

3.0 Customer Service – Add Account

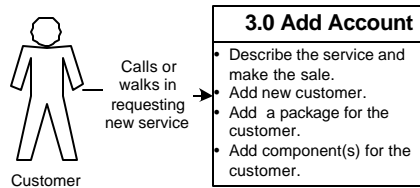
Overview: This section outlines the business procedures and policies for Customer Service - Step 3.0: Add Account. Following the business procedures and policies are related system procedures.

These procedures would be followed when a potential new customer contacts OneMain.com Customer Service with a request for information and service.

For ease of use, this sequence also includes the business processes for “Add Package” and “Add Component”, in the natural flow of adding a new account to the system. “Add Package” and “Add Component” will also be covered separately, for the case in which an existing customer calls and asks to have additional package(s) and/or component(s) added to the account.

Users: Customer Service Representatives (CSR’s)

Process:



Inputs to this Step:

- Customer phone call.
- Customer walk-in.

Outputs of this Step:

- CSR describes the service and makes the sale.
- CSR adds a new account to the system.
- CSR adds a new package for the customer.
- CSR adds component(s) to the package.

Systems Used: BOSS

**Business Procedures
And Policies**

When a new account is created, the customer has the choice of paying by check or credit card. After the first bill has been processed, he/she can change the payment method to Electronic Funds Transfer (EFT) by contacting OneMain.com.

The “Billing Start Date” determines the date on which billing begins, and determines the date of the billing cycle. For example, if the Billing Start Date is the 18th, then the customer will be billed from the 18th of one month to the 17th of the next month, with an invoice being generated on the 18th. By default, the Billing Start Date is the current date.

The Payment Due Date is 14 days after the invoice date. The Payment Grace Period is 5 days after the Payment Due Date. An account enters Collections based on the Payment Due Date + Payment Grace Period (see “24.0 Collections Overview” for further information).

ACTIONS:

3.0.1 Log in to BOSS.

- Select <Accounts>→<Add>.

3.0.2 The “Add Account” screen is displayed.

- Complete the “Account Information” panel.
- The yellow arrow pointing right indicates a required field.
 - How did you hear about OneMain?
 - Probe the customer to determine how he/she heard about OneMain.com, and select the appropriate choice from the drop-down menu. This information is invaluable in ensuring our marketing dollars are being spent wisely.
 - First Name
 - Last Name
 - Street Address
 - City
 - State
 - Zip
 - It is imperative that the spelling and punctuation of all Account Information is correct to ensure proper billing. The “City”, “State”, and “Zip Code” fields will be validated upon moving to the next screen.
 - County
 - The “County” field will be auto-generated within the billing system. There may be instances where the Zip Code entered spans multiple counties. In these cases, the CSR will be prompted to select the correct county when moving to the next screen.
 - Country (the default is “United States”)
 - Primary Phone
 - The Primary Phone number must be a phone number where OneMain.com can contact the customer; this should not be used to enter the number that the customer’s modem will be using.
 - Secondary Phone (if any)
 - FAX Number
 - Codeword – Ask the customer for his/her **mother’s maiden name**. This will serve as the codeword for the account.
 - Company (if any) – Scroll down to access this field.
- Select <Continue>.
 - If, after selecting <Continue>, the “Invalid City, State or Zip Code” error screen appears, return to the previous screen and verify the address information with the customer.

- 3.0.3 The “Add Account, Page 2” screen is displayed.
- Complete the “Payment Information” panel.
 - The yellow arrow pointing right indicates a required field.
 - Payment method (Check or Credit Card) – The default is Check.
 - o A customer can sign up initially with check or credit card only. After the initial invoice has been generated, the customer can call OneMain.com and change to electronic funds transfer (EFT, or direct debit).
 - If Check, then no further information is needed; the customer’s account will be activated immediately.
 - If Credit Card, then add the following information:
 - o Name on Credit Card – The customer’s name as it appears on the credit card.
 - o Credit Card Number – Must be entered without spaces or other characters (- , /).
 - o Vendor – The default is Visa.
 - o Expiration Date – The format is mmyy.
 - Credit cards are verified, but are not charged immediately. Customers will be charged by the following business day.
 - Explain any special payment circumstances.

“Mr. Customer, in order to ensure that you do not receive a lapse in service, we must receive your payment by (date). We will be sending out an invoice to you. However, if you would like to send your payment in earlier, please include your account number in the memo section of your check and mail it directly to this address: [address of lockbox]”
 - Complete the “Billing Information” panel:
 - Account Category - the default is Residential.
 - o Business
 - o Residential
 - Billing Start Date – The format is mm/dd/yyyy. The default date is the current date. DO NOT MODIFY.
 - Bill Format (e-mail, paper) – The default is paper.
 - o Check customers will receive a paper invoice, regardless of any selections here.
 - o Credit card customers will receive a paper invoice. Invoices issued to credit card customers are for their records only; the invoice will note that their credit card has been charged.
 - Purchase Order Number
 - Complete the “Misc. Information” panel:
 - Privacy
 - o If appropriate, select the checkbox to “Keep personal information private”.
 - Do you need an installation CD sent to you?
 - o Ask the customer if he/she needs an installation CD.
 - If the customer would like an installation CD, inform the customer that he/she must select “Existing Account” when installing the CD. Selecting “New Account” will create a second account for the customer.
 - o **We do not send installation CDs to customers of virtual ISPs.**
 - o <Select Operation System> from drop-down menu if customer has requested the installation CD.
 - Referral (if any)
 - o Submit the OneMain.com account number of the existing customer, if known, in the <Referred by:> field. If the account number is not known, submit unique information, such as email address. When vague information is entered, such as first and/or last name, OneMain.com may be unable to find the account and apply the appropriate referral credit.
 - o Sales ID
 - Select <Continue>.
- 3.0.4 The “Package Information” screen is displayed.
- The options for Residential Accounts are:
 - Dial Up – Main Street Basic Plan

- Dial Up – Main Street Unlimited Plan – Annual Plan
- Dial Up – Main Street Unlimited Plan – Monthly Plan
- Dial Up – Main Street Unlimited Plan – Semi Annual Plan
- Dial Up – Main Street Plus Plan – Annual Plan
- Dial Up – Main Street Plus Plan – Monthly Plan
- Dial Up – Main Street Plus Plan – Semi Annual Plan
- Dial Up – Main Street Premier Plan – Annual Plan
- Dial Up – Main Street Premier Plan – Monthly Plan
- Dial Up – Main Street Premier Plan – Semi Annual Plan
- Dial Up – Main Street Unlimited – Buy 6 Get 6 Promotion
- Dial Up – Main Street Plus – Buy 6 Get 6 Promotion
- Dial Up – Main Street Premier – Buy 6 Get 6 Promotion
- Metered ISDN Dial Up Account
- Unlimited ISDN Dial Up Account
- Consumer ADSL Product (California Only)
- ADSL Midwest Monthly Package
- ADSL Midwest Quarterly Package
- ADSL Midwest Semi Annual Package
- ADSL Midwest Annual Package
- Domain Registration
- Co-Location Package
- Basic Web Hosting Account
- Premium Web Hosting Account
- Deluxe Web Hosting Account
- Web Starter Account
- Blackberry RIM Monthly Package
- Blackberry RIM Annual Package
- The options for Business Accounts are:
 - Dial Up – Main Street Basic Plan
 - Dial Up – Main Street Unlimited Plan – Annual Plan
 - Dial Up – Main Street Unlimited Plan – Monthly Plan
 - Dial Up – Main Street Unlimited Plan – Semi Annual Plan
 - Dial Up – Main Street Plus Plan – Annual Plan
 - Dial Up – Main Street Plus Plan – Monthly Plan
 - Dial Up – Main Street Plus Plan – Semi Annual Plan
 - Dial Up – Main Street Premier Plan – Annual Plan
 - Dial Up – Main Street Premier Plan – Monthly Plan
 - Dial Up – Main Street Premier Plan – Semi Annual Plan
 - Dial Up – Main Street Unlimited – Buy 6 Get 6 Promotion
 - Dial Up – Main Street Plus – Buy 6 Get 6 Promotion
 - Dial Up – Main Street Premier – Buy 6 Get 6 Promotion
 - Metered ISDN Dial Up Account
 - Dedicated ISDN Product
 - Frame Relay Access
 - Fractional T-1 Access and Full T-1 Access
 - ADSL Business Service (California Only)
 - ADSL Midwest Monthly Package
 - ADSL Midwest Quarterly Package
 - ADSL Midwest Semi Annual Package
 - ADSL Midwest Annual Package
 - Analog Dial Networking Account (for US Government Only)
 - Domain Registration
 - Co-Location Package
 - Basic Web Hosting Account

- Premium Web Hosting Account
- Deluxe Web Hosting Account
- Web Starter Account
- Blackberry RIM Monthly Package
- Blackberry RIM Annual Package
- NO PACKAGE OR COMPONENTS

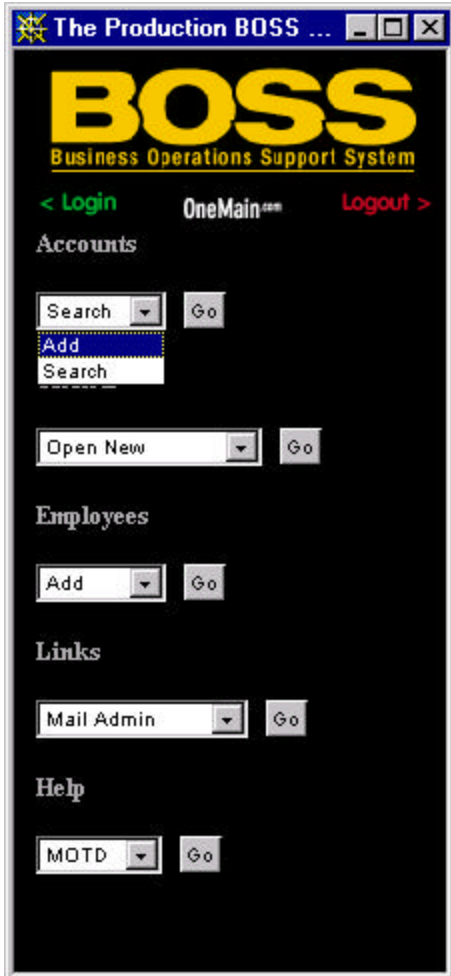
3.0.5 At this point, the CSR may:

- Refer to 4.0.a to Add one of the Dial Up Main Street Plans.
 - Refer to 4.0.b to Add one of the ISDN Dial Products.
 - Refer to 4.0.c to Add Dedicated ISDN Product.
 - Refer to 4.0.d to Add Frame Relay Access.
 - Refer to 4.0.e to Add Fractional T-1 and Full T-1 Access.
 - Refer to 4.0.f to Add Co-Location Package.
 - Refer to 4.0.g to Add ADSL Business Service (California Only).
 - Refer to 4.0.h to Add Analog Dial Up Networking (Government Only).
 - Refer to 4.0.i to Add Domain Registration.
 - Refer to 4.0.j to Add one of the Web Hosting Accounts.
 - Refer to 4.0.k to Add Web Starter Account.
 - Refer to 4.0.l to Add Consumer ADSL (California Only).
 - Refer to 4.0.m to Add one of the ADSL Midwest Packages.
 - Refer to 4.0.n to Add one of the Blackberry RIM Packages.
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System Procedures:

3.0.1 Log in to BOSS.

- Select <Accounts>→<Add>.



3.0.2 The “Add Account” screen is displayed.

- Complete the “Account Information” panel.
- The yellow arrow pointing right indicates a required field.
 - How did you hear about OneMain?
 - Probe the customer to determine how he/she heard about OneMain.com, and select the appropriate choice from the drop-down menu. This information is invaluable in ensuring our marketing dollars are being spent wisely.
 - First Name
 - Last Name
 - Street Address
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 - It is imperative that the spelling and punctuation of all Account Information is correct to ensure proper billing. The “City”, “State”, and “Zip Code” fields will be validated upon moving to the next screen.
 - County
 - The “County” field will be auto-generated within the billing system. There may be instances where the Zip Code entered spans multiple counties. In these cases, the CSR will be prompted to select the correct county when moving to the next screen.
 - Country (the default is “United States”)
 - Primary Phone
 - The Primary Phone number must be a phone number where OneMain.com can contact the customer; this should not be used to enter the number that the customer’s modem will be using.
 - Secondary Phone (if any)
 - FAX Number
 - Codeword – Ask the customer for his/her **mother’s maiden name**. This will serve as the codeword for the account.
 - Company (if any) – Scroll down to access this field.
- Select <Continue>.
 - If, after selecting <Continue>, the “Invalid City, State or Zip Code” error screen appears, return to the previous screen and verify the address information with the customer.

(3.0.2 Screenshot: “Add Account” screen, “Account Information” panel)

Add Account - Netscape

Account Information (fields marked with a * are required)

* How did you hear about OneMain?

* First Name: * Last Name:

* Street Address:

* City: * State: * Zip Code:

County: * Country:

* Primary Phone:
 -

Secondary Phone:
 -

Fax Number:
 -

* Codeword:

Company:

[< BACK](#) **BOSS**

3.0.3 The “Add Account, Page 2” screen is displayed.

- Complete the “Payment Information” panel.
- The yellow arrow pointing right indicates a required field.
 - Payment method (Check or Credit Card) – The default is Check.
 - A customer can sign up initially with check or credit card only. After the initial invoice has been generated, the customer can call OneMain.com and change to electronic funds transfer (EFT, or direct debit).
 - If Check, then no further information is needed; the customer’s account will be activated immediately.
 - If Credit Card, then add the following information:
 - Name on Credit Card – The customer’s name as it appears on the credit card.
 - Credit Card Number – Must be entered without spaces or other characters (- , /).
 - Vendor – The default is Visa.
 - Expiration Date – The format is mmyy.
 - Credit cards are verified, but are not charged immediately. Customers will be charged by the following business day.
 - Explain any special payment circumstances.

“Mr. Customer, in order to ensure that you do not receive a lapse in service, we must receive your payment by (date). We will be sending out an invoice to you. However, if you would like to send your payment in earlier, please include your account number in the memo section of your check and mail it directly to this address: [address of lockbox]”
- Complete the “Billing Information” panel:
 - Account Category - the default is Residential.
 - Business
 - Residential
 - Billing Start Date – The format is mm/dd/yyyy. The default date is the current date. DO NOT MODIFY.
 - Bill Format (e-mail, paper) – The default is paper.
 - Check customers will receive a paper invoice, regardless of any selections here.
 - Credit card customers will receive a paper invoice. Invoices issued to credit card customers are for their records only; the invoice will note that their credit card has been charged.
 - Purchase Order Number
- Complete the “Misc. Information” panel:
 - Privacy
 - If appropriate, select the checkbox to “Keep personal information private”.
 - Do you need an installation CD sent to you?
 - Ask the customer if he/she needs an installation CD.
 - If the customer would like an installation CD, inform the customer that he/she must select “Existing Account” when installing the CD. Selecting “New Account” will create a second account for the customer.

- **We do not send installation CDs to customers of virtual ISPs.**
- <Select Operation System> from drop-down menu if customer has requested the installation CD.
- Referral (if any)
 - Submit the OneMain.com account number of the existing customer, if known, in the <Referred by:> field. If the account number is not known, submit unique information, such as email address. When vague information is entered, such as first and/or last name, OneMain.com may be unable to find the account and apply the appropriate referral credit.
 - Sales ID
- Select <Continue>.

(3.0.3 Screenshot: "Add Account, Page 2" screen)

Add Account, Page 2 - Netscape

Payment Information

Payment method:
 Check Credit Card

*if the above payment type is **Credit Card** then the information below must be populated

Name on Credit Card: Credit Card Number:

Vendor: Expiration Date: (mm/yy)

Billing Information

Account Category: Purchase Order Num:

Billing Start Date: (mm/dd/yyyy) Bill Format: email paper

Misc. Information

Privacy:
 Keep personal information private

Do you need an installation CD sent to you? Yes No

If yes, select an Operation System:

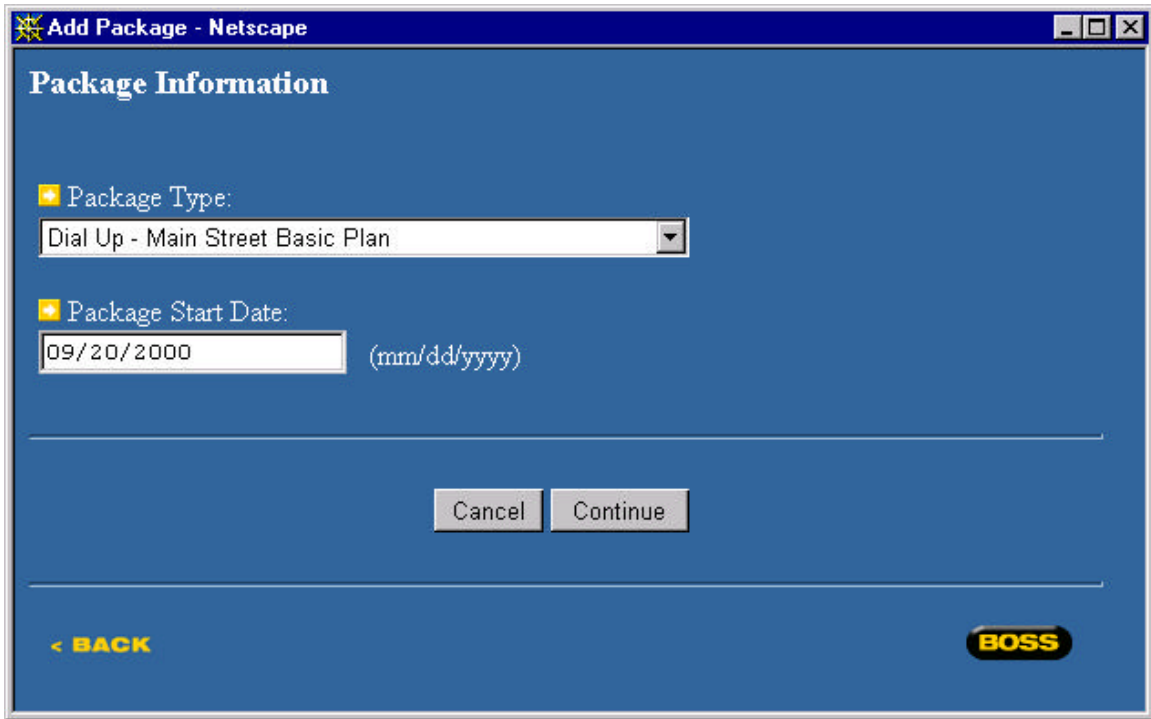
Referred by:

Sales id:

3.0.4 The “Package Information” screen is displayed.

- The options for Residential Accounts are:
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3.0.5 At this point, the CSR may:

- Refer to 4.0.a to Add one of the Dial Up Main Street Plans.
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- Refer to 4.0.c to Add Dedicated ISDN Product.
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