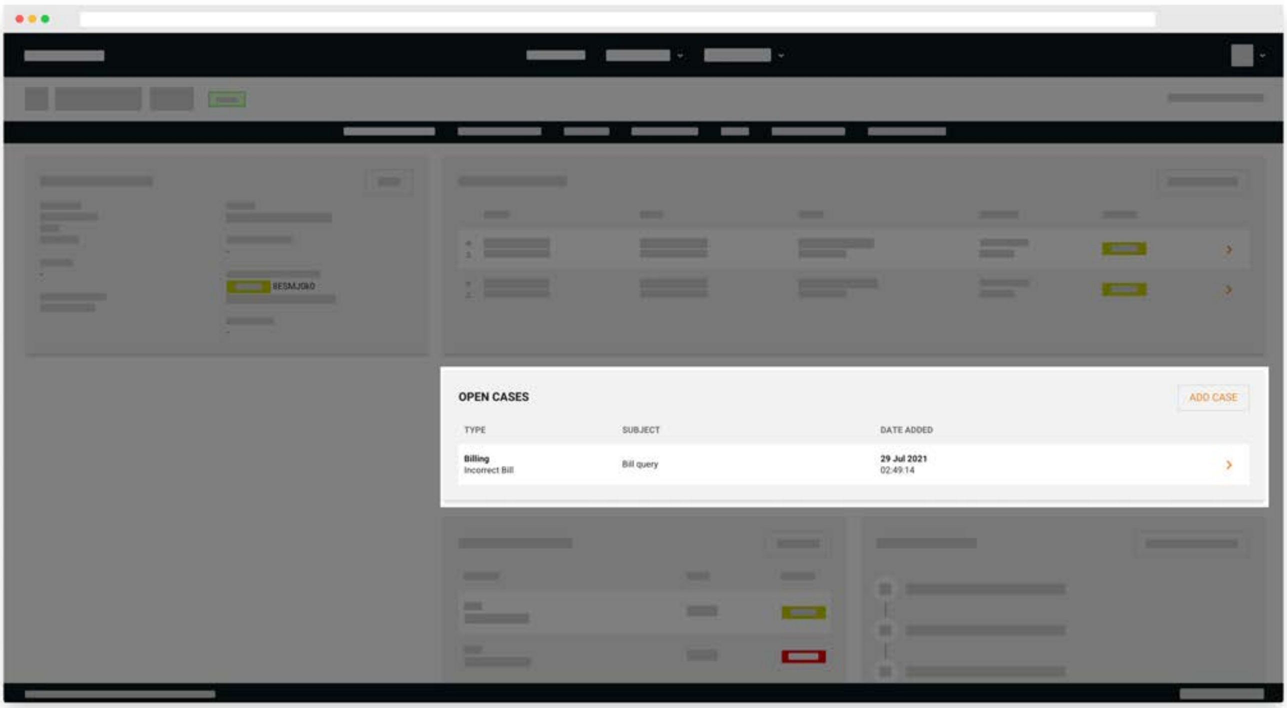

**Add product**

**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



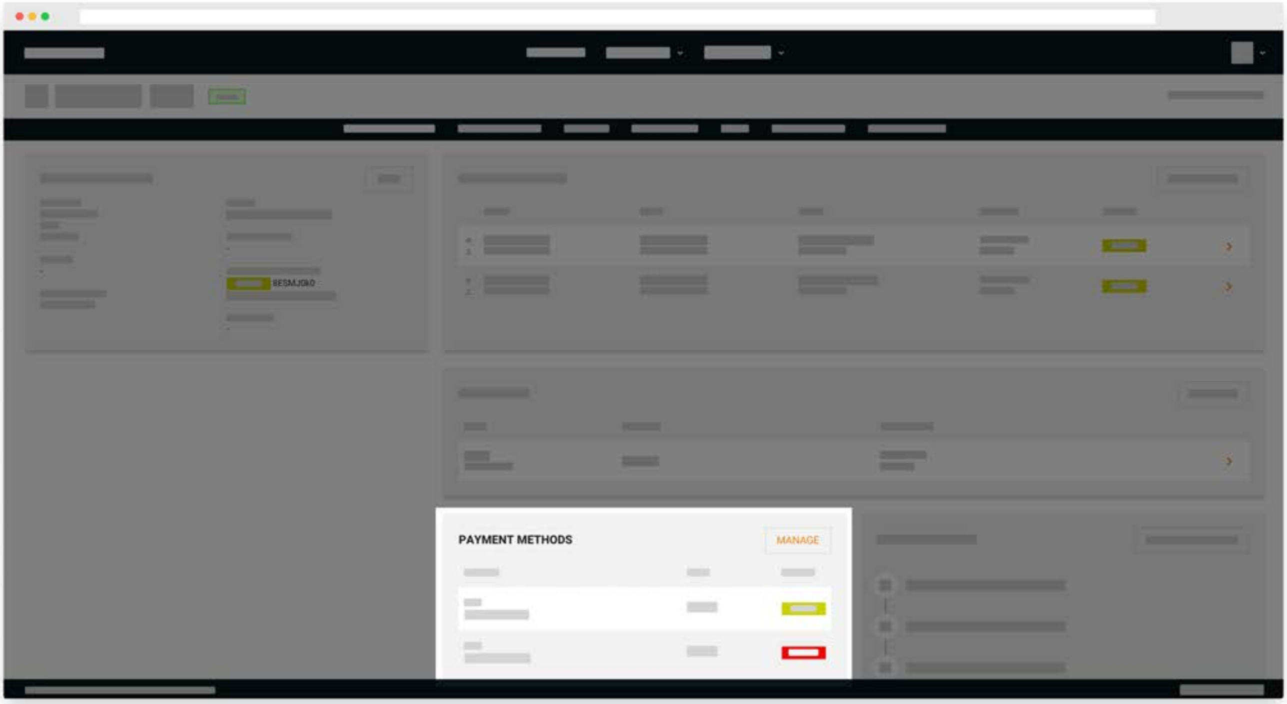
View case

**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.

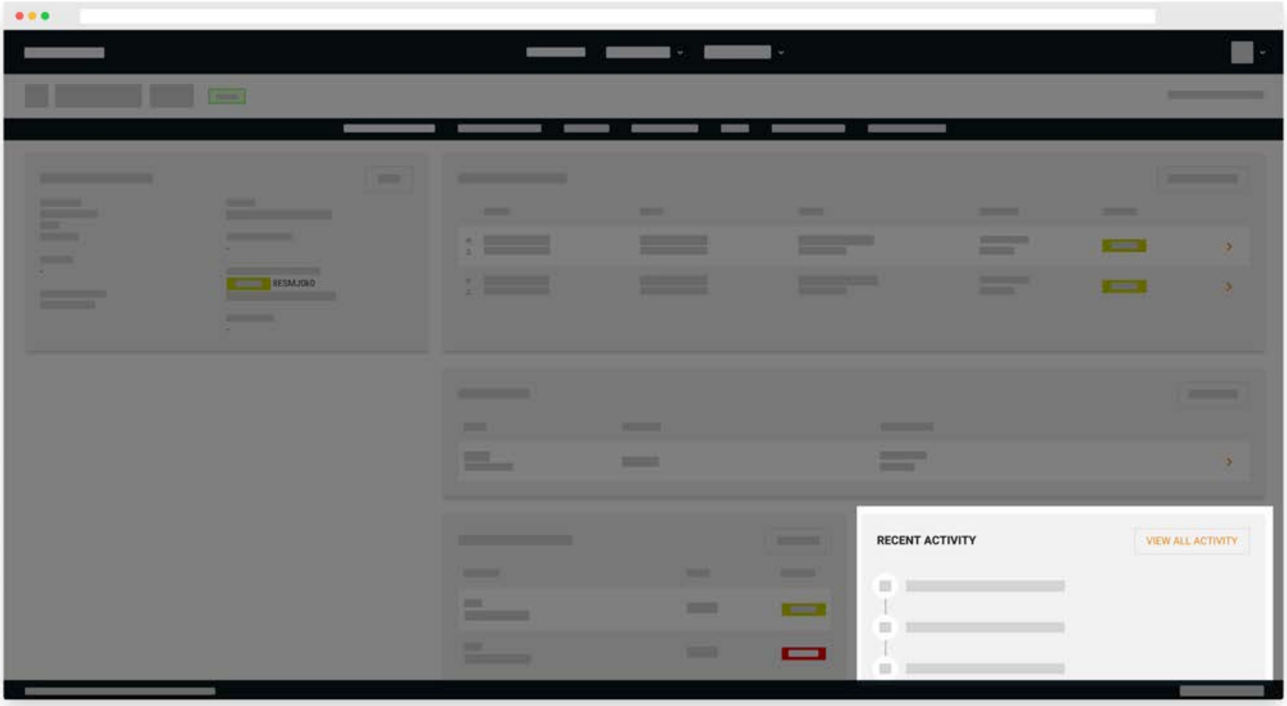



**Manage payment methods**

**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.

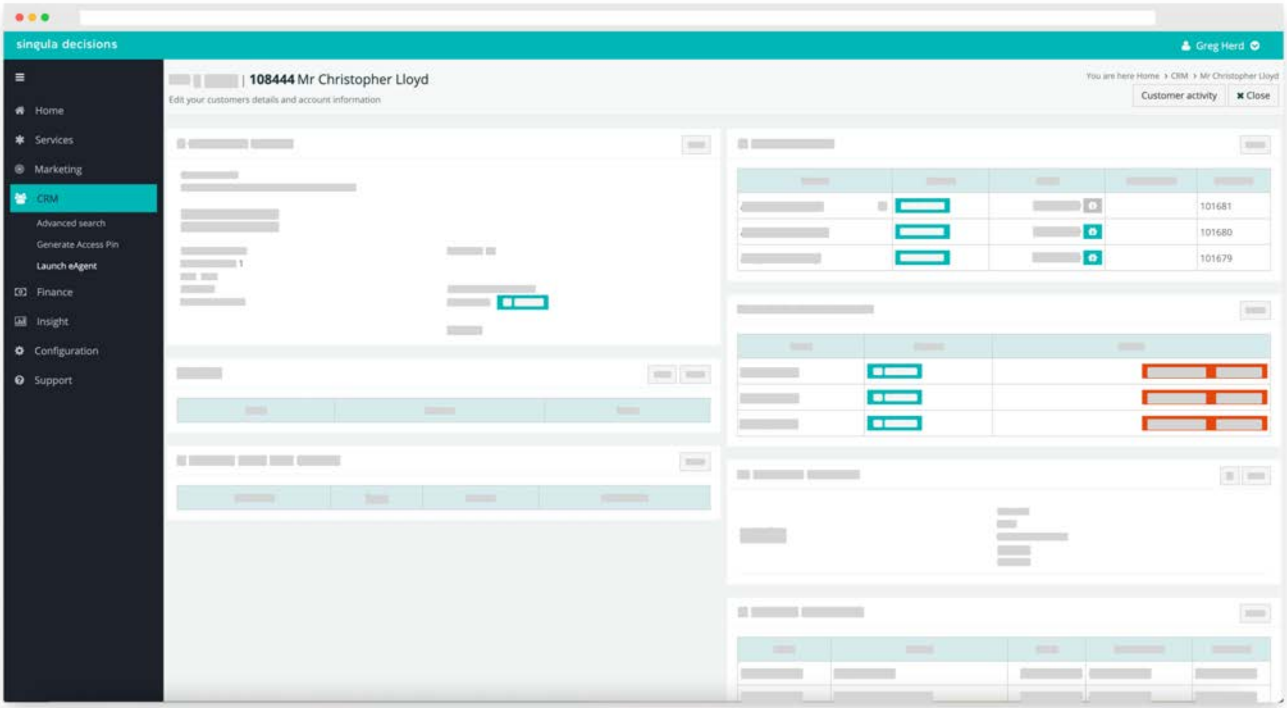



## EDIT A CUSTOMER

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**

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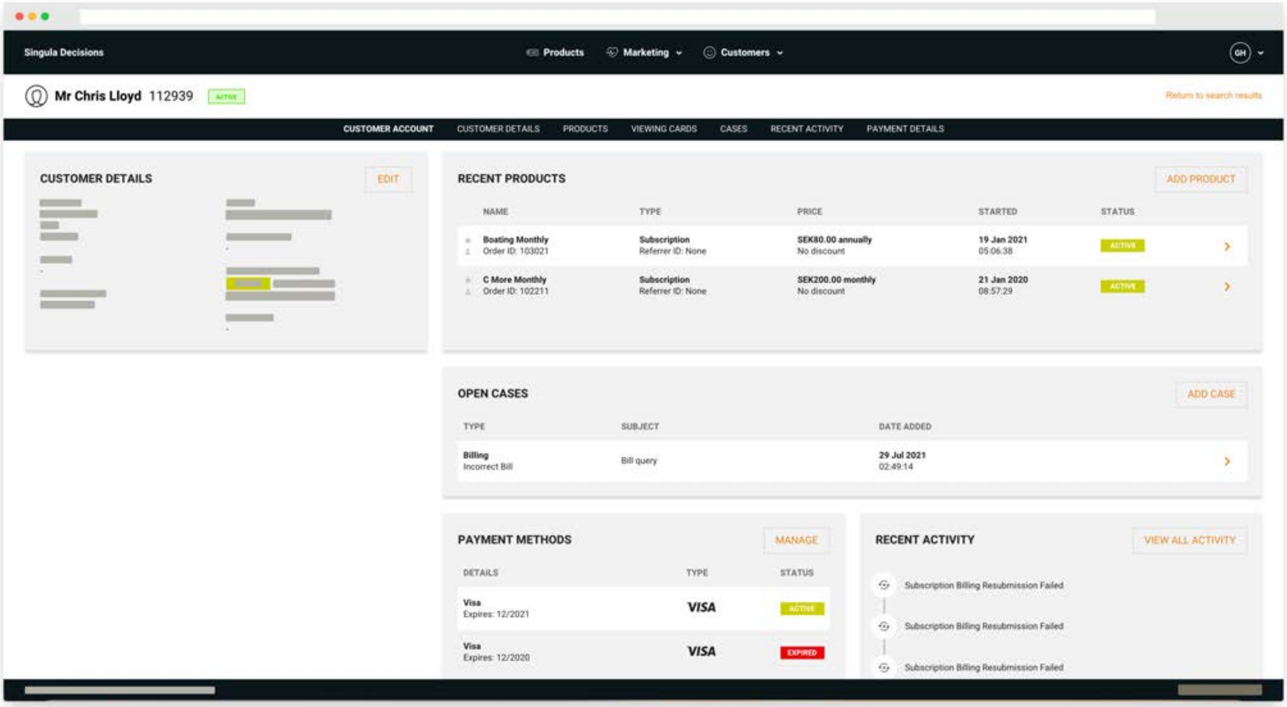
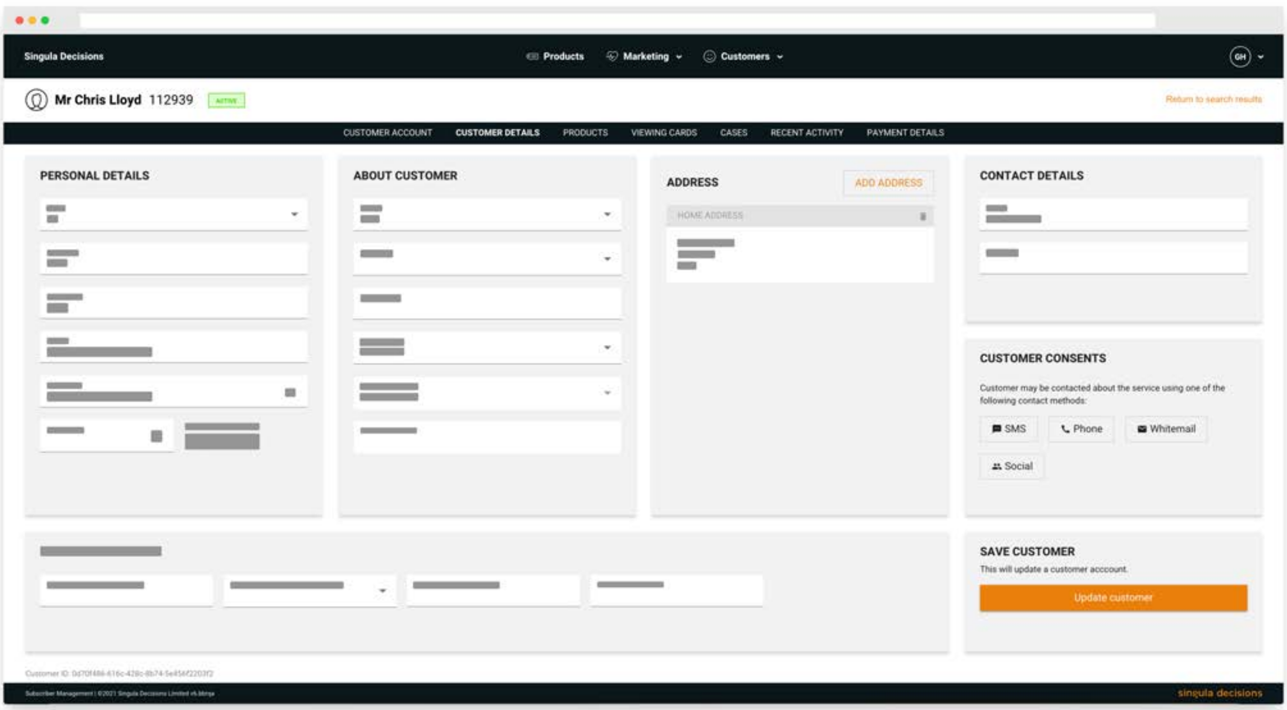
# BETA Customer personal details

## 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



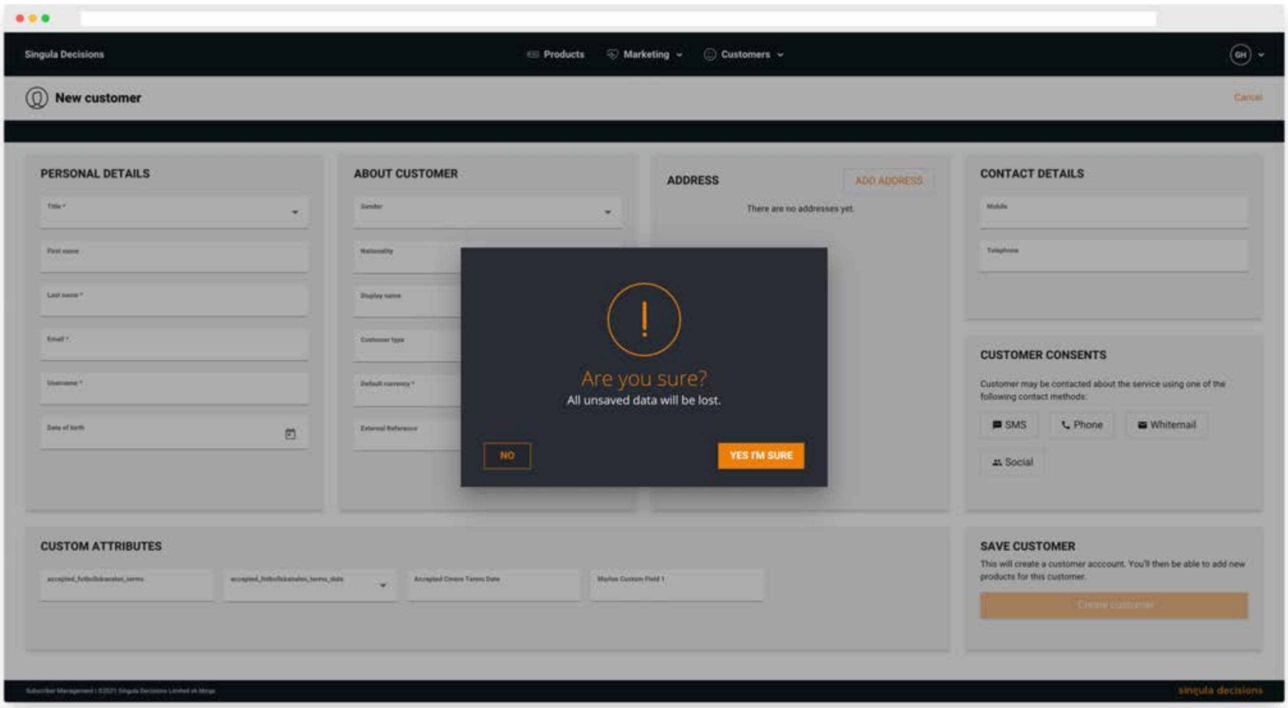
## CUSTOMER'S REFER A FRIEND CODE

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.



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# Customer subscription products

## VIEW SUBSCRIPTION PRODUCTS

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

To view more detail about the subscriptions select View

This will open the Current subscription and history page

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

## ADD A SUBSCRIPTION PRODUCT

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

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

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

   **Selecting the '+' expand button will show:**

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

## ADDING AN ALTERNATIVE PAYMENT METHOD DURING ADD SUBSCRIPTION

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

5. Select Next

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

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

The subscription is added to the customer's record.

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

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

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

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

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

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

## MANAGING A SUBSCRIPTION PRODUCT

You can see:

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

## PAUSE A SUBSCRIPTION PRODUCT

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

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

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

## REMOVE A PAUSE

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

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

## CANCEL A SUBSCRIPTION PRODUCT

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

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

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

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

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

## WITHDRAW A CANCELLATION

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

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

The subscription will be reinstated.

## REFRESH PRODUCT ENTITLEMENTS

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

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

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

## CHANGE A SUBSCRIPTION PRODUCT PAYMENT METHOD

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

5. Select Save to confirm changes

## CHANGE SUBSCRIPTION BILLING DATE

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

## CROSSGRADE A SUBSCRIPTION PRODUCT

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

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

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

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

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

## UPGRADE A SUBSCRIPTION PRODUCT

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

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

## DOWNGRADE A SUBSCRIPTION PRODUCT

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

A success message will appear, confirming the downgrade:

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

## CANCEL A SCHEDULED DOWNGRADE

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

## ADD A MANUAL PAYMENT

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

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

   The following fields will be displayed:

   - Cash amount – this is mandatory
   - Official receipt number
   - Collection code
   - Temporary receipt number

5. Complete the required fields
6. Select Confirm

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

## CHANGE A REFERRER ID

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

## SUBSCRIPTION HISTORY

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

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

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

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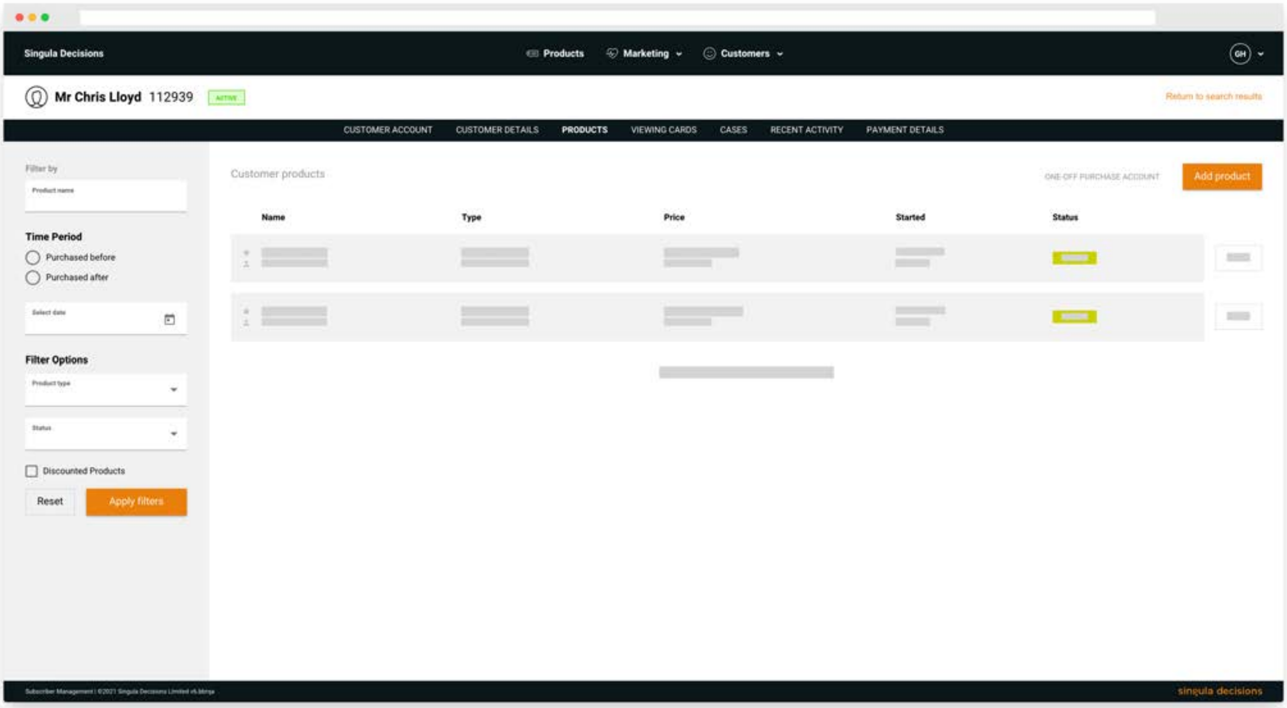
# BETA Customer subscription products

## 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

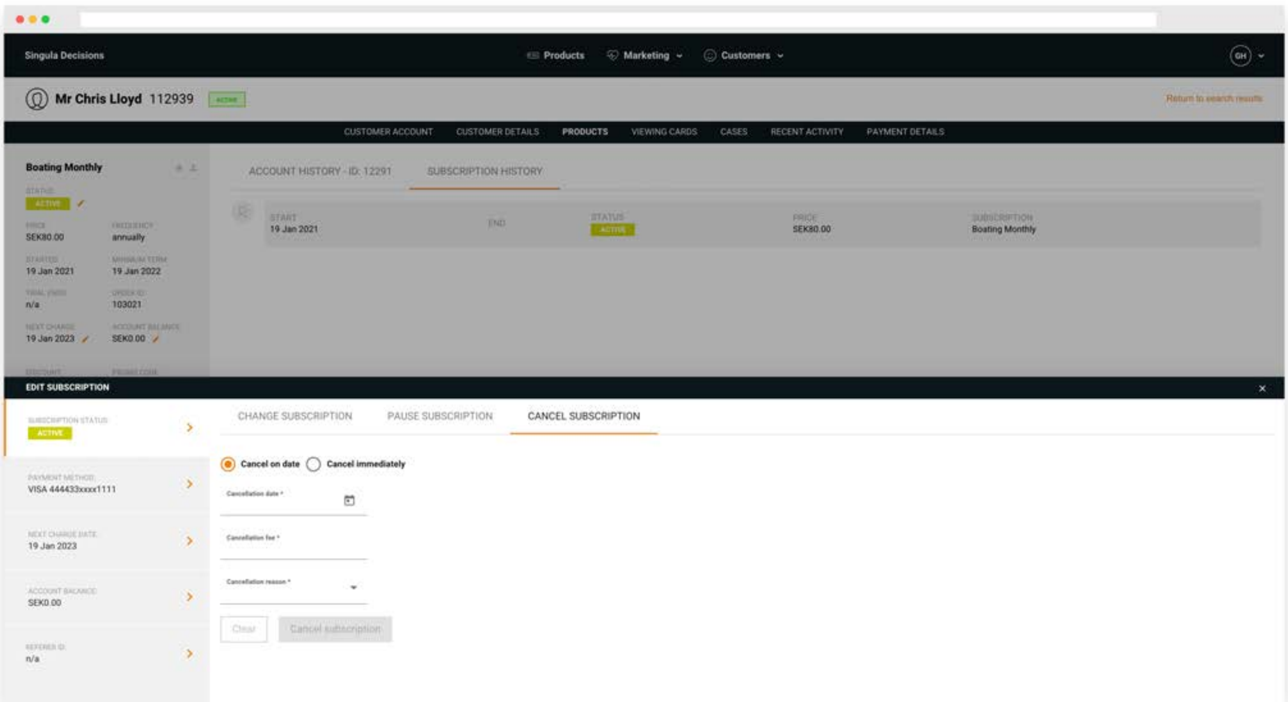
1. Choose the pen to edit the subscription product
2. Select subscription status
3. Select cancel subscription
4. Select cancel on date or cancel immediately
5. Select cancel subscription

### 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**

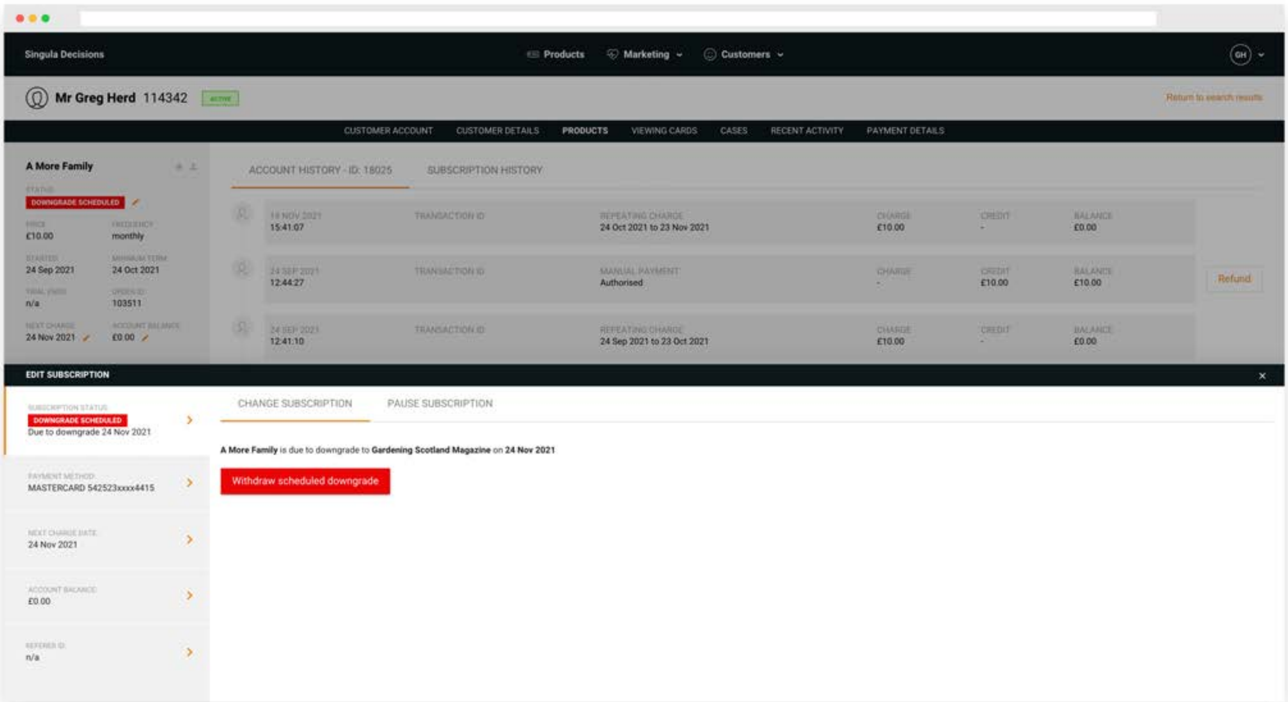
The customer will be charged the pro-rated amount and their bill date will be adjusted to 'today'

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




## 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

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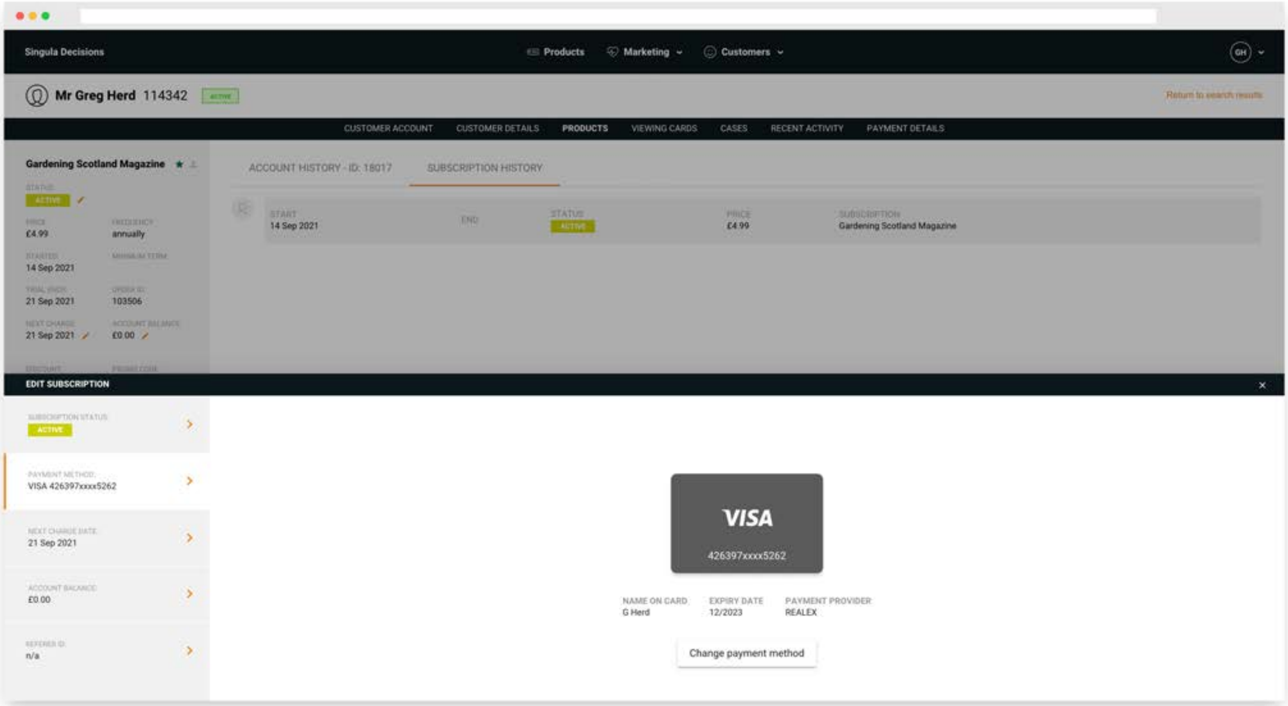
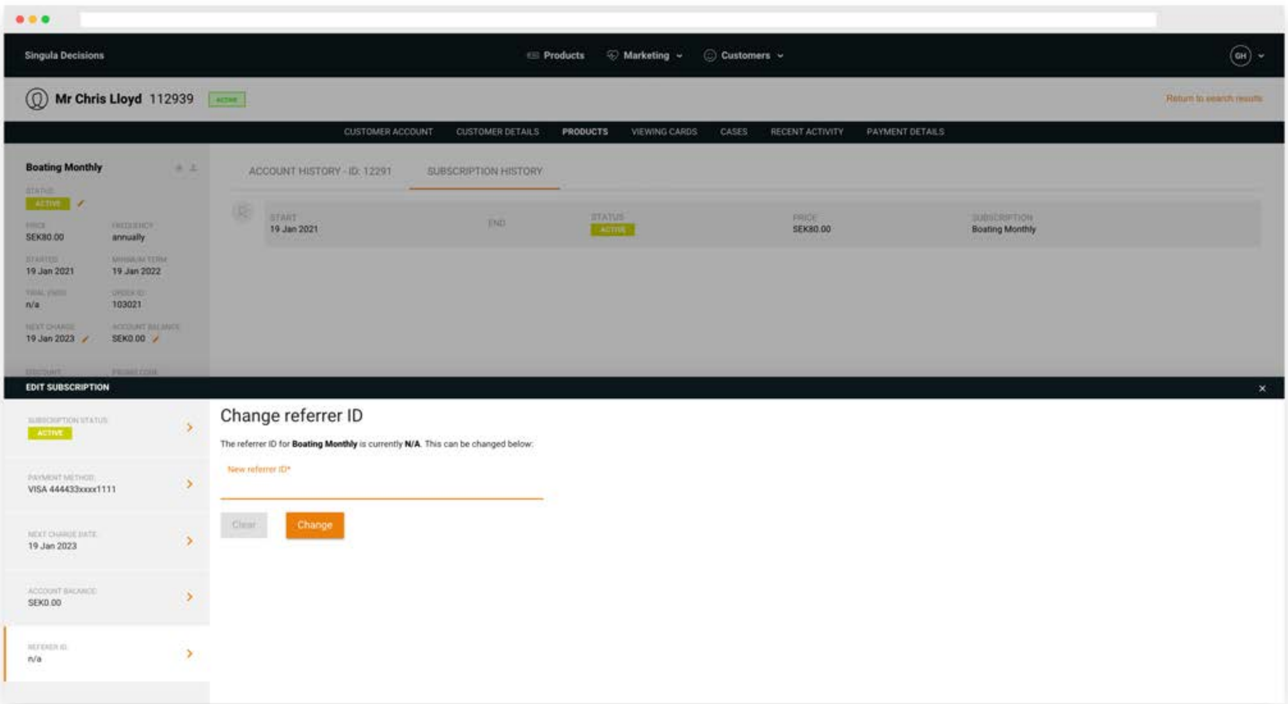



## CHANGE REFERRER ID

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

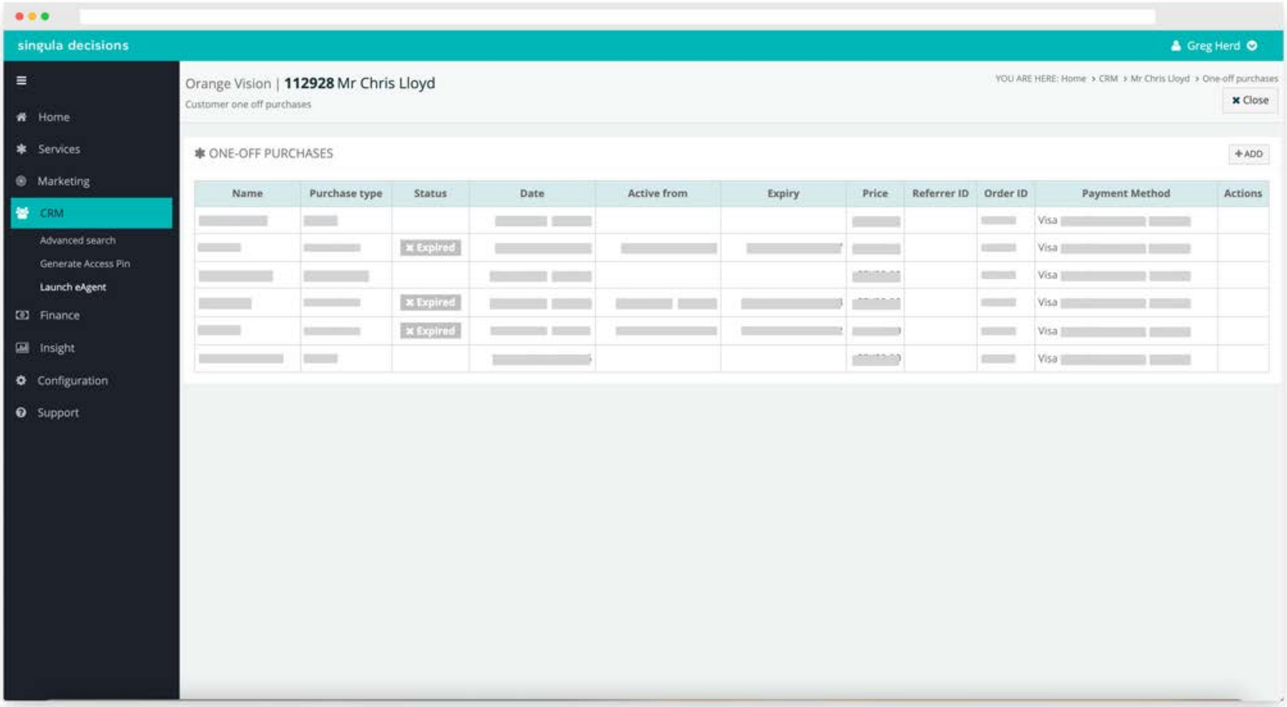


# Customer one-off purchases

## 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 disocunt to a one-off purchase. Select Next
5. Choose Add card. A new tab in your browser will open
6. A summary of the customer's details will be displayed, select Add payment. This will launch the Global Iris or Realex Payments secure hosted payment page (HPP).
7. Enter the customer's card number, expiry date, security code and cardholder name

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

## MANAGING A ONE-OFF PURCHASE

You can see:

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

## ADD A MANUAL PAYMENT

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

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

The following fields will be displayed:

- Cash amount – this is mandatory
- Official receipt number
- Collection code
- Temporary receipt number

5. Complete the required fields
6. Select Confirm

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

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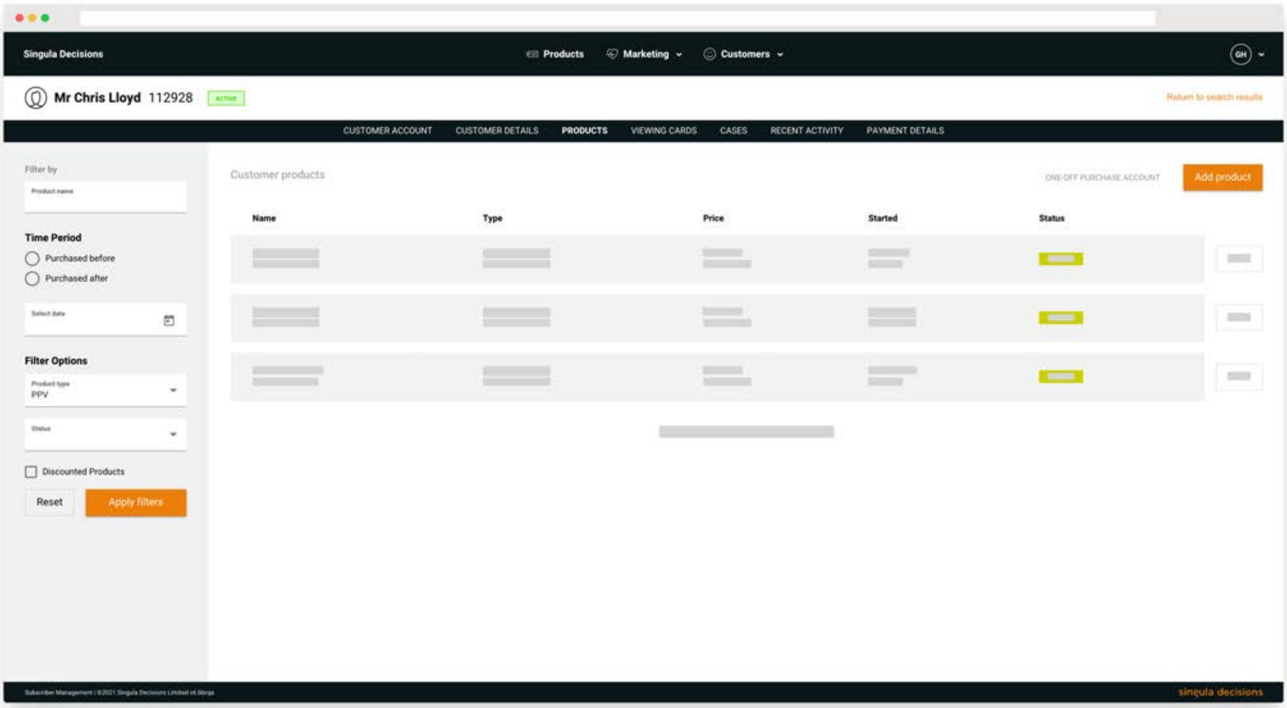
# BETA Customer one-off purchases

## 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

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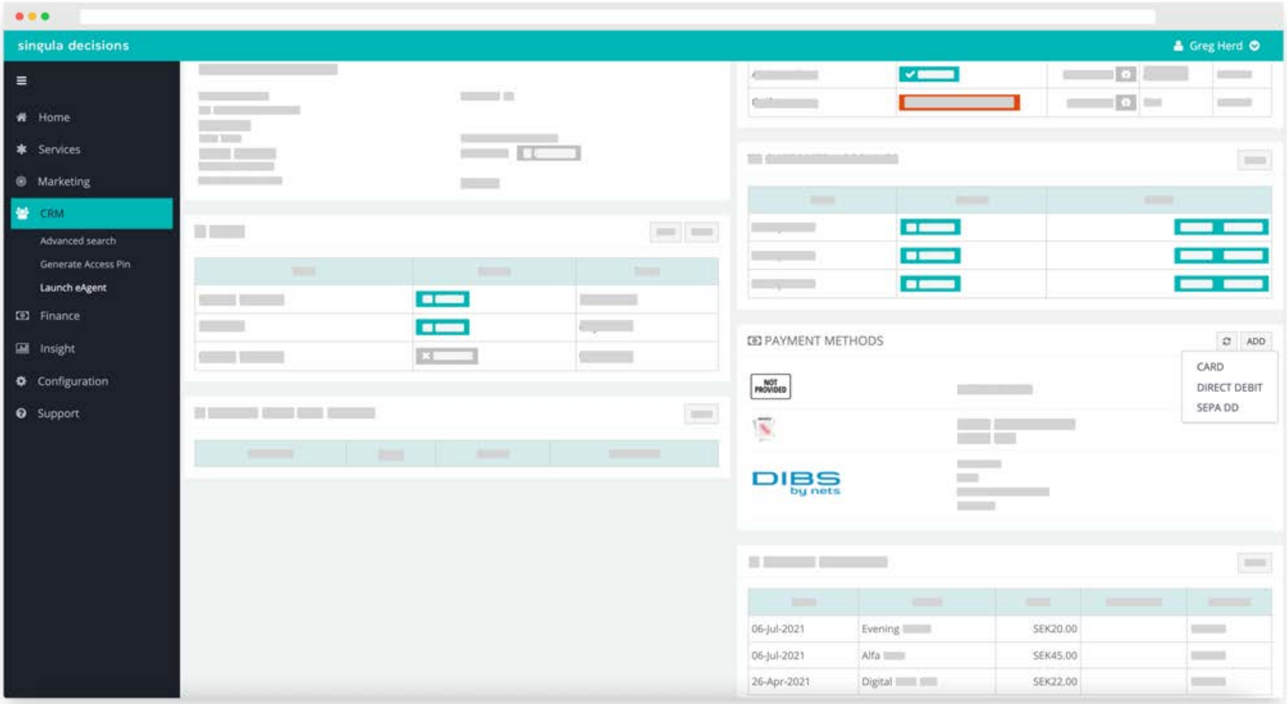
# Customer payment methods

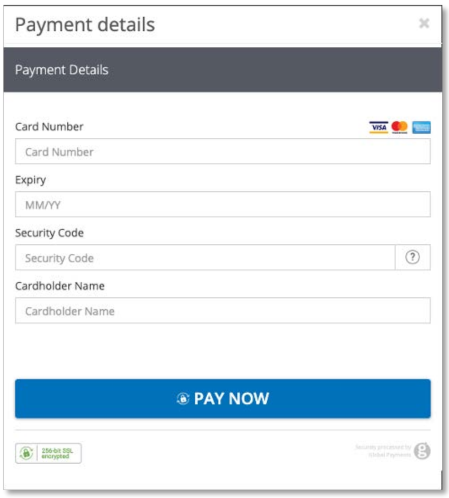
## ADDING A CREDIT/DEBIT CARD

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).




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.

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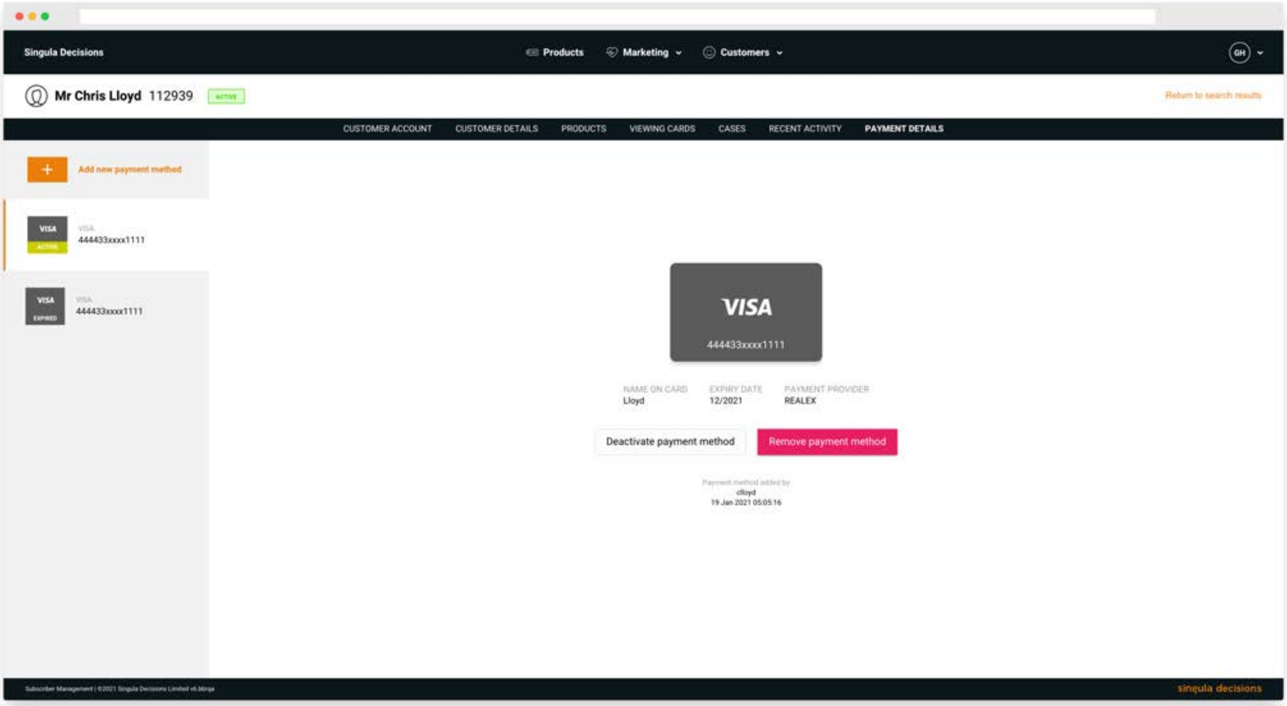
# BETA Customer payment methods

## VIEW PAYMENT METHODS

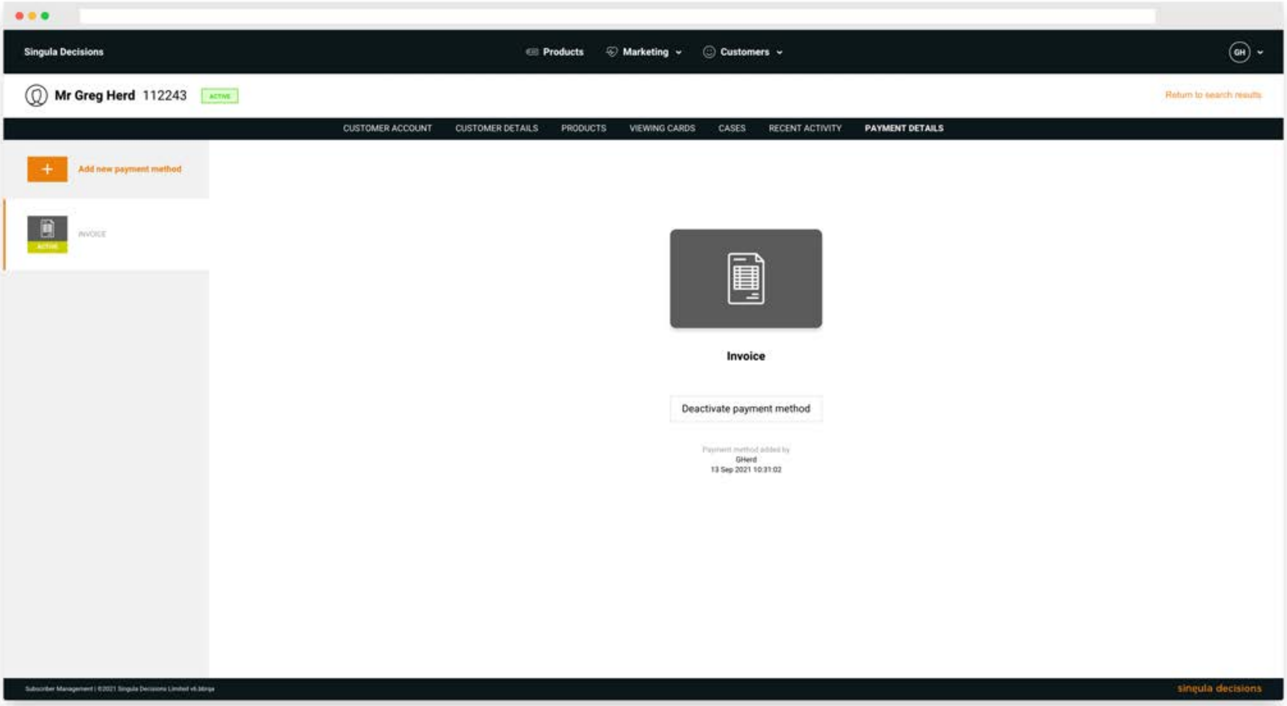
1. Select Payment details

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



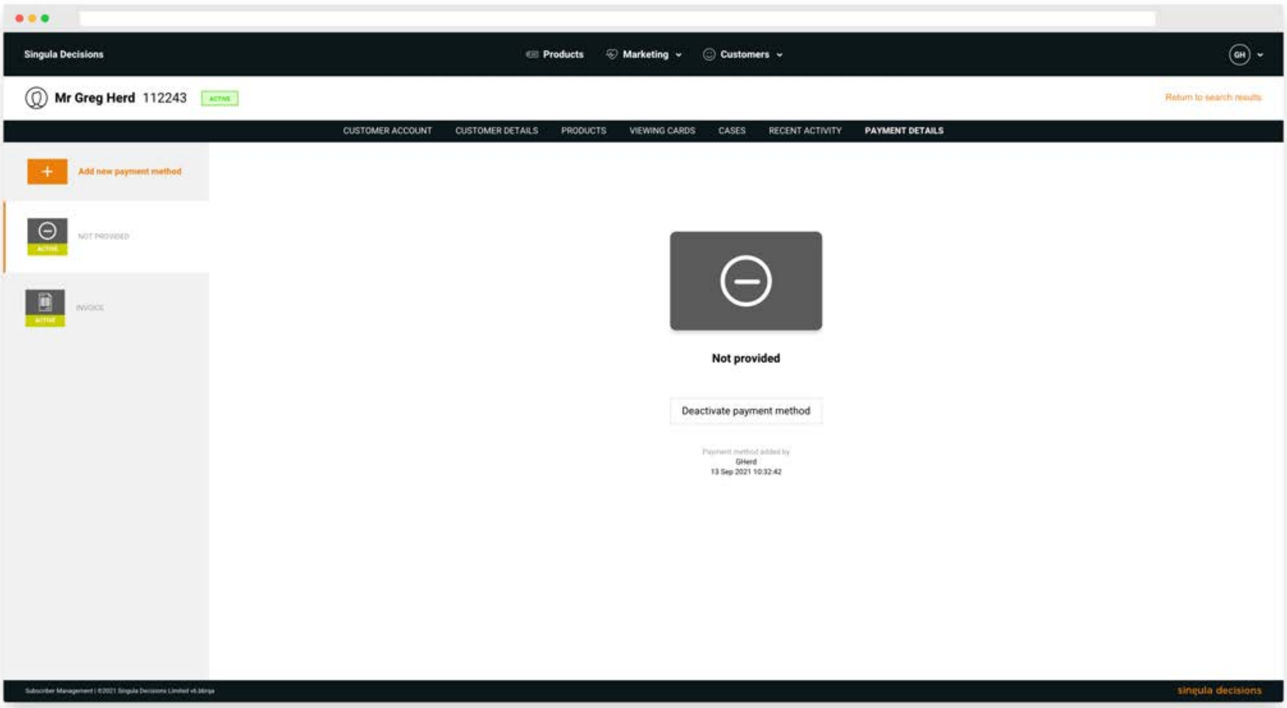

## ADD AN INVOICE PAYMENT METHOD

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

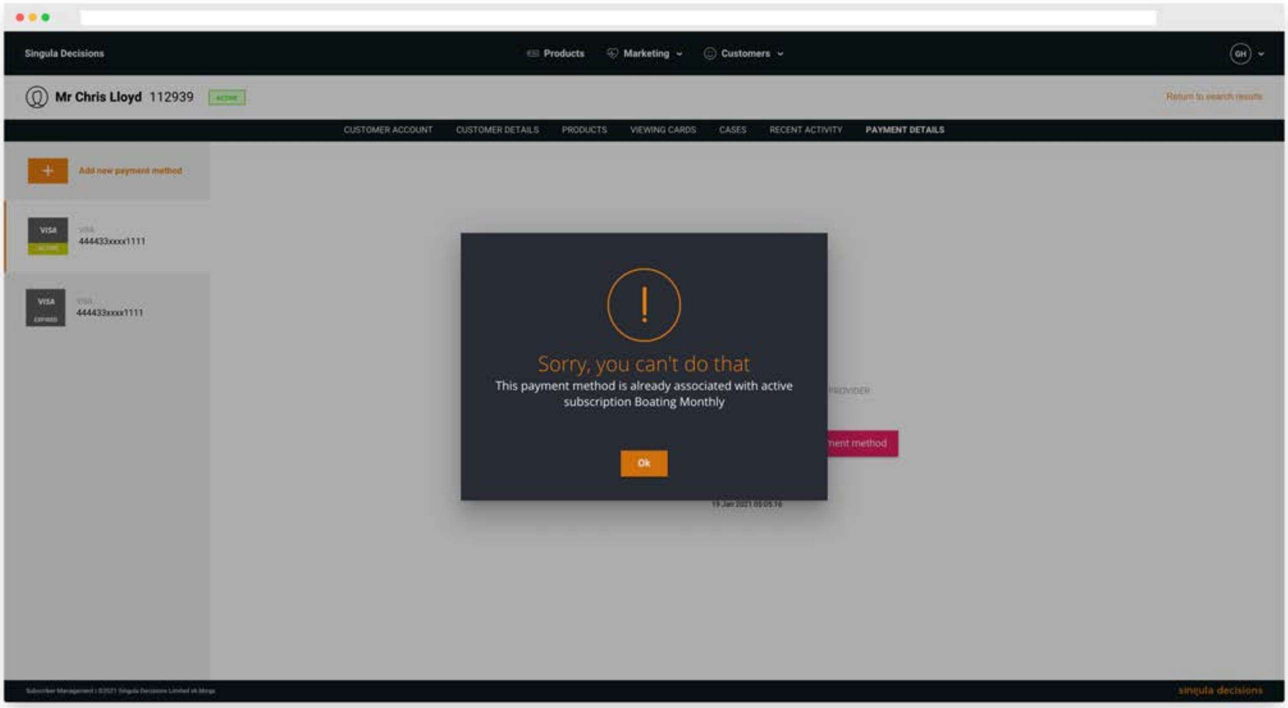
1. Select Payment details
2. Select the payment method to be activated
3. Select Activate payment method
4. Confirm the activation

## 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.**

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# 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:

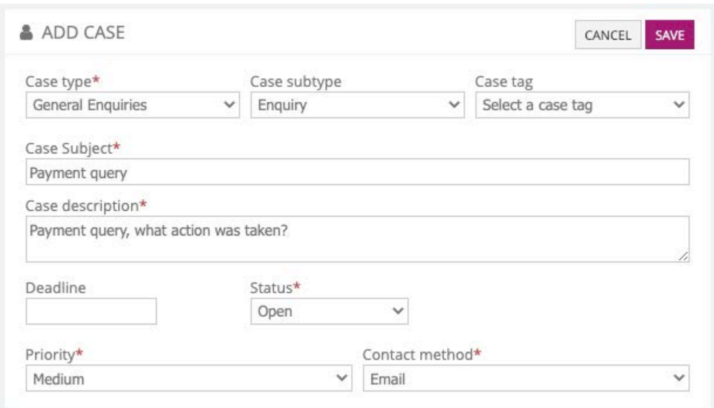

CASES ADD VIEW

| 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




The Case will appear in the cases table.

CASES

ADD VIEW

| 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

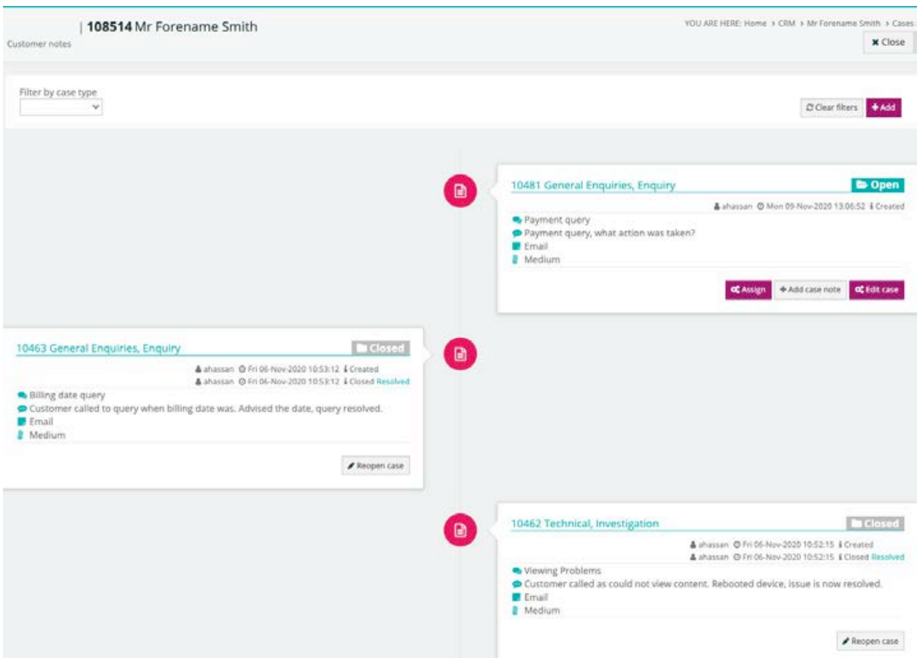
1. Select View in the cases area

CASES

ADD VIEW

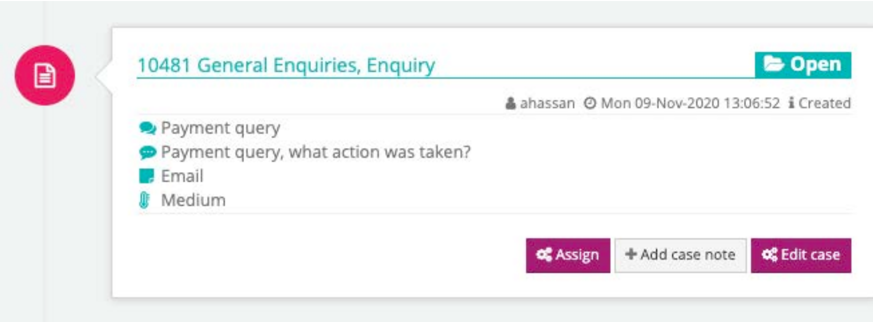
| Title | Status | Date |
|---|---|---|
| General Enquiries | ✔ OPEN | 09-Nov-2020 |
| General Enquiries | ✖ CLOSED | 06-Nov-2020 |
| Technical | ✖ CLOSED | 06-Nov-2020 |

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.



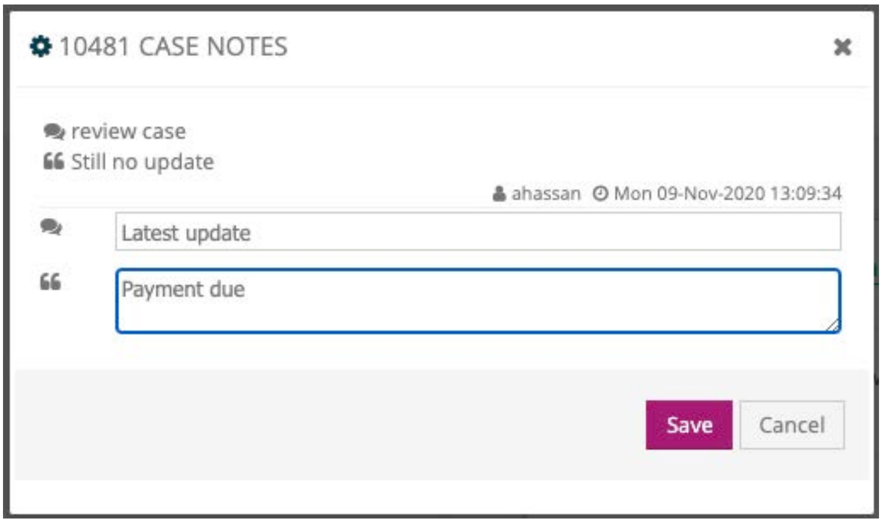

3. Select Add case note button

**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)**

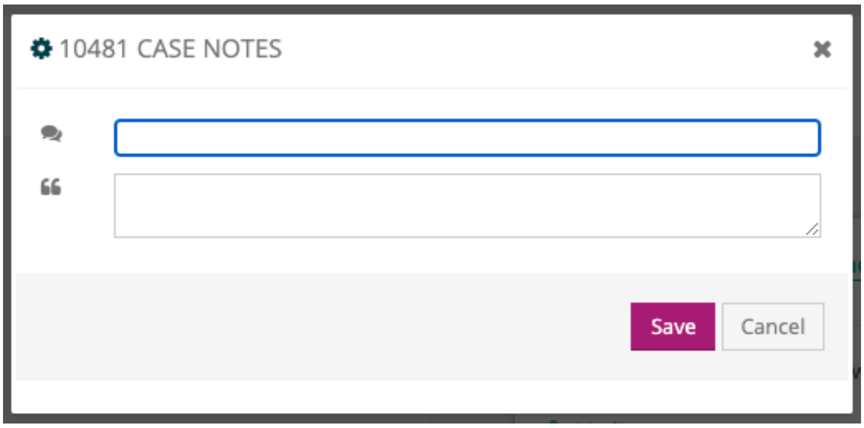



Add case note button displayed


4. Complete the subject and description

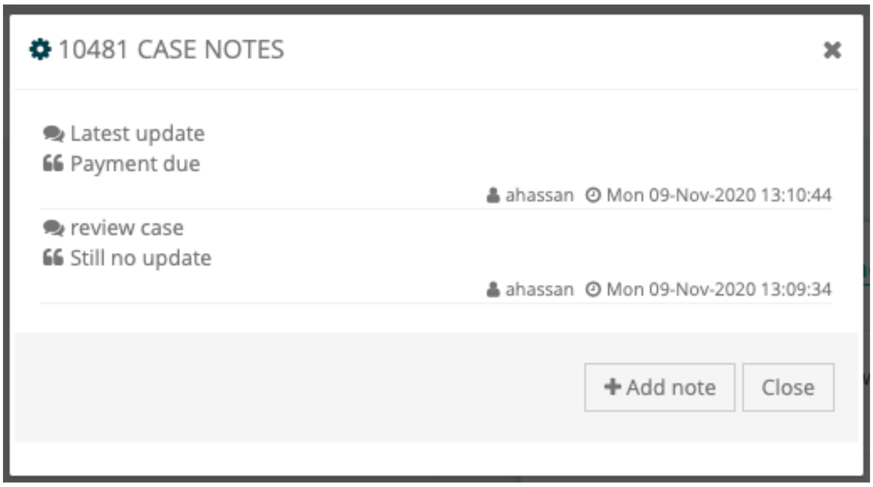



Note: If Add case note was selected then the Add Case Notes window will appear containing a case subject field and case notes field, complete these to add you new case notes:




5. Select Save

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

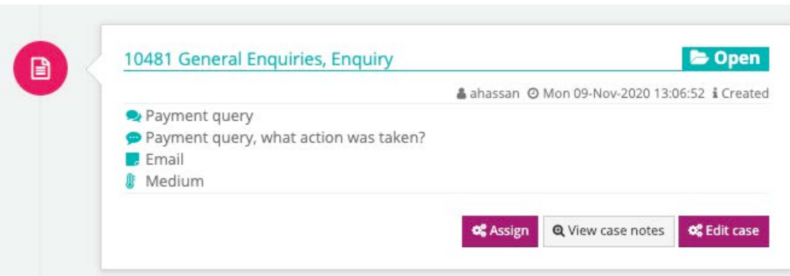




## EDIT AN EXISTING CASE

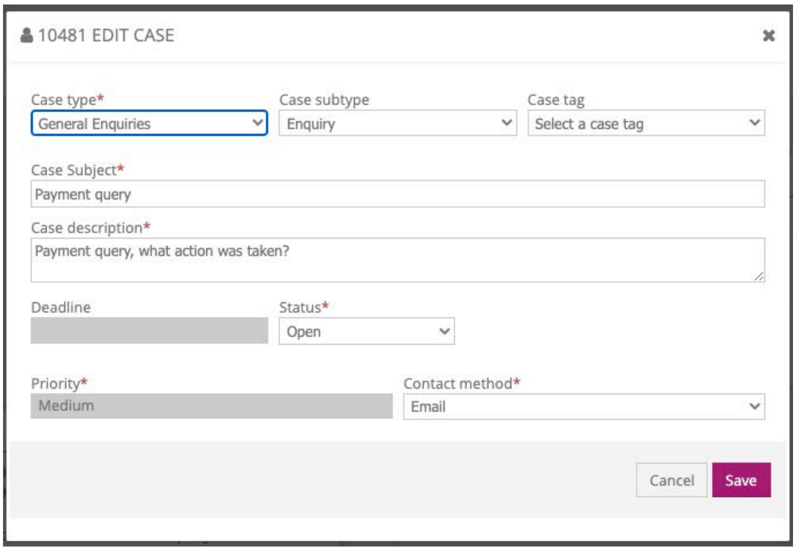
You can edit a case once it's been created. This allows you to amend any fields that were completed when the case was created.

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

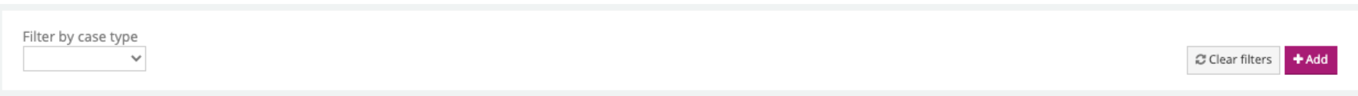



3. Select Save to confirm your changes.

## 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:

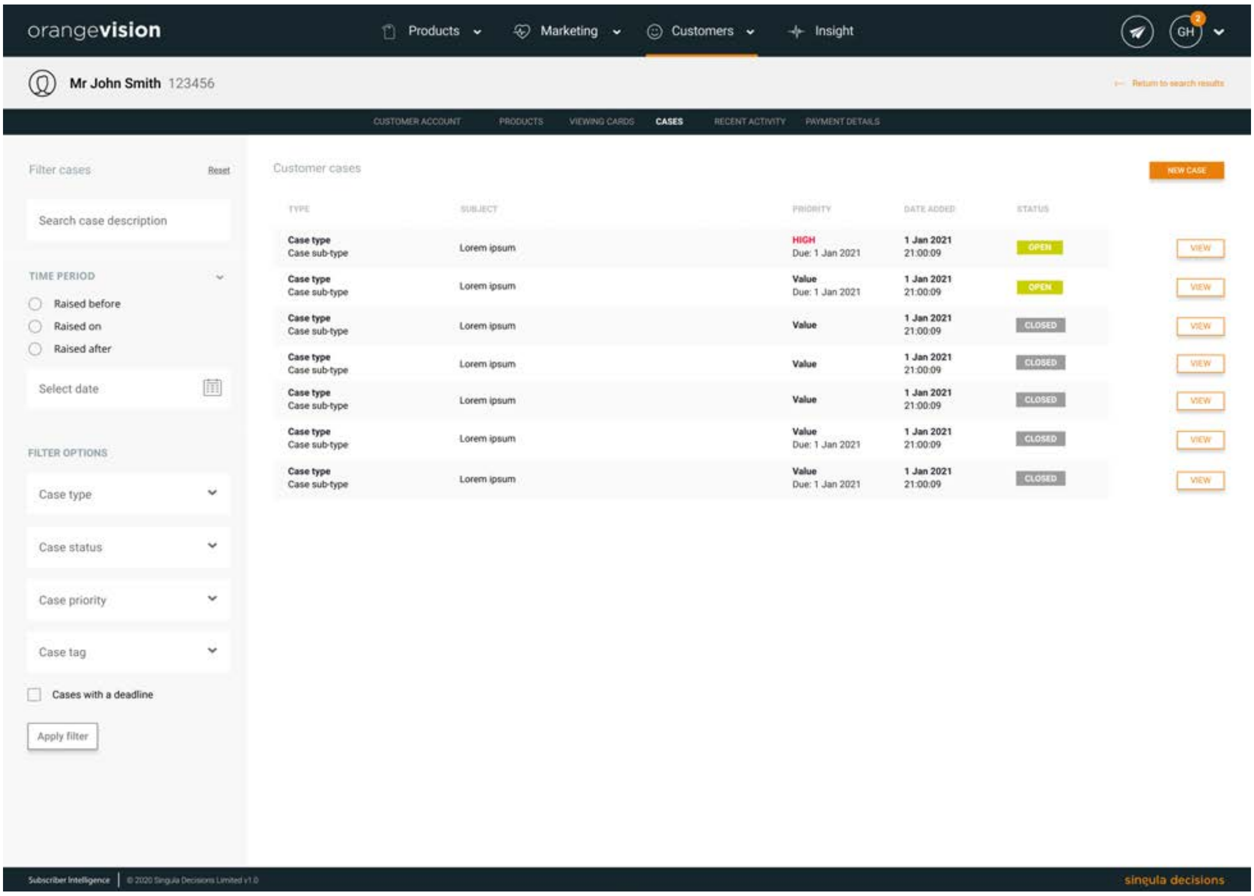


# BETA Customer cases

## VIEWING CUSTOMER CASES

Customer cases are used by customer service agents to record customer contacts.

1. Find a customer account
2. View the most recent 'Open' cases within the 'Cases' widget on the customer account page
3. Recently opened cases can be opened directly from the customer account by selecting the '>' icon within the widget
4. To view all customer cases, select 'Cases' from the customer account menu




## FINDING CUSTOMER CASES

You can quickly find cases using the available filters. Choose from:

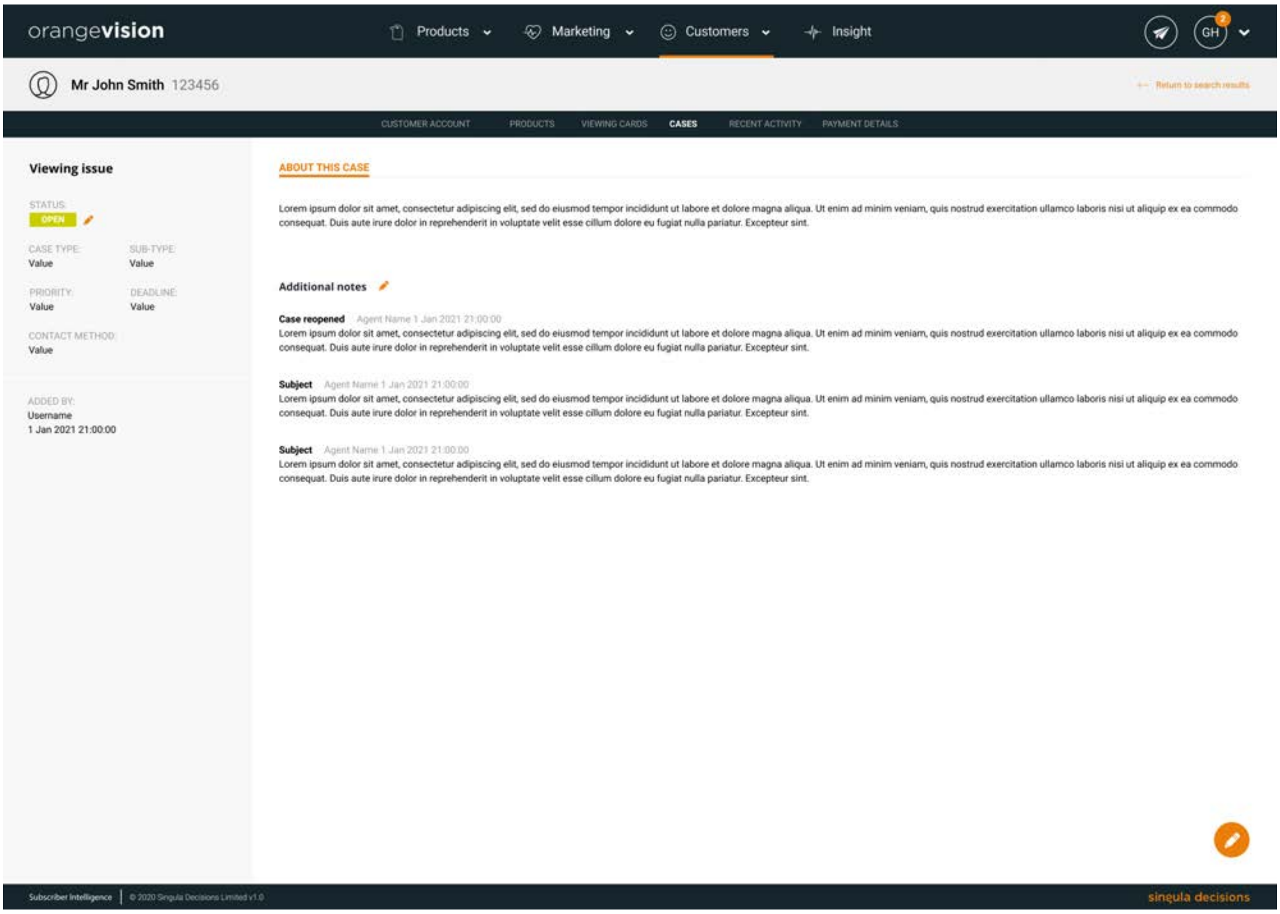
- time period - case raised before or after a date
- case type - cases that have been created with a certain case type
- case status - open or closed cases
- case priority - the priority allocated to the case when created
- search - find cases based on keywords in the subject and description

## VIEWING A CUSTOMER CASE

1. From the cases page, select 'View' to view a customer case
2. Recently opened cases can be opened directly from the customer account by selecting the '>' icon within the widget
3. The case will be displayed. You will see:

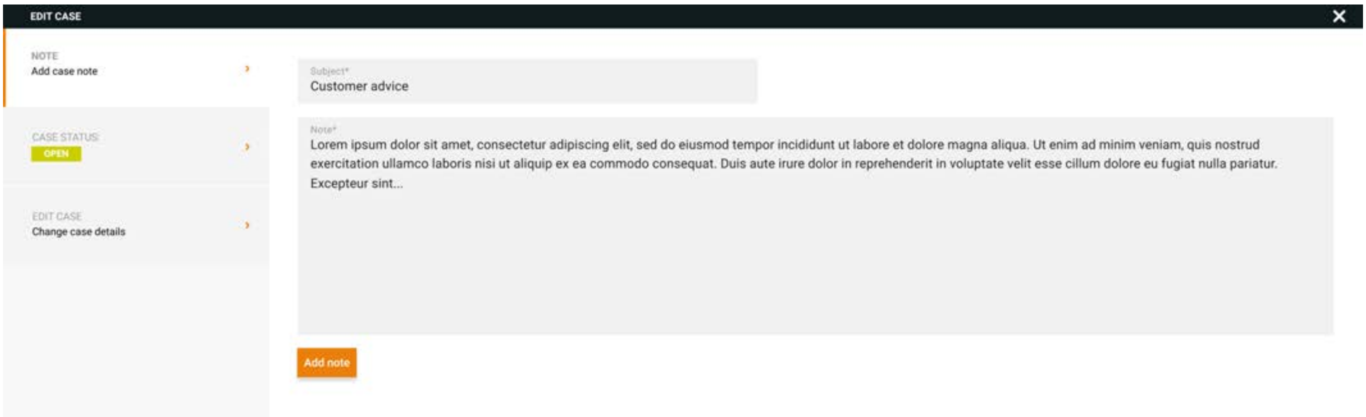
- The status of a case - OPEN or CLOSED
- The type of case

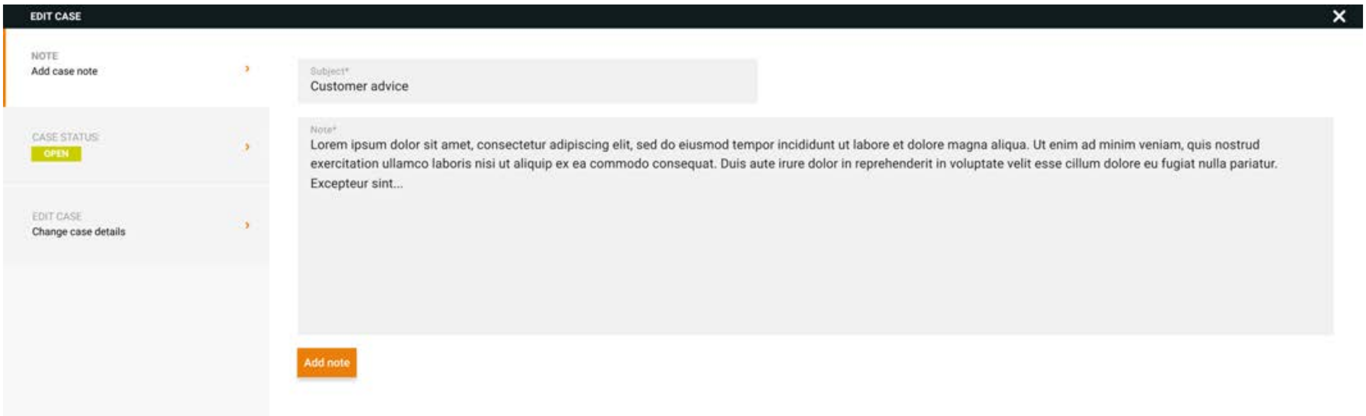
- Priority of case - if applied
- Case deadline - if applied
- Contact method
- Who and when the case was added
- Case details
- Additional notes added to the case allowing you to track history including closed and reopened notes.




## ADDING A NOTE TO A CUSTOMER CASE

1. Locate the customer account and customer case
2. Select the pencil icon next to 'Additional notes' or select the pencil icon in the lower corner of the page
3. The edit case panel will appear from the bottom of the screen
4. Select the note section. It may already be selected by default
5. Choose a subject from the dropdown
6. Add your note
7. Select 'Add note' to apply the note to the existing case

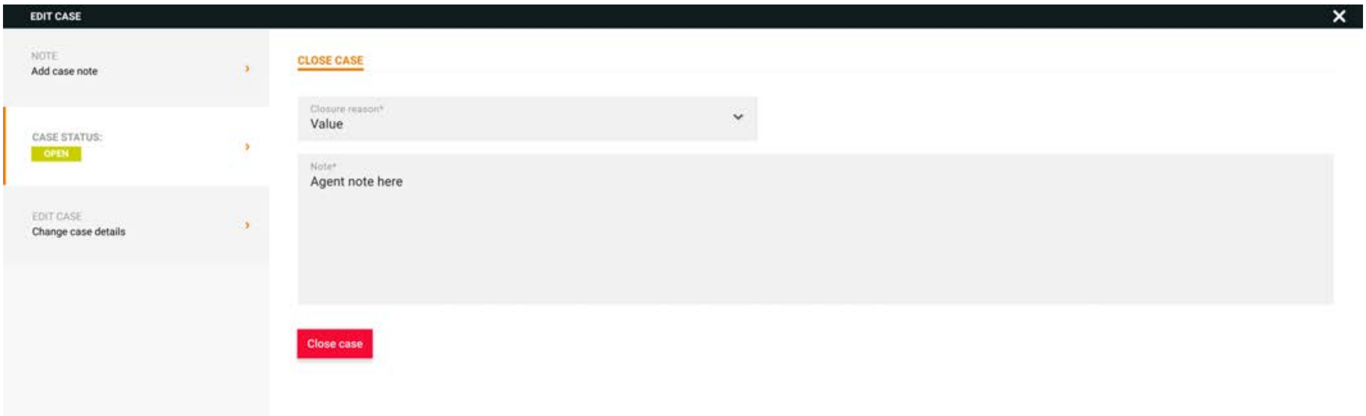



## CLOSE A CUSTOMER CASE

Once a customer case has been actioned or is no longer required it should be closed

1. Locate the customer account and an open customer case
2. Select the pencil icon next to 'Status' or select the pencil icon in the lower corner of the page
3. The edit case panel will appear from the bottom of the screen
4. Select the 'Status' section. It may already be selected by default
5. Choose a closure reason from the dropdown
6. You'll need to add a note to explain the closure
7. Select 'Close case'
8. The case will now be closed and the closure reason will be displayed on the case




## REOPEN A CUSTOMER CASE

Once a customer case has been closed, it can be reopened for edit purposes

1. Locate the customer account and a closed customer case
2. Select the pencil icon next to 'Status' or select the pencil icon in the lower corner of the page
3. The edit case panel will appear from the bottom of the screen
4. Select the 'Status' section. It may already be selected by default
5. Choose a reopen reason from the dropdown
6. You'll need to add a note to explain the reason for reopening the case
7. Select 'Reopen case'
8. The case will now be opened and the reopen reason will be displayed on the case

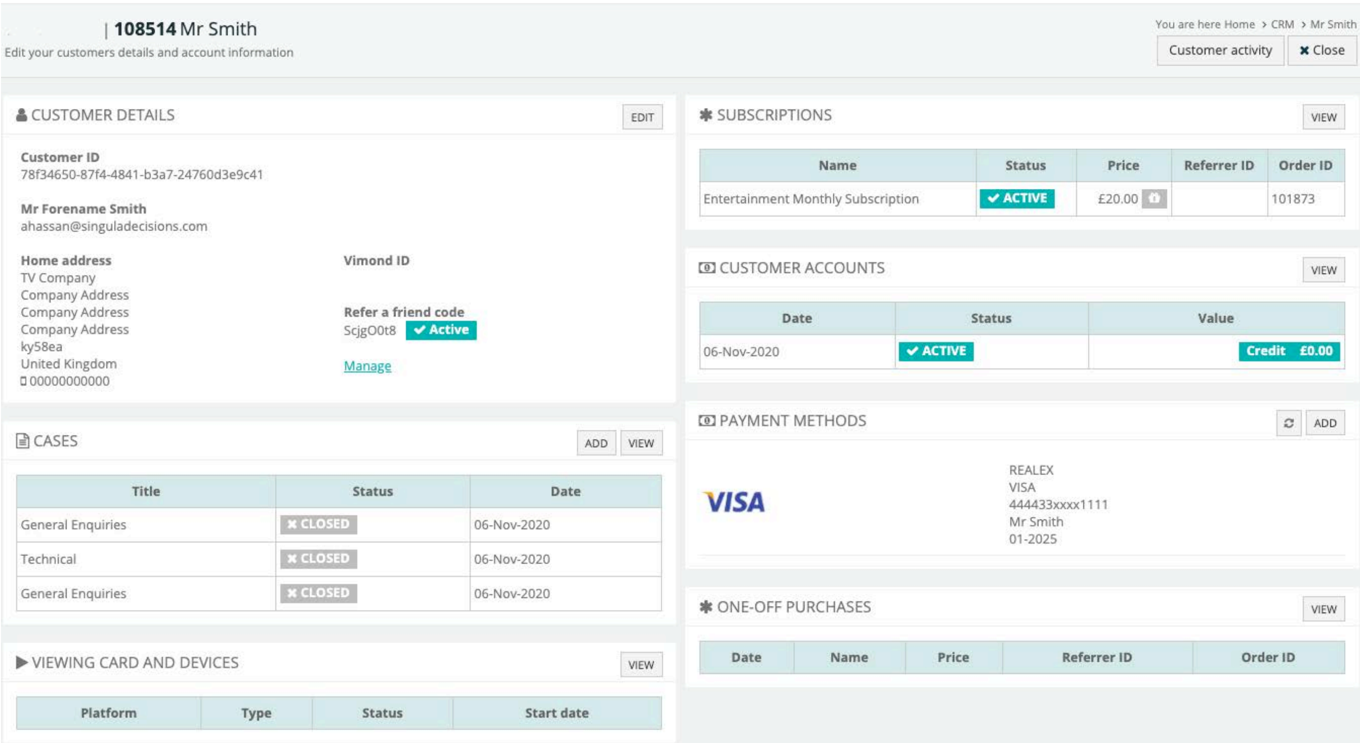
# Customer activity

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.

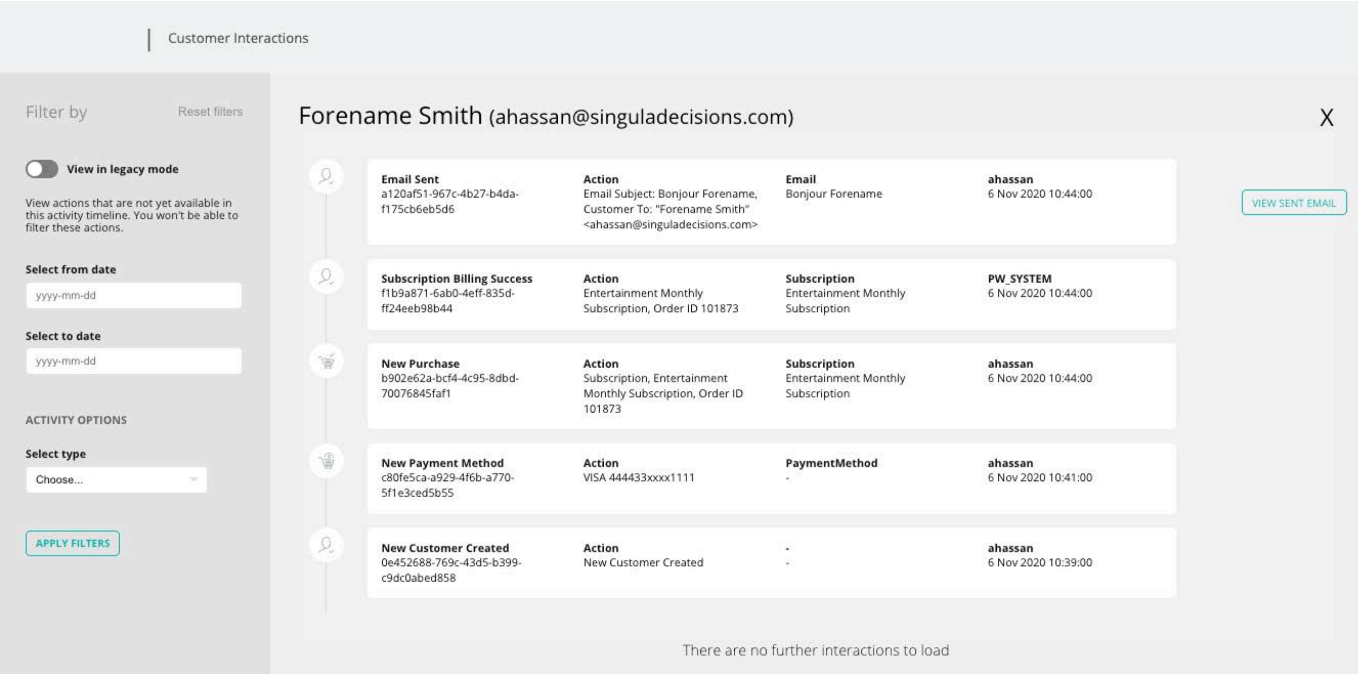
## HOW TO VIEW THE INTERACTIONS

To see the interactions on an account:

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

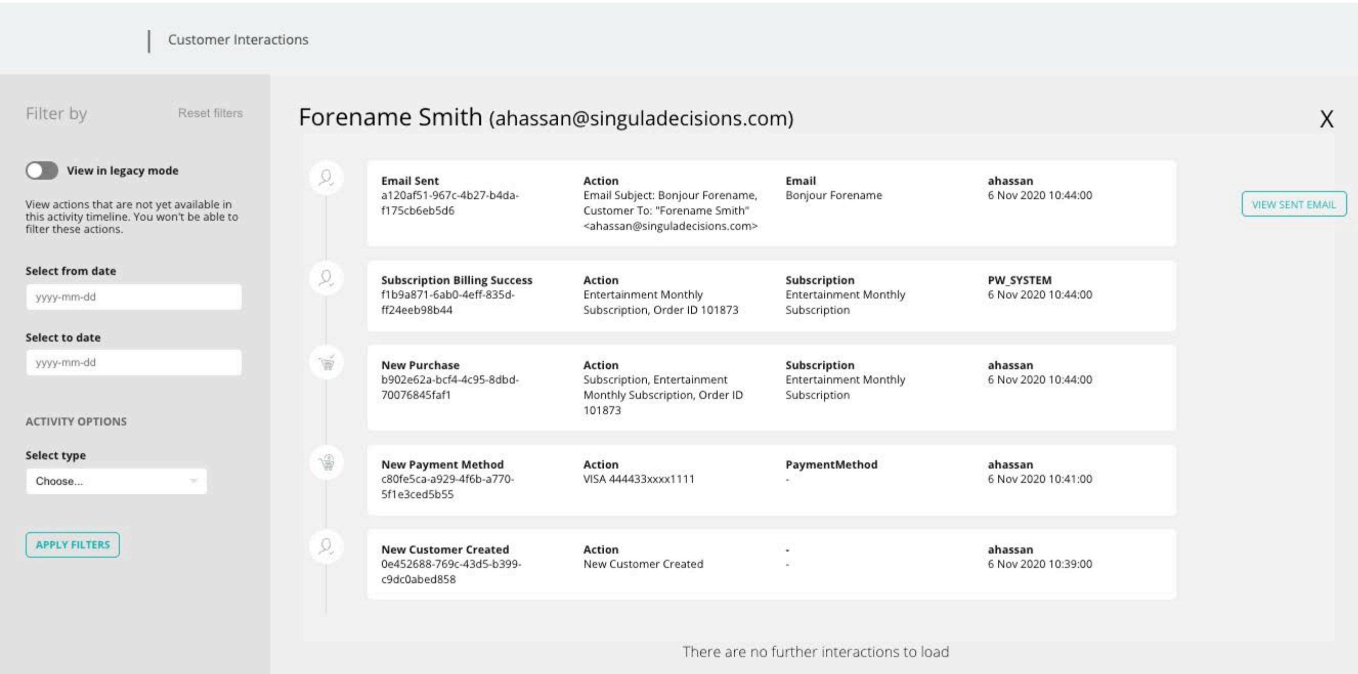



This will open the Customer Activity in a new window:




## CUSTOMER ACTIVITY

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




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)

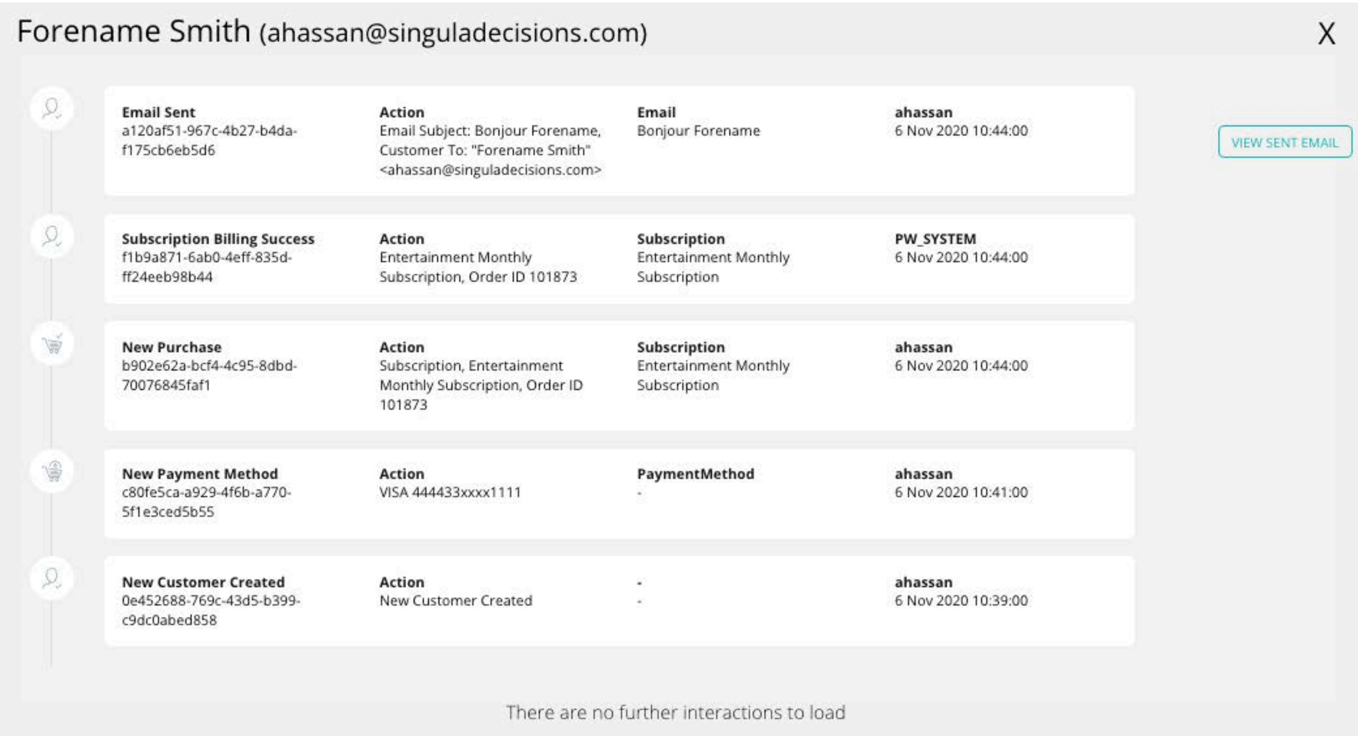
### Legacy Interactions

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.

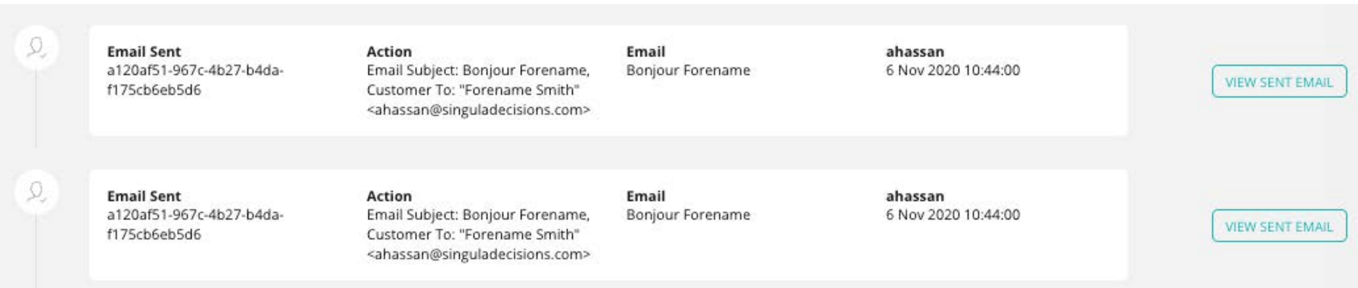

## OVERVIEW OF INTERACTIONS

Interactions are presented in order of newest first:




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

See the example below:




Each interaction will display specific attributes.

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

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

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

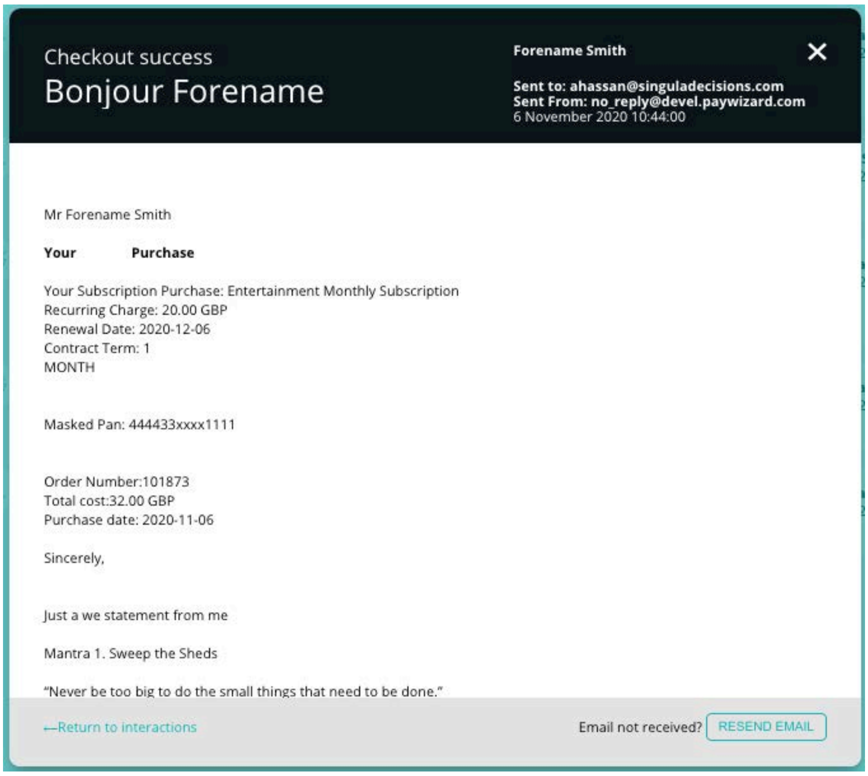
| | |
|---|---|
| | - Subscription product name that is paused<br>- Subscription Order ID |
| Customer's scheduled paused subscription is cancelled | - Unique ID<br>- Title of interaction = 'Scheduled Pause cancelled'<br>- User ID (for Agent initiated action)<br>- 'System' (for API or SSM initiated action)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

## 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:

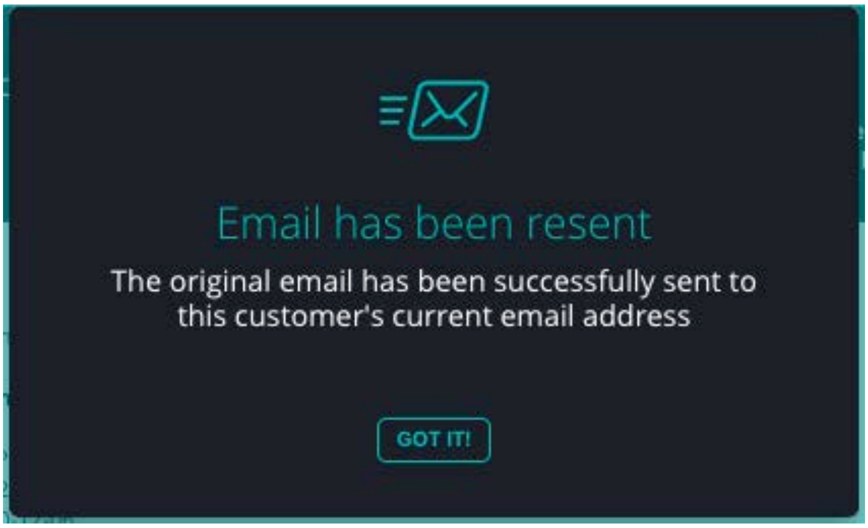

The sent email will be displayed in a pop-up window.

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.



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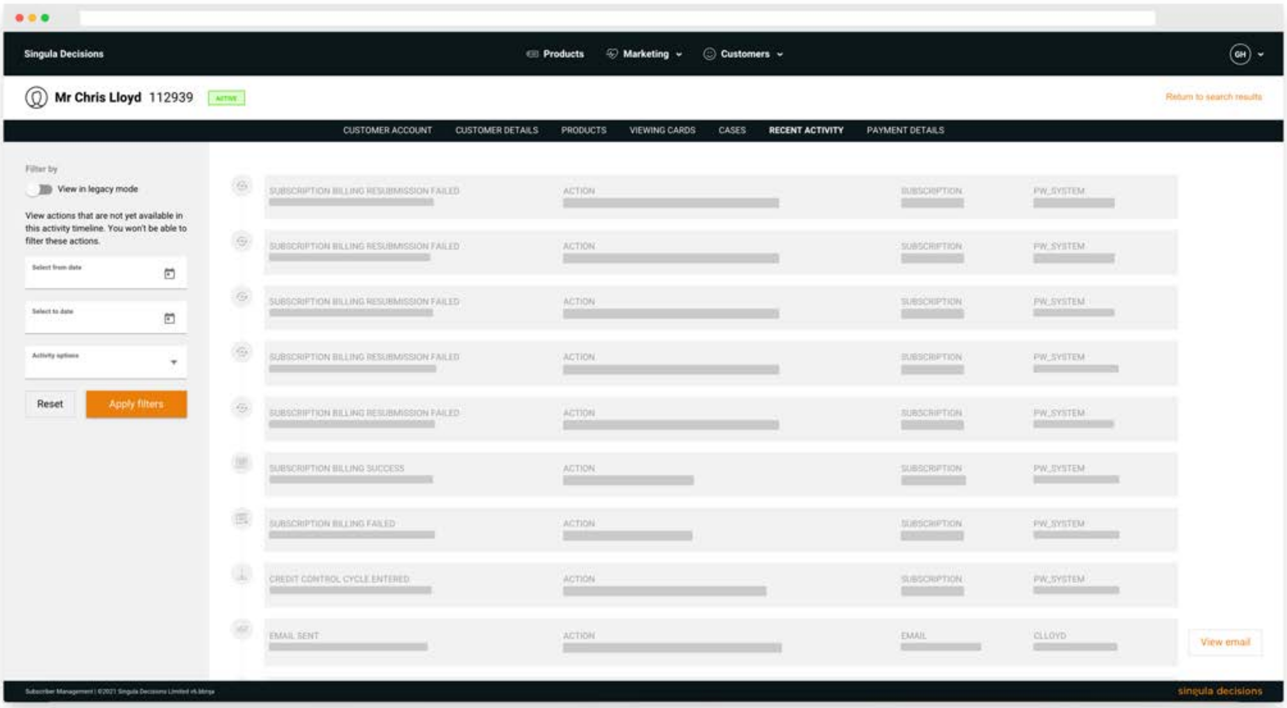
# BETA Customer activity

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

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

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

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

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

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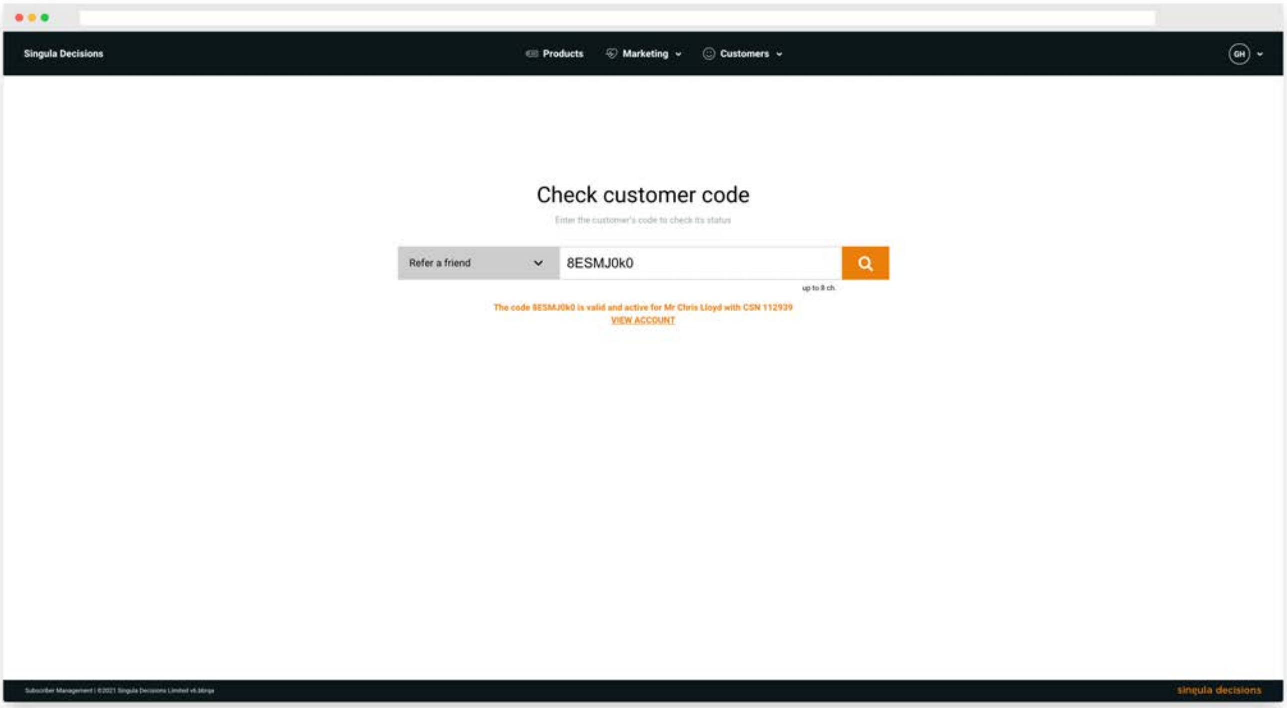
# Customer codes

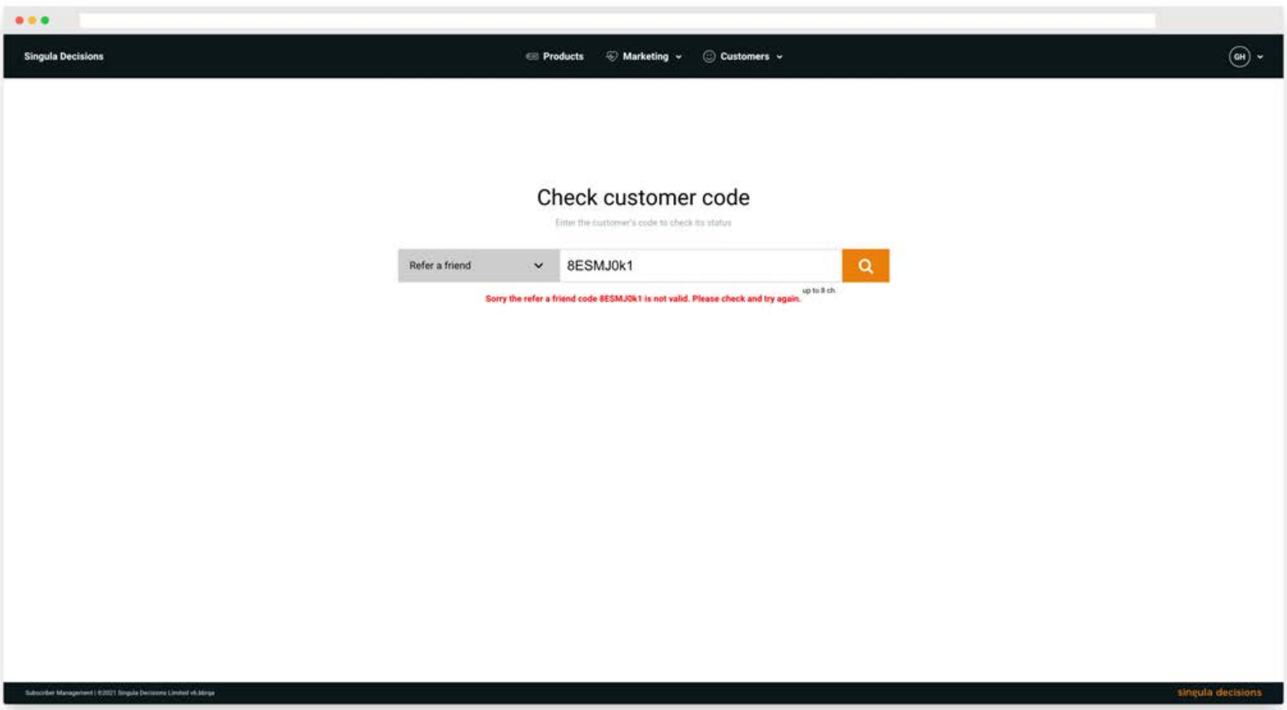
## REFER A FRIEND CODE

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.

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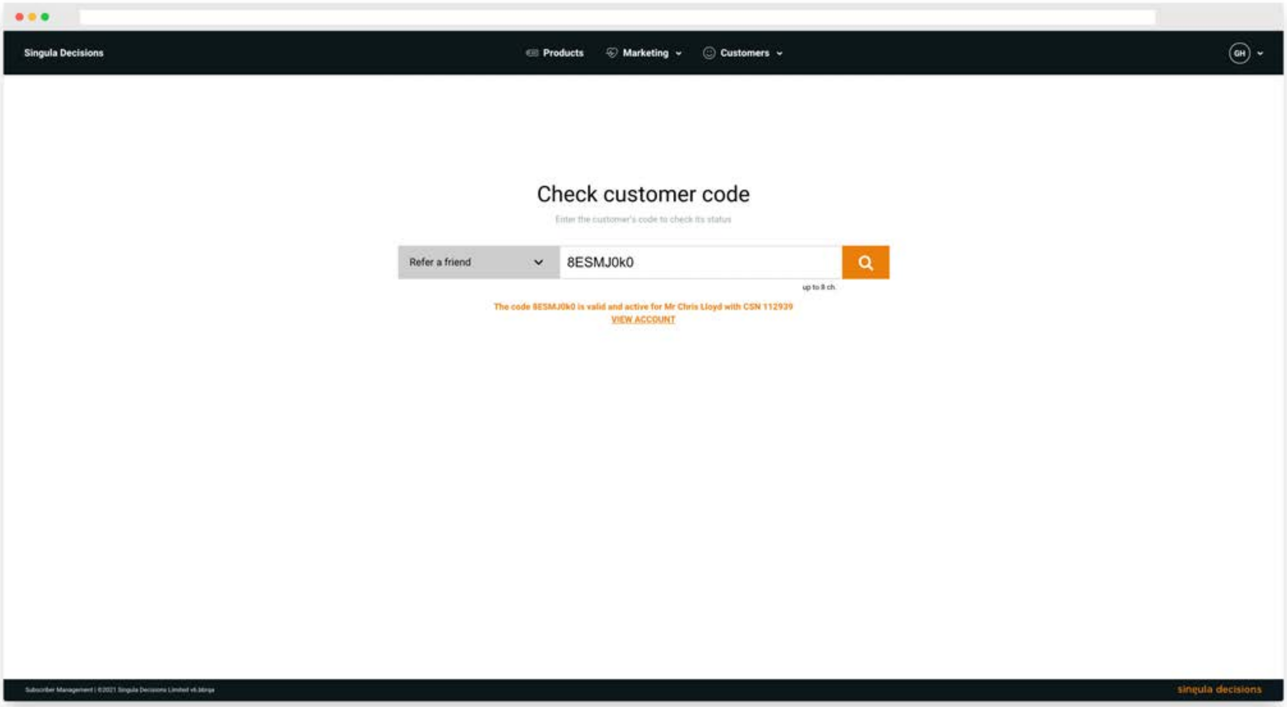
# BETA Customer codes

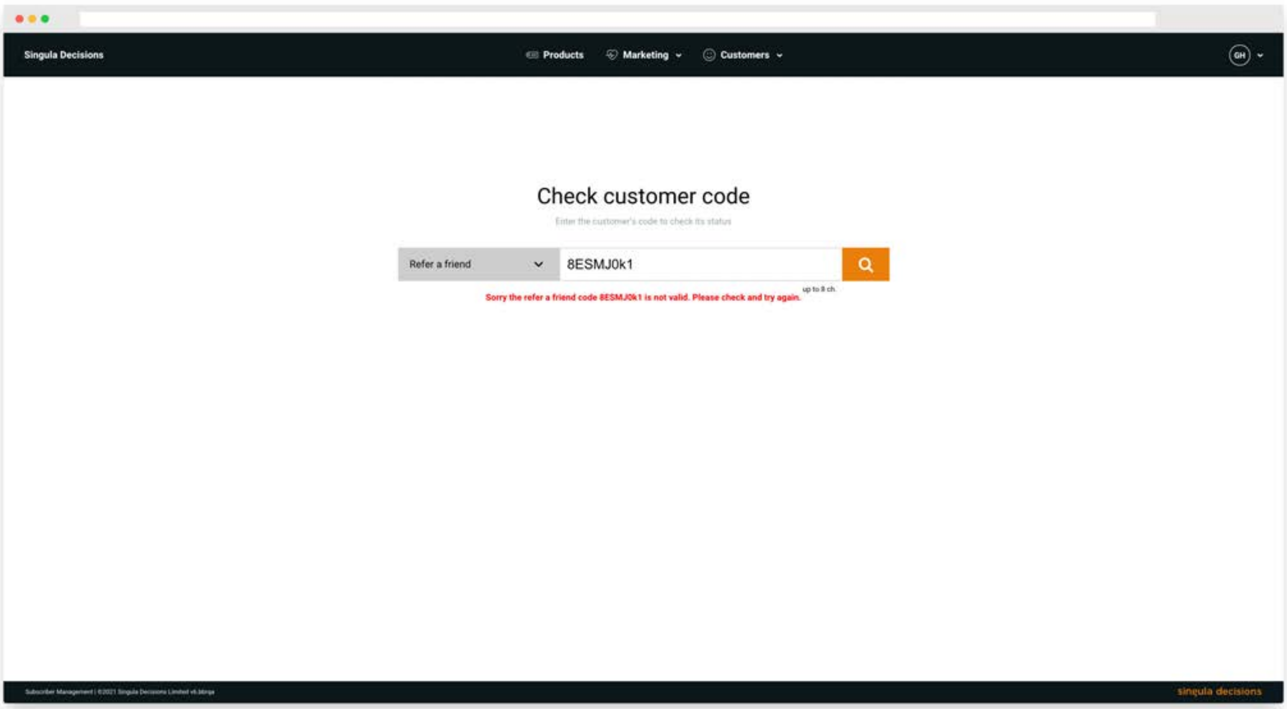
## REFER A FRIEND CODE

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



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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.

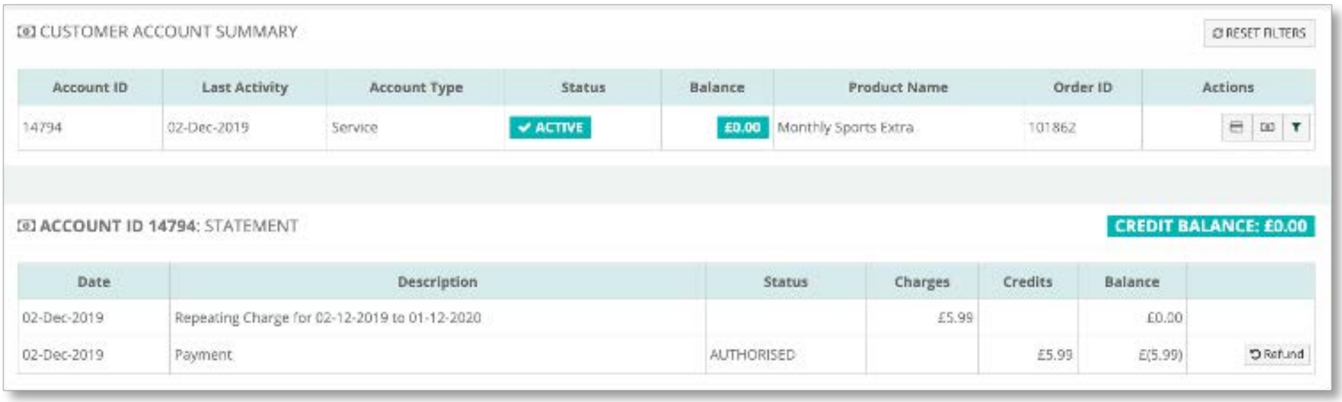
## CUSTOMER REFUND

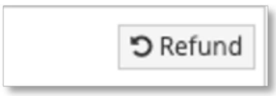
The process of providing a refund is done within the Customer Accounts section. The refund will go back to the payment method used for the subscription or the purchase.

## TO PROCESS A REFUND:

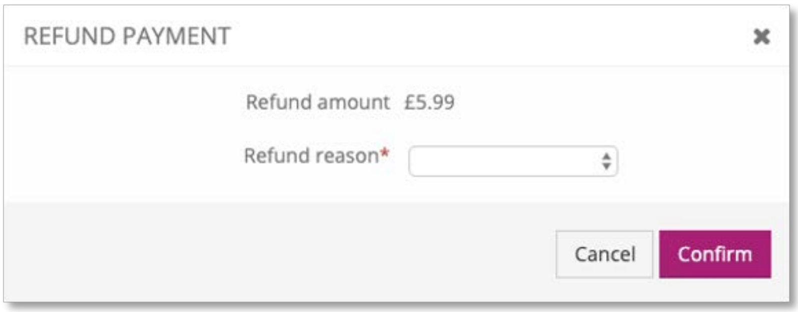
1. Click the View button in the top right corner of the Customer Accounts section:


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




This will open the Refund Payment window




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

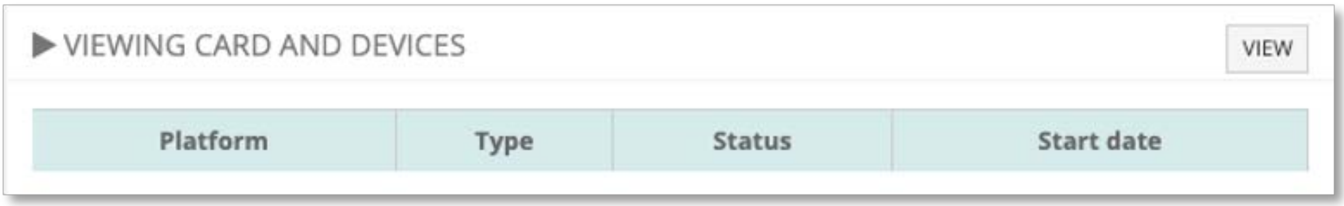
| Date | Description | Status | Charges | Credits | Balance |
|---|---|---|---|---|---|
| 03-Dec-2019 | Refund Credit | AUTHORISED | | £5.99 | £0.00 |
| 03-Dec-2019 | Refund Payment | AUTHORISED | | £(5.99) | £5.99 |
| 02-Dec-2019 | Repeating Charge for 02-12-2019 to 01-12-2020 | | £5.99 | | £0.00 |
| 02-Dec-2019 | Payment | REFUNDED | | £5.99 | £(5.99) |

# Customer devices and platforms

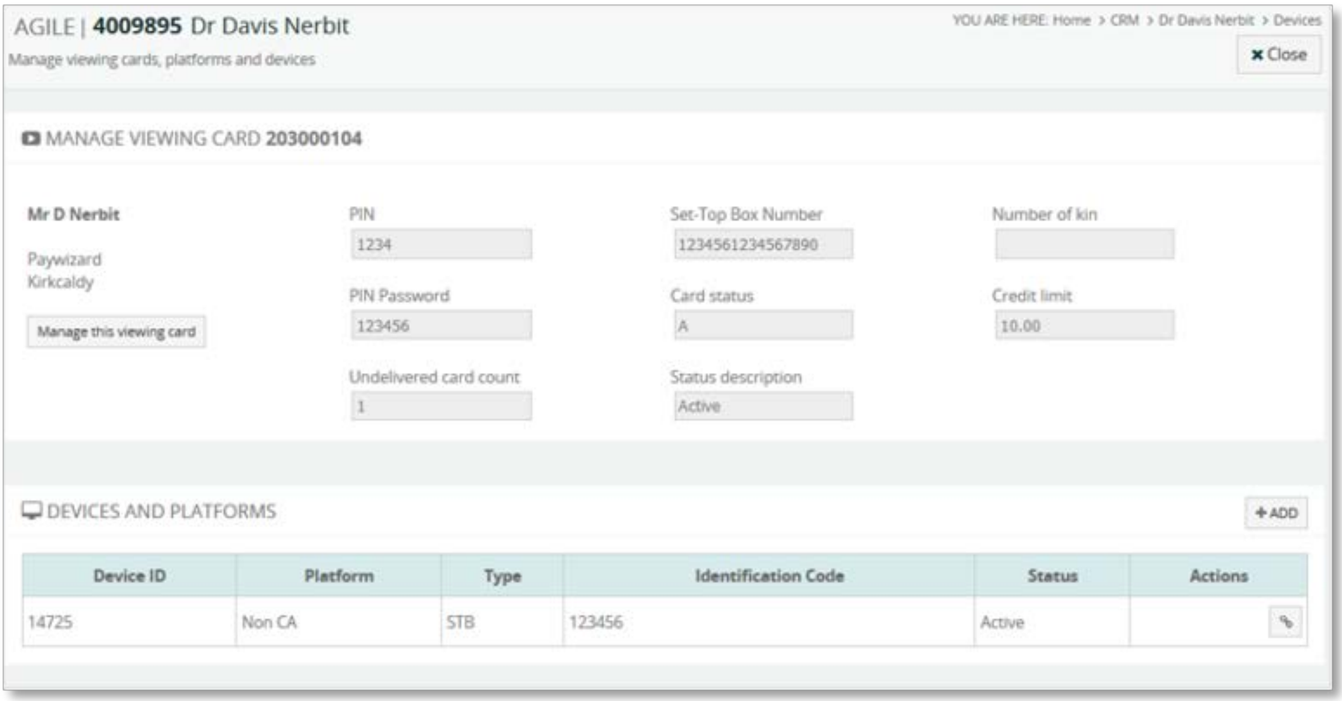
The Viewing card and devices box gives a quick glance of the customer's viewing card number (VCN) and any devices associated to their account.

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

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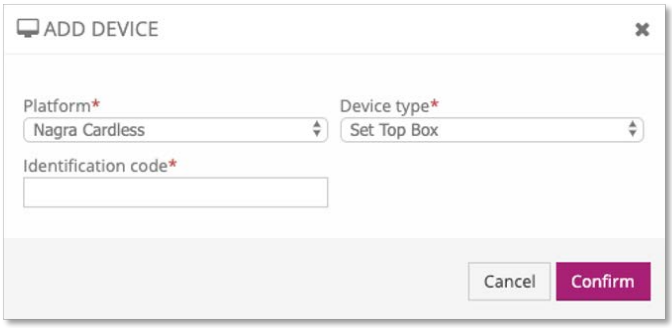
## Add a Device

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

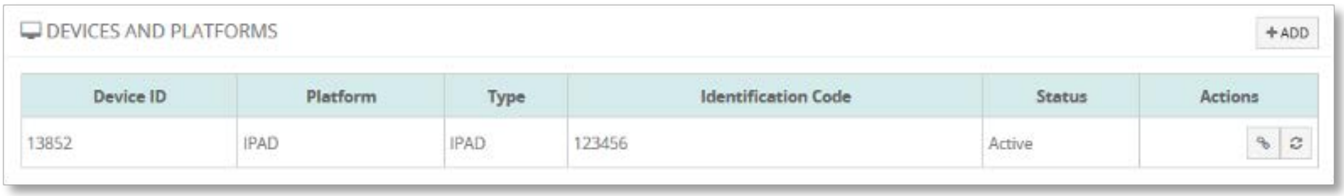
This will display the Add device window:




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

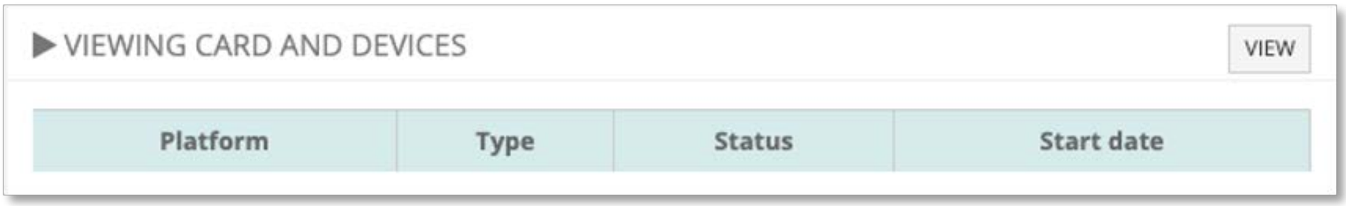
| Device ID | Platform | Type | Identification Code | Status | Actions |
|---|---|---|---|---|---|
| 13852 | IPAD | IPAD | 123456 | Active | |

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

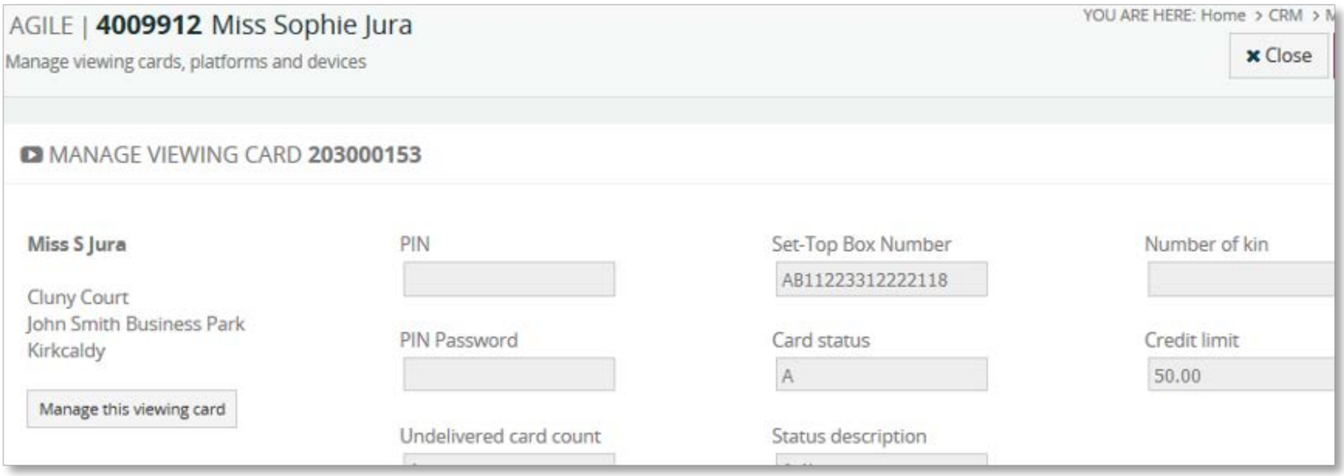
# Customer Sky viewing card

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

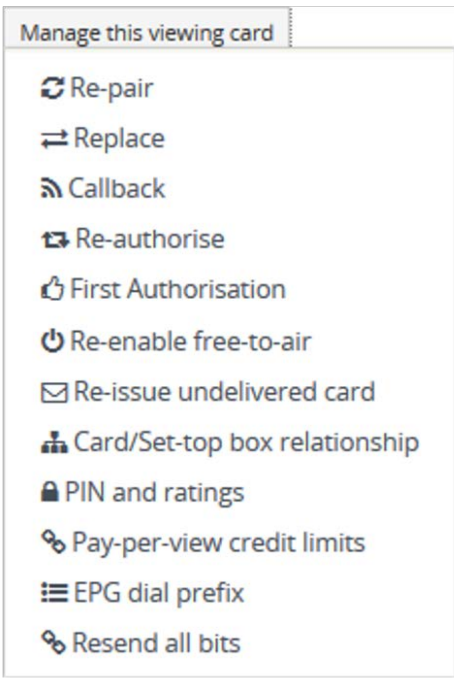
1. Click on View in the Viewing Card and Devices section:




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

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# Inbox messages

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

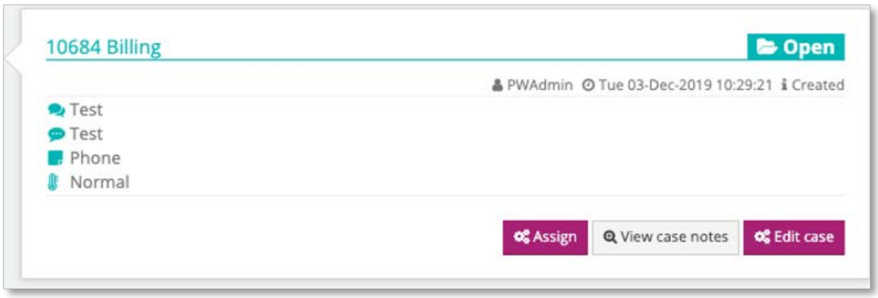
Cases can then be assigned to an Inbox where a User may take ownership and 'handle' the Case eg a Finance User might take ownership of a Case in the Finance Inbox that had been raised where a Customer had complained about poor video quality.

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

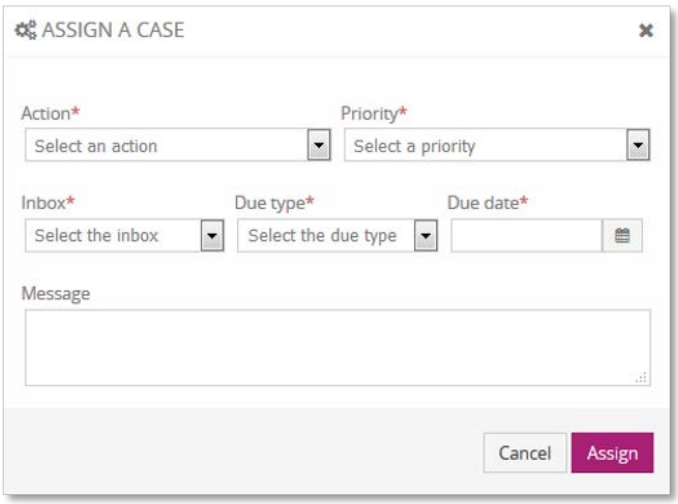
## SENDING AN INBOX MESSAGE

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.

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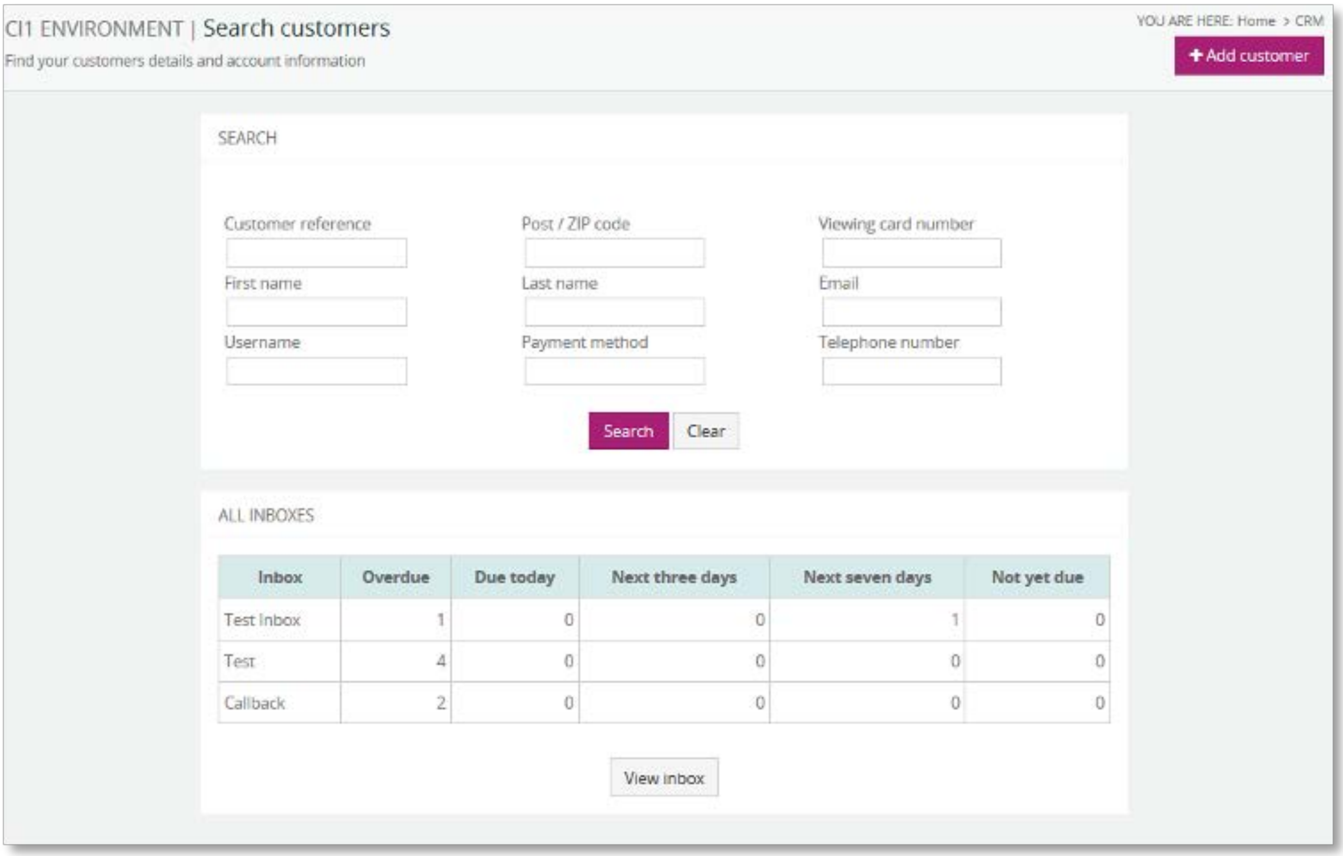
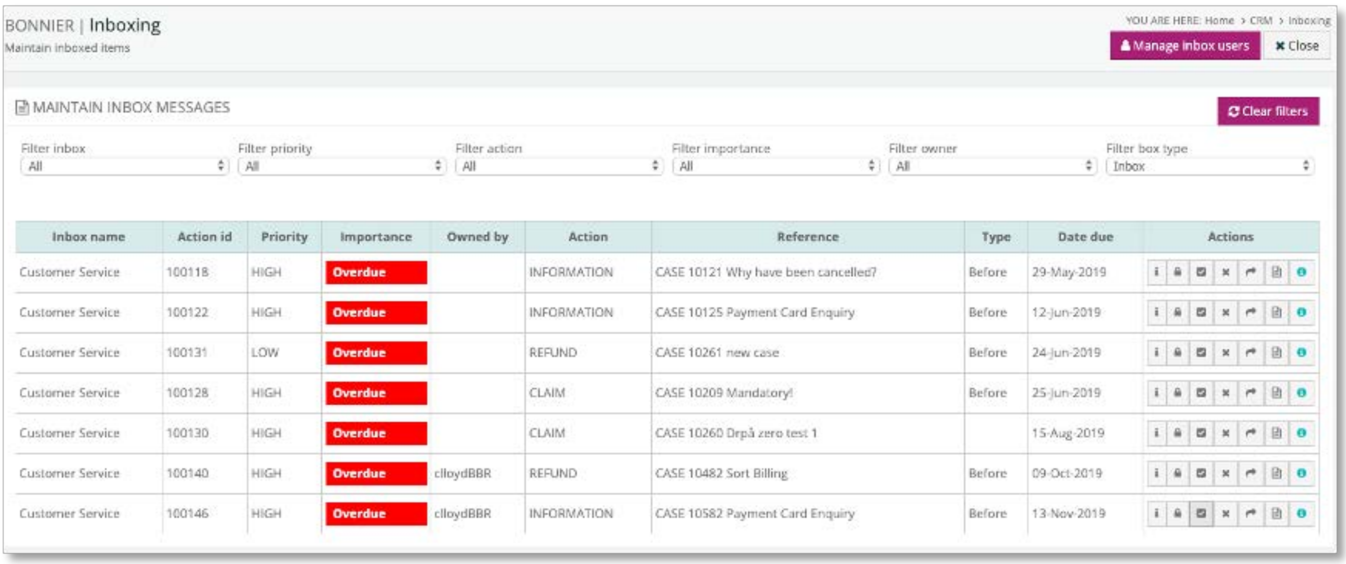
# Viewing Inbox messages

Providing you have access to view inboxes:

1. Go to the Search customers screen
2. Select 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:



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.

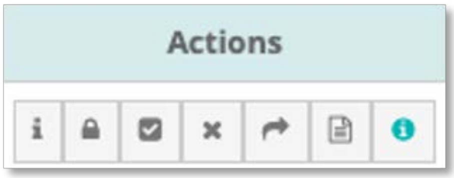
# Inbox actions

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 | Typ |
|---|---|---|---|---|---|---|---|
| Customer Service | 100124 | HIGH | Overdue | | CLAIM | CASE 10161 Cancel | Befor |
| 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 | Act |
|---|---|---|---|---|---|
| Customer Service | 100124 | HIGH | Overdue | PWAdmin | CLAIM |

## MARKING INBOX MESSAGES AS COMPLETE

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

.

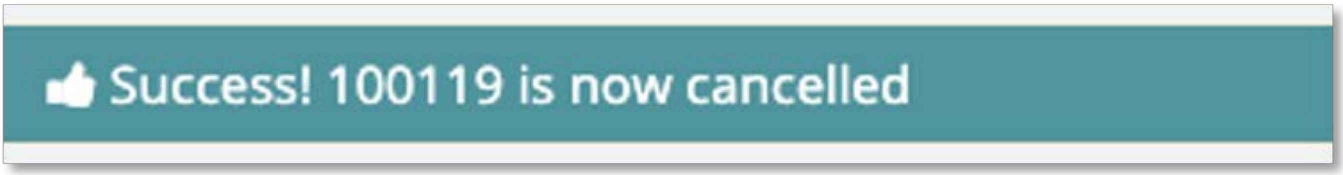
The inbox will now be removed from the 'Maintain inbox messages' table along with a success message at the top confirming the action.

Success! 100124 is now marked as complete

## CANCELLING INBOX MESSAGES

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

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

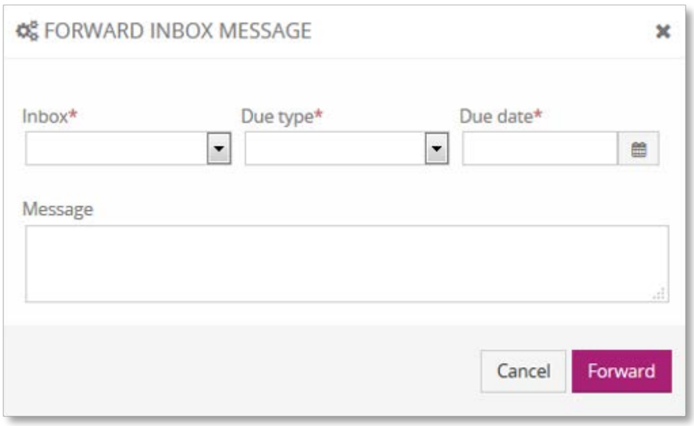



## FORWARDING INBOX MESSAGES

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

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

The 'Forward inbox message' window will be displayed:




Fill in the following fields:

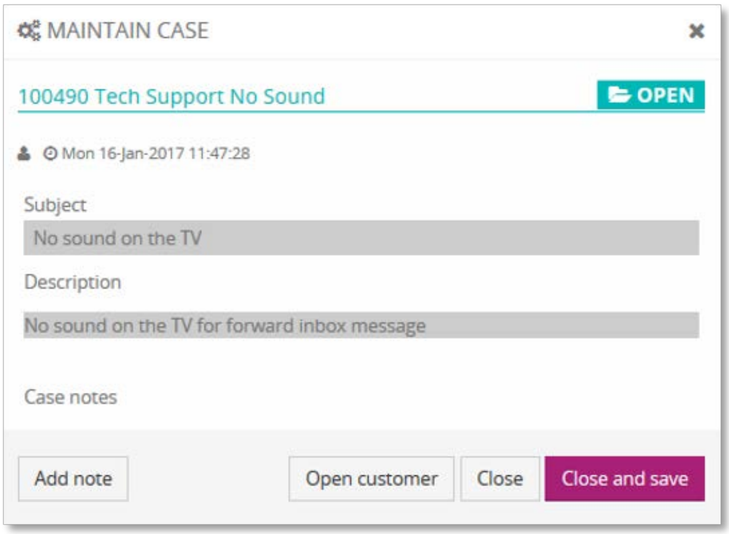
Inbox – Select another inbox to send the message to;
Due type –
Due date – Click on this field to reveal a calendar to select the due date from;
Message – Provide more detail about the inbox.

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

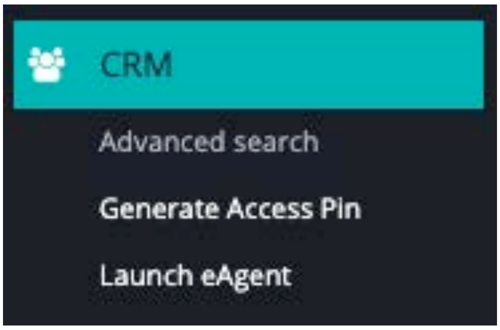
This functionality allows you to generate an Access PIN to give Non-DSAT Customers access to streaming services.

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.

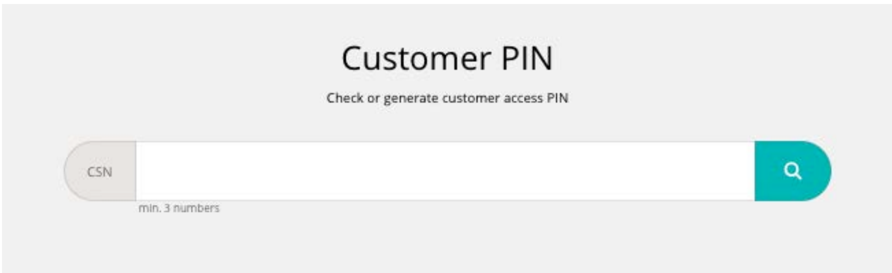
This Access PIN is unique to their Purchase or Subscription and they may get in touch to find out their Access PIN.

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.

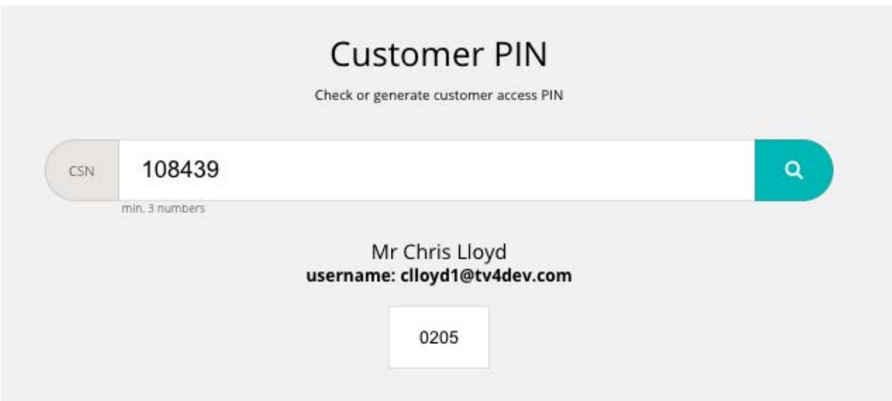
1. Select CRM
2. Select Generate Access PIN:



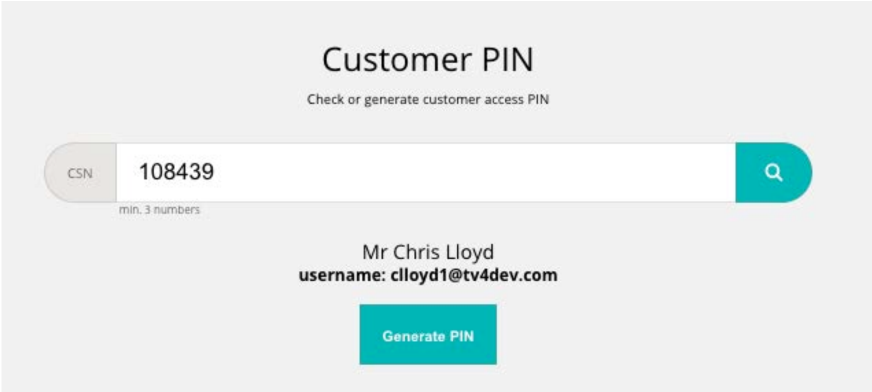

3. Search for the customer using their CSN




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




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
108439
min. 3 numbers
Mr Chris Lloyd
username: clloyd1@tv4dev.com
Generate PIN

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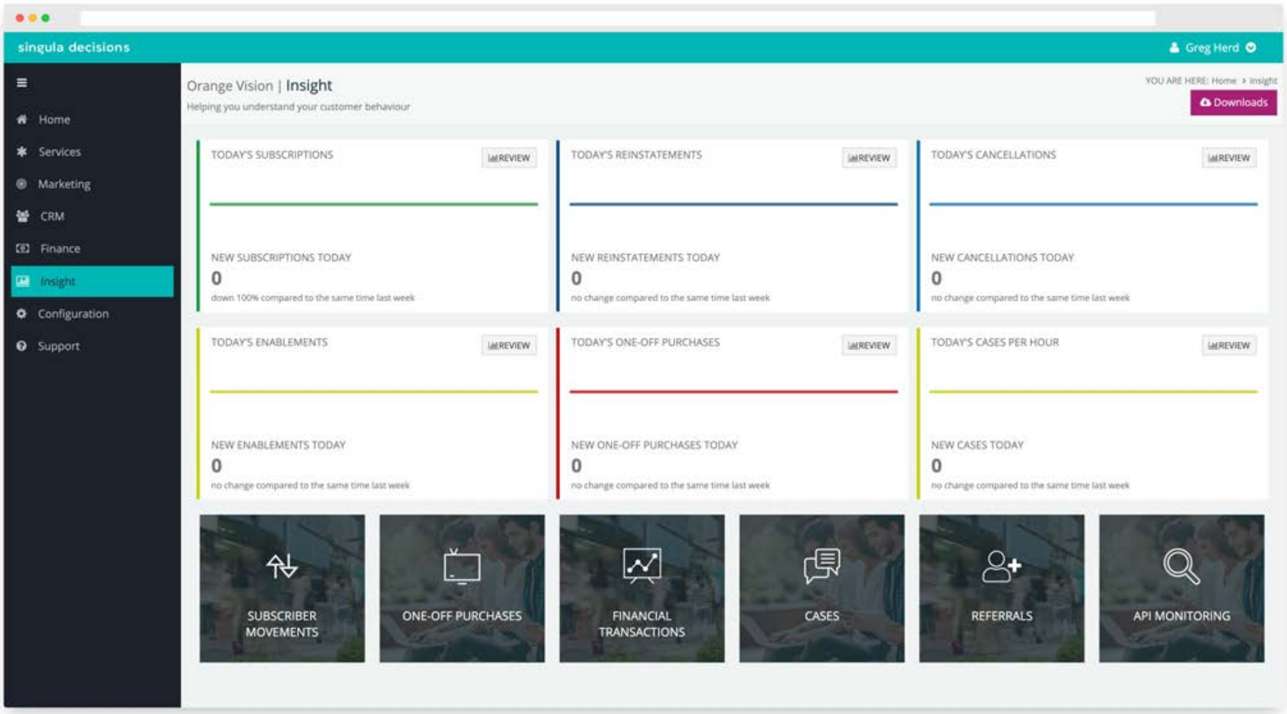
# INSIGHTS

## 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?**

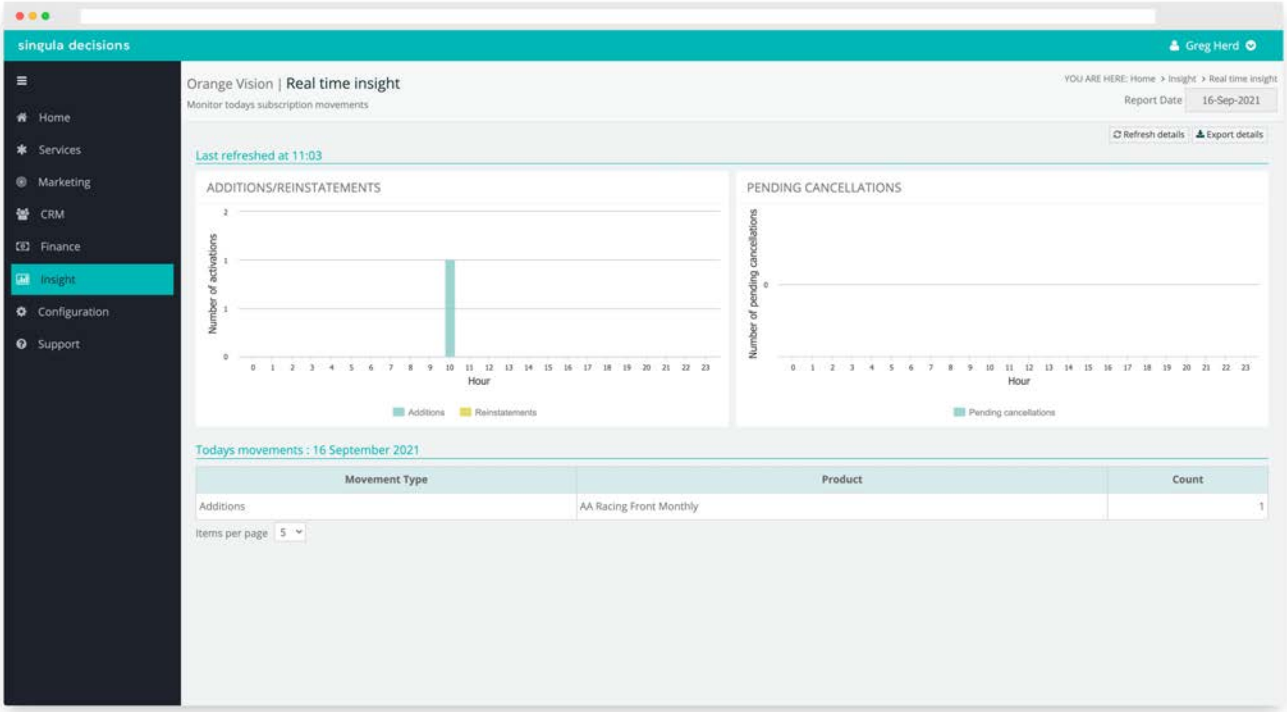
- Hovering your cursor over the graph line reveals statistics for that time period
- Comparisons of the day against the same day, last week
- Access detailed real-time reports
- Access a secure download area

## 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

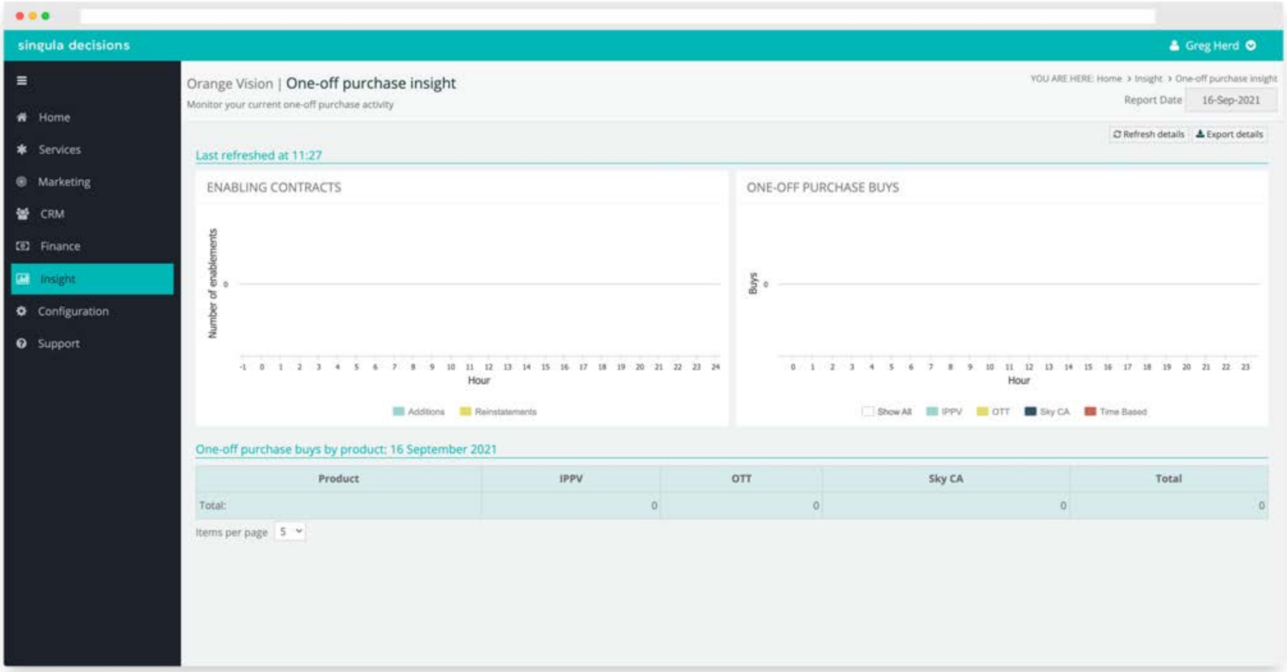



## ENABLEMENTS

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

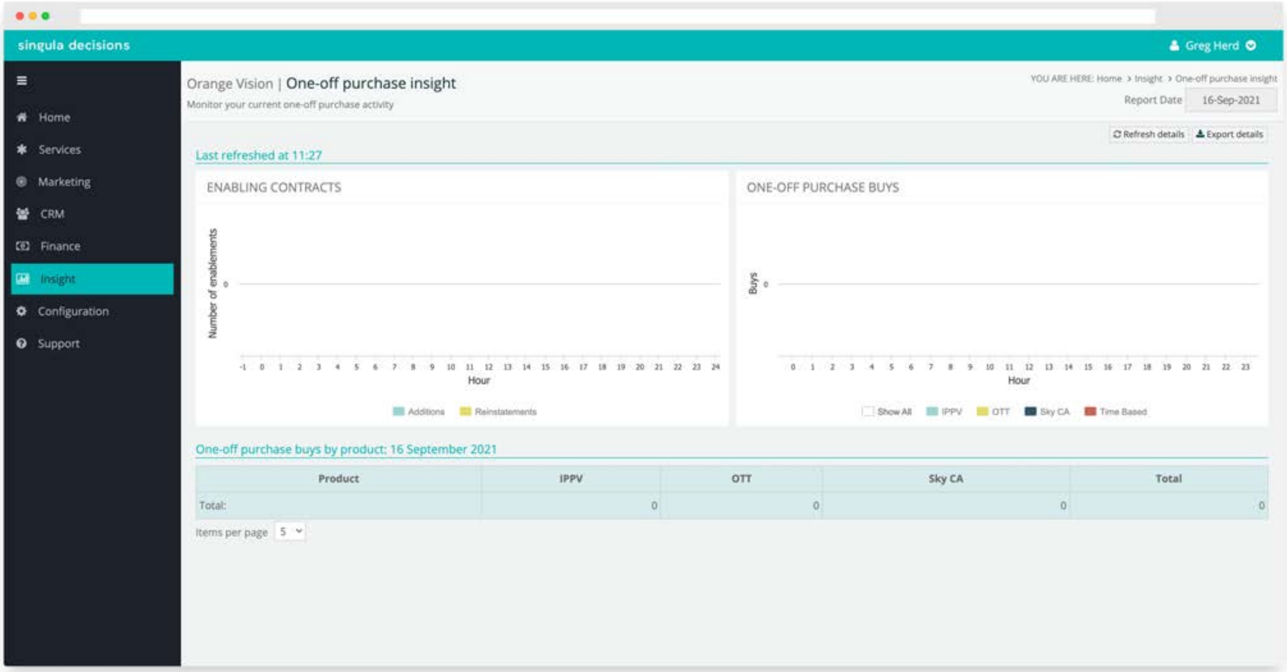



## ONE-OFF PURCHASES

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 techical issue or a billing enquiry
- A view showing 24-hours of activity
- Analyse your data further by downloading a detailed report in the either Excel or CSV. Select Export Details
- Filter views by toggling items within the legend

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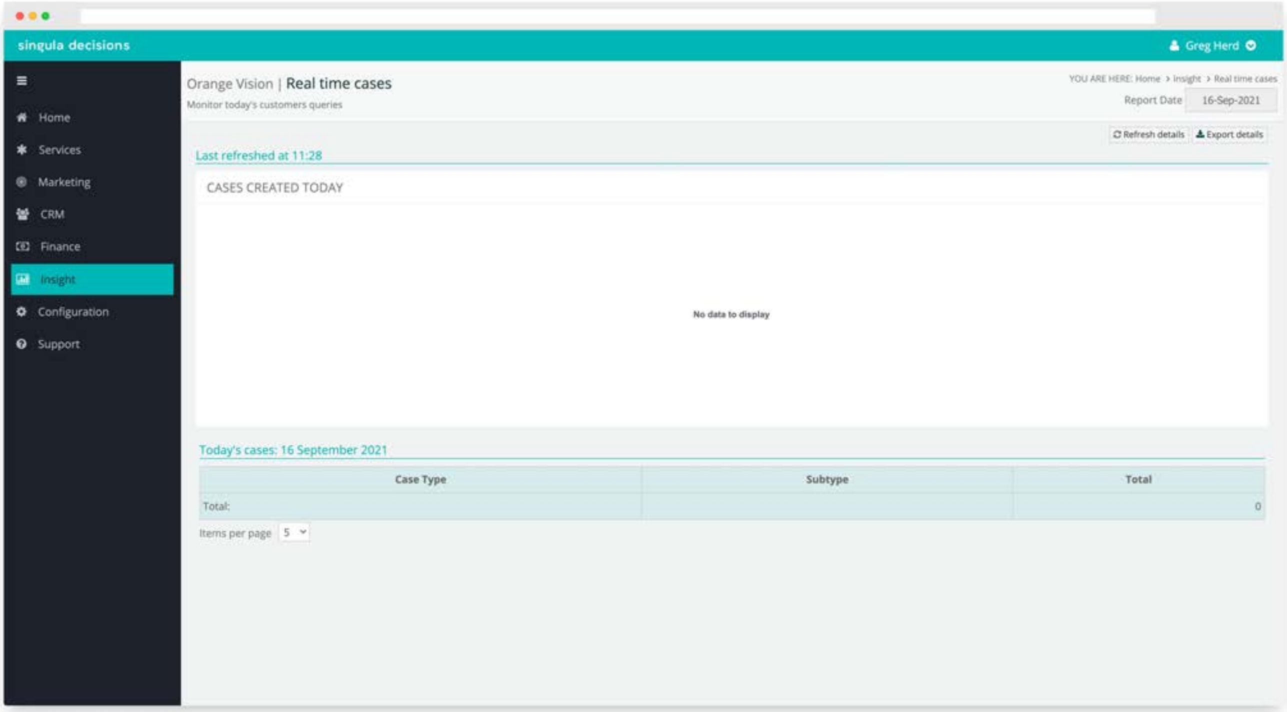
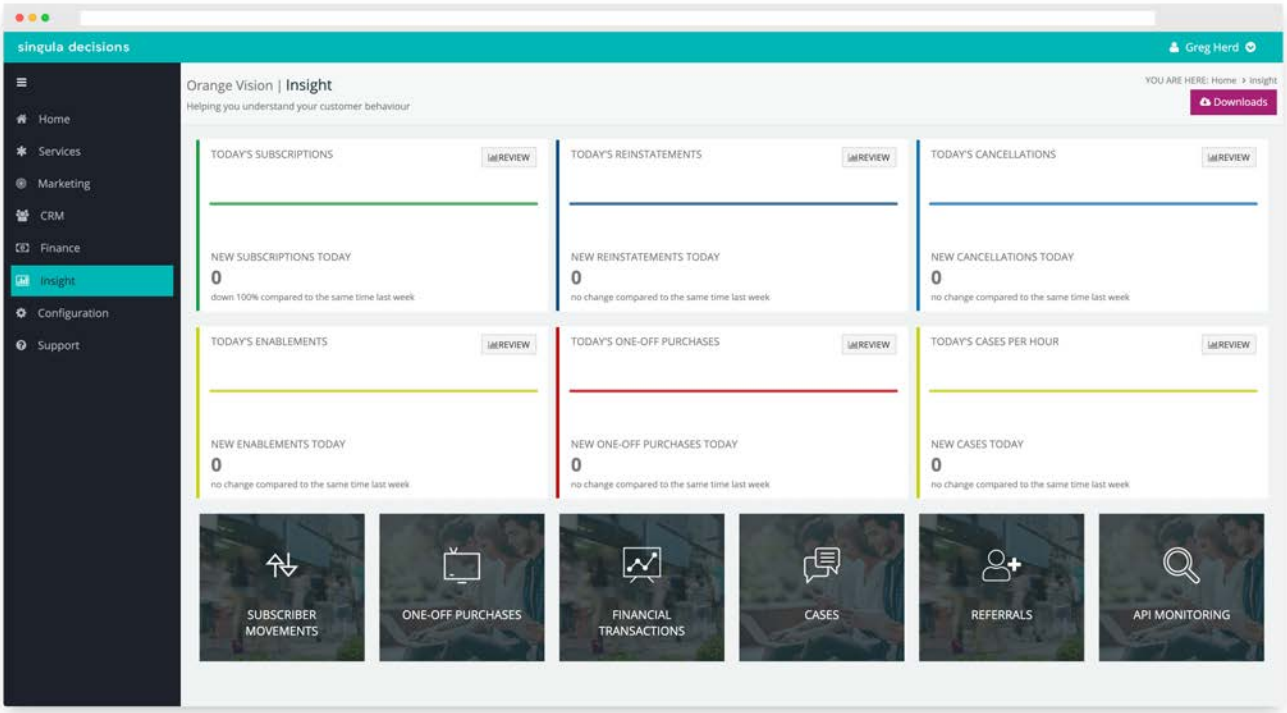
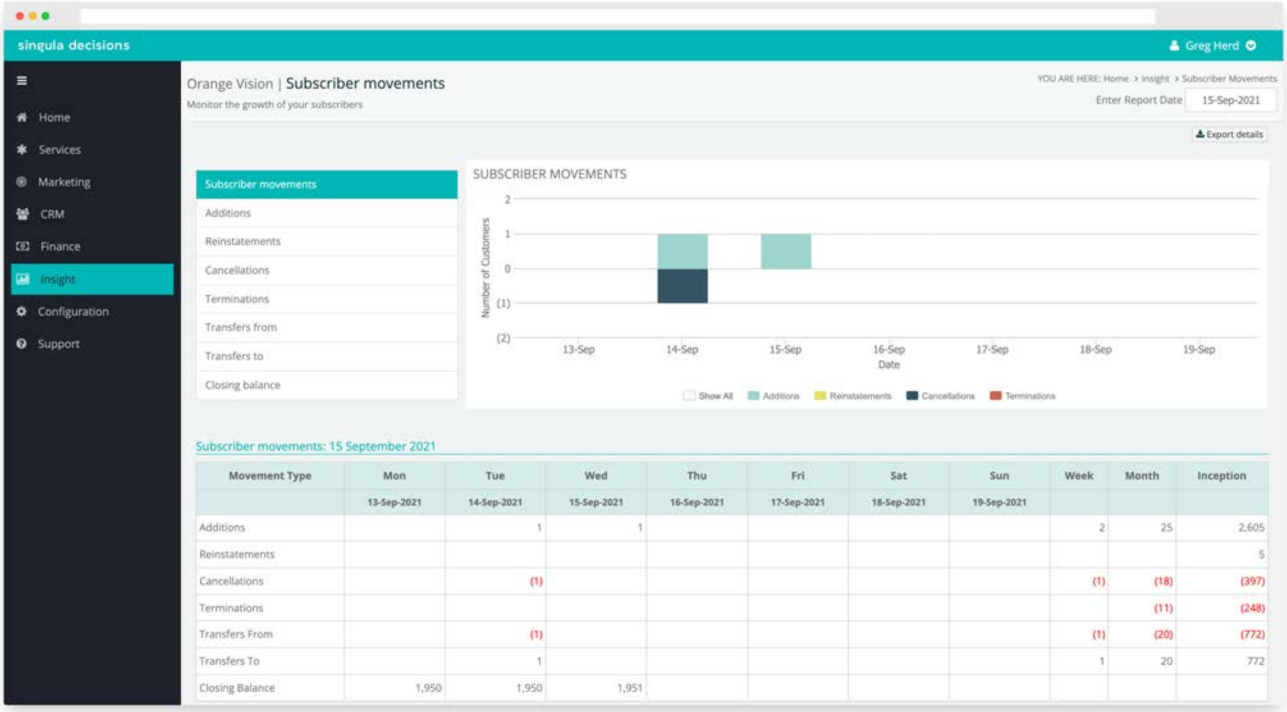



## HISTORICAL REPORTS

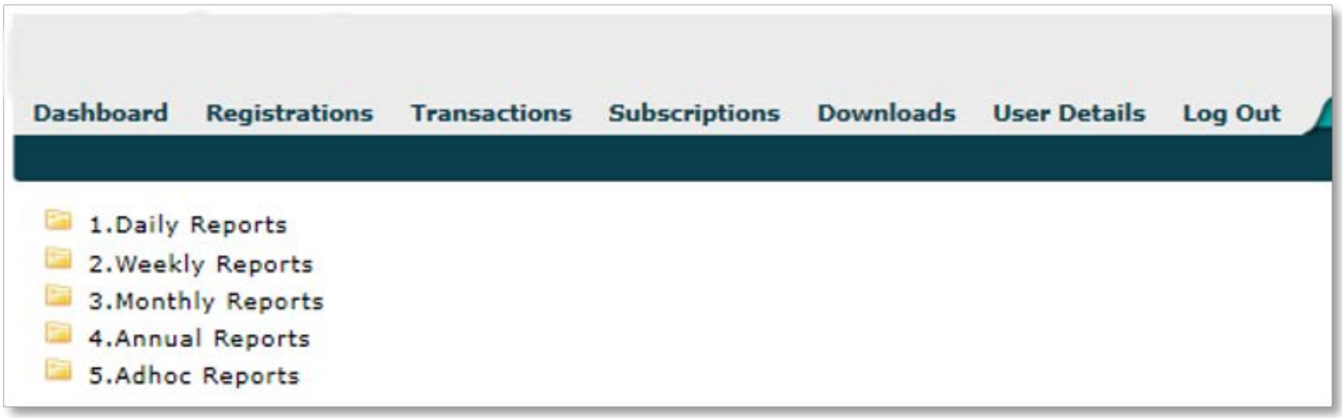



Each report reveals a detailed view along with the ability to download data for further analysis. You can filter the view by toggling items within the legend




## 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.




## BETA Downloads

### ACCESS DOWNLOADS

Downloads are used by the Singula Decision Business Intelligence team to provide you with custom reports.

1. Select 'Insight' from the main menu. You will only see the menu item if you have the correct role and permissions.
2. Select 'Downloads' from the menu

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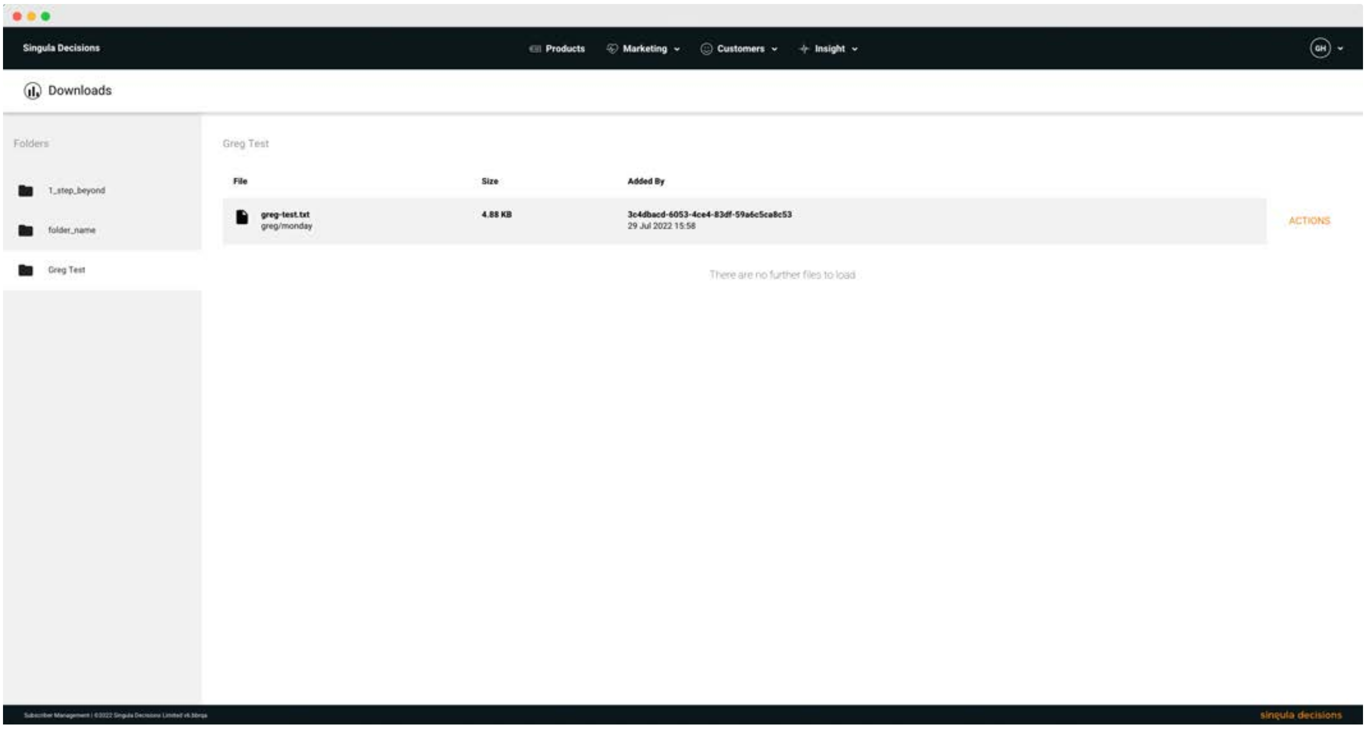



## VIEWING FOLDERS

Folders are used to organise your files

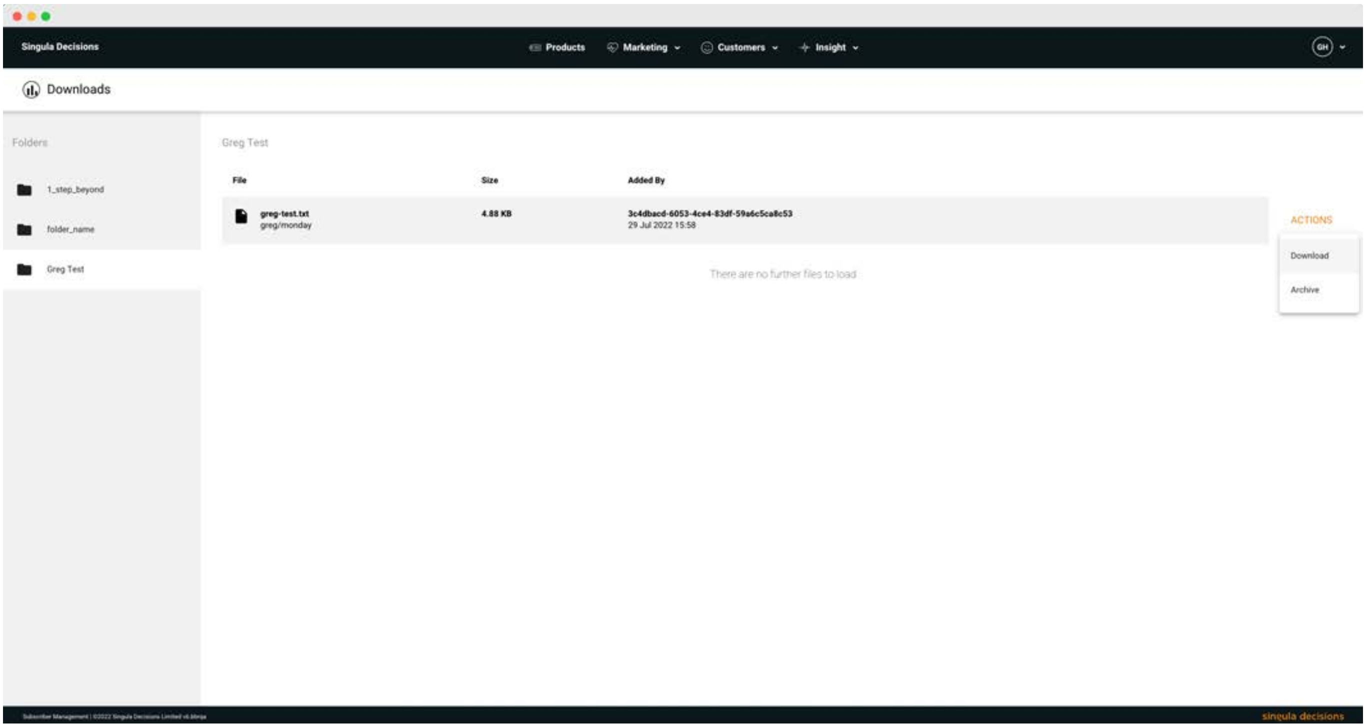
1. Folders are displayed on the left side of the screen
2. Select the folder you wish to view
3. The files contained within the folder will be displayed. The folder may not contain any files.

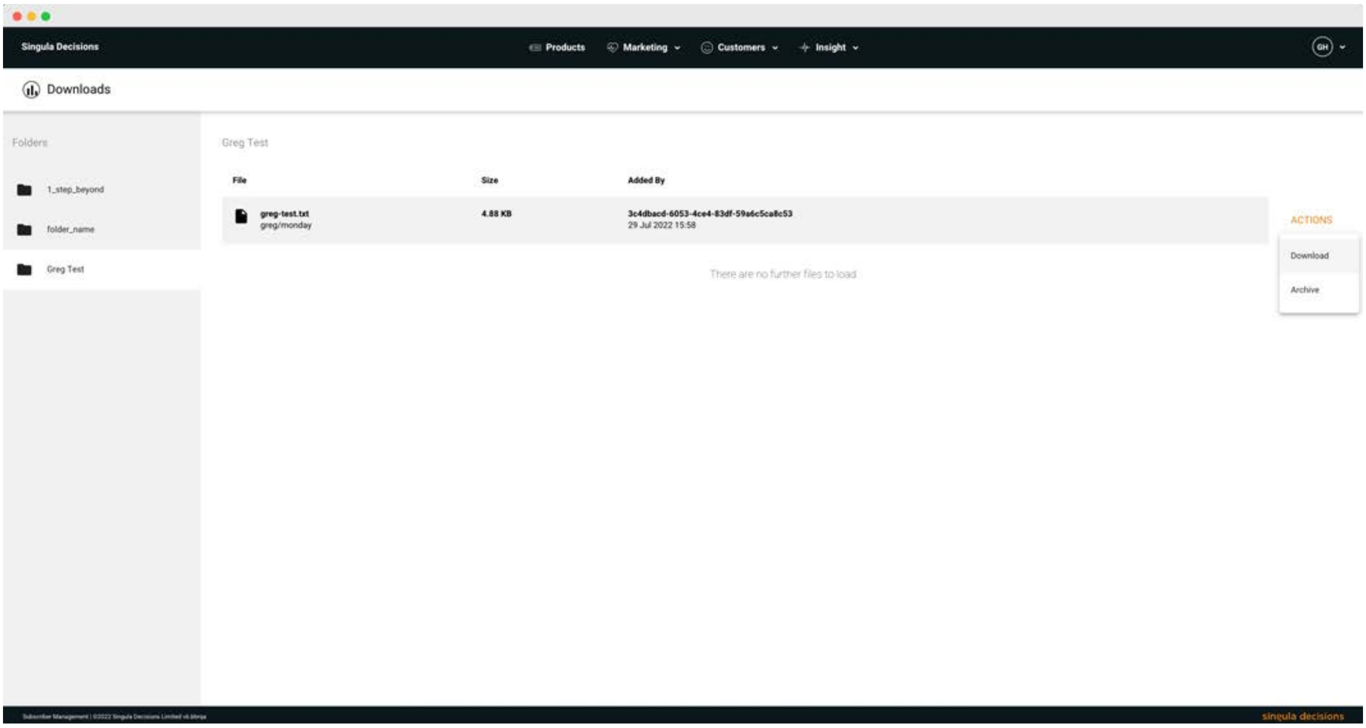
## VIEWING FILES

1. Select the folder you wish to view
2. A list of files contained within that folder will be displayed
3. You will see the filename and location, size of the file, when the file was added and by whom

## DOWNLOAD A FILE

1. Select the folder you wish to view
2. Find the file you want to download
3. Select the 'Download' button at the end of the item
4. The file will be downloaded to your device. Depending on the file size, this may take some time. The progress bar will indicate the download time remaining.




### ARCHIVE A FILE

You can archive a file to review it from the folders available to you

1. Select the folder you wish to view
2. Find the file you want to archive
3. Select the 'Actions' button at the end of the item
4. Select 'Archive'
5. You will be asked to confirm if you want to archive the selected file

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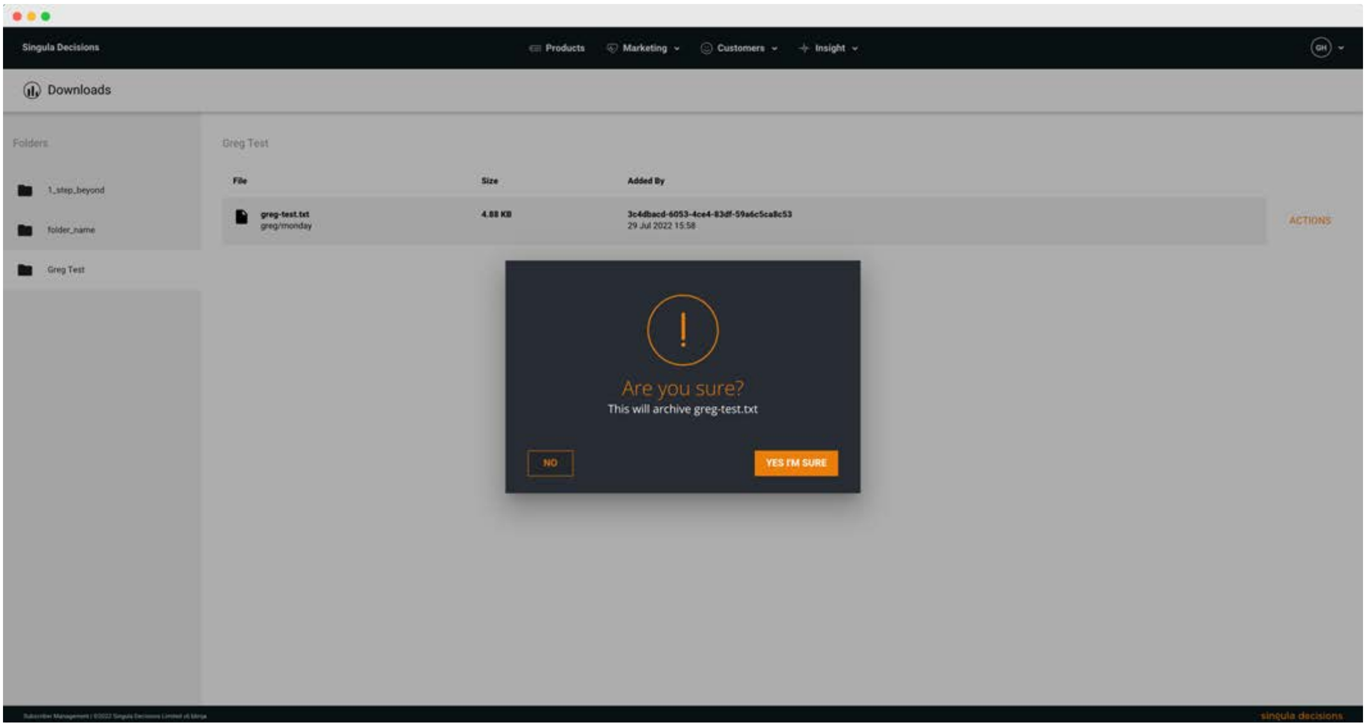


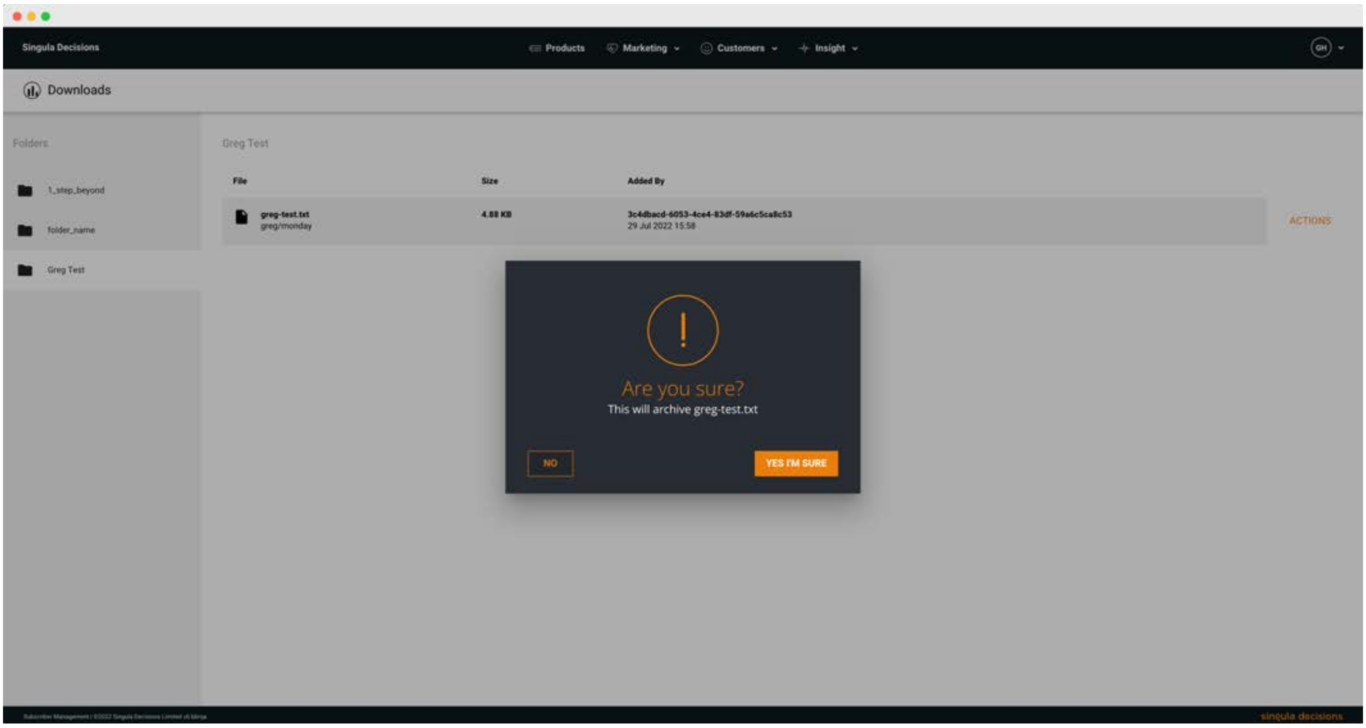

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# CONFIGURATION

## Users

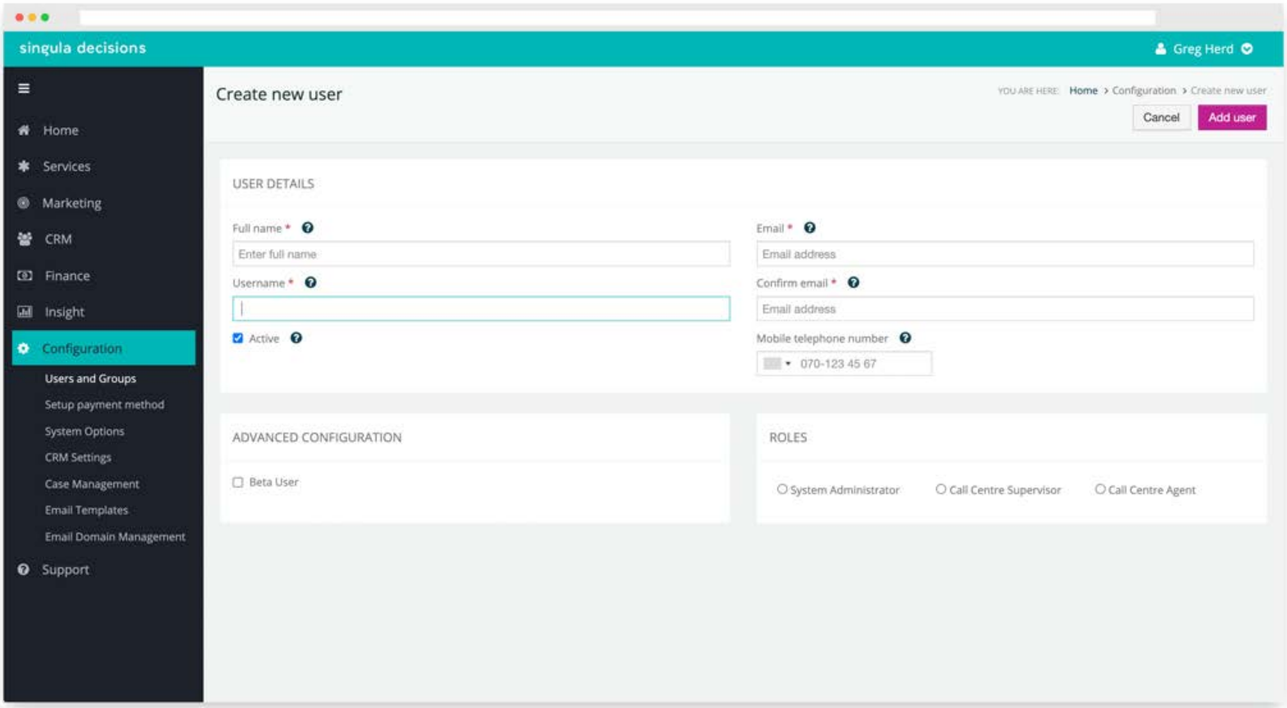
### ADDING A NEW USER

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

**User details**

Username - is case sensitive and can be up to 20 characters long, alphanumerical and the following special characters are also allowed: ! £ – _ . * ( ). 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.




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

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

**Passwords**

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

## RESETTING A USER PASSWORD

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


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

## DEACTIVATING A USER

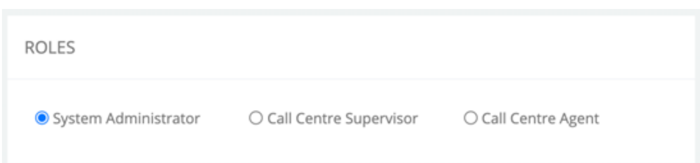
1. Select 'Configuration'
2. Select 'Users and Groups'
3. Search for the user using their username
4. Select the 'Pen' icon against the user
5. Remove the tick from the 'Active' checkbox
6. Select 'Update user'


## ACTIVATING A USER

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


## MANAGING ROLES AND PERMISSIONS

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



## ADDING A BETA USER

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

# Roles and permissions

Roles allow you to restrict access to your subscriber management system

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

| AREA | ADMINISTRATOR | ADMINSTRATOR (NO CRM) | CUSTOMER SERVICE | SALES AGENT | FINANCE | MARKETING |
|---|---|---|---|---|---|---|
| Services | ✓ | ✓ | | | | |
| Marketing | ✓ | ✓ | | | | ✓ |
| CRM | ✓ | | ✓ | ✓ | ✓ | |
| Finance | ✓ | ✓ | | | ✓ | |
| Insight | ✓ | | | ✓ | ✓ | ✓ |
| Configuration | ✓ | ✓ | | | | |
| Support | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

# 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

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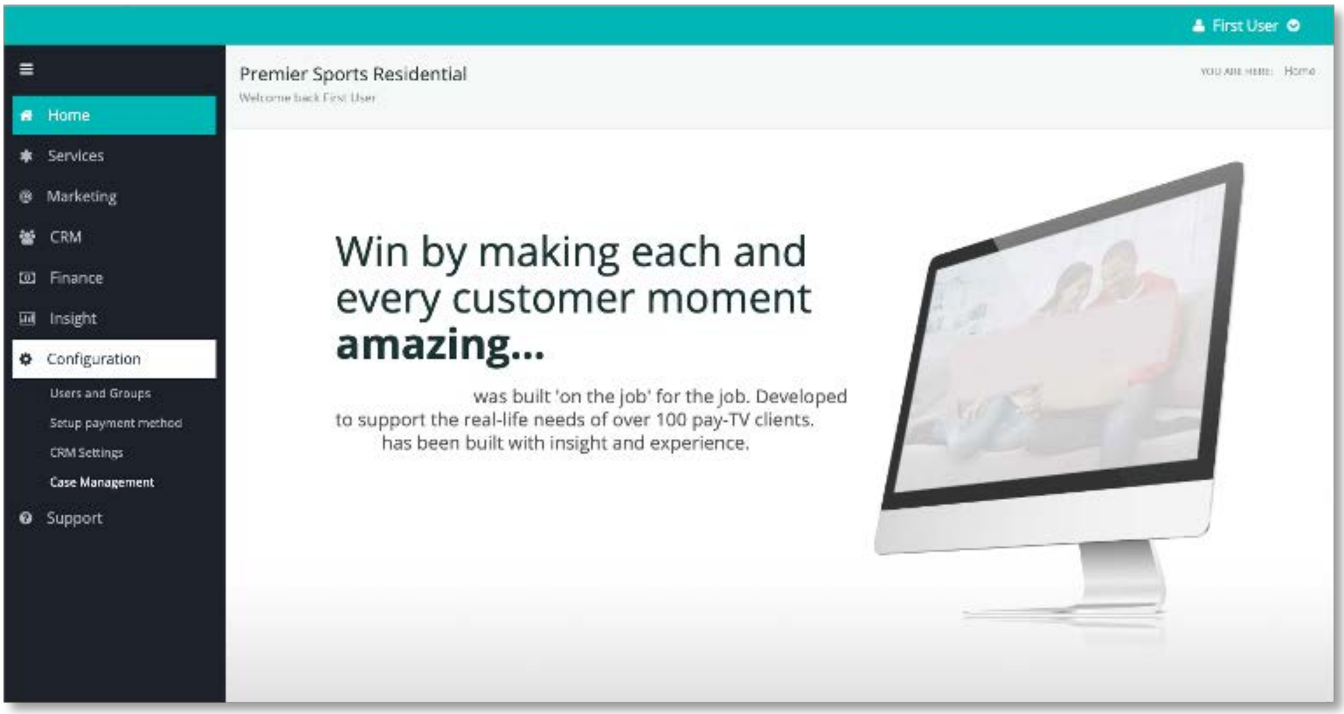
# Cases

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

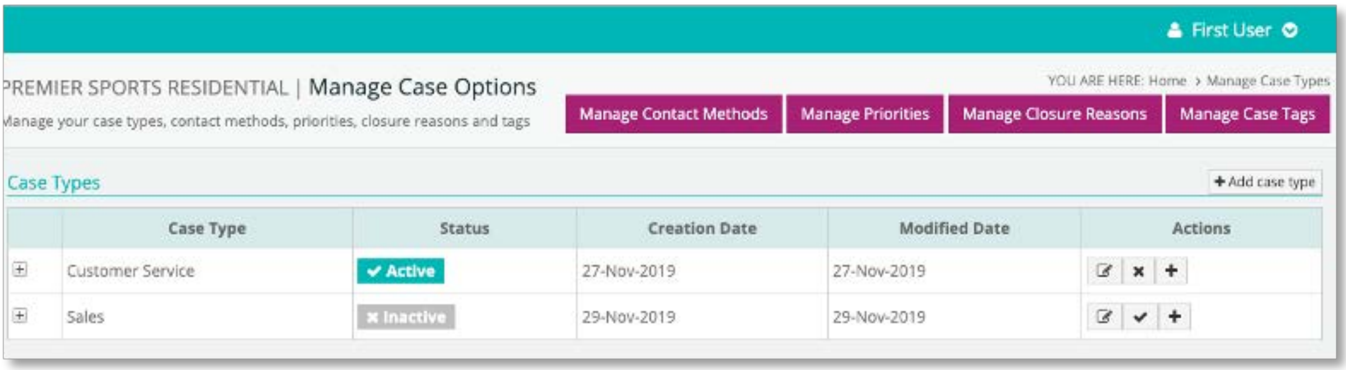



The Manage Case option screen will appear:

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

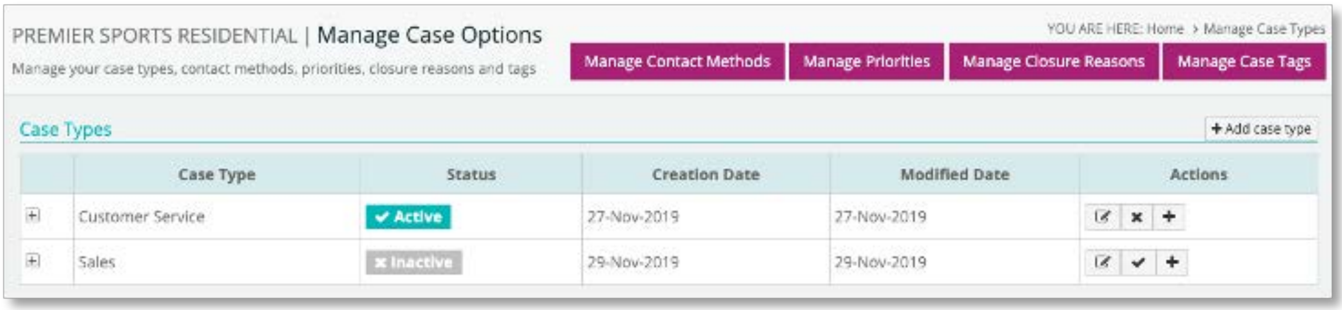
## CREATE AND MANAGE CASE TYPES

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

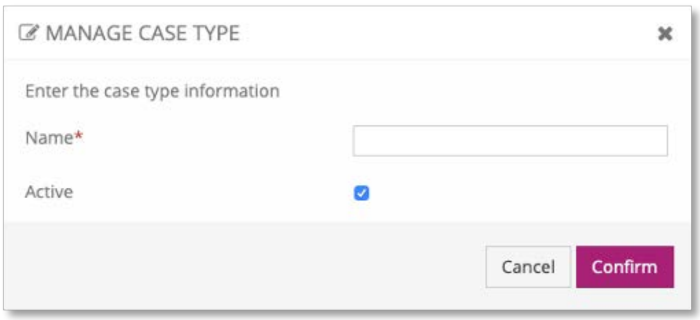
An example could be Sales, General Enquiry, Billing etc.

To create a Case Type:

1. Click + Add Case Type on top right corner

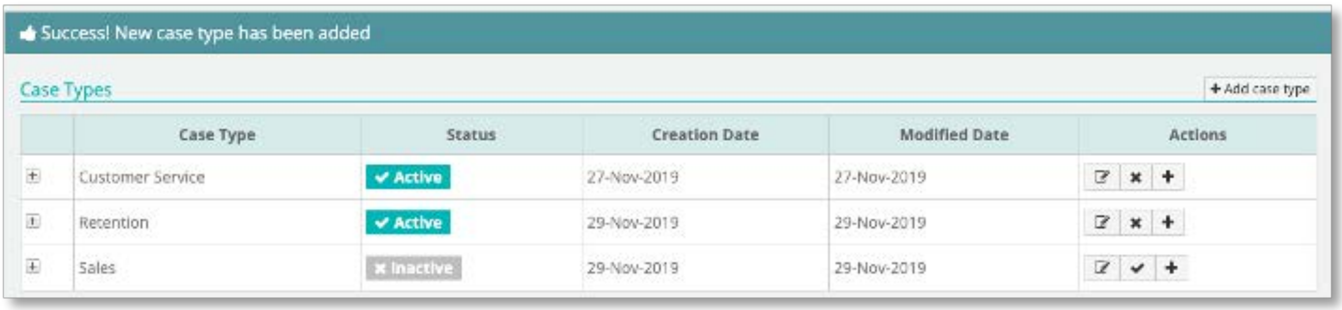



2. A Manage Case Type window will appear, enter the Case Type Name and select the Active status for the Case type
3. Click Confirm to save

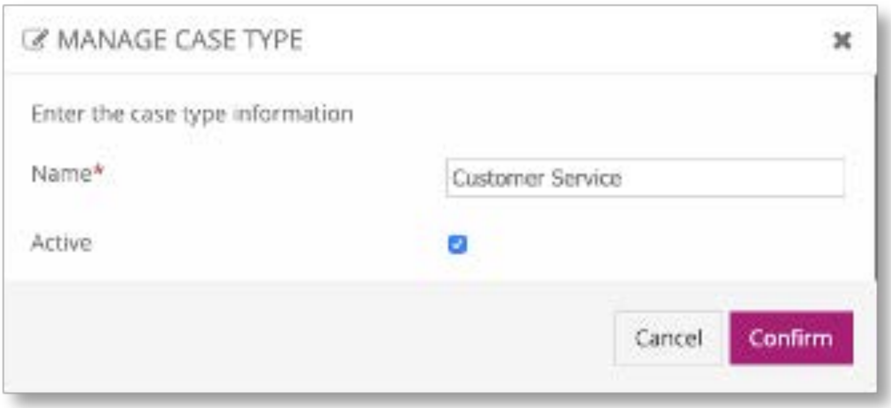



A Success confirmation message will appear on the screen

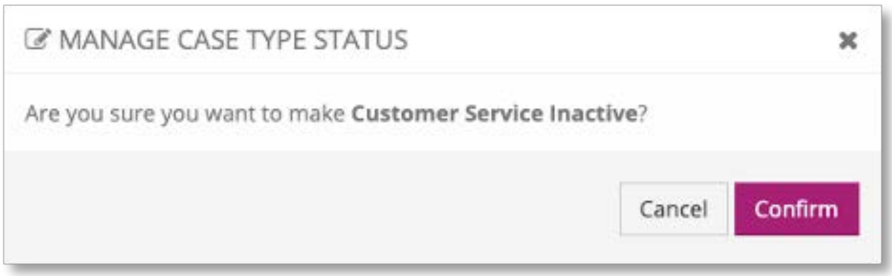
The Case Type you've created will appear in the Case Types table:



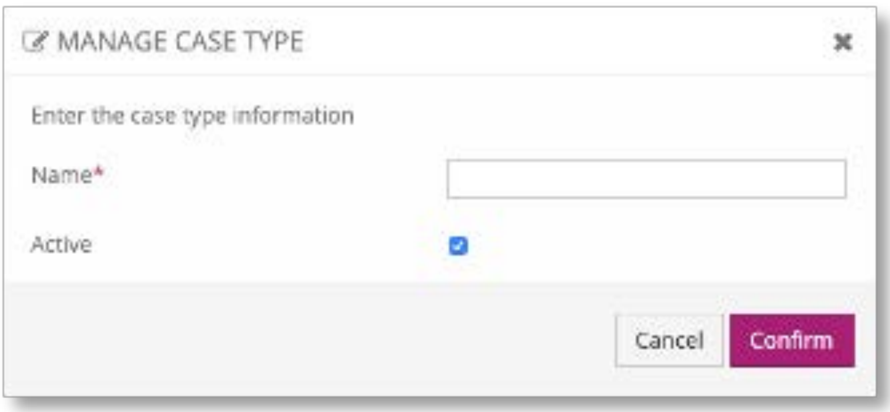

To edit the Case type click the 'pen' icon




To deactivate the Case type click the 'cross' icon




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



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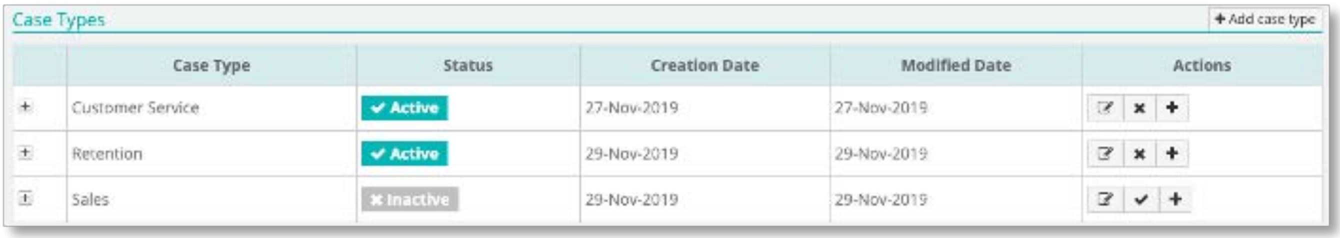
## ADD A CASE SUB TYPE TO A CASE TYPE

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

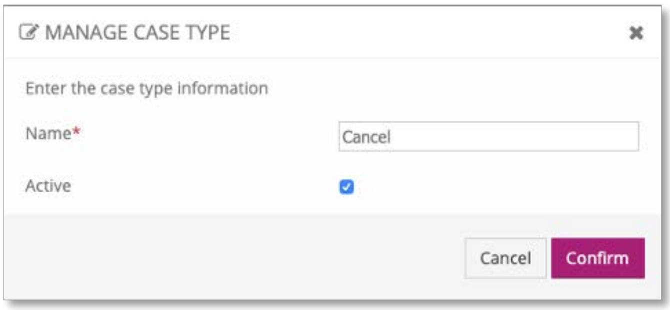
To setup a Case Sub Type:

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



Case Types — + Add case type

| | 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 | |



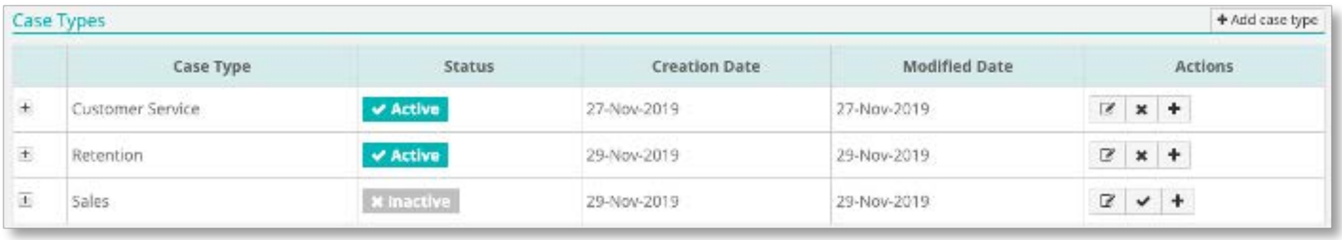

2. Enter a name for the Sub Type
3. Choose the Active status
4. Click Confirm to save

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 — + Add case type

| | 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

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| 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 | |

| Case Type | Status | Creation Date | Modified Date | Actions |
|---|---|---|---|---|
| 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.

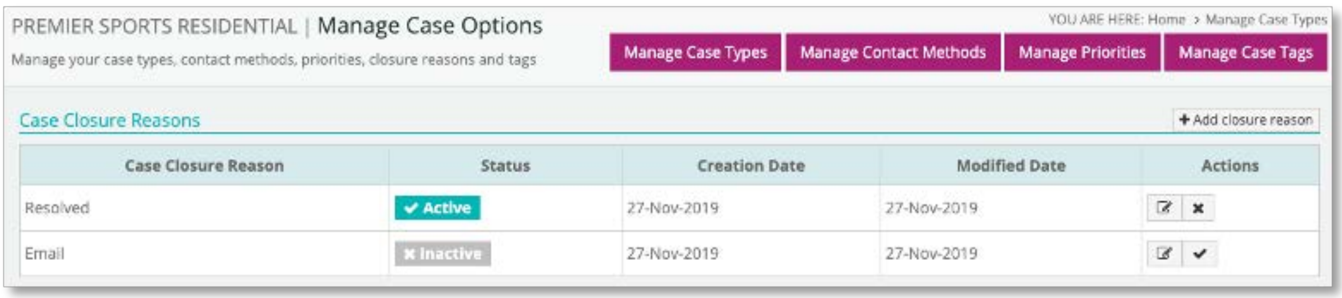
To create or edit a Closure Reason:

1. Click the Manage Closure Reasons button:


| 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 | |

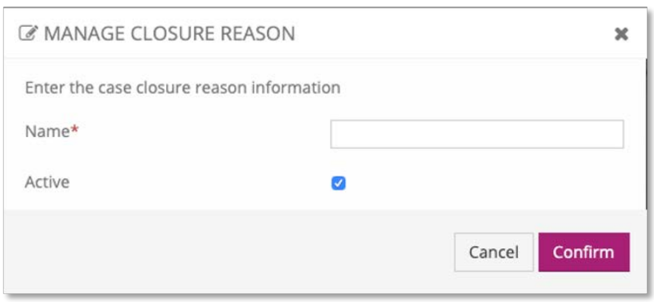
2. The Manage Case Closure Reasons section will appear:

   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




| 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:



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

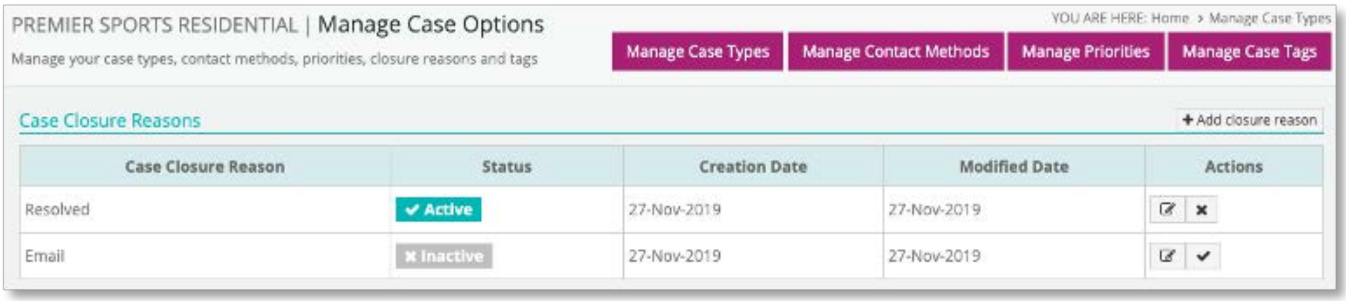
A confirmation message will appear on the Case Management screen

## 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.

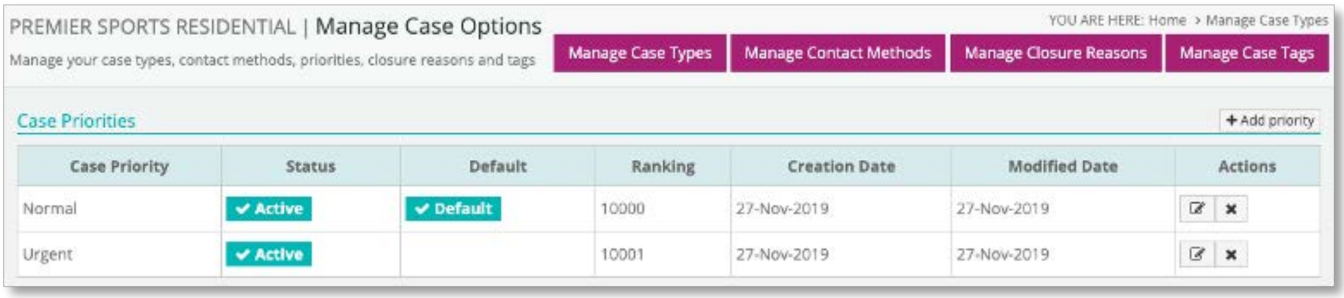
To create or edit Case Priorities:

1. Click the Manage Priorities button:

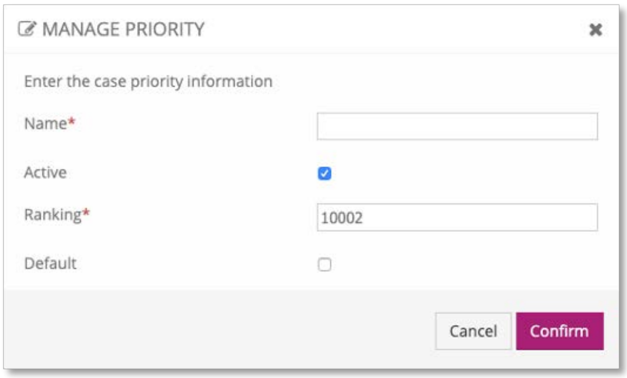



2. The Manage Priorities Reasons section will appear:

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




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




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

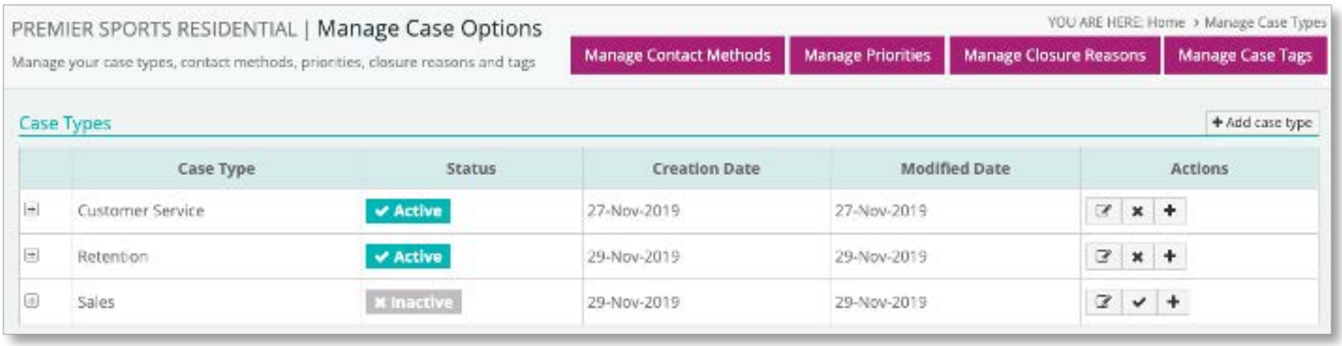
A confirmation message will appear on the Case Management screen

## 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.

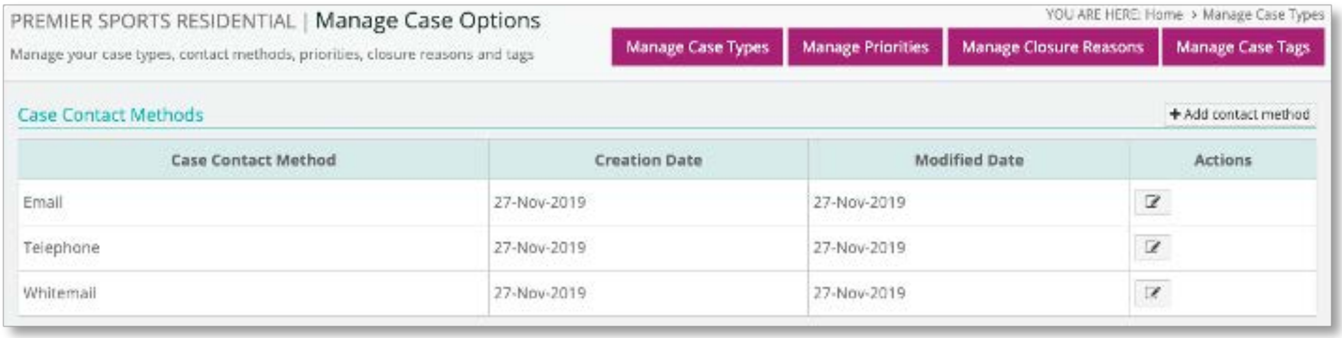
To create or edit Contact Methods:

1. Click the Manage Contact Methods button:

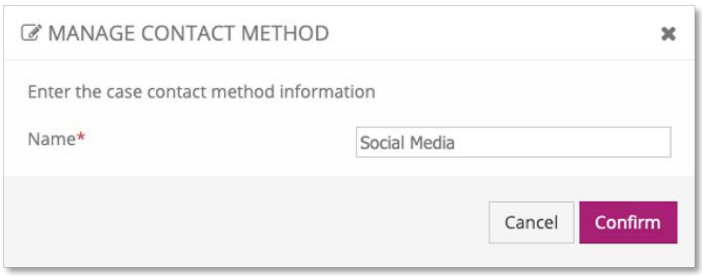



2. The Manage Contact Methods section will appear:

   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:




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

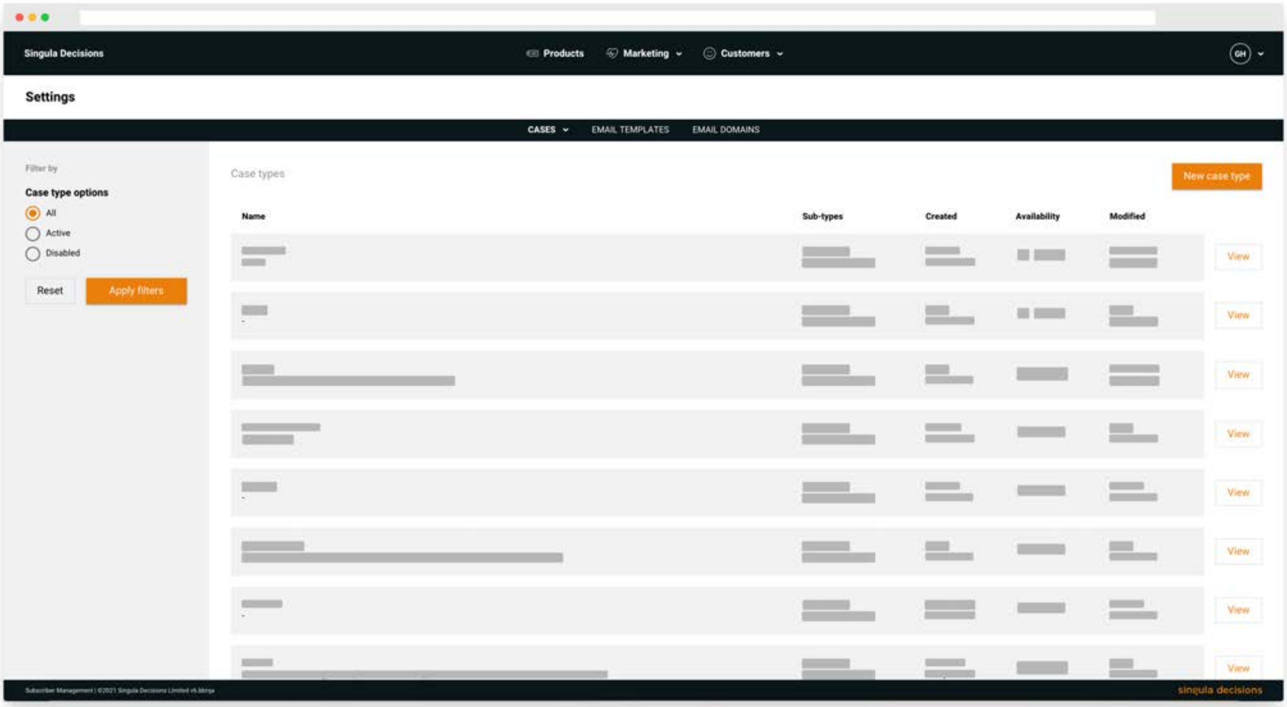
A confirmation message will appear on the Case Management screen

# 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

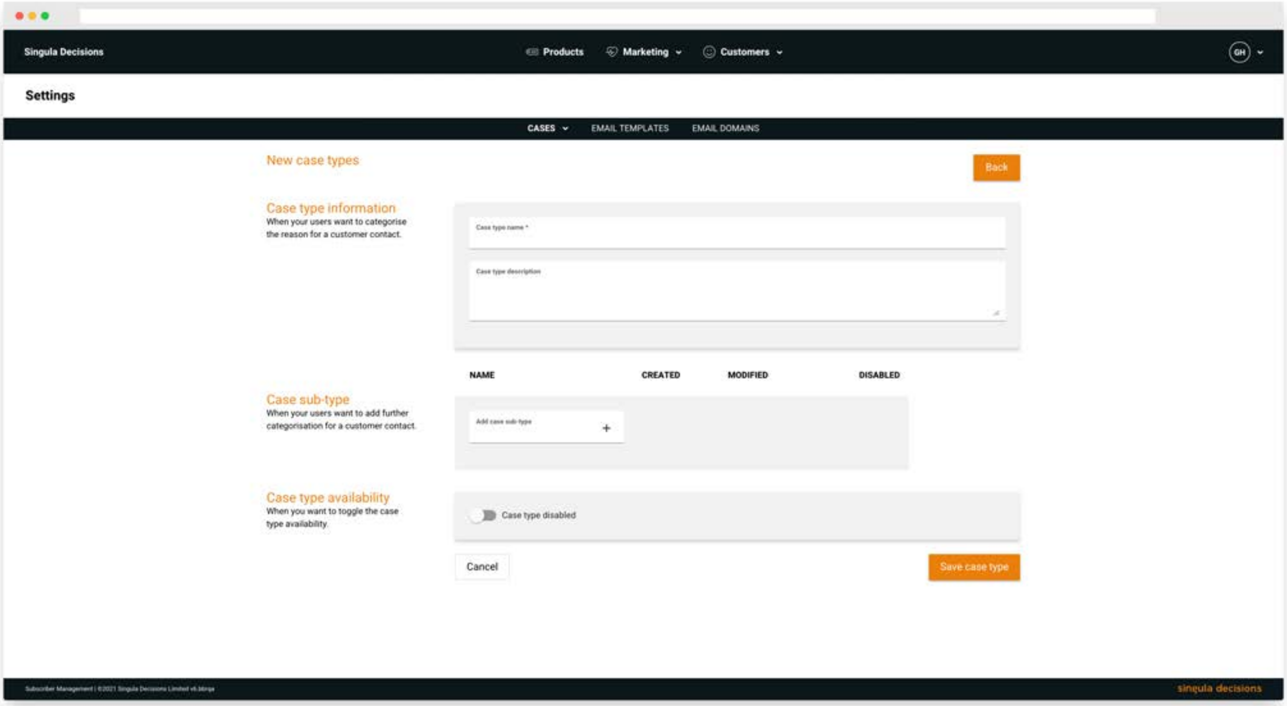
5. Enter Case type name
6. Enter Case description

### 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.

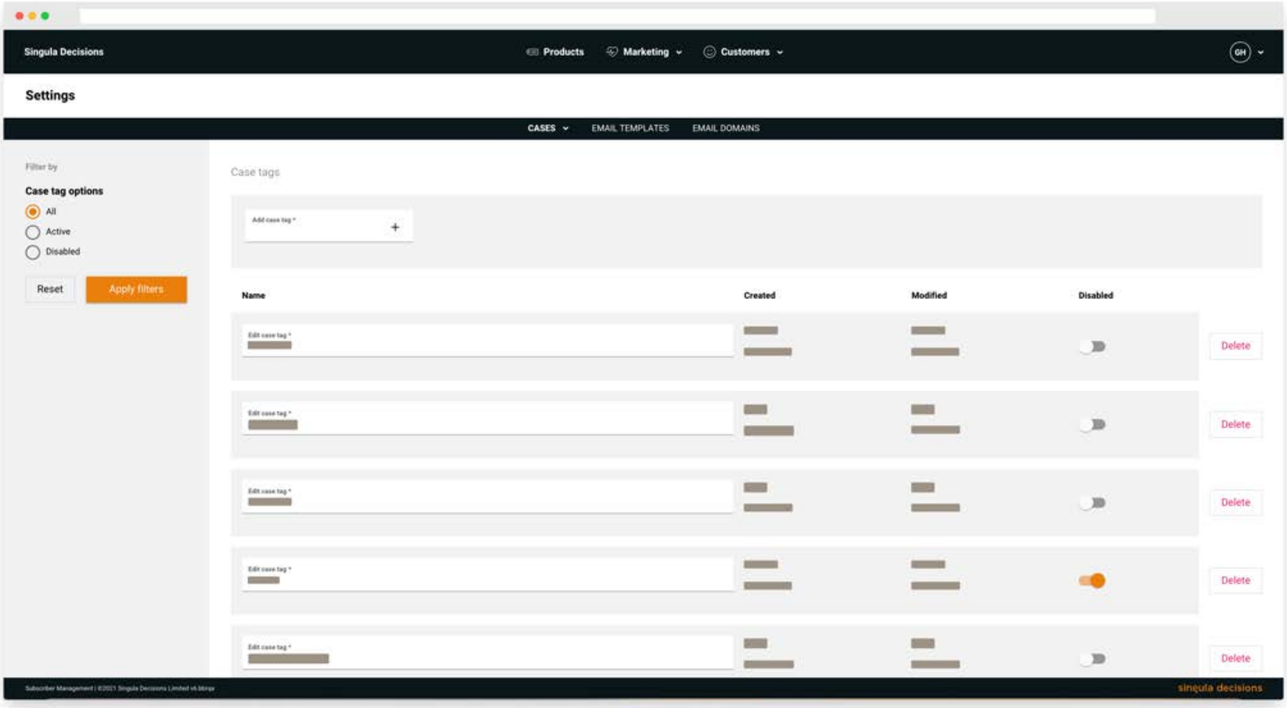
## CASE SUB-TYPES

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



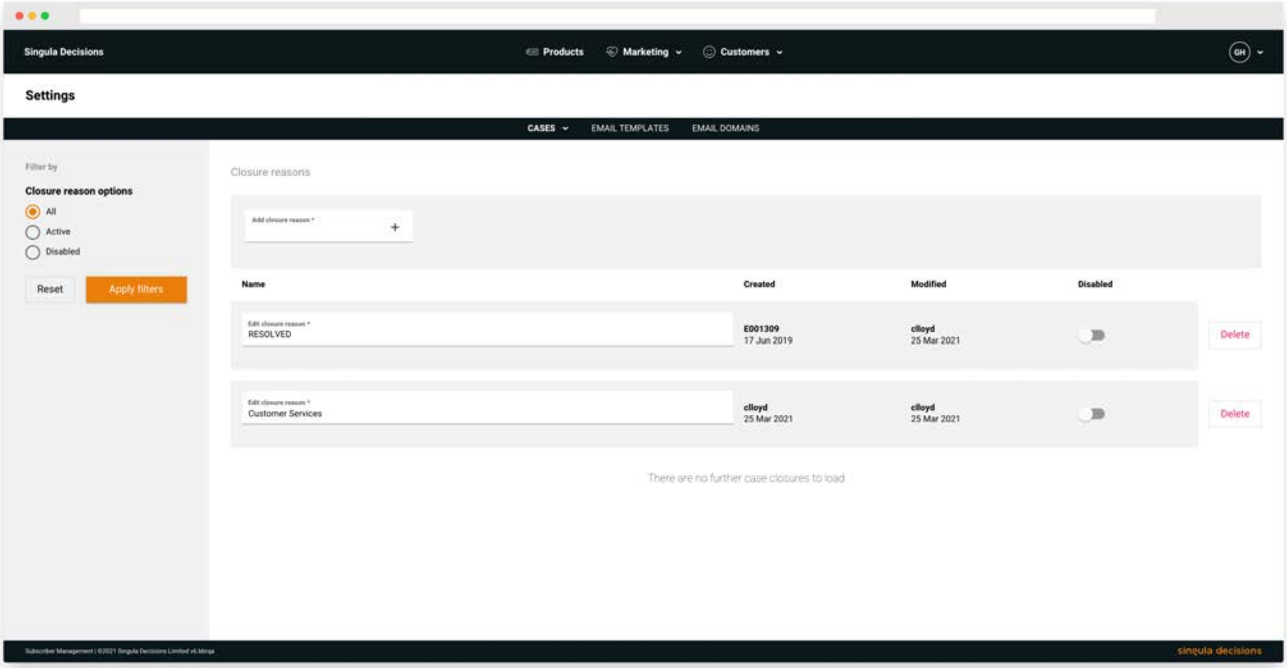

## ADD CASE TAG

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

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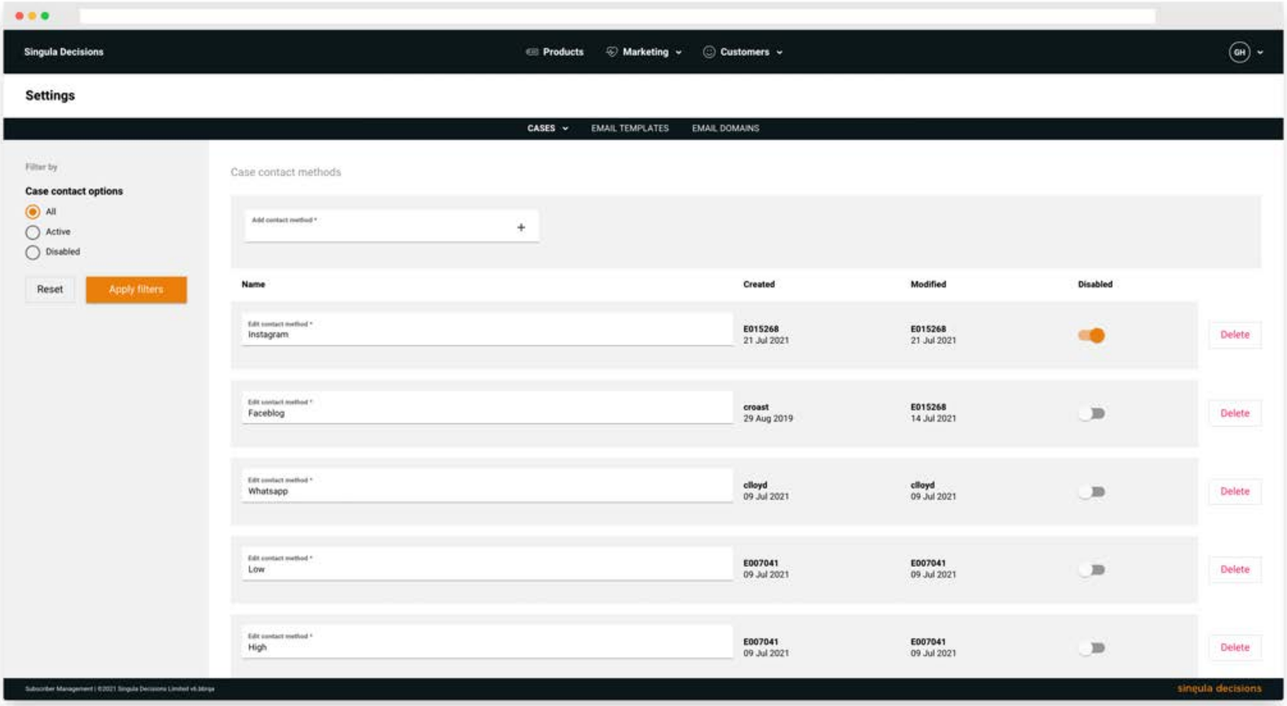



## NEW CASE CONTACT METHOD

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.

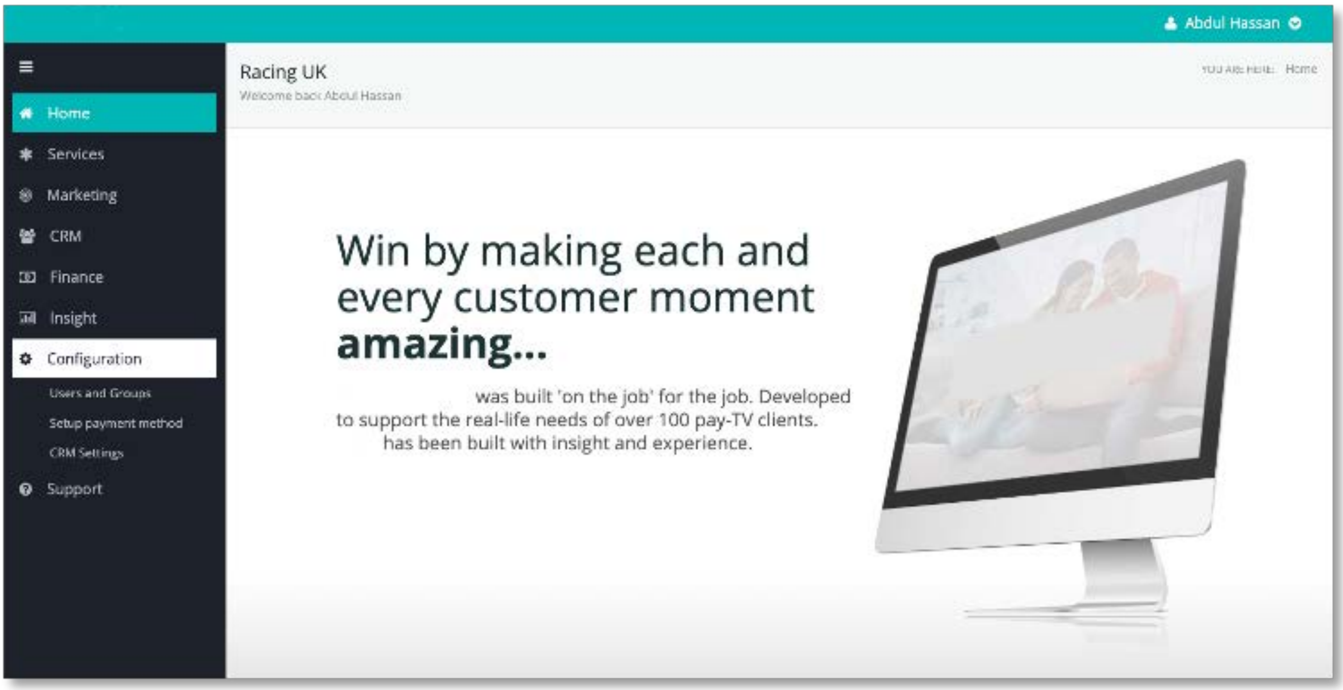
## Marketing consents

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

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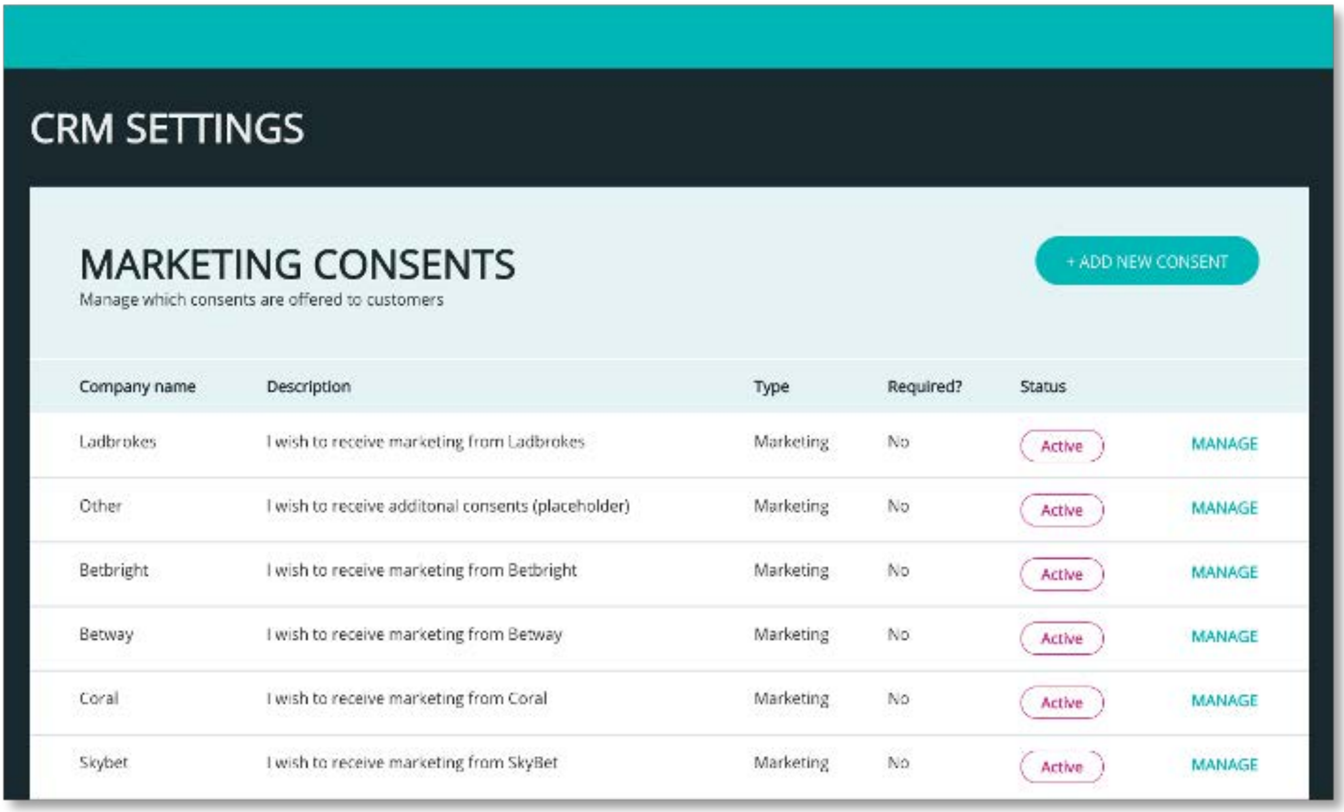



3. Click '+ Add new consent' button on the top right corner


The following fields will then be displayed:


4. Complete each of the fields;

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

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

## MANAGE AN EXISTING MARKETING CONSENT

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


The following fields will then be displayed:


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)

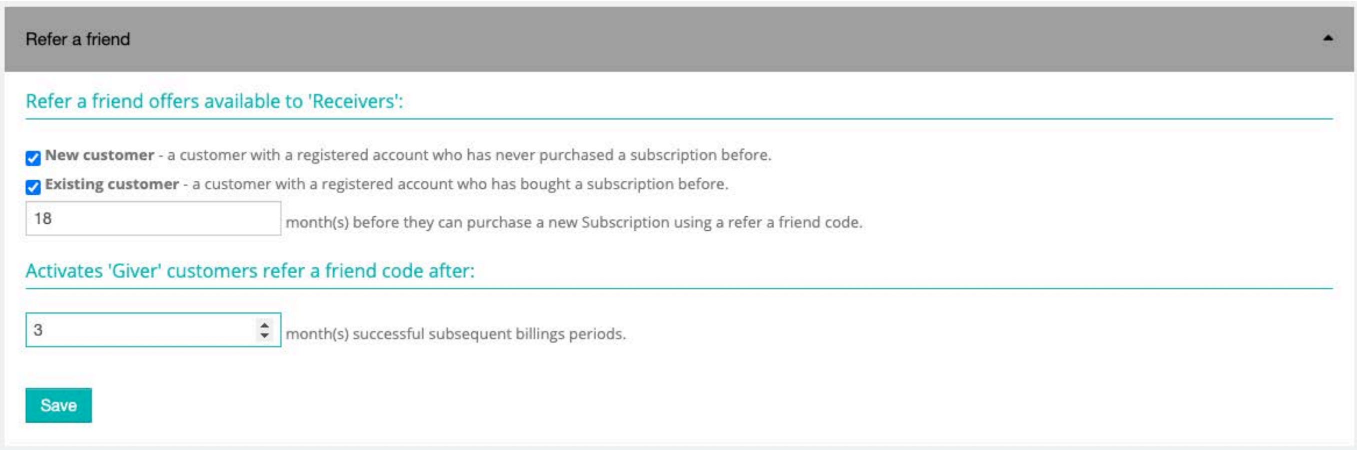
**Set the period of months where a subscription has to be active before the customer can give out a Refer a Friend code:**

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

The Settings page will now appear

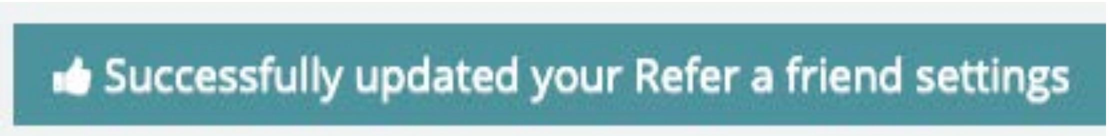

3. Click the 'Expand' icon on Refer a Friend:


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




5. Click 'Save' to confirm the changes

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

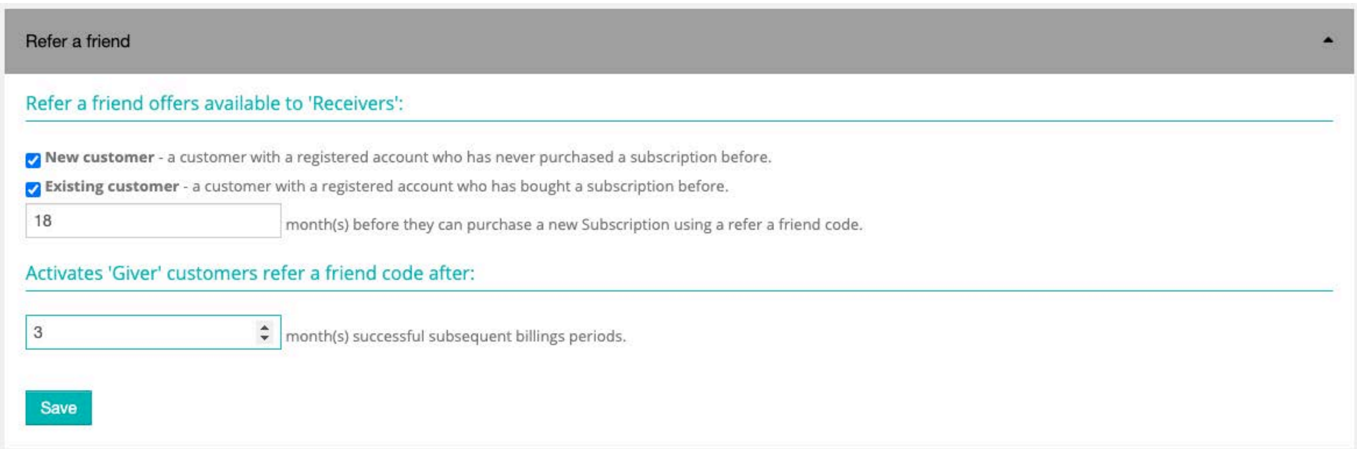



**Set the period of months before a customer can purchase a new subscription using a Refer a Friend code:**

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




**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

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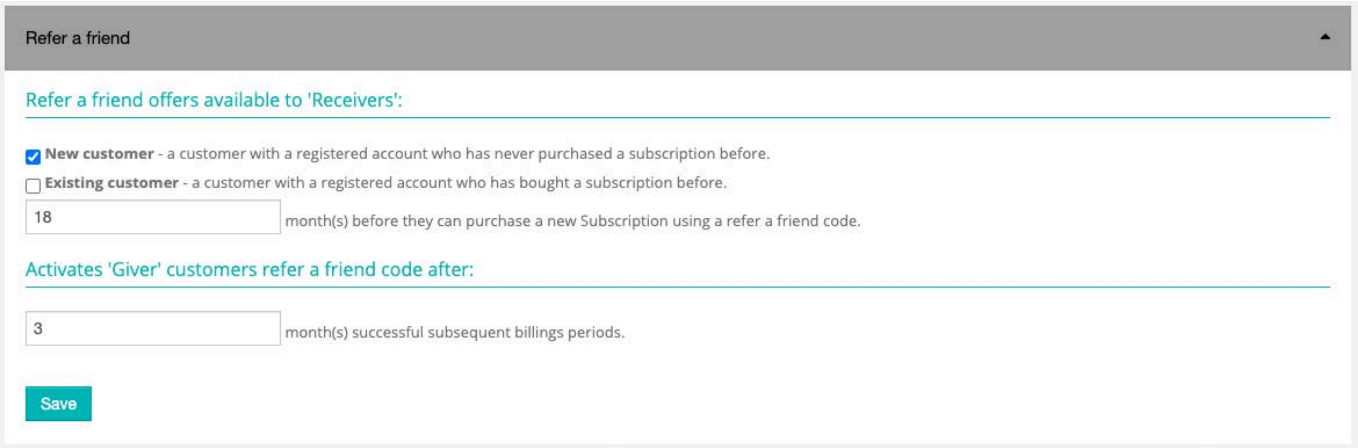
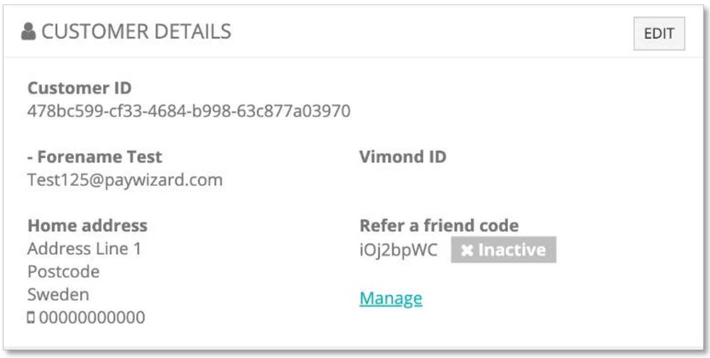



**Manually activate a Refer a Friend code outside of the automated rules:**

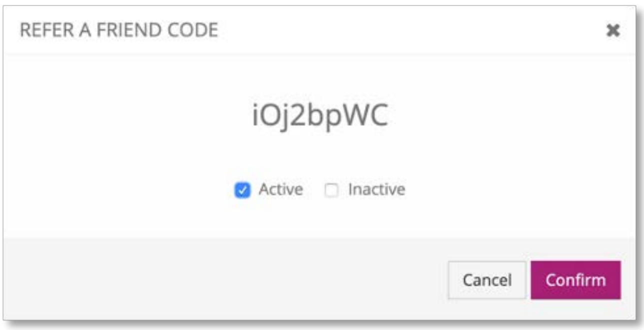
1. Click 'CRM'
2. Search for the customer's account
3. Once in the customer's account, click 'Manage' within the Customer Details section:



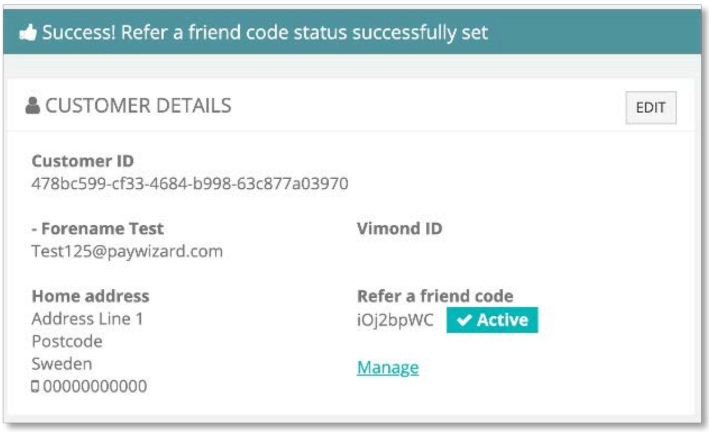

Note: If the code is manually changed then the automated rules will not revert setting later.

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'




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
Test125@paywizard.com
Vimond ID
Home address
Address Line 1
Postcode
Sweden
00000000000
Refer a friend code
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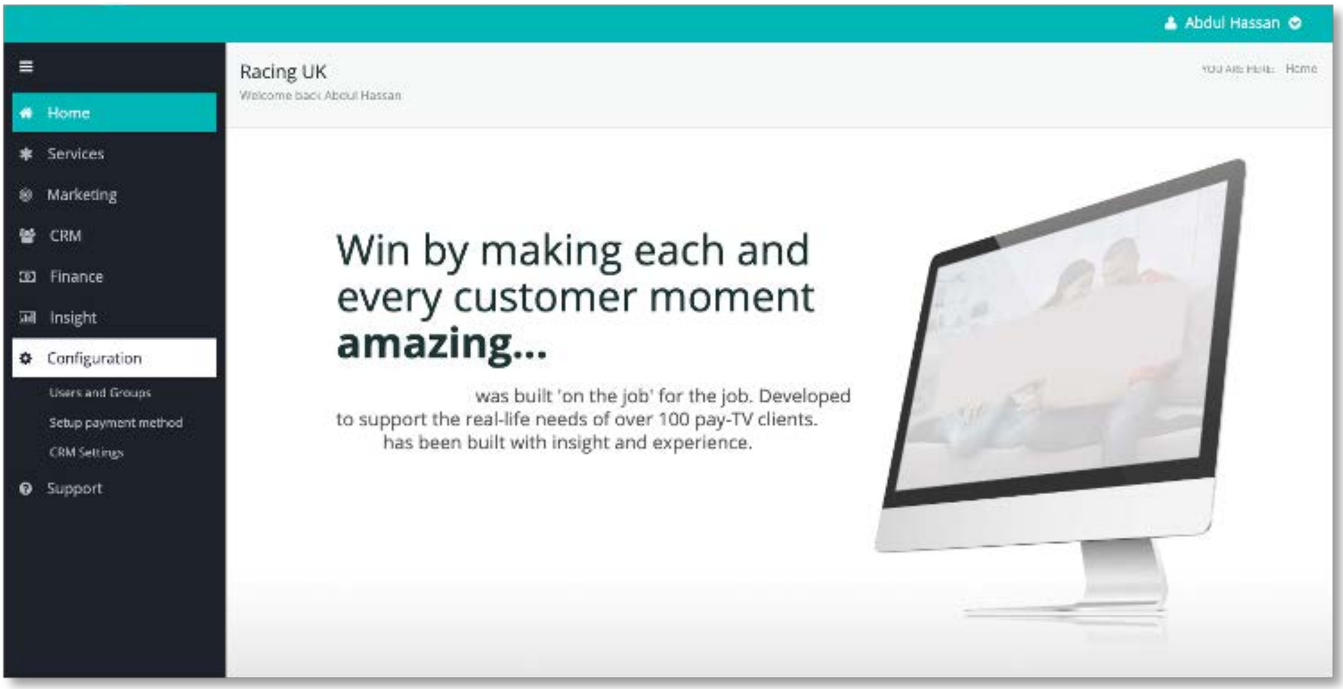
## Contact preferences

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.

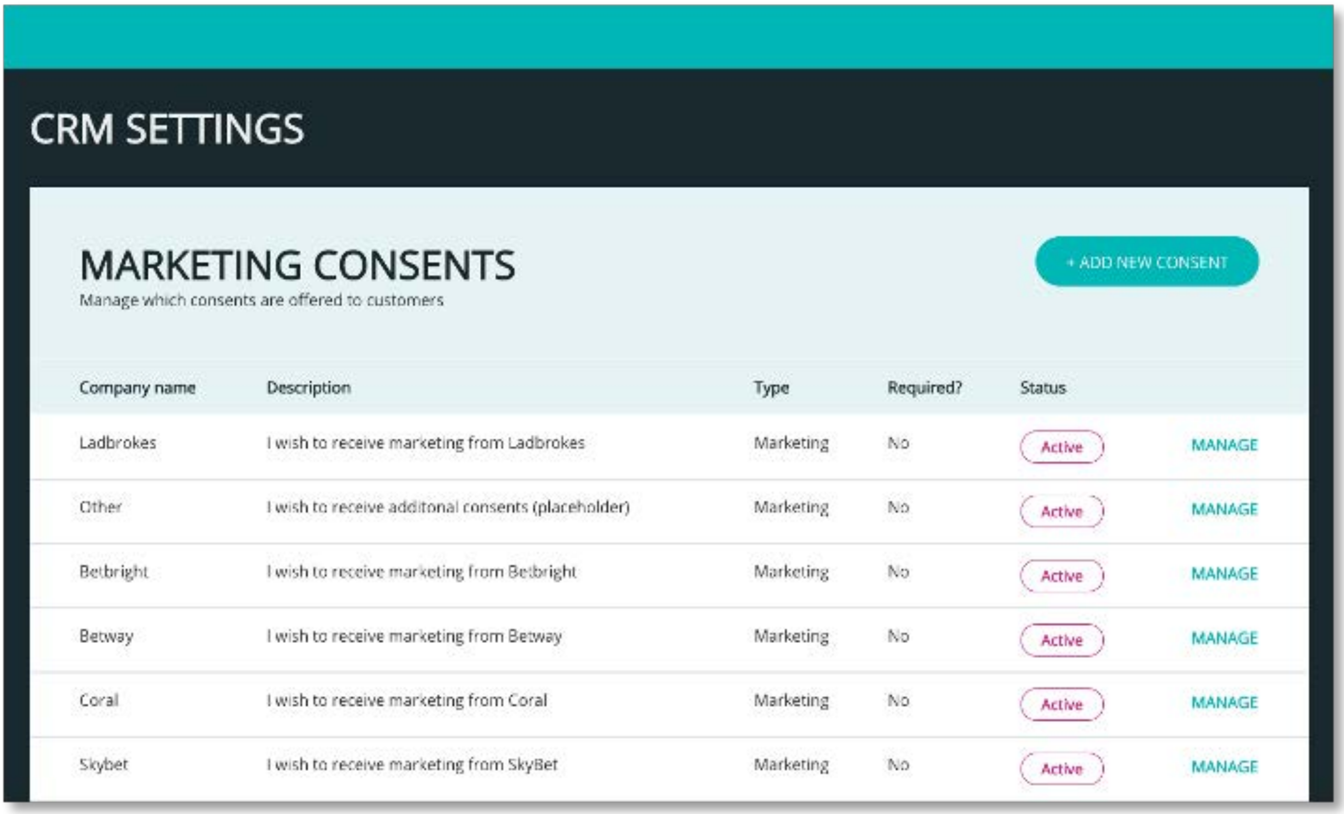
This would be captured at first contact with the customer and can then be used for effective customer engagement for both service and sales related contact.

**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:

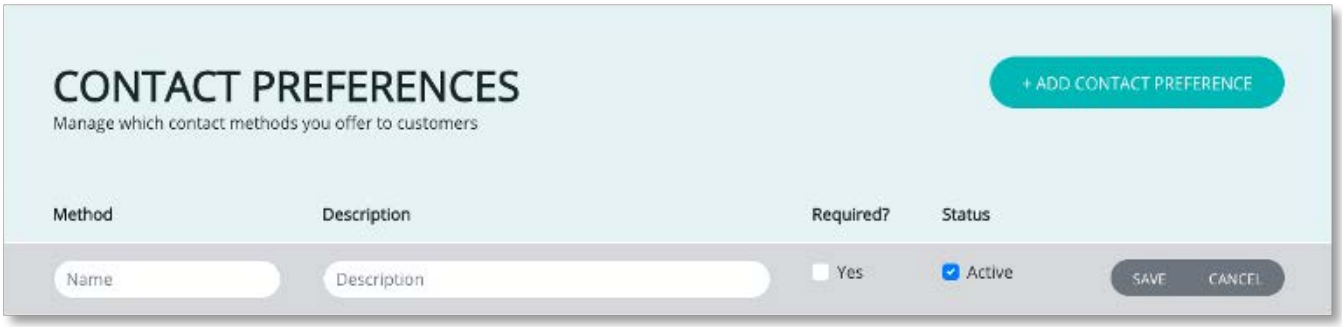



This will show:

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:



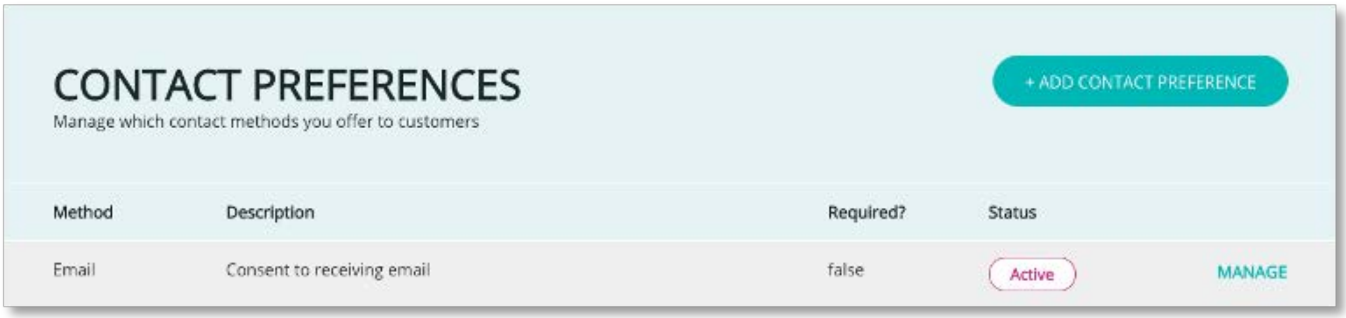

4. Complete each of the fields;

- 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 following fields will then be displayed:


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.**

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# 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

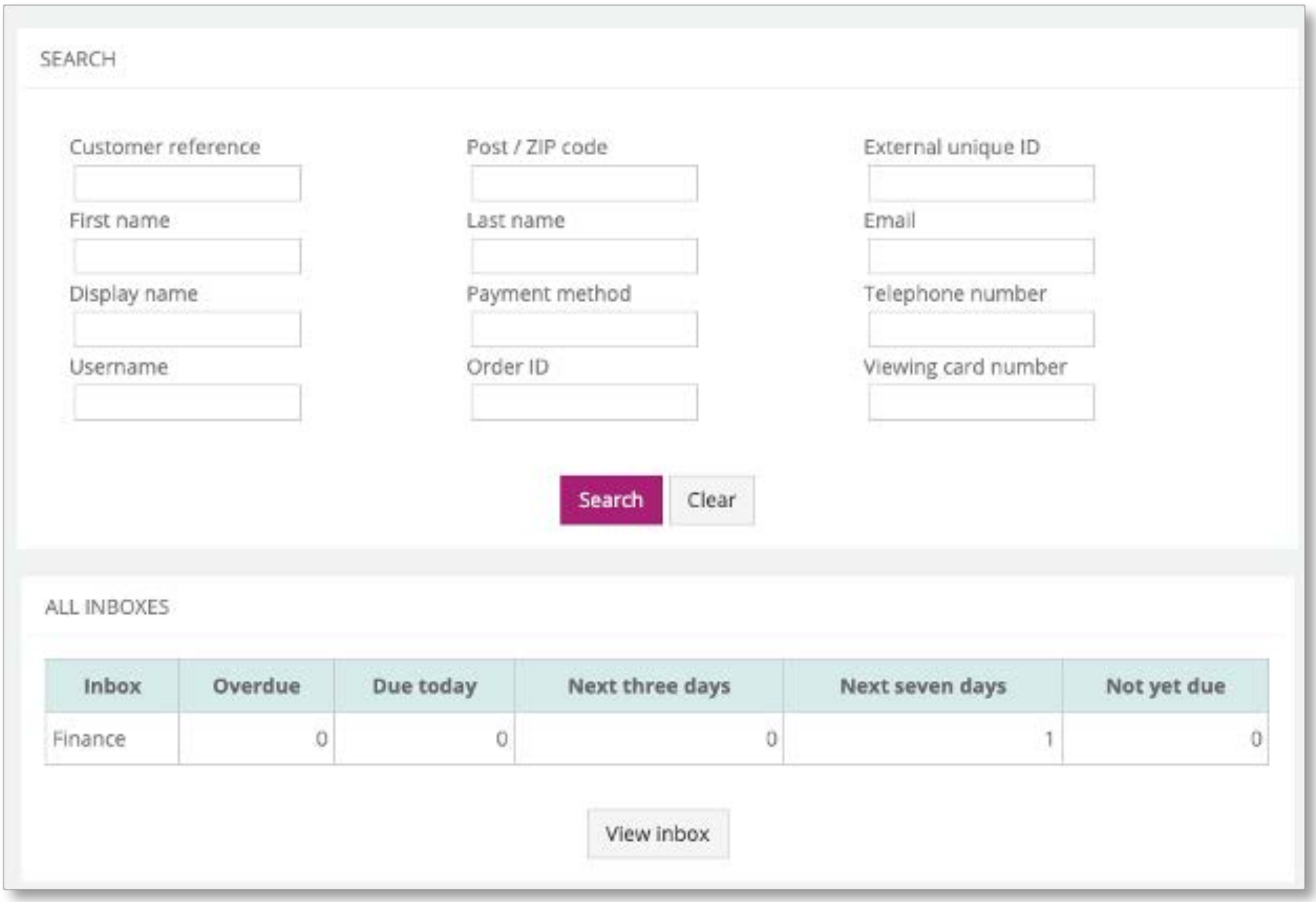
Inboxes are used to handle Cases. System Users can be assigned to Inboxes such as 'Finance', 'Customer Service' or 'Technical'.

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':




The Inboxing screen will appear:

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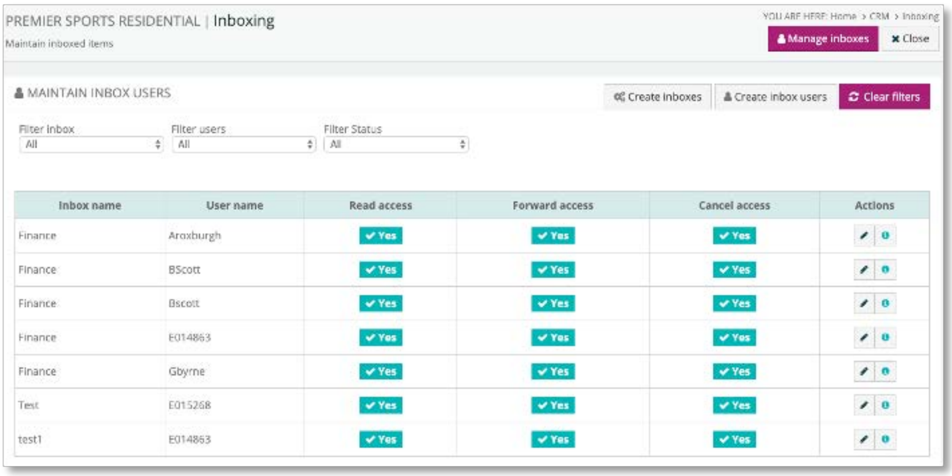
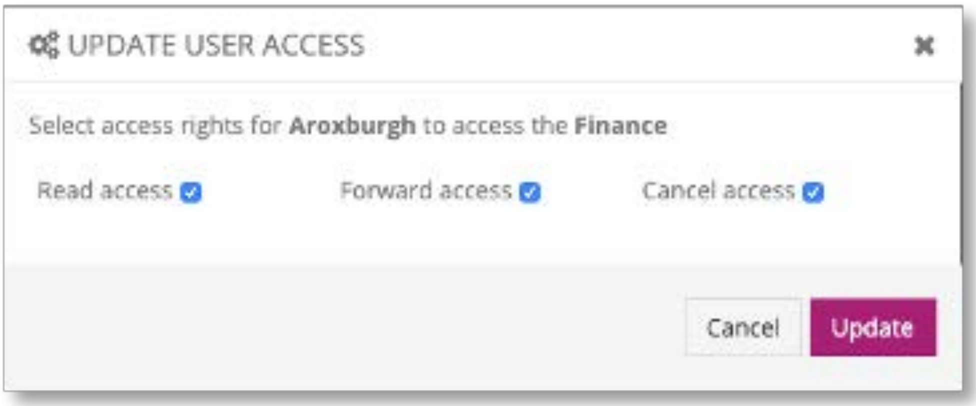
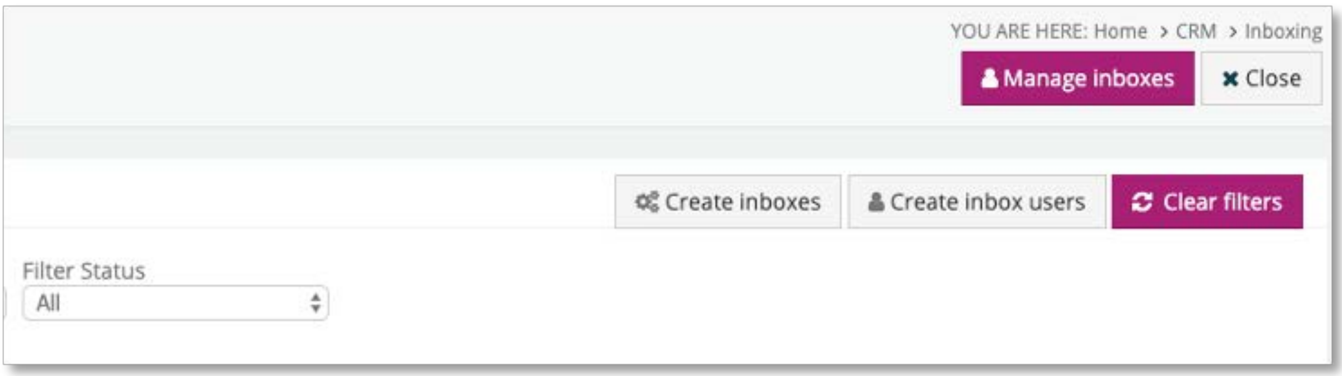



You can update users access for inboxes they are assigned to by clicking the 'pen' icon alongside the Inbox in the table of Inboxes:


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




2. Click Manage inboxes button or the Create inboxes button



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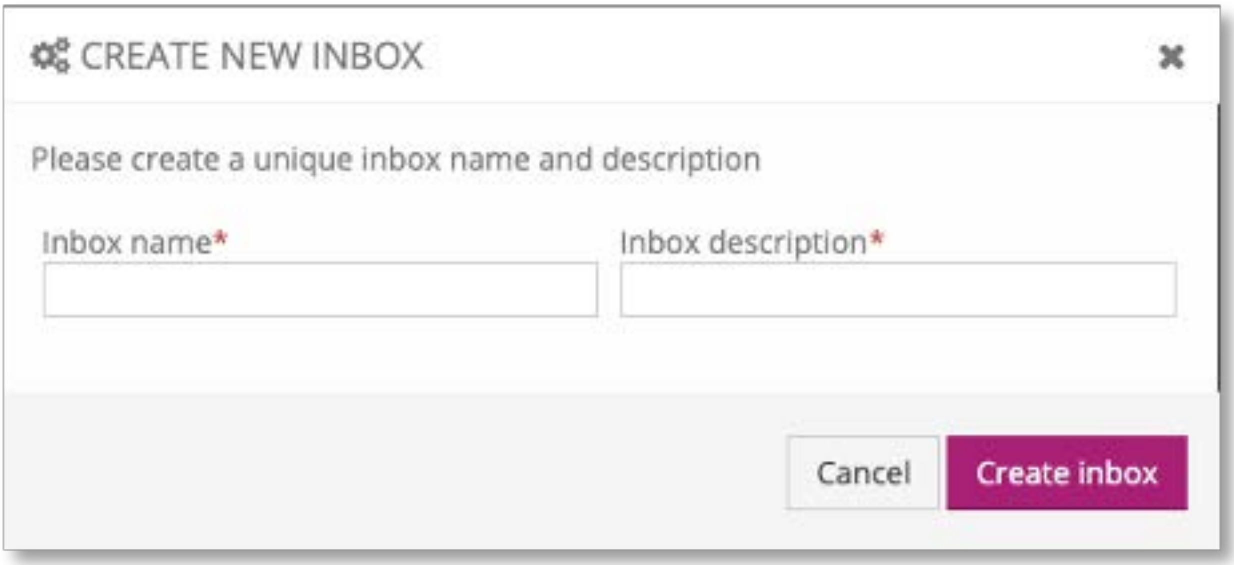
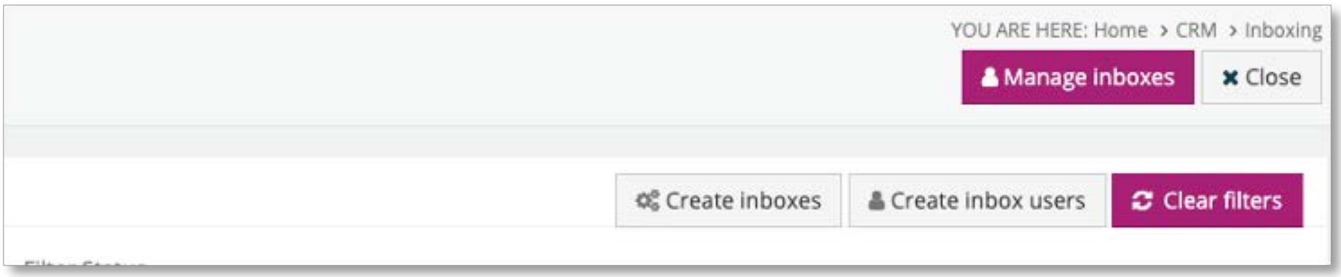
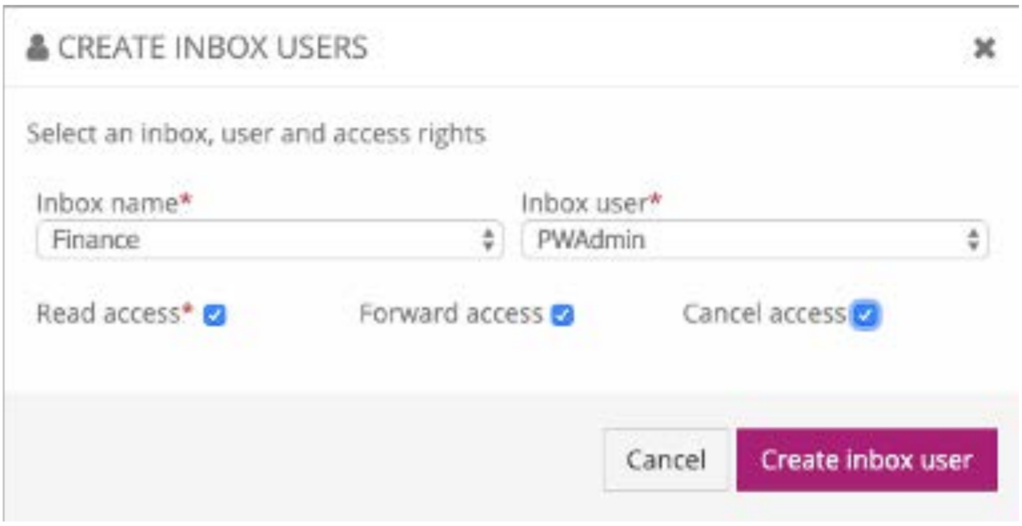
3. A Create new inbox window will appear, enter the Inbox Name and Inbox Description, then click 'Create Inbox':



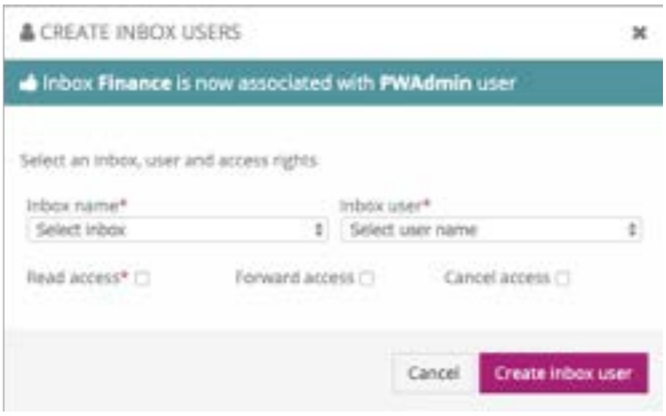

4. The New inbox has now been created. The next step is to create Inbox Users so that the inbox can be managed accordingly. Click 'Create Inbox users":




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':




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:



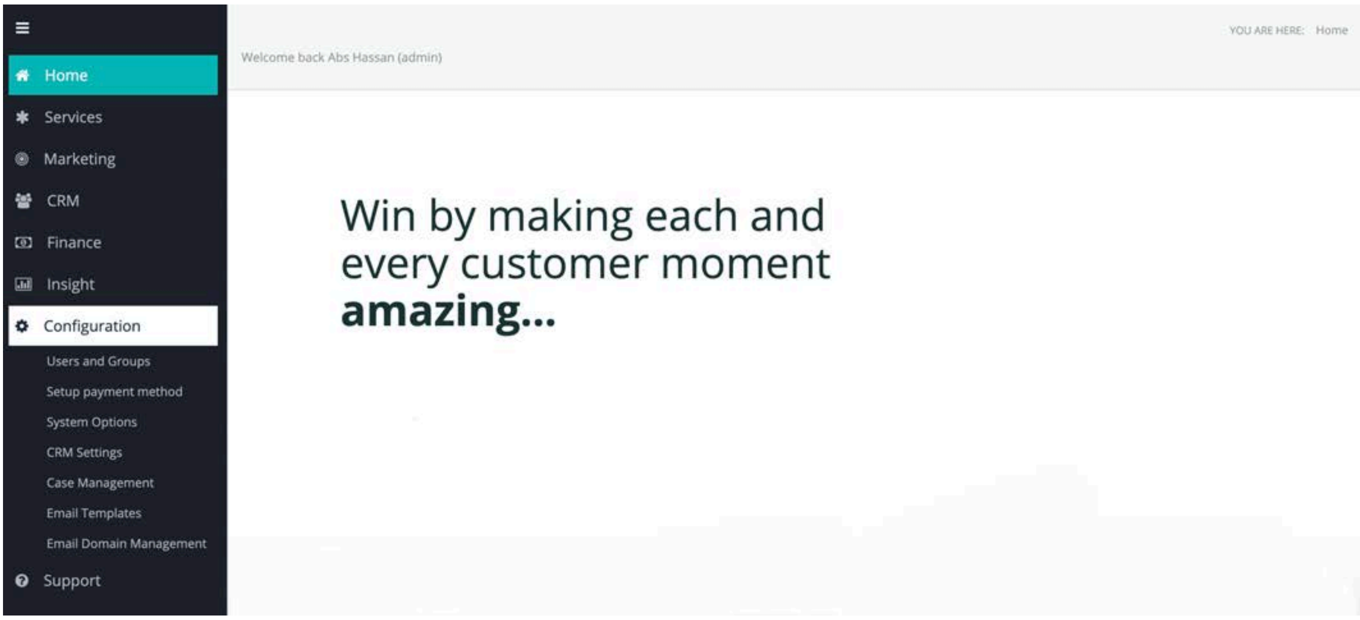

On the Maintain Inboxes Screen, you will then see the new Inbox summary and can manage the inbox and actions from there:

# Email templates

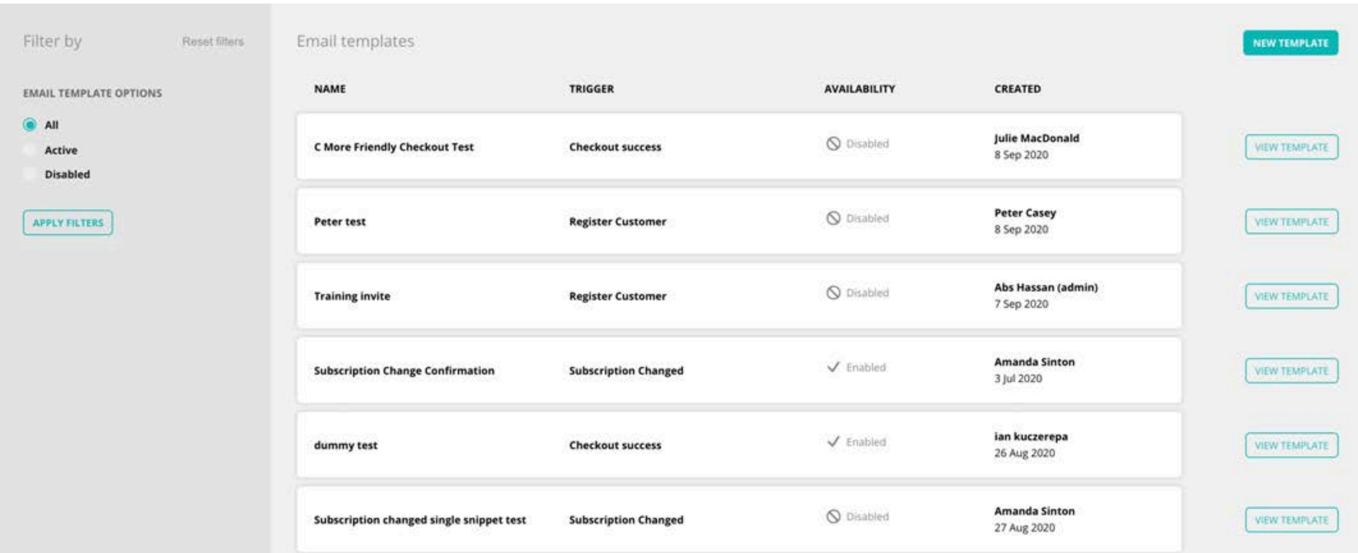
## HOW TO VIEW EMAIL TEMPLATES

Follow these simple steps to view existing Email Templates:

1. Select Configuration
2. Select Email Templates



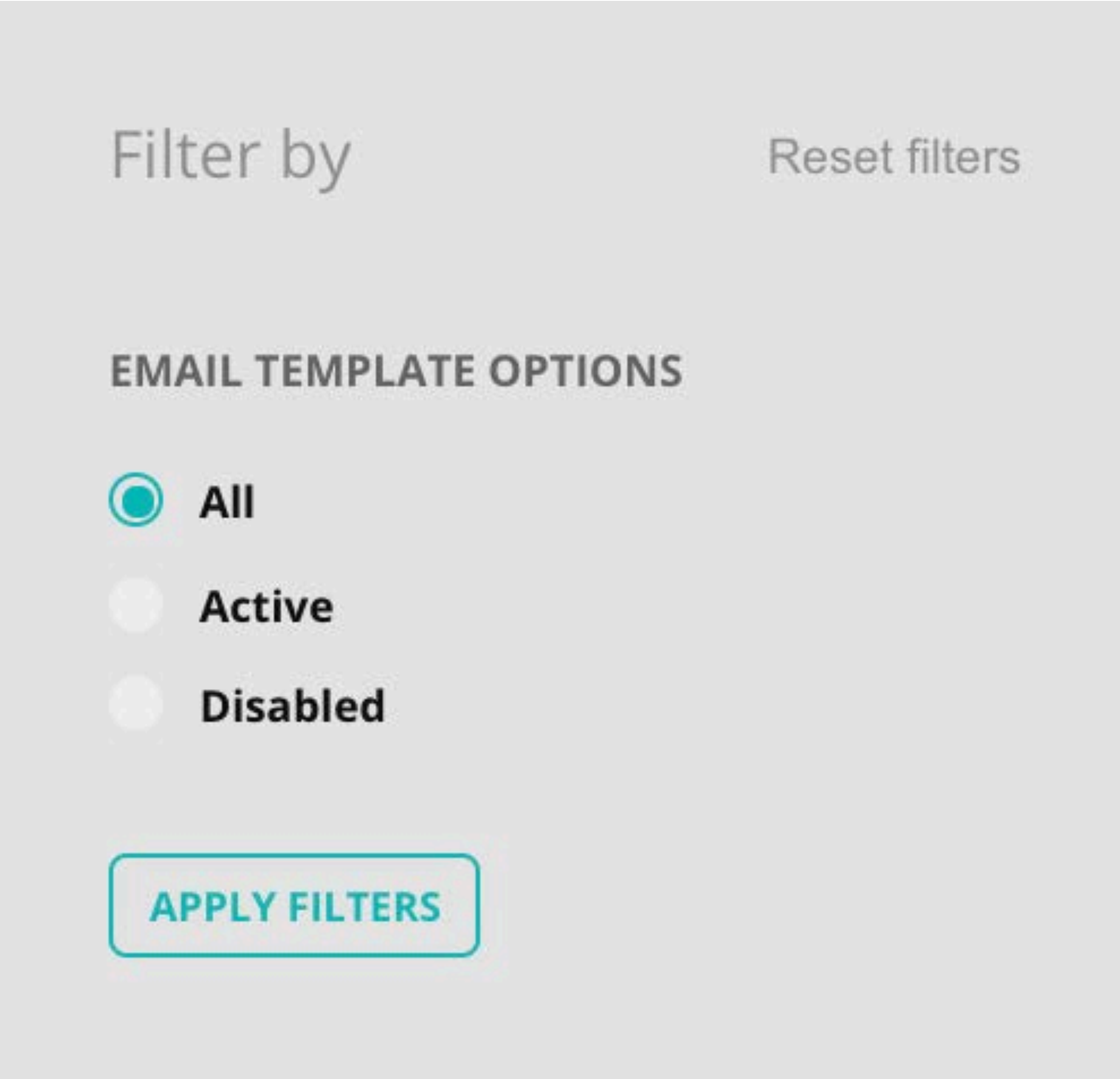

This will launch the Email Templates section:




Here you'll see all the templates created.

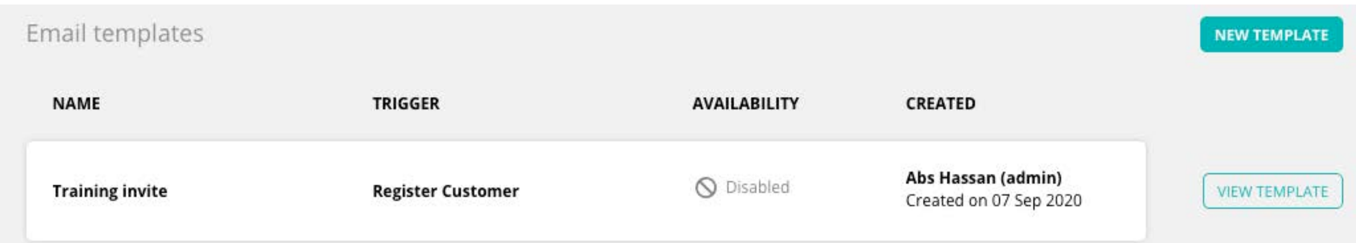
All templates will be displayed along with the option to filter to only view the Active or Disabled ones.

You can filter the templates using the left hand menu:



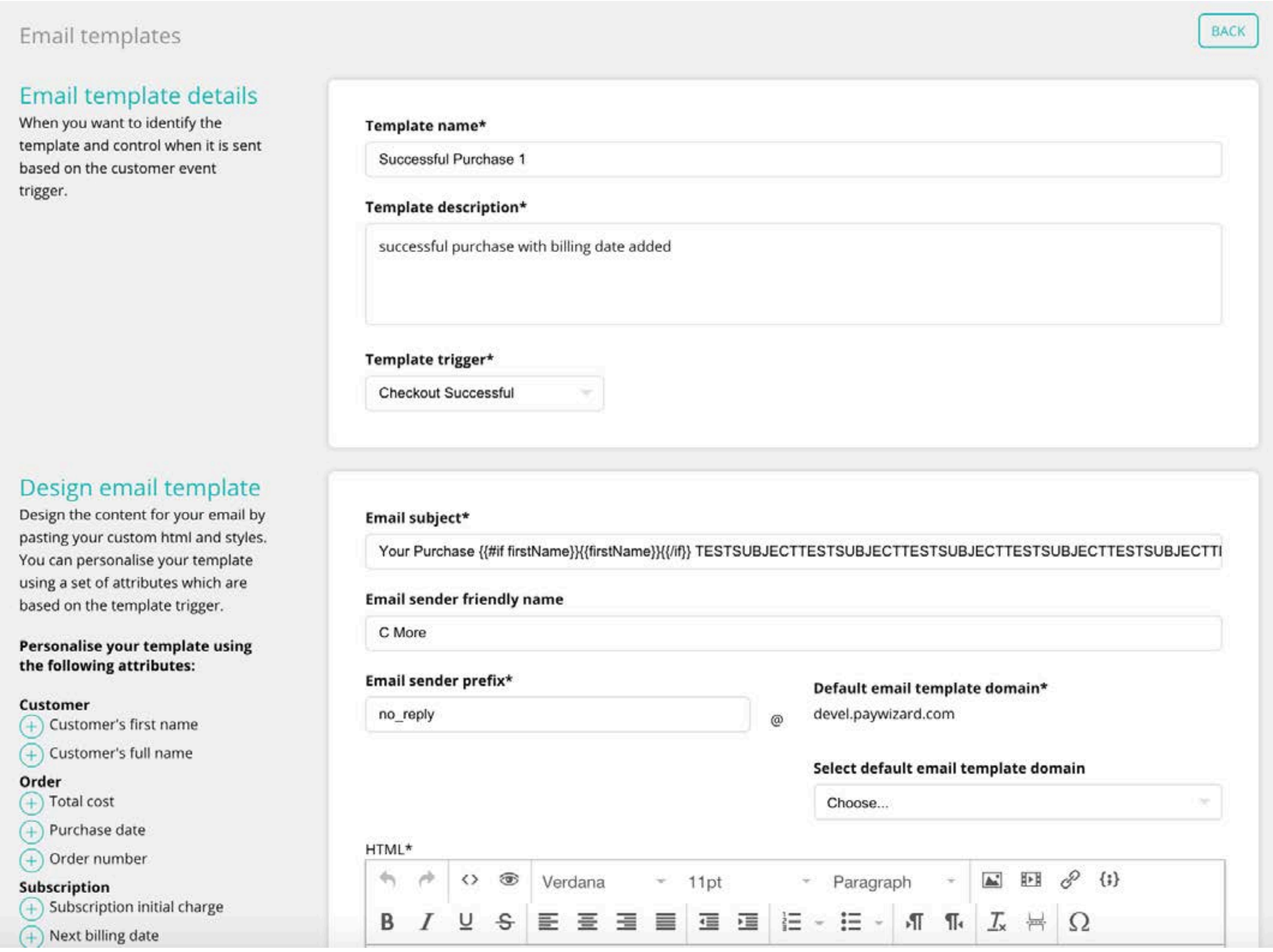

You can create and view templates from this screen.

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:




...

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



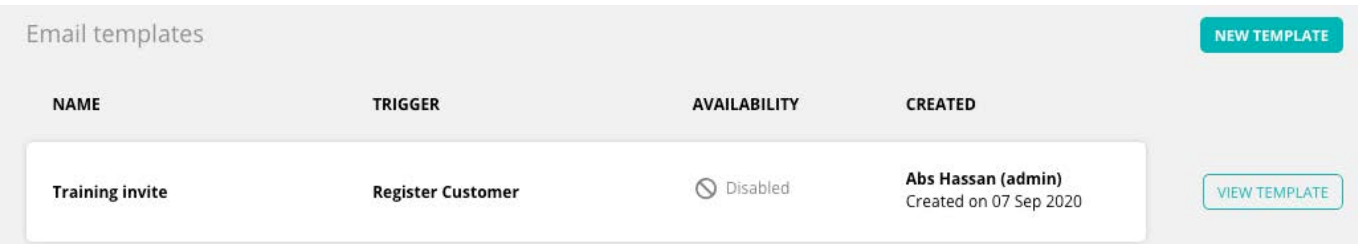

### One Active Email Template for each trigger

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

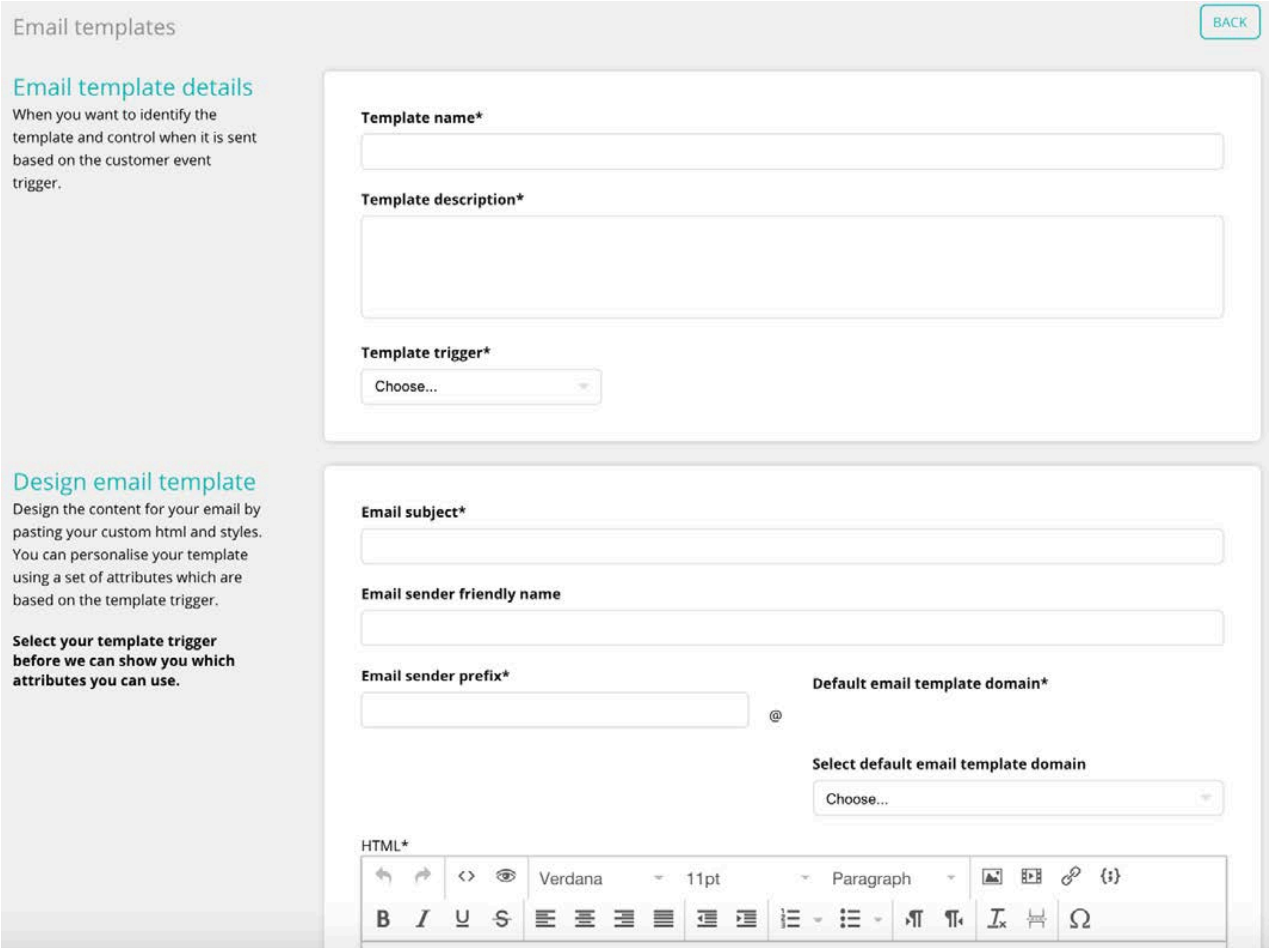
If there is one active at present you will need to save the one you are creating as inactive then turn the other one off first. Or disable the active one first before you begin creating a new email template.

## HOW TO CREATE AN EMAIL TEMPLATE

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




This will launch the Email Template creation screen:




## 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.

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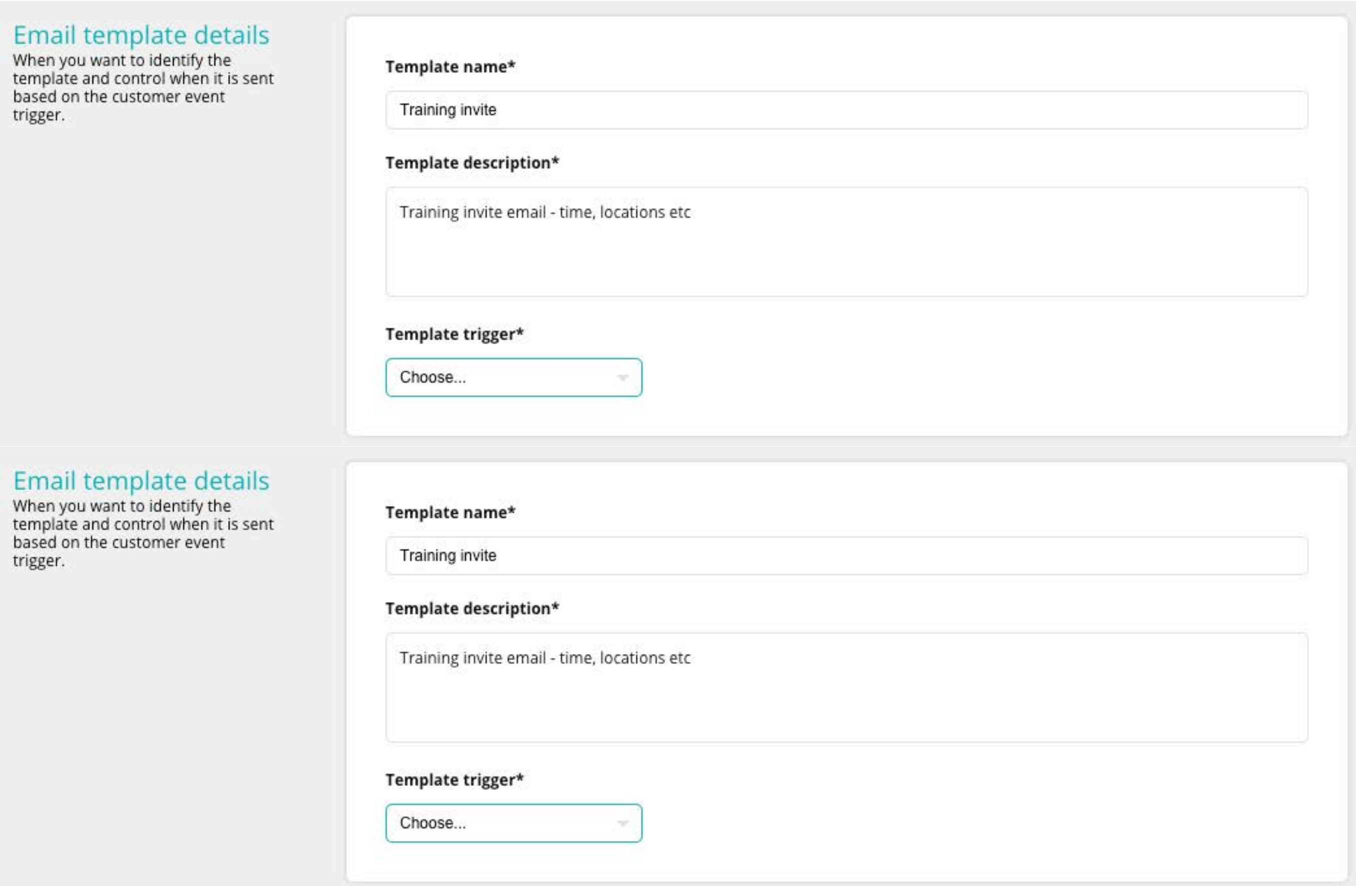
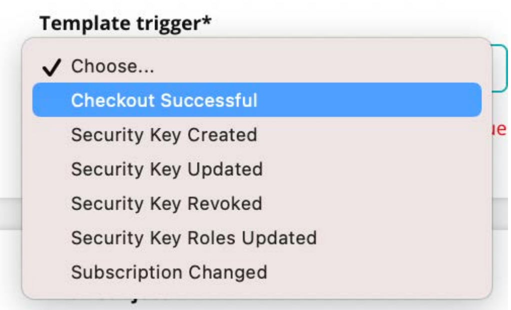


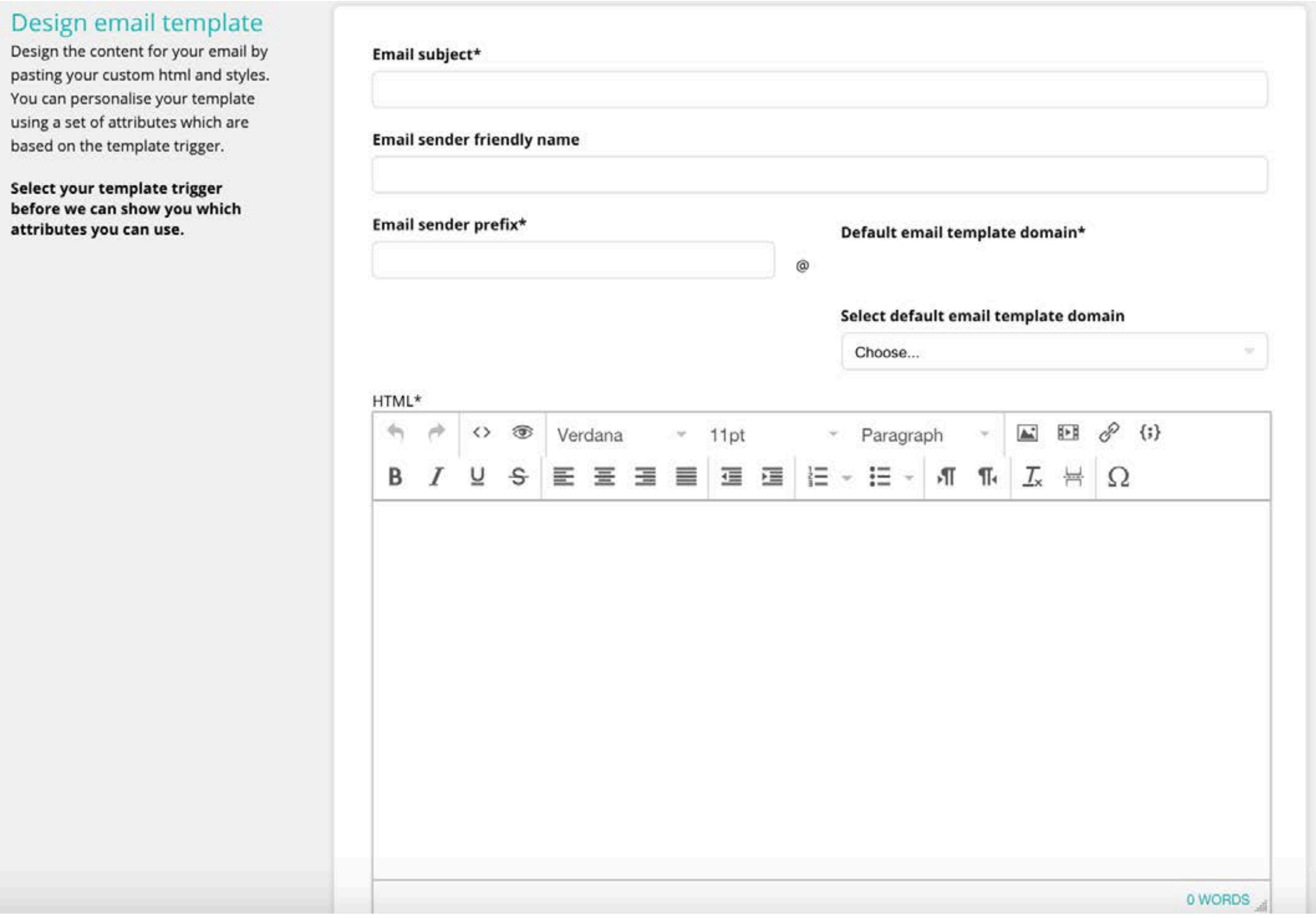

…




**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.




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


HTML Editor

**Adding undocumented attributes to your Email Template**

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

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

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

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

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

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

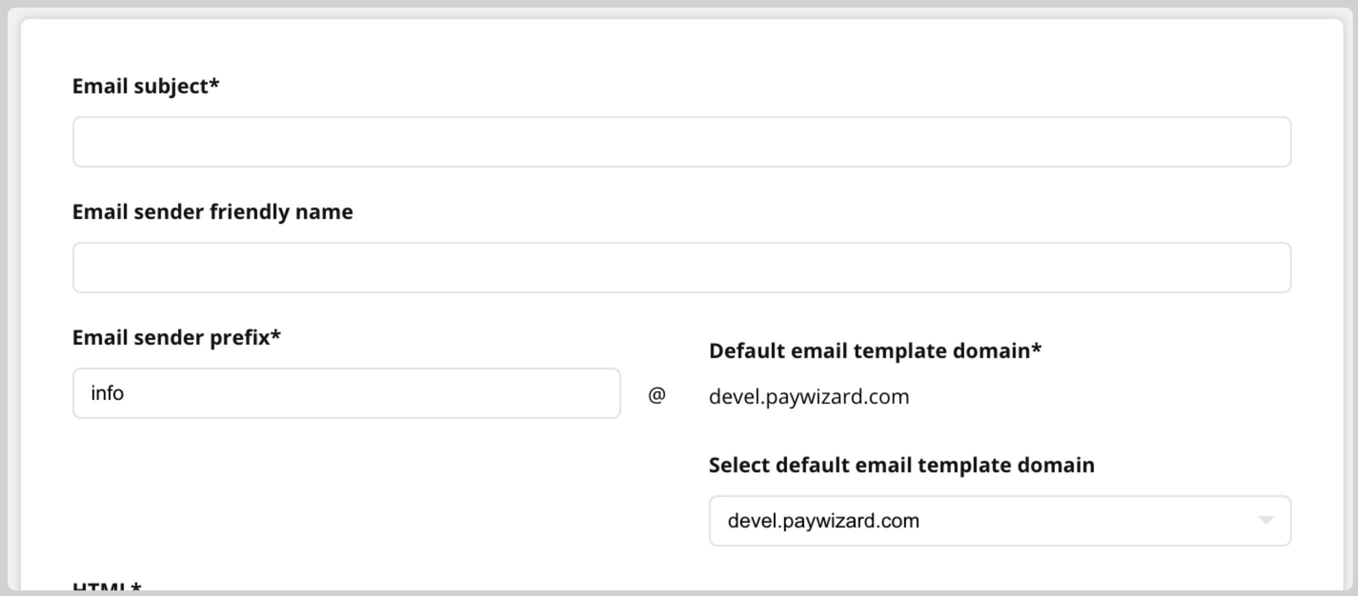
1. Complete the Email subject - this is the subject of the email that will be sent to your customer
2. Complete the Email sender friendly name - this is optional and if used you can add a name to the sender as opposed to just a default 'no reply'.

**An example of this could be:**

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

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

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




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)

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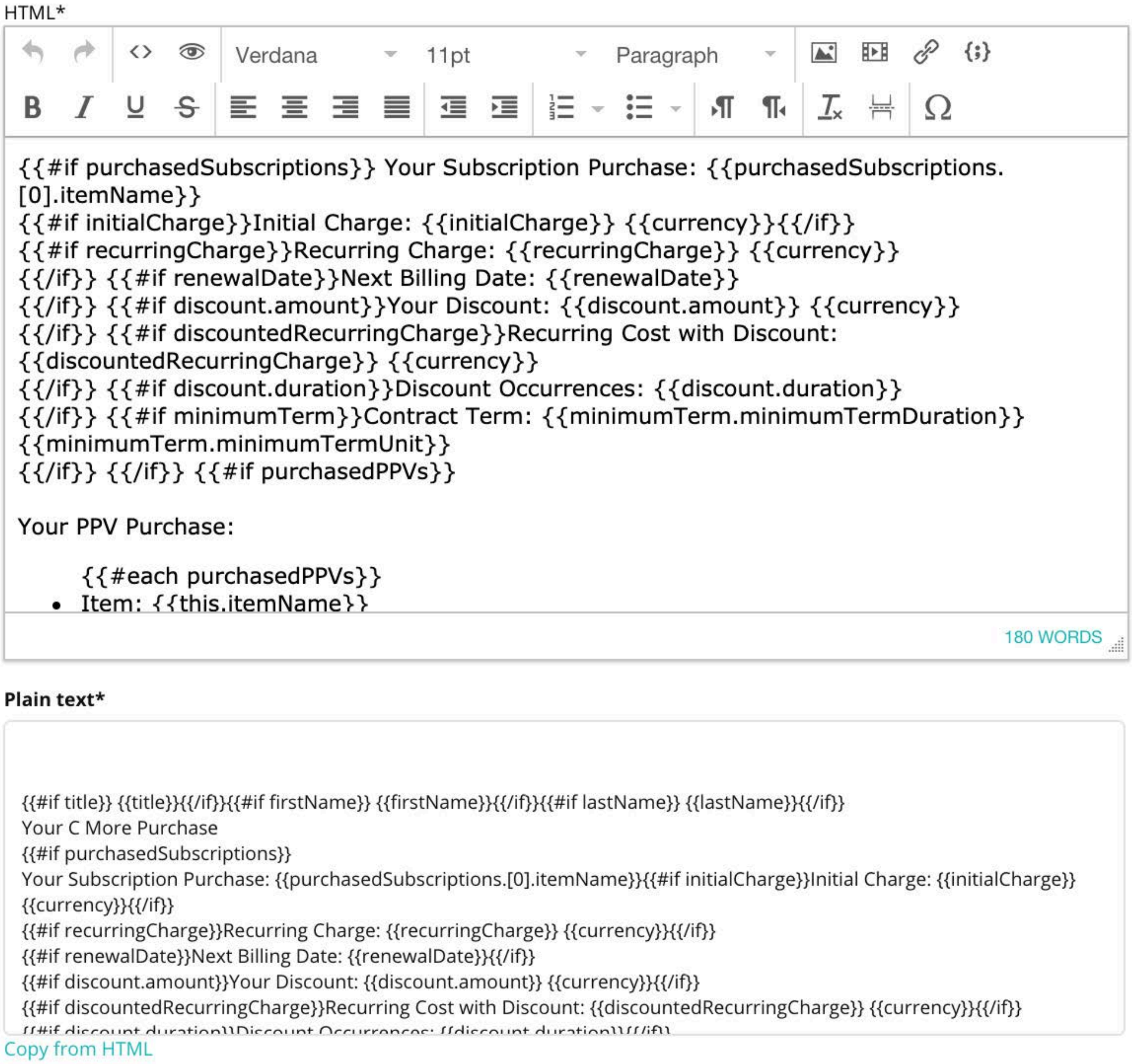
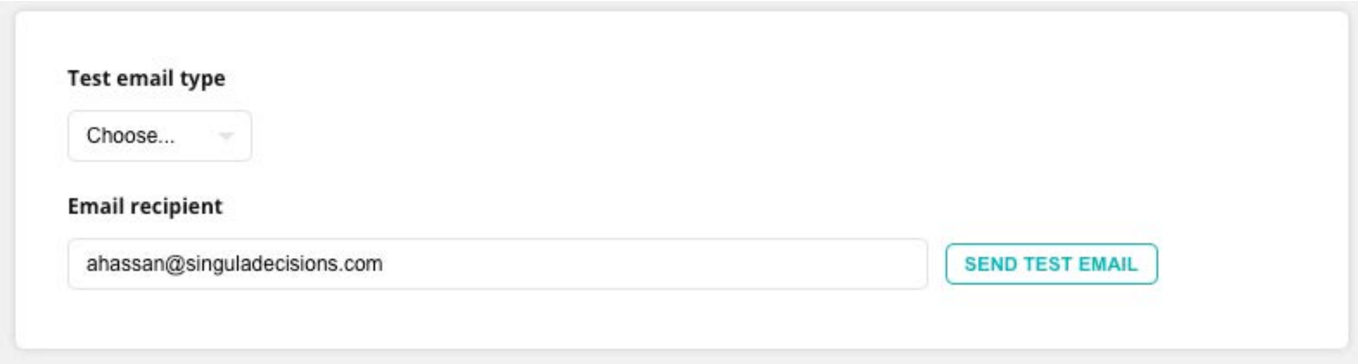



## COMPLETE THE TEST EMAIL TEMPLATE SECTION

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

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

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

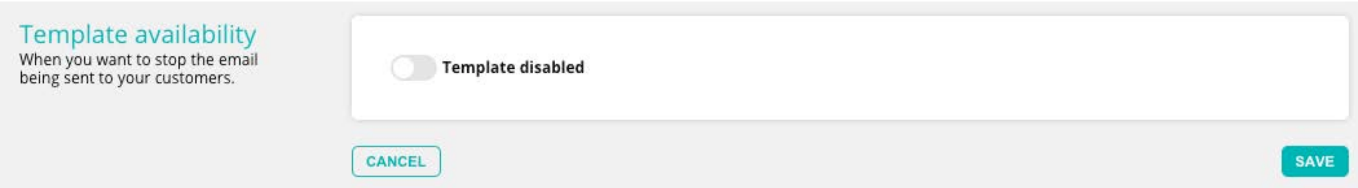



## CONFIRM THE EMAIL TEMPLATE AVAILIBILITY

Finally you need to confirm the template availability.

This is set to enabled by default however, if you want to disable it to use at a later date, select 'Template disabled" button

Once you're happy with the template, select 'Save' to create the email template.




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

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# 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

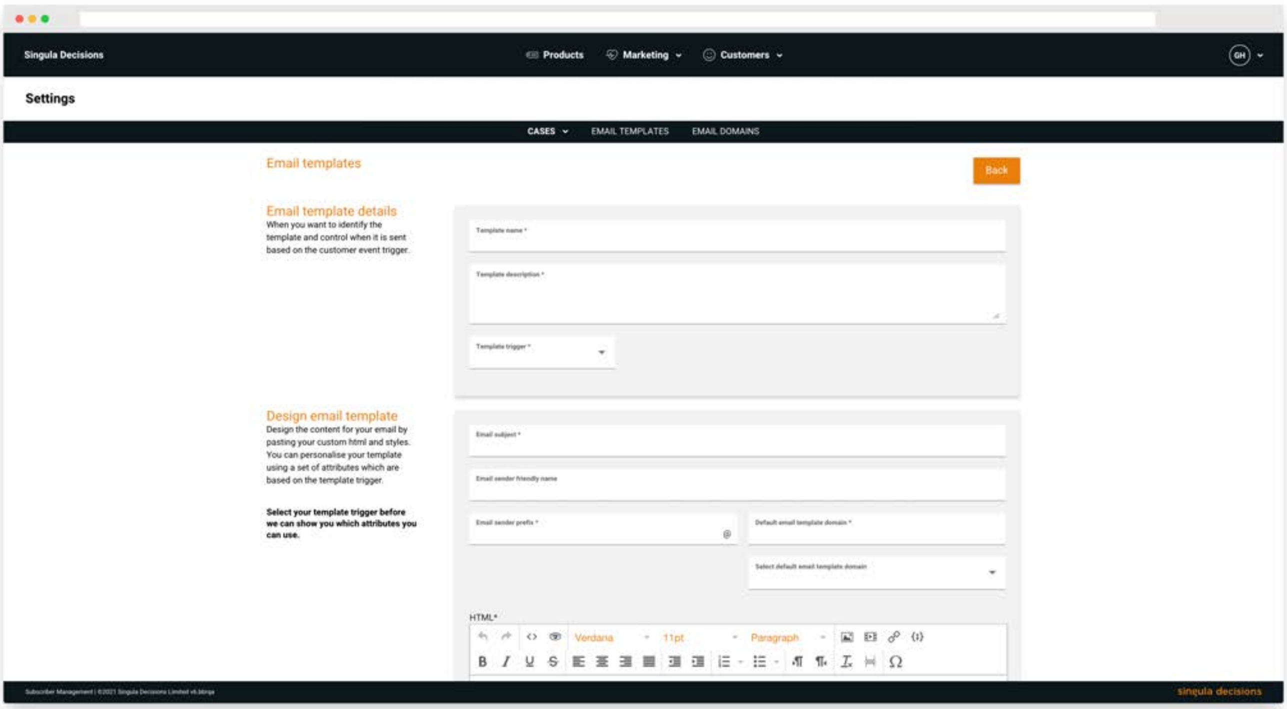
When you create an email template you can only have one active email template for each trigger.

## 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

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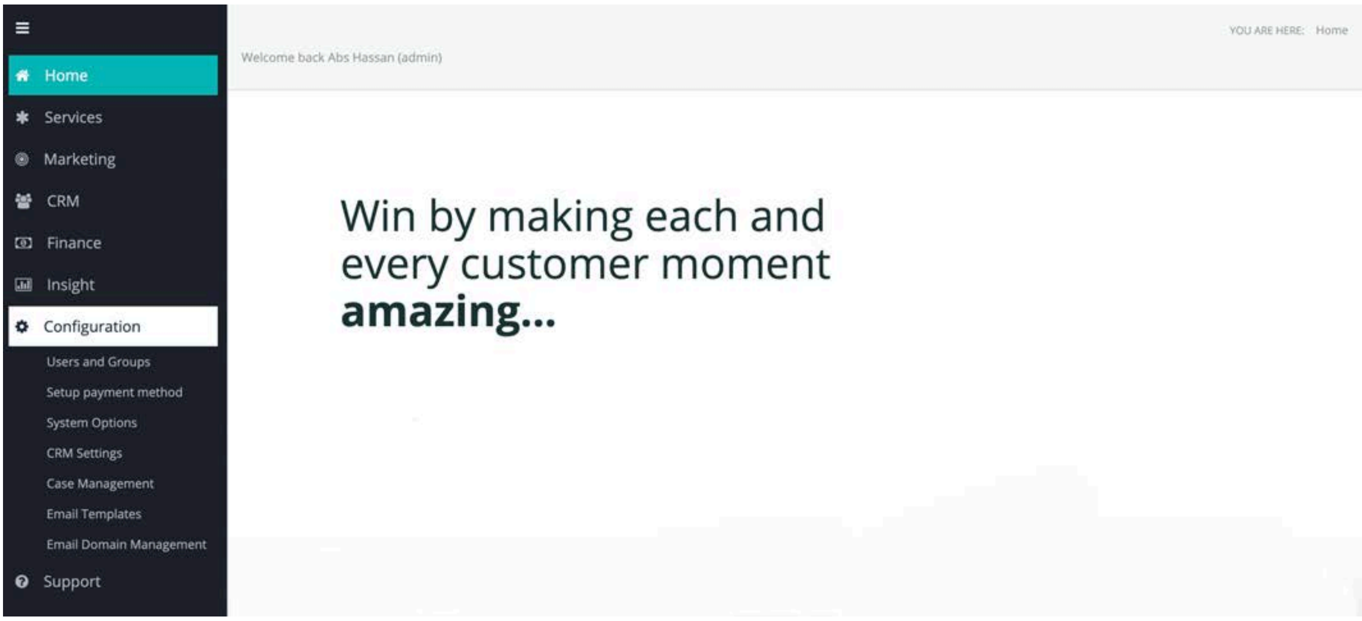
# Email domain management

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.

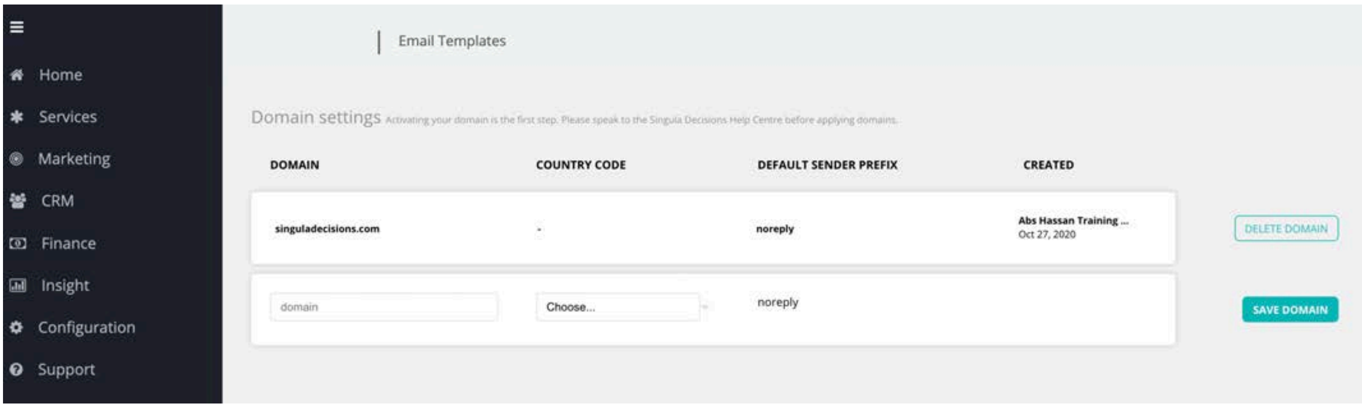
Note: Any new domains will need to be validated by Singula Decisions' Help Centre.

## HOW DO I ACCESS EMAIL DOMAIN MANAGEMENT?

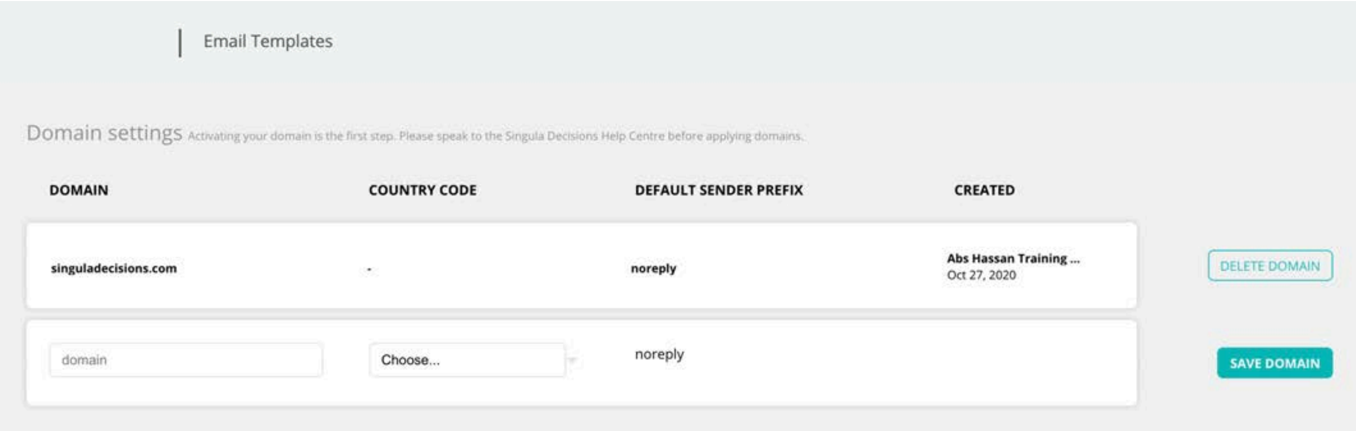
1. Select Configuration
2. Select Email Domain Management




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:



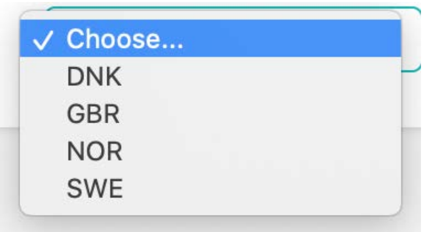

The default domain will be listed at the top and then any additional domains will be below this . The list will show the domain's Domain, Country Code, Default Sender prefix and who created it and when:


## HOW TO ADD A NEW DOMAIN

Follow these simple steps to add a new domain:

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


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



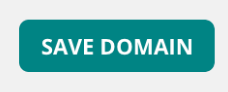

The country codes will need to be added by Singula Decisions Help Centre for it to appear in the drop down list. The list will show any country codes that have been setup and have not already been used.
This means the drop down update according to which country codes you have already used and so will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

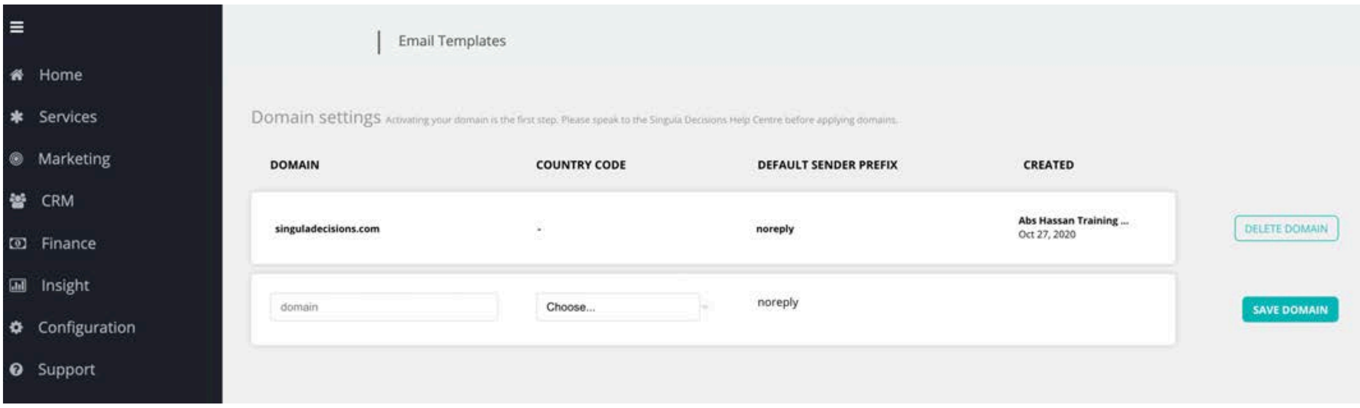
4. Select 'Save Domain'



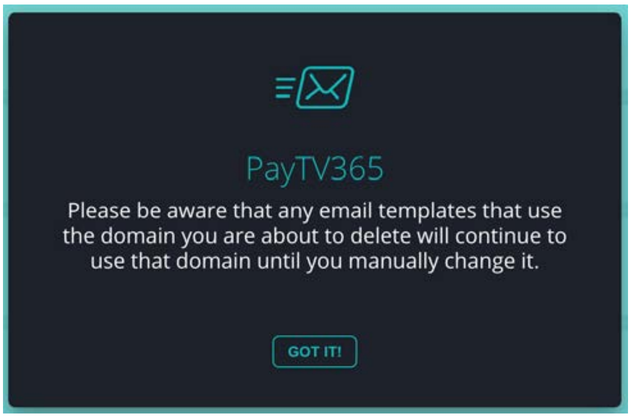

Once the domain has been saved it will appear in the list:


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.




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

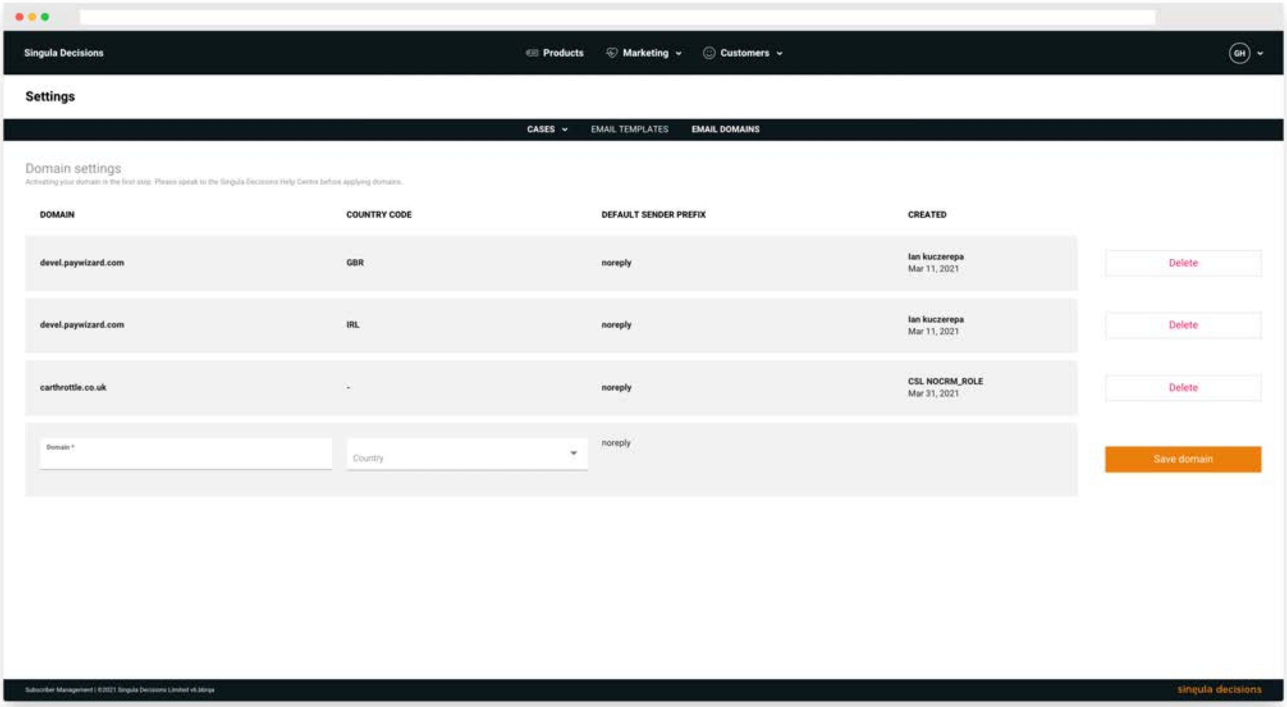


# BETA Email domains

**We need to verify your domains**

1. Select Settings
2. Select Email Domains

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




## 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

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# Payment methods

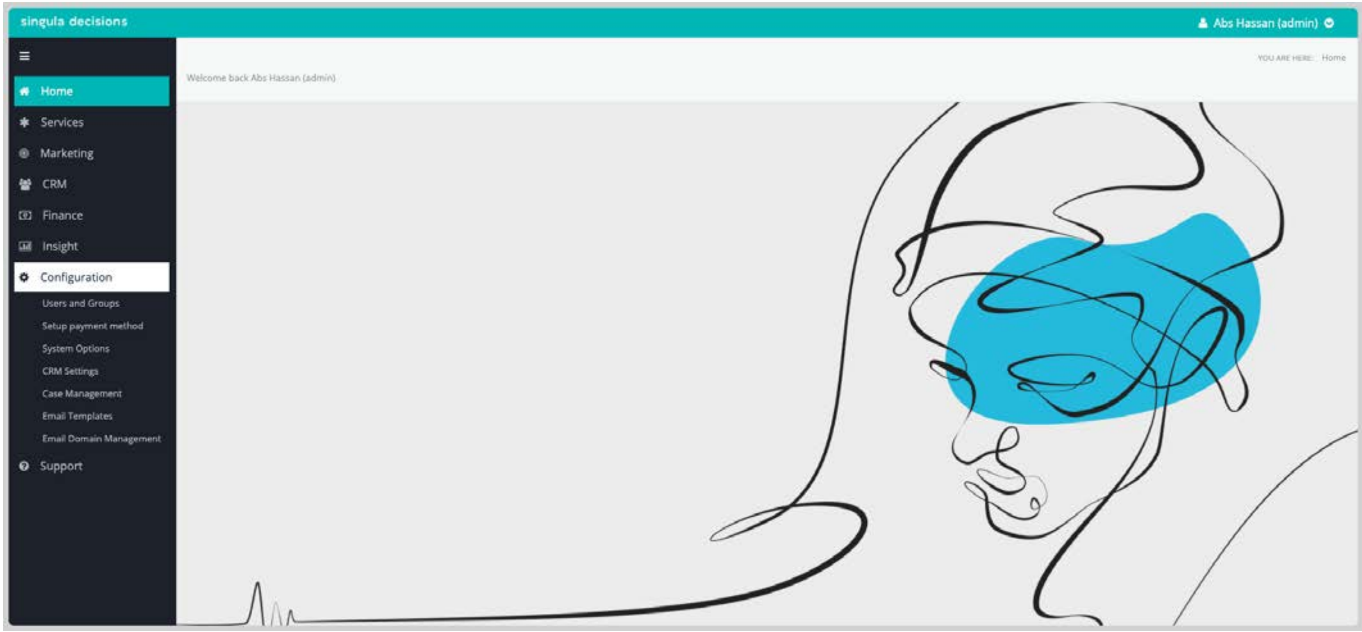
Setup Payment Method enables you to set up accounts along with any supporting metadata as well as configuring the necessary payment gateways in order to allow you to start using PSPs to take payments.

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

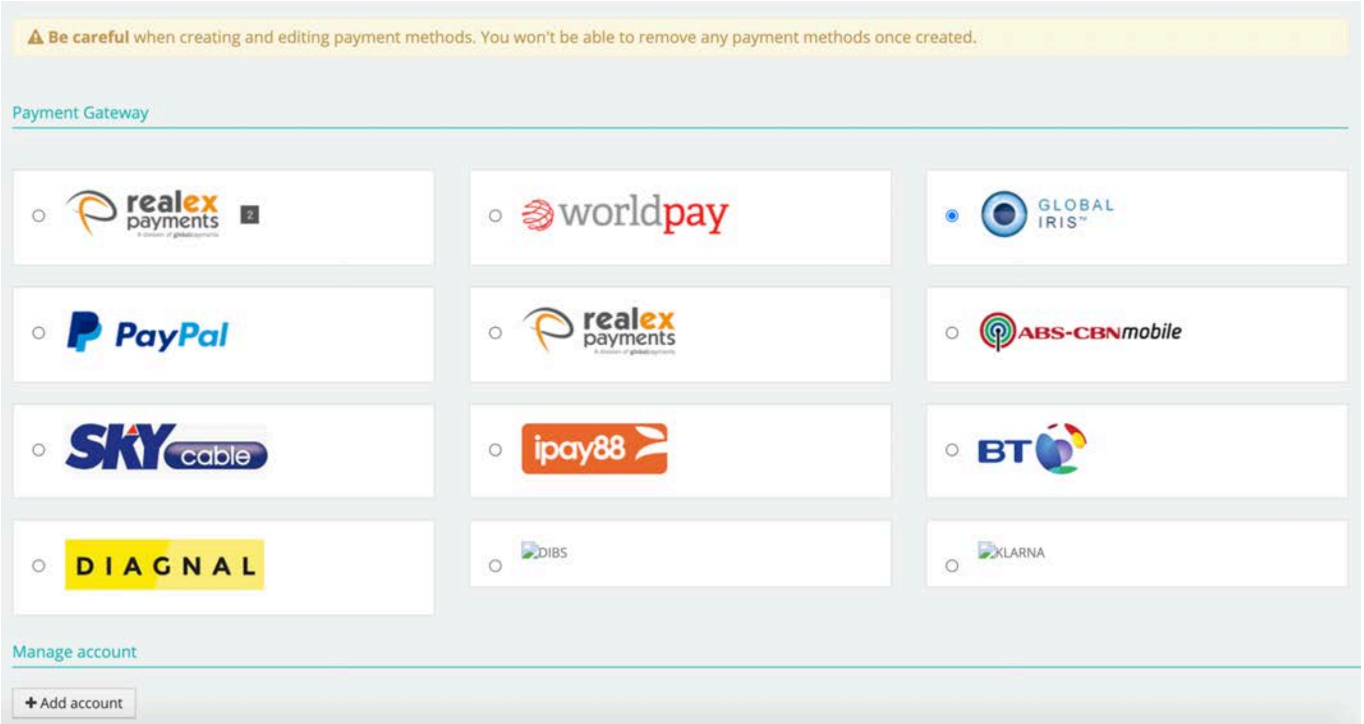
## GETTING STARTED

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

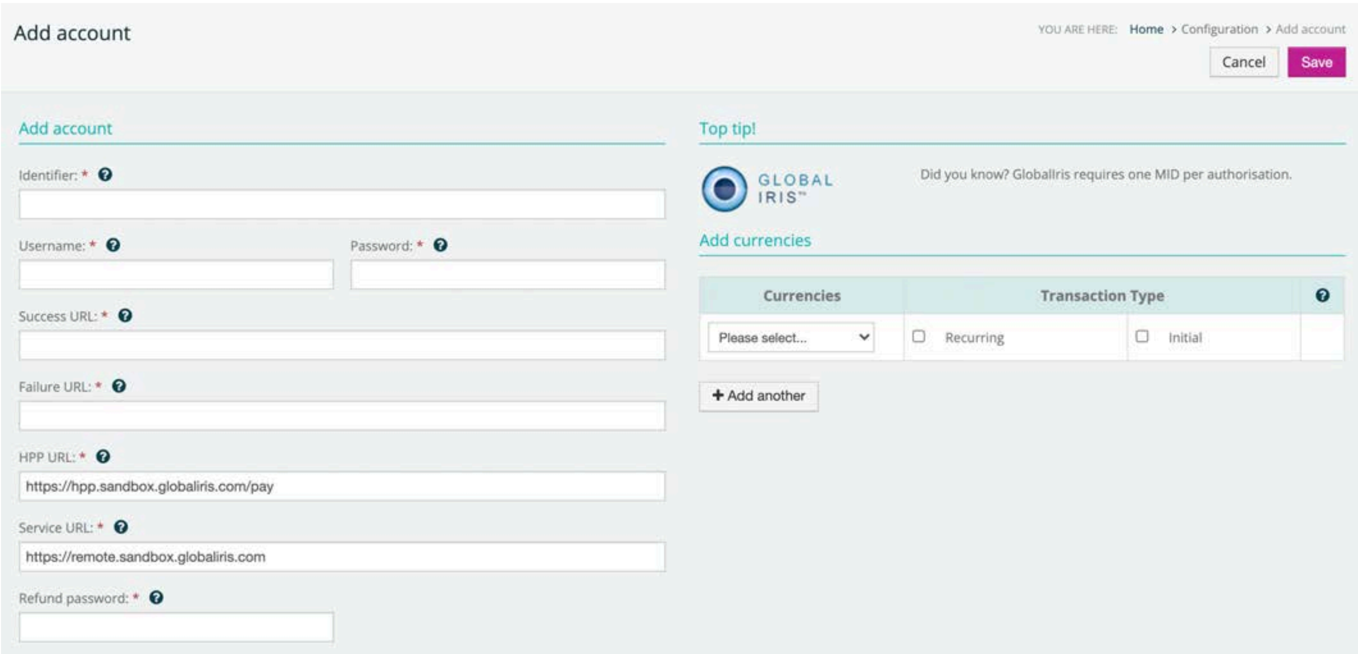
1. Contact one of our supported PSPs (e.g. Realex Payments, PayPal, DIBS, Klarna) and obtain the information that's required for setting up an account with them;
2. Log into Singula® Subscriber Management and select 'Configuration' then 'Setup payment method';




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;




5. Save changes;

The account can be edited if required.

## ADDING A REALEX PAYMENT ACCOUNT

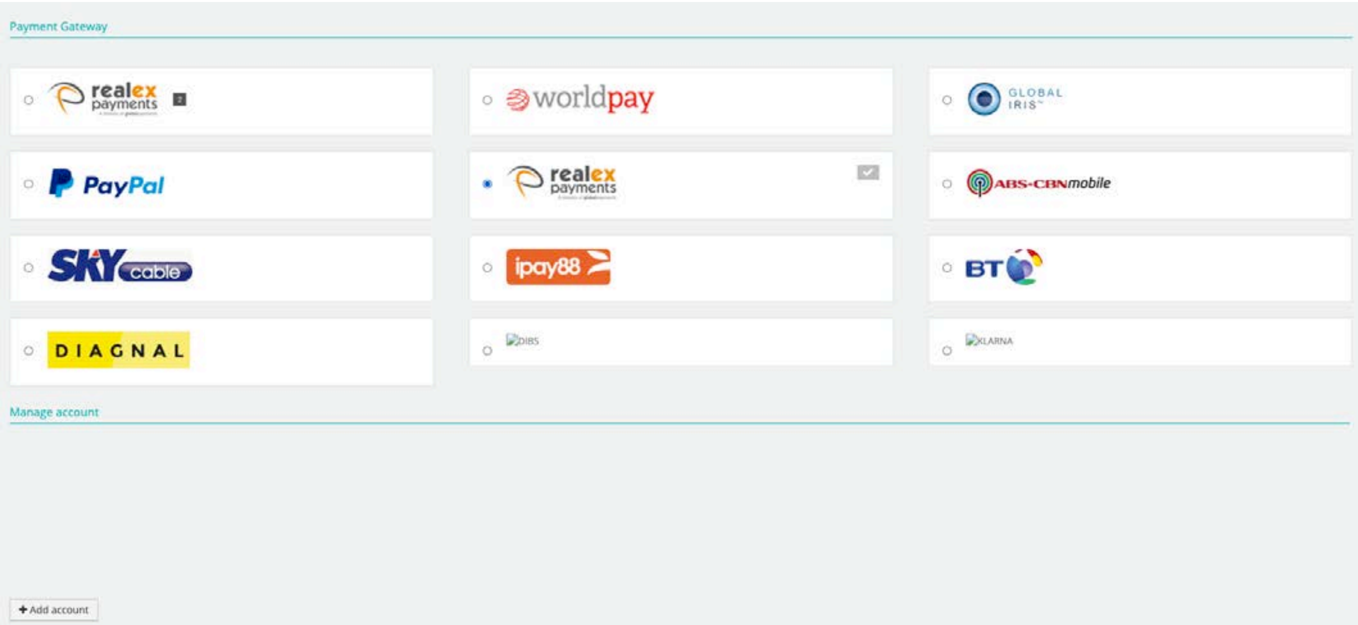
Realex Payments is an online payment processing solution. Realex Payments will capture and store your customers' tokenised payment details. You can also process payments during cart checkout and run regular billing cycles using the token provided by Realex Payments.

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

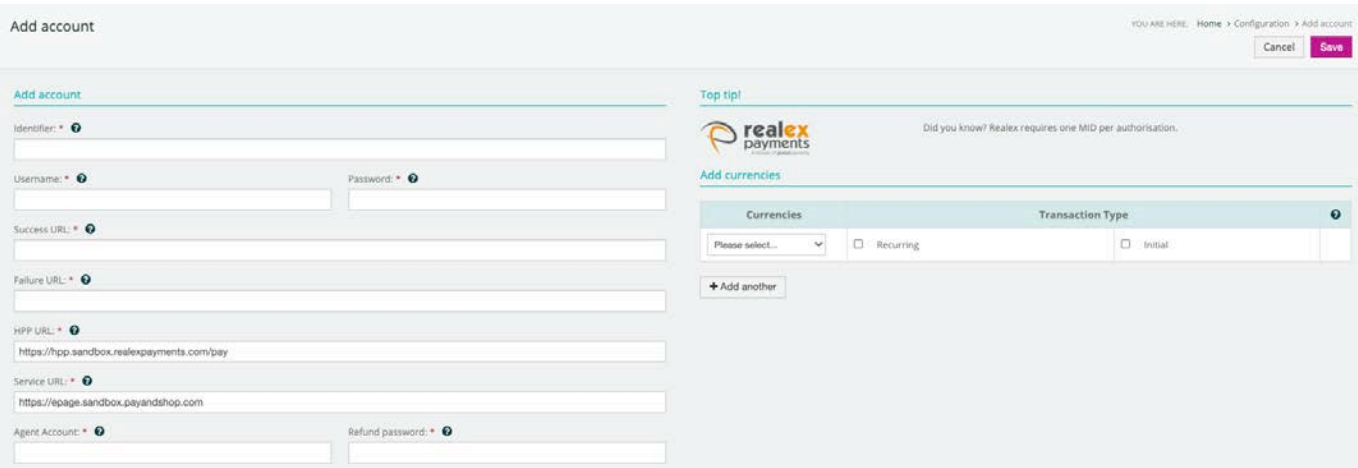
Realex Payments needs one identifier per transaction type. (This is provided by Realex)

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;

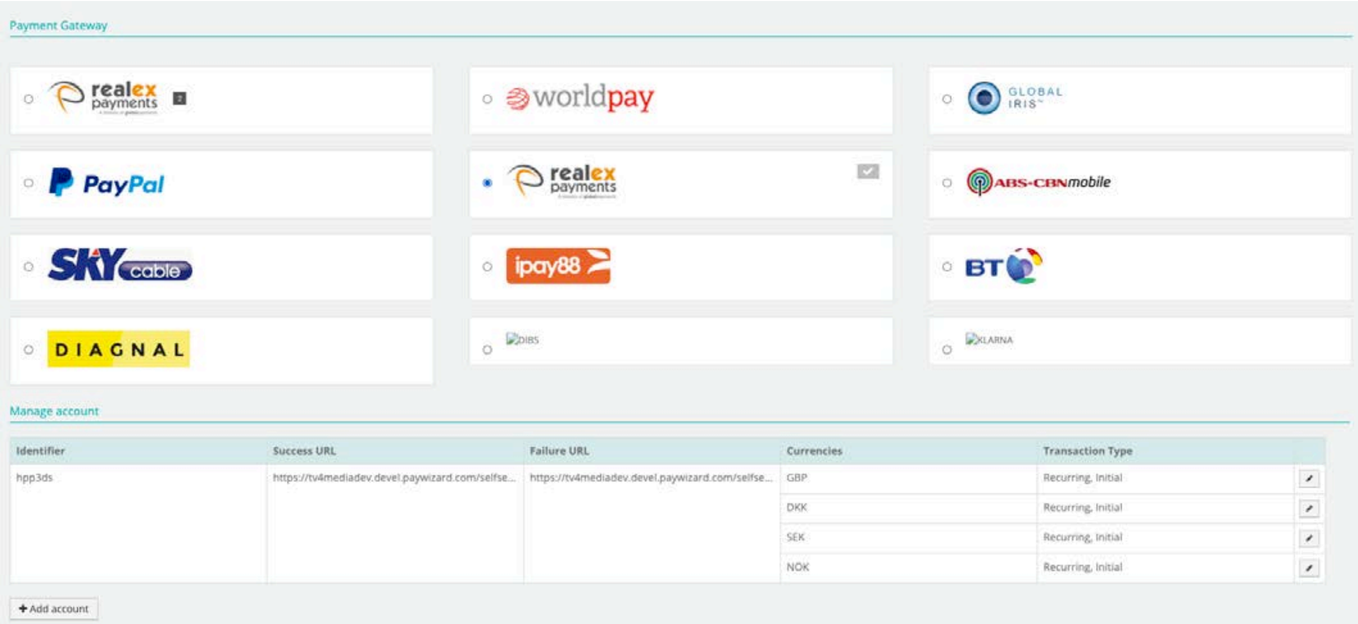
Once setup is complete, click the Save button at the bottom or Cancel to go back.

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.

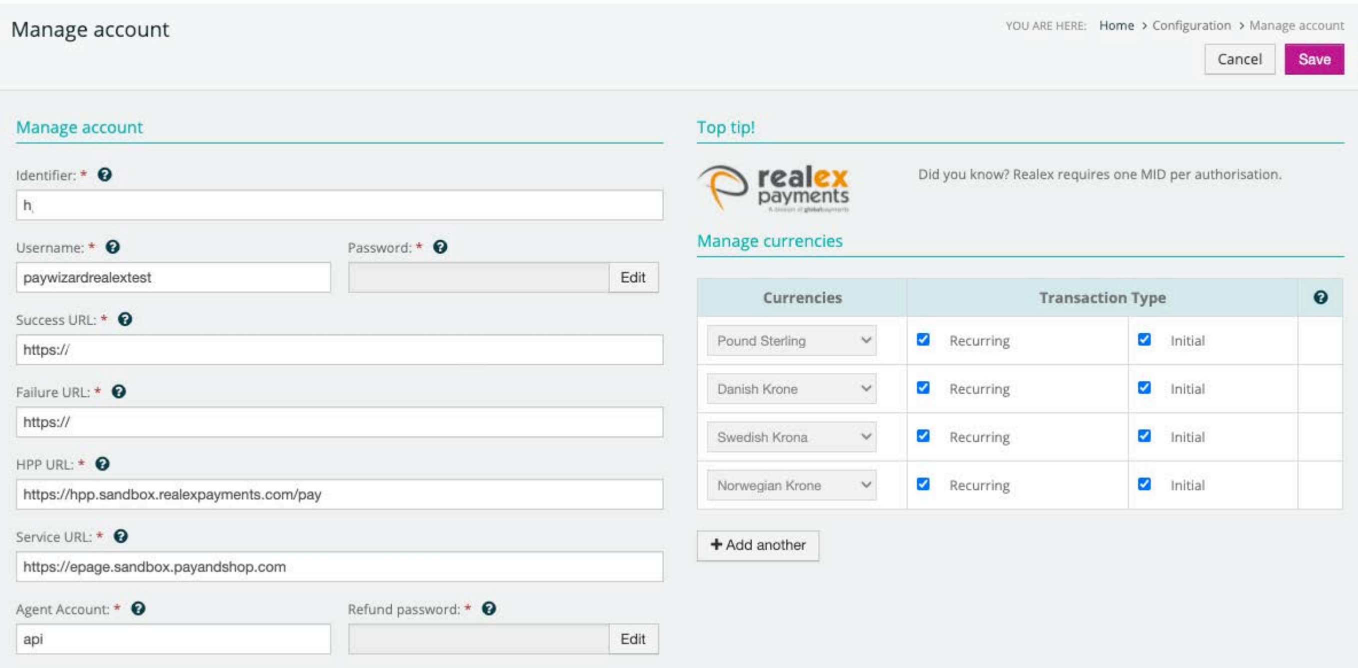
If you need to delete or deactivate a payment method please contact your Account Manager or Help Centre.

## 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.

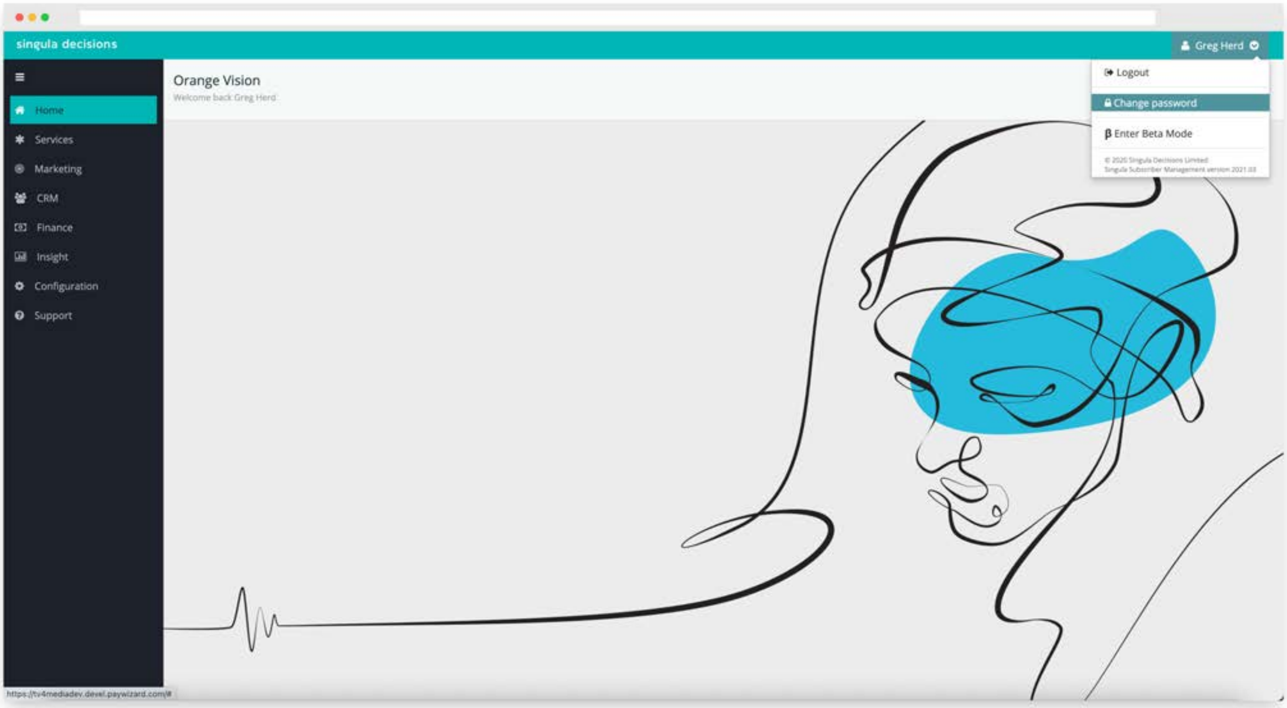
**Note**: If you click on a protected edit field (grey box) it will display a blank white box, if you click on this but don't wish to edit it, click the 'Cancel' button to go back, this will revert to your previous settings.

# 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.

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# SUPPORT

## Contact support

### CONTACTING THE HELP CENTRE

You can email the Help Centre directly using the following email address helpcentre@singuladecisions.com or call on +44 (0)844 855 2975. The Help Centre is available 24 hours a day, 7 days a week, 365 days a year.

### RAISING A TICKET

You can raise a ticket, view an incident or make a request on the Singula Decisions ticket management system portal.

Instructions on how to raise a ticket will be supplied by your account manager. Your email domain will be whitelisted to use this site.

In the event you are unable to access the portal, you can contact the Help Centre.