

## QA Points

---

**Greeting** “Thank you for calling business care, my name is....”

**PIR** - I can certainly help you with that.”

**Empathy** “ know how frustrating problems can be. Let’s take a look together and see how we can fix it.

**Self service/customer education** offer wireless.att.com or \* services

**HOLD** – let them know your name and repeat their name after coming back from hold.

**PCN** – “Would you like me to email you a summary of this call?” (only on calls with changes)

**Summary (resolved)**- Have I fully resolved your issue/request/ today?

**Summary (unresolved)** Is there anything else I can help you with?

**Closing** – “As you know my name is Joanne, thank you for calling business care.

\*\*\* **Transfers** – give ph# to that dept and tx to queue if okay to cold tx. \*\*\*\* If it’s a warm transfer, note the acct the and record name of agent you transferred the call to.

## CARE Cheatsheet

---

**(A) Address Change** -  > enter new address > select billing or PPU (select mobiles if necessary) > NEXT > if not verified click NEXT > FINISH (must repeat procedure for each phone).

**(A) Auth Users - adding** RECORD menu > auth users (populates box) > update level > update allowed (select changes, info or nothing) > to auth mobile or both select mobile number > enter name > ADD > YES.

**(A) Auth Users - delete** Records > Auth Users (populates box) > highlight user > DELETE > YES.

**(A) Adjustment - deleting** – ACTIONS tab > Pending/Charges/Credits > highlight credit > note? > DELETE > YES.

**(A) Adjustment - issuing** -  > Select OCC or RTA\* > select ACTION CODE (if acct level leave mobile blank) > enter amount > select credit > date (auto populates today’s date) > Note acct > APPLY > OK. \*RTA credits apply right away to the acct

**(M) Adjustment – rollover** - SUBSCRIPTION tab > (select specific mobile) > RECORD menu > rollover adjustments > Click Adjustment quantity > type in reason code > write notes. To **view** to make sure the adj was applied, VIEW menu > rollover summary > adjustments > current.

**Cases** (clarify), Do for bill reprints, re rates greater than 60 days, returned equipment not credited to the account, subsidy unlocks.

**(M) Change Phone #** - select mobile > SERVICE menu > select mobile # > choose service area (do not select svc area with PP) > NPA > retrieve > highlight first number > OK > YES > OK > YES.

**(A) Contract expiration** – RECORD menu > contracts > tells what contract(s) is in affect.

**(A) Contract extension** - RECORD menu > contract > highlight mobile > END > waive liq damages > OK > check available contracts > enter date > ADD > YES > OK

**Do Not Call List (M)** - Record > Solicitations/Notifications

**(M) Equipment upgrade** – SERVICE menu> equipment upgrade > check date.

**(M) Feature – add/delete**→ select mobile >SUBSCRIPTION tab > add >  twice (make sure you do it for all mobiles if it’s not a shared feature) shared features are M2M, NW and PTT) DELETE select **UPDATE** not delete.

**FSLE** – no VID for add must place test call to make sure NOT working, must VID and place test call to make working once removed.\*\*\*\*\*DOES NOT work overseas \*\*\*\*\*

**Passcode** – RECORD > passcode (only for acct not sep mobiles)

**(A) Priority Notes** – click on key icon

**(A) P2Pay** (see CSP bookmark) CFS > treatment activity = w/in 30 days **payment arrangement > 60 days.**

\*\*\* always ask if they want a future dated payment check if has had NSF, suspension or broken P2P. still can be disconnected, may face \$36 activation charge

**Rate Plan – change** – (\*\*\*\* check roll over minutes first and let customer know that they may lose accumulated rollover minutes.

**Rate Plan** – view – (A)  > follow prompts.

**(M) Rollover – view** - VIEW menu > rollover summary > adjustments > current.

**Rollover – crediting** (see adjustments)

**(M) Service - deactivate** -  > inactive \*\*\*NOT RECYCLE \*\*\* > note why suspension, ie son is grounded also tell and note customer there is a re activation fee - can waive it only once a year if justified.

**(M) Service - re instate** - as above but select active - up to you to activation fee is waived. Check notes.

**Service suspend** - see service deactivate. Select military or RRS.

**Subsidy unlock** – this is a case in clarify

**Switch activity** – select mobile >  s

**Unlock SIM** – select mobile >  > give cust PUK or PUK2. Ask them to power the phone on.