

KNOW-HOW GUIDE PROCESSING A FRANCHISE FLEX PAY UPGRADE TRANSACTION

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ADVISOR HUB – VERIFICATION

Log into Advisor Hub and complete verification checks with the customer

Complete these first steps using the Retail Tablet

Hub

Retail Albert

Apps

Complaints

Tools

Reminders

New Contact

Hub Home

Customer Security

Manual search

Customer name

Select customer...

Customer assistance:

Customer type:

Telephone number:

Service status:

Account number:

Account type:

Authentication level:Verification required

Contact source:None

Contact Channel:None

Disconnection riskLow

Contact in the last 7 daysNone

ADVISOR HUB

P.N

Account: 176783799

Add a transfer note

New sales & general support

Different account

Continue

COMPASS PLUS -- INCOME CHECK

Log into the customer's account on Compass + and ensure to select 'SHOP/ENJOY'.

First, check if the Customer is already on Flex Pay, if not check if they are eligible for Flex Pay

Select 'UPGRADE'

Compass Plus + New Customer Sandip.B

Search

Search

CUSTOMER DETAILS

ELIGIBILITY

PRODUCT HOLDING

Usage

Store Code

Customer ID

Select where the sale is being processed

Select...

Select...

Shop/Enjoy

Hybrid

Clear

Search

New Customer

CUSTOMER DETAILS

ELIGIBILITY

PRODUCT HOLDING

User type

Customer name

Account holder

CTN

No of CTN

Usage info

Flex Pay line

Flex Pay account

Account number

Postcode

Spend Cap

Auto switch

Consumer

Dr...

Dr...

01

3

Not Allowed

No

No

2000

No

Contr dates

Upg elig date

Flex Pay elig

BAN available spend

Contr tenure

Cust tenure

Contr length

Days remain

Add line elig

4GWifi cust

Cust ATP eligible?

Initial ATP avail spend

Enjoy area?

HBB line check

Credit Class

Mobile checker

30/03/2022 - 30/03/2024

Eligible Now

Yes

£365.83

9 Months

2 Years and 2 Months

24 Months

436 Days

Yes - 2

No

Y-5

£360.00

Yes

click here

8

click here

Plan

Contr device

Insurance

HBB

BT HBB

EE/BT Benefits

Smart Wifi User

MP data boost

Avg bill amount

Recipient

Detailed PH

SHOW LESS

Call reason

Upgrade

COMPASS PLUS -- INCOME CHECK

When you select 'UPGRADE' the Income Check is automatically triggered

Allow the customer to select their income banding from the dropdown list



If the customer wants a standard upgrade or select 'DOES NOT WISH TO DISCLOSE'

Compass Plus + New Customer

SHOW MORE

Call reason

Upgrade

Add To Plan

ADVISOR: Enter account holder's annual income to progress device offers

Please select an income band ...

Income Calculator

Cancel

Submit

ADVISOR: Enter account holder's annual income to progress device offers

Please select an income band ...

Does not wish to disclose

£0 - £12,499

£12,500 - £14,999

£15,000 - £17,499

£17,500 - £19,999

£20,000 - £22,499

£22,500 - £27,499

£27,500 - £29,999

£30,000 - £34,999

£35,000 - £39,999

£40,000 - £49,999

£50,000 - £69,999

£70,000+

Submit

COMPASS PLUS – INCOME CHECK

If your customer does not wish to disclose their income or they are not suitable for Flex Pay – you will not be able to continue with a Flex Pay Sale. Select 'DOES NOT WISH TO DISCLOSE'

SHOW MORE

ADVISOR: Enter account holder's annual income to progress device offers

Please select an income band ...

Please select an income band ...

Does not wish to disclose

£0 - £12,499

£12,500 - £14,999

£15,000 - £17,499

£17,500 - £19,999

£20,000 - £22,499

£22,500 - £27,499

£27,500 - £29,999

£30,000 - £34,999

£35,000 - £39,999

£40,000 - £49,999

£50,000 - £69,999

£70,000+

Income Calculator

Submit

COMPASS PLUS – INCOME CHECK PASSED

There are two scenarios for passing the Income check:

- Passes with the Available Spend as is
- Passes but Available Spend is reduced

The screenshot shows the Compass Plus interface with a teal header bar containing a yellow '8' icon, the text 'Compass Plus', and a '+ New Customer' button. Below the header, there is a 'SHOW MORE' button. The main content area is divided into two columns. The left column has a 'Call reason' section with two buttons: 'Upgrade' and 'Add To Plan'. The right column contains two identical confirmation boxes. Each box has a green checkmark icon, the text 'Income check passed', and an 'OK' button. The second box also includes the text 'Revised BAN available spend (per month): £170' and 'Discuss and amend the deal if required'.

Click 'OK'



The 'FINANCE' tab only becomes visible in the next screen once the Income Check has been completed and has passed

COMPASS PLUS – INCOME CHECK NOT PASSED

This message indicates that customer is not eligible for Flex Pay, however you may offer them a standard upgrade instead



If the customer is an existing Flex Pay customer this statement will show. You must read out the mandatory statement to the customer

The screenshot displays the Compass Plus interface. At the top, there is a teal header bar with the Compass Plus logo, a '+ New Customer' button, and a search bar containing 'JBR'. Below the header, a 'SHOW MORE' button is visible. The main content area is divided into two sections. The top section, titled 'Call reason', contains two buttons: 'Upgrade' and 'Add To Plan'. A modal dialog box is open in the center, displaying a red exclamation mark icon and the text: 'Customer has not met income criteria' and 'Offer a standard upgrade'. An 'OK' button is located in the bottom right corner of the modal. The bottom section of the interface, also titled 'SHOW MORE', contains a red exclamation mark icon and the following text: 'ADVISOR ACTION: Read Mandatory Statement', 'MANDATORY STATEMENT: Unfortunately your income check hasn't met the expected criteria. This means that we can't continue with your order today, including selling you any additional lines or allow you to purchase any chargeable add-on's including add to plan which have a minimum commitment greater than 30 days.', and a highlighted orange box with the text: 'Please contact us again in 30 days when we can reassess your eligibility'.

COMPASS PLUS – BUILDING THE DEAL

The customer should first select the device they would like to have

The two end columns will show the full device cost and the minimum up-front amount the customer will need to pay today

Next, click on the 'PLANS' tab at the bottom to view the loan options

SHOW MORE

Stock Update	Manufacturer	Model	Memory (GB)	Colour	Speed	Device cost	Min upfront	
	Apple	iPhone 11 NC 64GB	64 GB	Select..	4G	£510.00	£20.00	Add
	Apple	iPhone 11 NC 128GB	128 GB	Select..	4G	£558.00	£20.00	Add
	Apple	iPhone 11 NC 256GB	256 GB	Select..	4G	£702.00	£30.00	Add
	Apple	iPhone 11 Pro 64GB	64 GB	Select..	4G	£866.40	£30.00	Add
	Apple	iPhone 11 Pro 256GB	256 GB	Select..	4G	N/A	N/A	Add

Recs & Promos

Devices

Plans

Finance

Save tools

Add ons

Accessories

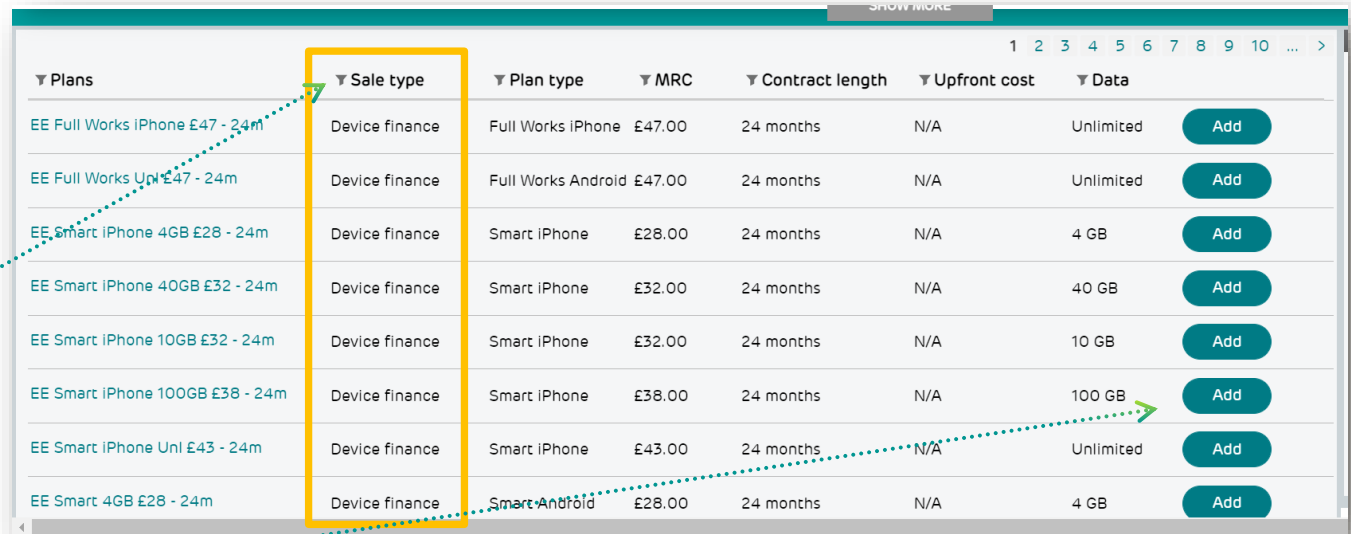
Add to

COMPASS PLUS – BUILDING THE DEAL

The tariffs will be displayed here for the customer to choose from

You can see and filter Flex Pay and Standard plans. Select a Flex Pay plan

Discuss the options with the customer and when ready click 'ADD'



SHOW MORE

1 2 3 4 5 6 7 8 9 10 ... >

Plans	Sale type	Plan type	MRC	Contract length	Upfront cost	Data	
EE Full Works iPhone £47 - 24m	Device finance	Full Works iPhone	£47.00	24 months	N/A	Unlimited	Add
EE Full Works Uni £47 - 24m	Device finance	Full Works Android	£47.00	24 months	N/A	Unlimited	Add
EE Smart iPhone 4GB £28 - 24m	Device finance	Smart iPhone	£28.00	24 months	N/A	4 GB	Add
EE Smart iPhone 40GB £32 - 24m	Device finance	Smart iPhone	£32.00	24 months	N/A	40 GB	Add
EE Smart iPhone 10GB £32 - 24m	Device finance	Smart iPhone	£32.00	24 months	N/A	10 GB	Add
EE Smart iPhone 100GB £38 - 24m	Device finance	Smart iPhone	£38.00	24 months	N/A	100 GB	Add
EE Smart iPhone Uni £43 - 24m	Device finance	Smart iPhone	£43.00	24 months	N/A	Unlimited	Add
EE Smart 4GB £28 - 24m	Device finance	Smart Android	£28.00	24 months	N/A	4 GB	Add

COMPASS PLUS – BUILDING THE DEAL

Confirm how much the customer wants to pay upfront today, the remainder will then be on the Flex Pay plan to pay over 24 or 36 months

The monthly repayment is updated based on the upfront cost and duration selected

Switch to Pay by Cash Price if the customer wants to pay for the device in full today.

Click 'CONFIRM' to add the deal builder

Device	Finance Amount	Upfront Cost	Duration	Monthly Repayment	Pay Cash Price	
Apple iPhone 11 Pro 64GB	£490.00	£20.00 £20.00 £30.00 £40.00 £50.00 £60.00 £70.00 £80.00 £90.00 £100.00 £110.00 £120.00 £130.00 £140.00 £150.00 £160.00	36m	£13.61	☐	Confirm

Devices

Plans

Finance

Save tools

Add ons

Accessories

Add to

Note: e.g. if the customer wants to contribute £150 towards the upfront – and franchisee is offering £50 discount, you will need to increase the upfront cost to £200. the finance amount will then change to £390.

COMPASS PLUS -- BUILDING THE DEAL

Franchise Discount can be applied in Save Tools, you can discount up to price of the device shown in Compass+



You **must not** apply discounts in EPOS when selling Flex Pay

The upfront cost must include the total of the customer's contribution, plus any Franchise Discount (see next page for example)

SHOW LESS

Monthly Membership Discounts

Franchise Discount

Membership Double Data

Winning the Household offers

Deal builder

Upgrade

RCT 1

Your basket

	Upfront	MRC
APPLE IPHONE 11 NC 128GB		
Black	£50.00	£0.00
Flex Pay amount	36m	N/A
£480.00		£13.33
EE All Rounder iPhone 50B £29	£0.00	£29.00
Franchise	-£50.00	£0.00
Visual Voice Mail	£0.00	£0.00
Total	£0.00	£42.33

Discard deal

Add to basket

Recommendations Promos Devices Plans Finance Save tools Add ons Accessories Add to plan Trade In

In 4G/5G area 5G Resident

SHOW LESS

Device	Flex Pay Amount	Upfront Cost	Duration	Monthly Repayment	Pay Cash Price
Apple iPhone 11 NC 128GB £480.00		£50.00	36m	£13.33	☐

Confirm

Deal builder

Upgrade

RCT 1

Your basket

	Upfront	MRC
APPLE IPHONE 11 NC 128GB		
Black	£0.00	£0.00
EE All Rounder iPhone 50B £29	£0.00	£29.00
Visual Voice Mail	£0.00	£0.00
Total	£0.00	£29.00

Discard deal

Add to basket

Recommendations Promos Devices Plans Finance Save tools Add ons Accessories Add to plan Trade In

COMPASS PLUS – BUILDING THE DEAL

Example:

Device cost - £530
Customer contribution - £0
Franchise discount - £50

Total Contribution - £50

Enter Franchise discount
amount here

The screenshot displays the 'COMPASS PLUS – BUILDING THE DEAL' interface. At the top, it shows network status 'In 4G/5G area' and '5G Resident'. Below this is a table with columns: Device, Flex Pay Amount, Upfront Cost, Duration, Monthly Repayment, and Pay Cash Price. The table contains one row for an 'Apple iPhone 11 NC 128GB' with a Flex Pay Amount of £480.00, an Upfront Cost of £50.00, a Duration of 36m, and a Monthly Repayment of £13.33. A 'Confirm' button is next to the row.

Below the table is a 'Deal builder' sidebar with three sections: 'Monthly Membership Discounts', 'Franchise Discount', and 'Membership Double Data'. The 'Franchise Discount' section has a 'Franchise' input field with the value '50'. A dotted line connects this input field to the 'Total' in the 'Your basket' summary on the right.

The 'Your basket' summary shows the following items and their costs:

Item	Upfront	MRC
APPLE iPhone 11 NC 128GB		
Black	£50.00	£0.00
Flex Pay amount	£480.00	£13.33
EE All Rounder iPhone 5GB £29	£0.00	£29.00
Franchise	£50.00	£0.00
Visual Voice Mail	£0.00	£0.00
Total	£0.00	£42.33

At the bottom of the interface, there are buttons for 'Recommendations', 'Promos', 'Devices', 'Plans', 'Finance', 'Save tools', 'Add ons', 'Accessories', 'Add to plan', and 'Trade In'.

Flex Pay Loan
amount adjusted
by £-50

Customer
upfront today -
£0

COMPASS PLUS – BUILDING THE DEAL

Once you have built the basket, review with the customer to ensure it's correct. You can change some items like device colour and Flex Pay length

Once completed, select 'ADD TO BASKET'

! If the customer has an outstanding loan balance to pay it will show in the basket

Deal builder

Your basket	Upfront	MRC
APPLE IPHONE 11 NC 64GB Black Finance amount £490.00 36m	£20.00	£0.00
Early Upgrade Fee	£453.70	£0.00
EE Full Works iPhone £41 - 24m	£0.00	£41.00
£7.99 Damage Cover With ACS	£0.00	£7.99
Excess Replace Band C - £100	£0.00	£0.00
Visual Voice Mail	£0.00	£0.00
Apple Music	£0.00	£0.00
BT Sport App Ultimate	£0.00	£0.00
Total	£473.70	£50.00

Your Device

Loan Amount £1316.48

Total Device MRC £36.56

Your Plan

Split Plan 24m

Total after discount £26.60

Your Addons

Total Addons £25.00

Discard deal

Add to basket

COMPASS PLUS – BUILDING THE DEAL

The Affordability Statement is presented once the deal has been built and you select 'ADD TO BASKET'

Read out the statement to the customer and select the customer's answer 'YES' or 'No'

Click 'SUBMIT'



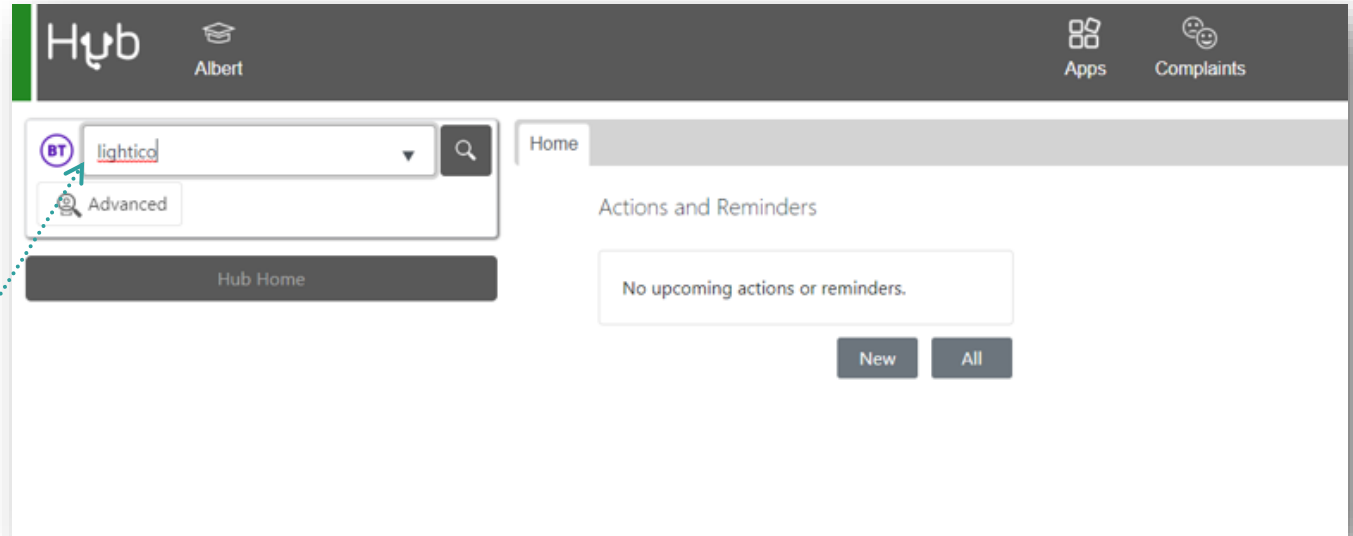
If answered '**NO**' the value is recorded and the deal is added to the basket. If answered '**YES**' (they **do** know of circumstances which will impact being able to afford the repayments) the value is recorded and the basket will need to be rebuilt so that the customer can answer "**NO**". Note this may be a standard plan

The screenshot shows a web interface for the 'COMPASS PLUS' system. A modal window titled 'ADVISOR: Confirm customer's ability to pay the agreed monthly amount to finalise the deal (Read statement below)' is displayed. Inside the modal, there is a text area for the statement, followed by two buttons: 'No' and 'Yes'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. The background shows a blurred view of the main system interface with various data fields and buttons.

LIGHTICO – ACCEPTING THE AGREEMENTS

Log into a Store Hybrid Laptop

Log into Advisor Hub and search for 'LIGHTICO' in the search bar



LIGHTICO – ACCEPTING THE AGREEMENTS

Log into Lightico using BT
Webtop Auto Login

21C Authentication: Login

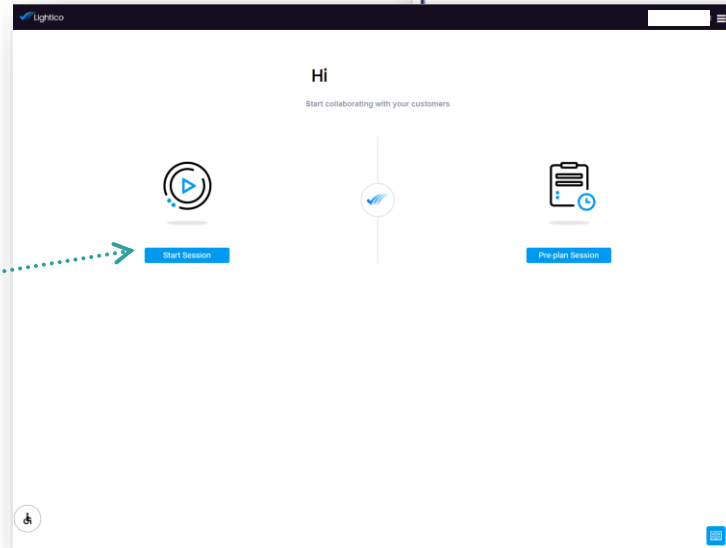
BT Webtop Auto Login

OR

User Name:

Password:

Select 'START SESSION'



LIGHTICO – ACCEPTING THE AGREEMENTS

Enter the customer's CTN
and their full name

If the customer prefers to
have the documents sent to
their email – change the
toggle to email

The screenshot shows the Lightico web interface. At the top, the Lightico logo is on the left and 'Emlyn Heard' with a menu icon is on the right. The main heading is 'Hi' followed by 'Start collaborating with your customers'. Below this are three large icons: a play button, a handshake, and a clipboard with a clock. Under each icon is a button: 'Start Session', 'Pre-plan Session', and 'Pre-plan Session'. A 'New Session' modal form is open in the center. It has a title bar with a close button. The form contains the text 'Enter customer details', two input fields labeled 'Phone Number' and 'Customer Name', a toggle switch for 'Pre-plan Session' (which is currently turned on), and a 'Start' button. Two callout boxes with teal borders and dotted lines point to the form: one points to the 'Start Session' button and the other points to the 'Pre-plan Session' toggle.

Lightico

Emlyn Heard

Hi

Start collaborating with your customers

Start Session

Pre-plan Session

Pre-plan Session

New Session

Enter customer details

Phone Number

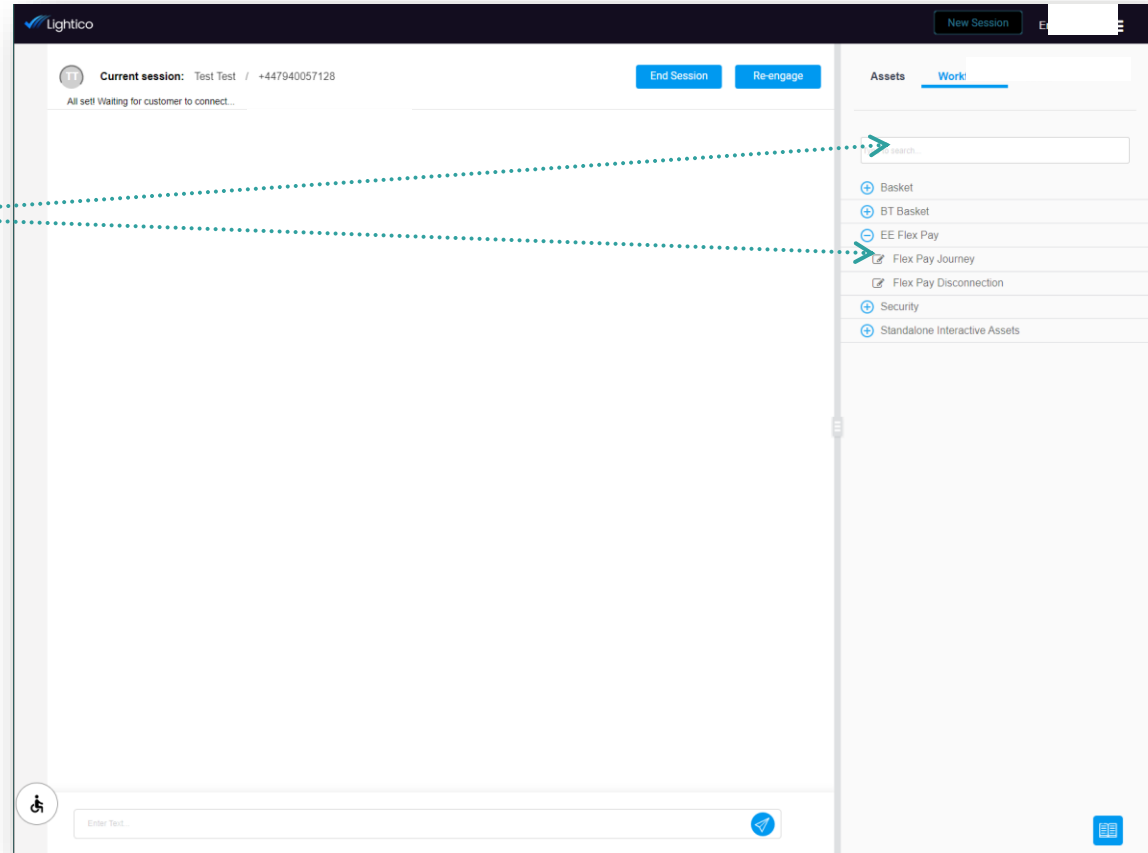
Customer Name

Pre-plan Session

Start

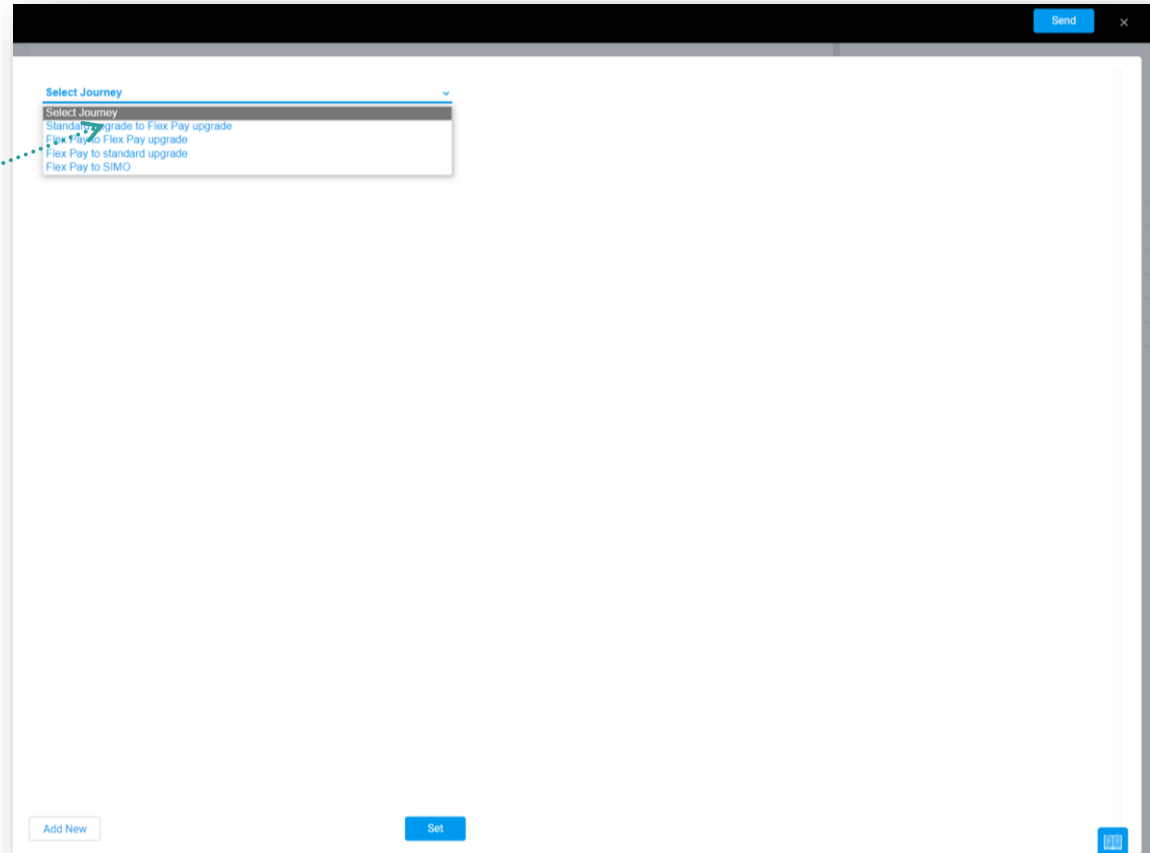
LIGHTICO – ACCEPTING THE AGREEMENTS

Select 'WORKFLOWS > EE
FLEX PAY > FLEX PAY
JOURNEY'



LIGHTICO – ACCEPTING THE AGREEMENTS

Select 'STANDARD UPGRADE TO FLEX PAY' if the customer isn't already on Flex Pay or select 'FLEX PAY TO FLEX PAY' if they are already on a Flex Pay Plan



The screenshot shows a web application interface for 'LIGHTICO'. At the top right, there is a 'Send' button and a close icon. The main content area features a 'Select Journey' dropdown menu. The dropdown is open, showing four options: 'Standard upgrade to Flex Pay upgrade', 'Flex Pay to Flex Pay upgrade', 'Flex Pay to standard upgrade', and 'Flex Pay to SIMO'. The first option is highlighted. At the bottom of the interface, there are 'Add New' and 'Set' buttons, and a small icon in the bottom right corner.

Select Journey	
Standard upgrade to Flex Pay upgrade	
Flex Pay to Flex Pay upgrade	
Flex Pay to standard upgrade	
Flex Pay to SIMO	

LIGHTICO — ACCEPTING THE AGREEMENTS

Complete all the fields.
Select the device the customer is upgrading to from the dropdown list

Check RRP is correct, enter the amount customer is taking on Device Credit and the upfront cost amount (if applicable)

Standard upgrade to Flex Pay upgrade

Your Device

Device *

- Doro 7030
- Doro 8050
- Doro 8150
- Falophone 4
- Google Pixel 4a 128GB Just Black
- Google Pixel 4a 5G Just Black
- Google Pixel 5 5G Just Black
- Google Pixel 5 5G Sage Green
- Google Pixel 6 5G 128GB Black
- Google Pixel 6 5G 128GB Coral
- Google Pixel 6 5G 128GB Seafoam
- Google Pixel 6 Pro 5G 128GB Black
- Google Pixel 6 Pro 5G 128GB Sunny
- Google Pixel 6 Pro 5G 256GB Black
- Google Pixel 6a 5G 128GB Chalk
- Google Pixel 6a 5G 128GB Charcoal
- Google Pixel 6a 5G 128GB Sage
- Google Pixel 7 128GB Lemongrass

Plan Discount €

Plan Discount %

Discount Length

Your Add-ons

Insurance *

Cost €

Replacement Excess €

Repair Excess €

Bundle

Cost €

Add to Plan

Upfront €

ATP Cost

Your Deal extras

Upgrade Fee €

0.00

Upgrade Fee Discount €

0.00

Make up Fee €

0.00

Add New

Set

Standard upgrade to Flex Pay upgrade

Your Device

Device *

iPhone 14 5G 128GB Blue

Device Cost € *

819

Device Credit €

719.00

Device Upfront Payment € *

100.00

Credit Agreement Term *

36 months

APR *

0%

Your Plan

Plan *

Plan Cost *

Plan Discount €

Plan Discount %

Discount Length

Your Add-ons

Insurance *

Cost €

Replacement Excess €

Repair Excess €

Bundle

Cost €

Add to Plan

Upfront €

ATP Cost

Your Deal extras

Upgrade Fee €

0.00

Upgrade Fee Discount €

0.00

Make up Fee €

0.00

Add New

Set

LIGHTICO – ACCEPTING THE AGREEMENTS

If applicable, enter any discounts towards the device, this must match the amount added in Compass Plus

Select the Credit Agreement Tenure – 24 or 36 months.

Send

X

Standard upgrade to Flex Pay upgrade

Your Device

Device *

iPhone 14 5G 128GB Blue

Device RRP £ *

819

Device Credit £

0.00

Device Upfront Payment £ *

100.00

Credit Agreement Tenure *

36 months

APR *

0%

Your Plan

Plan *

Plan Cost *

Plan Discount £

Plan Discount %

Discount Length

Add New

Set

LIGHTICO – ACCEPTING THE AGREEMENTS

If applicable, select insurance
– enter in the cost,
replacement excess and
repair excess (must match
Compass Plus)

Select any Bundles or Add
to Plans (if applicable)

Standard upgrade to Flex Pay upgrade

Your Device

Device *
iPhone 14 5G 128GB Blue

Device RRP £ *
819

Device Credit £
719.00

Device Upfront Payment £ *
100.00

Credit Agreement Tenure *
36 months

APR *
0%

Your Plan

Plan *
EE Full Works £48

Plan Cost *
48.00

Plan Discount £

Plan Discount %
10

Discount Length
24

Your Add-ons

Insurance *
Cost £

Replacement Excess £
Repair Excess £

Bundle
Cost £

Add to Plan
Upfront £
ATP Cost

Your Deal extras

Upgrade Fee £
0.00

Upgrade Fee Discount £
0.00

Make Up Fee £
0.00

Add New Set

LIGHTICO – ACCEPTING THE AGREEMENTS

If applicable, select the Early Upgrade Fee and discount amount if there is one

Select 'FREE DELIVERY'

Send

Standard upgrade to Flex Pay upgrade

Your Add-ons

Insurance *	Cost £		
AppleCare with full cover	13.49		
Replacement Excess £	Repair Excess £		
100.00	50.00		
+	Bundle	Cost £	
	100 UK to EU minutes	6.84	
-	Bundle	Cost £	
		0	
+	Add to Plan	Upfront £	ATP Cost
	Apple HomePod Starter Kit	10.00	25.00

Your Deal extras

Upgrade Fee £
100.00
Upgrade Fee Discount £
0.00
Make Up Fee £
0.00
Device Damage Fee £
0.00
MRC Trade In Discount £

Add New

Set

MRC Trade In Discount £

Delivery Option:

Delivery *
Free delivery

☐ Please select if Usage Info requires action in Excalibur

Add New

Set

LIGHTICO -- ACCEPTING THE AGREEMENTS

Once you have completed all the relevant fields, click on 'SET'

Click on 'SEND' to send the order to basket

Standard upgrade to Flex Pay upgrade

Your Device

Device
iPhone 14 5G 128GB Blue

Device RRP £
\$18

Device Credit £
719.00

Device upfront Payment £
100.00

Contract Agreement Term £
36 months

APR¹
0%

Your Plan

Plan
EE Full Works 64G

Plan Cost²
40.00

Plan Discount £

Plan Discount %
10

Discount Length
24

Your Add-ons

Insurance³
AppleCare with full cover

Replacement Screen £
100.00

Cost £
13.40

Screen Cost £
50.00

Cost £
6.54

Bundle
100 UK to EU minutes

Cost £
0

Cost £
0

Apple HomePod Starter Kit

Upfront £
10.00

ATP Cost⁴
25.00

Your Deal extras

Upgrade Fee £
100.00

Insurance £
10.00

Screen Up Fee £
0.00

Device Storage Fee £
0.00

MRC Trade In Discount £

Delivery Options:

Delivery⁵
Free delivery

☐ Please select if Usage Info requires action in Escalator

Upgrade 1 of 1

iPhone 14 5G 128GB Blue

Your Regular Payments

Your Device	£0
Your Plan & add-ons	£39.53
Total Monthly Payment	£39.53

Your Deal Extras

Device upfront payment	£100.00
Upgrade Fee	£100
Add to Plan upfront	£10
Free up to 7	£0
Total Charges Today	£210

Your Device

iPhone 14 5G 128GB Blue

Device RRP	£18.00
Device Credit	£719.00
Device Cash Price	£100
Upfront Payment	£100.00
Device Credit Agreement Amount	£0
Interest rate	0%
10 payments of	£0
and a final payment of	£0

Your Plan

EE Full Works 64G

Monthly Cost

EE Full Works 64G	£40.00
Plan discount	10%

Your Add-ons

100 UK to EU minutes	£3.04	100 UK to EU minutes
AppleCare with full cover	£13.40	Your total monthly insurance payment is inclusive of Insurance Premium Tax
Apple HomePod Starter Kit	£25.00	(11 Months)
	£10.00 upfront	

Monthly Plan Cost (inc discounts)
£39.53

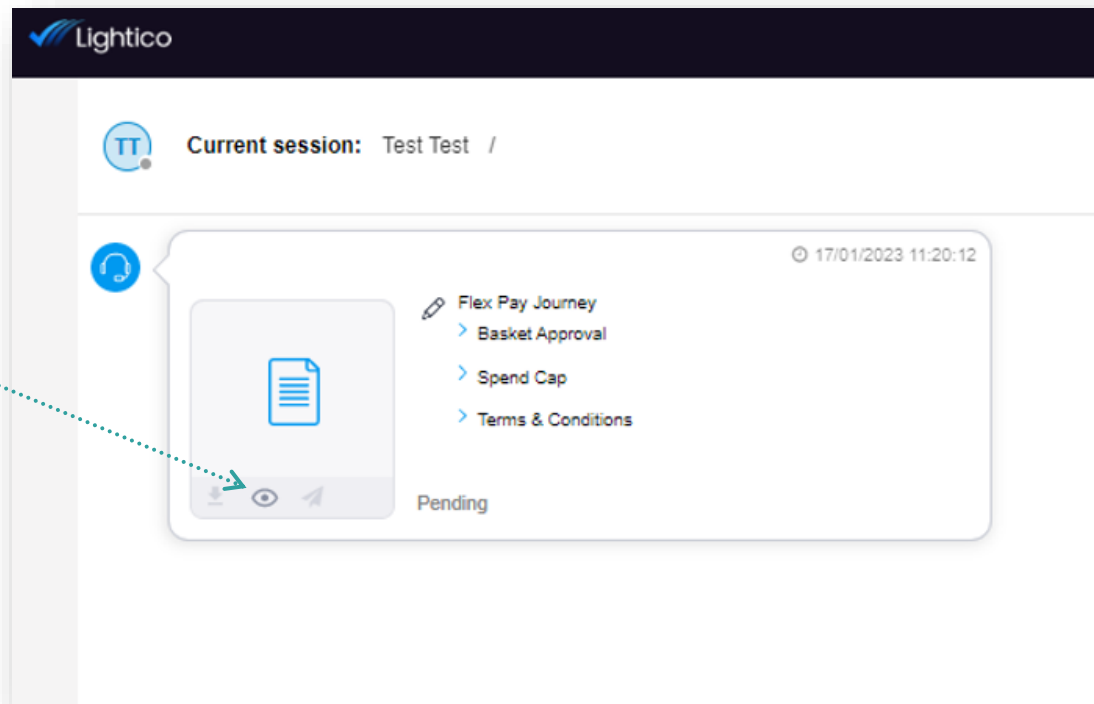
SEND

LIGHTICO – ACCEPTING THE AGREEMENTS

The agreement will be sent to the customer. They will be able to view and accept the documents on their device

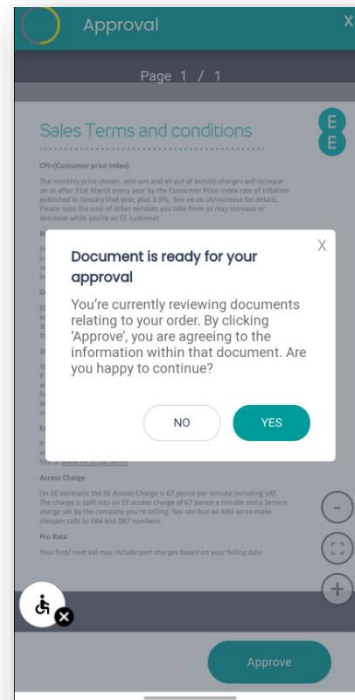
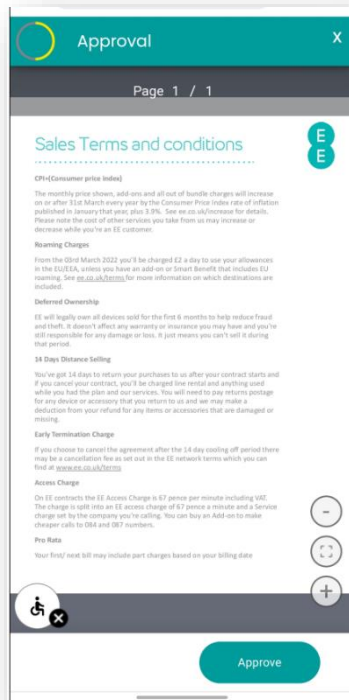
The customer can view the documents on the tablet – click on the eye icon. Note: they will still need to accept on their own device

⚠ Ensure the customer selects the same spend cap that you have agreed on in Compass Plus. If the customer wants to change this – you will need to rebuild the offer on Compass Plus



LIGHTICO -- ACCEPTING THE AGREEMENTS

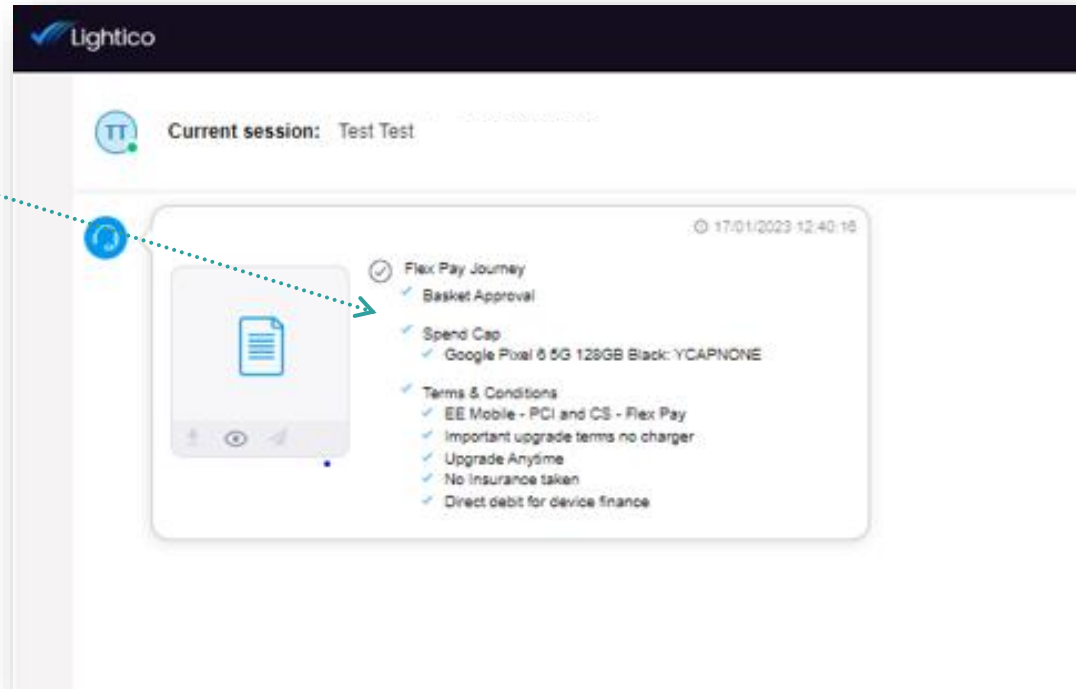
The documents will appear like this on the customer's device. They must approve each section to continue



LIGHTICO – ACCEPTING THE AGREEMENTS

Once each document has been accepted by the customer - a tick will appear in Lightico confirming the documents have been completed. This will allow you to move onto the next stage

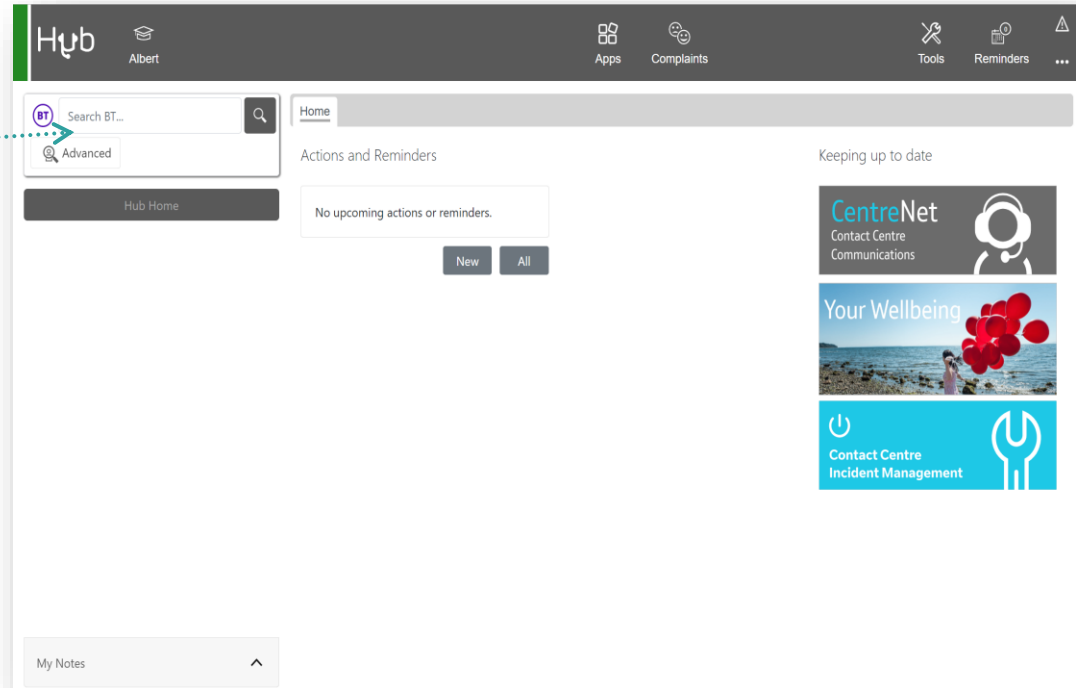
Keep the Lightico session open as you'll need to use it later to send the finance documents to the customer



EXCALIBUR HYBRID – COMPLETING THE ORDER

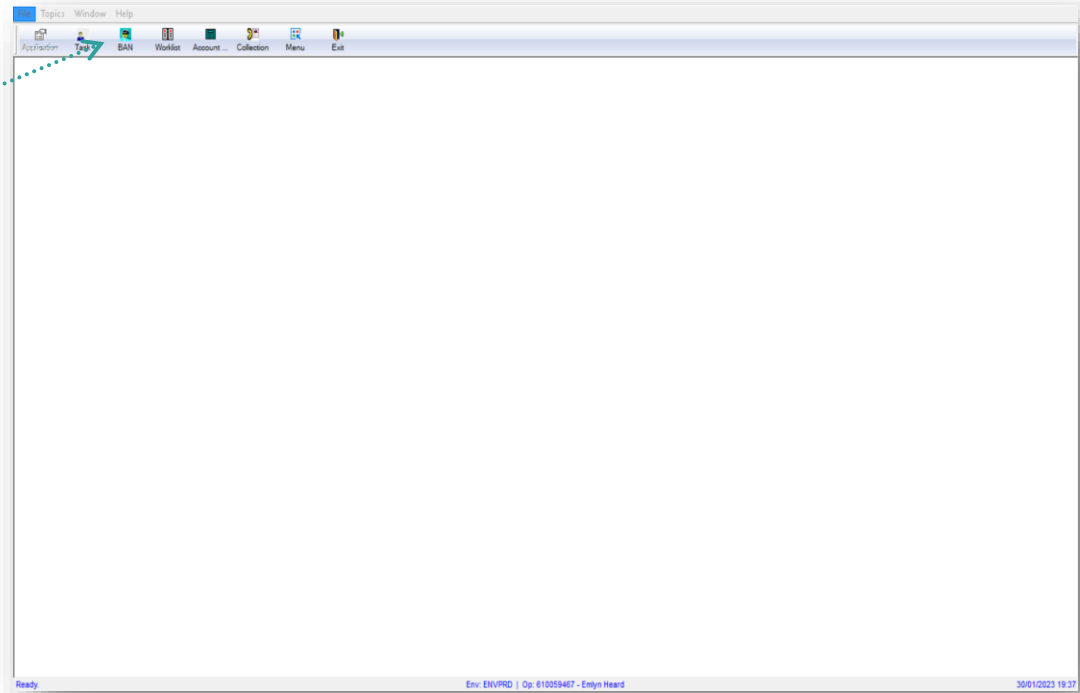
Search for and launch
'EXCALIBUR HYBRID' from
Advisor Hub

! If the customer has an
outstanding loan
balance, contact
Customer Care to take
this payment before
launching EXCALIBUR
HYBRID



EXCALIBUR HYBRID – COMPLETING THE ORDER

Click 'BAN' and search for the customer's account



EXCALIBUR HYBRID -- COMPLETING THE ORDER

Select 'UPGRADE'

The screenshot displays the EE mobile app interface. At the top, a teal header bar contains the EE logo and navigation icons for CTN, Create, Complaints, Hub, Orders, and End. Below the header, the main content area is divided into several sections:

- Payment Day 12th**: Shows the payment method as Direct Debit and a 'Make Payment' button.
- LAST PAYMENT**: Displays '£77.79 Paid Successfully' for Direct Debit on 12 Jun 2023.
- Special Instructions**: A yellow box containing the text: '28 Dec 2022 - 09:30 AM ***Customer part of the EE Device Finance testing. Pleas...'
- RECENT MEMOS**: A list of recent memos, including one dated 28 Dec 2022.
- Plan & Device Details**: The central section showing the current plan and device. It includes a 'Usage' section with a bar chart for 'Unlimited' data. The 'Plan & Devices' section lists the 'EE Full Works £48' plan, the 'Xperia 10 IV 5G' device, and the 'Device Finance' option. A green dotted arrow points from the text 'Select 'UPGRADE'' to the 'Upgrade' button in this section.
- Current Services**: A section at the bottom showing the service monthly charges as £0.00.

EXCALIBUR HYBRID – COMPLETING THE ORDER

Enter the SEC code.
All Franchise stores
enter 'FRFP' (do not enter
your existing FC code)

Enter your store code and
press 'OK'. A 0 is required in
front of 4XXX store codes.
RXXX stores are entered as
normal

EDIT SALES ENTITY

Sales Entity

CUST - EE CUSTOMER SOCS

574 - GMC Mobile Comms

A001 - M020 SERVICE CENTRE

A002 - HENDON SERVICE CENTRE

A003 - END-TO-END TEST.B CLEMENTS

A010 - GOLDERS GREEN ELECTRONICS

A011 - MAINSPOT LIMITED

Cancel Save

EXCALIBUR HYBRID – COMPLETING THE ORDER

Select 'RETRIEVE FROM COMPASS'

Please note – you cannot build the order manually for Flex Pay

The screenshot displays the 'Basket' interface in the Excalibur Hybrid system. The top navigation bar is teal and includes a user profile 'Mrs' with a 'DEV' status, a mobile icon, and several action buttons: CTN, Create, Complaints, Memo, Orders, and End. Below the navigation bar, the breadcrumb 'Home > Basket' is visible. The main header for the basket section reads 'Basket | Sales Entity: RTOB | Store ID: 04147 - RETAIL OUTBOUND'. The central area is titled '1 PACKAGE' and contains a form with a mobile icon and a section titled 'Select offer to proceed with the configuration.' This section has two radio buttons: 'Retrieve from Compass' (which is selected) and 'Build Order Manually'. A 'Continue' button is located at the bottom right of this section. To the right of the main form is a 'SUMMARY' panel showing the ID '07496895504' and the message 'No records to display'.

EXCALIBUR HYBRID – COMPLETING THE ORDER

Check that all the details are correct

If the customer requires a new SIM – select 'SIM REQUIRED', otherwise click 'CONTINUE'

The screenshot displays the 'Mr. [Name]' order summary in the 'DEV' section. The top navigation bar includes icons for CTN, Create, Complaints, Memo, Orders, and End. The order details are as follows:

Item	PAY MONTHLY	PAY NOW
Device Google Pixel 7 128GB Black IN STOCK	—	£550.00
Device Discount	—	-£550.00
Device Finance 36 months Credit Agreement Total Finance Amount Payable: £408.00	£11.33	—
Plan EE Full Works £40 L22APF06 24 month contract Spend Cap: £0.00	£40.00	—
Included Services	Free	Free
Add-ons YCAPZER0E Spend Cap £0.00 Effective Date: 04 Jul 2023 Expiry Date: NA	Free	Free
Sim ☐ SIM Required Physical SIM	—	Free
Total (Inc. VAT)	£51.33	£0.00

At the bottom, there are two buttons: 'Upgrade Another Line' and 'Continue'. A red box highlights the 'Sim' section and the 'Continue' button. A red arrow points from the 'Continue' button to the 'Sim' section.

EXCALIBUR HYBRID – COMPLETING THE ORDER

Send the OTP to the customer for verification. Select the customer's CTN from the drop-down options

! If you have already completed the OTP verification within Advisor Hub – you will not be required to follow this process again. The 'SKIP' option will appear in this scenario

The screenshot shows the EE Excalibur Hybrid checkout interface. The top navigation bar includes the EE logo and icons for CTN, Create, Complaints, Memo, Orders, and End. The breadcrumb trail shows 'Home > Basket'. The basket summary indicates 'Sales Entity: RTOB', 'Store ID: 04147 - RETAIL OUTBOUND', and 'BAN Available Spend: £199.39'.

The main content area is divided into two columns. The left column shows the checkout steps: 1. PACKAGE (1 Upgrade), 2. VERIFICATION, 3. DEVICE FINANCE CHECKS, 4. DELIVERY, and 5. ACCEPTANCE. The 'VERIFICATION' step is currently active.

Under the 'VERIFICATION' step, there is a 'One-time PIN' section. It prompts the user to 'Select CTN' from a drop-down menu. The menu shows three options: '*****5504', '*****8409', and '*****5504'. A hand icon is pointing at the first option. To the right of the menu is a 'Send Pin' button. Below the menu are 'Skip' and 'Continue' buttons.

The right column shows a 'SUMMARY' section. It includes a 'Pay Now' section with 'Google Pixel 7 128GB Black' for 'Free'. Below that is a 'Pay Monthly' section with 'DEVICE' details: 'Google Pixel 7 128GB Black' for '£11.33'. The 'PLAN' section shows 'EE Full Works £40 L22APF06' for '£40.00'. The 'Add-ons' section shows 'Add-ons' for 'Free'. The 'Total (Inc. VAT)' section shows 'Pay Monthly' for '£51.33', 'Device' for '£11.33', and 'Plan' for '£40.00'.

EXCALIBUR HYBRID – COMPLETING THE ORDER

EE

Mr

01

CTN

Create

Complaints

Memo

Orders

End

Home > Basket

Basket

Sales Entity: RTOB

Store ID: 04147 - RETAIL OUTBOUND

BAN Available Spend: £199.39

1 PACKAGE | 1 Upgrade

2 VERIFICATION | OTP Verification Successful

3 DEVICE FINANCE CHECKS

Address Validation

You must confirm with the customer that the details below (including the address) are up to date.

Name

Mrs Beveri

Date of Birth

15 Oct 1969

Current Address

Customer Address

Oxfordshire

OX127FP

UK

Continue

SUMMARY

BASKET ID: 0031608676

Pay Now

Google Pixel 7 128GB Black

Free

Pay Monthly

DEVICE

Google Pixel 7 128GB Black

£11.33

PLAN

EE Full Works £40 L22APF06

£40.00

Add-ons

Free

Total (inc. VAT)

Pay Monthly

£51.33

Device

£11.33

Plan

£40.00

If you need to apply changes to the customer's personal details – click on the edit icon. Otherwise, click 'CONTINUE'

EXCALIBUR HYBRID – COMPLETING THE ORDER

'No Questions' EIV is mandatory for Flex Pay if the address has changed in the last 30 days or since last pre-screening

! If the details in Excalibur don't match those held by Equifax the check will fail. If EIV Lite fails, the customer should contact Equifax to check and update the details they hold

If there is a technical failure with EIV – complete a manual EIV No Questions in Luminate and paste the reference in Excalibur

The screenshot displays the 'EDIT CURRENT ADDRESS' modal and the 'DEVICE FINANCE CHECKS' section of the Excalibur Hybrid order completion interface.

EDIT CURRENT ADDRESS Modal:

- Current Address:** 123 Main Road, South West London, EW25 5R UK
- EDIT ADDRESS:**
 - Post Code:** EW25 5R
 - Street Name (Optional):** (Empty field)
 - House Name/Number (Optional):** (Empty field)
 - FIND ADDRESS:** (Button)
 - Update Billing Address:** (Checkbox, unchecked)
 - Reason for Change:** (Dropdown menu, 'Select' option visible)
 - Memo Details (Optional):** (Text area)

DEVICE FINANCE CHECKS Section:

- 1. ADDRESS VALIDATION:** (Completed)
- 2. DIRECT DEBIT MANDATE:** (Completed)
- 3. AVS CHECK:** (Completed)
- 4. EIV CHECK:** (Pending)
 - EIV Check:** PENDING
 - Message:** As the customer has made some changes to their account (e.g. updating their address) an additional identity check is required. Please click 'Continue' to proceed with the check.
 - CONTINUE:** (Button)

Summary Section:

- SUMMARY:**
 - Line 1:**
 - Agreement Number:** 000000
 - Pay Now:**
 - Apple iPhone 12 Pro 5G 128GB Gold: £80.00
 - Physical SIM: Free
 - Pay Monthly:**
 - DEVICE:** Apple iPhone 12 Pro 5G 128GB Gold: £20.00
 - PLAN:** Smart Plan 10GB: £35.00

Footer:

- £20.00** Device Pay Monthly
- £59.00** Plan Pay Monthly
- £80.00** Pay Now
- SUBMIT:** (Button)

EXCALIBUR HYBRID – COMPLETING THE ORDER

Click on the 'PROMO CODE' drop down menu and select 'EE FRANCHISE RETAIL' for Franchise stores

Select 'GET DELIVERY OPTIONS'

The system automatically selects the next available delivery day. If the customer prefers a different date – click on the calendar icon for more options

Free Delivery for orders delivered Monday-Friday. However, there is a charge for deliveries made on the weekend

The screenshot displays the 'Delivery Date & Slot' section of the Excalibur Hybrid interface. It includes fields for Delivery Name (Mrs Beverl), Delivery Address (Grove), and Contact Number. Below these are fields for Delivery Password (Optional) and Delivery Instructions (Optional). A 'Promo Code' dropdown menu is shown with a list of options: Customiser, Screen protector No Del Chg, Tele OB U&R No Del Charge, EE Direct Retail (selected), EE Franchise Retail, and Retail Business Consultant. A 'Get Delivery Options' button is visible. A calendar icon is present next to the 'CUSTOM Select Date' text. The calendar shows the month of July 2023, with the 4th (Wednesday) highlighted. The bottom of the screen shows the total cost: £11.33 Device Pay Monthly and £40.00 Plan.

Delivery Name: Mrs Beverl
Delivery Address: Grove
Contact Number:
Delivery Password (Optional):
Delivery Instructions (Optional):
Delivery Date & Slot
Promo Code:
Get Delivery Options
Customiser
Screen protector No Del Chg
Tele OB U&R No Del Charge
EE Direct Retail
EE Franchise Retail
Retail Business Consultant
Delivery Date & Slot
Promo Code
EE Direct Retail
Get Delivery Options
Promo Code EE Direct Retail applied | Undo
WED 5th Jul (Tomorrow) THU 6th Jul CUSTOM Select Date
2023 July
Su Mo Tu We Th Fr Sa
4
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
Continue
ACCEPT
£11.33 Device Pay Monthly £40.00 Plan

EXCALIBUR HYBRID – COMPLETING THE ORDER

Click the edit icon

Enter the customer's contact details – please note, this must match the details you initially entered the first time you completed Lightico in the earlier stages

The screenshot displays the 'Excalibur Hybrid' order completion interface. The main screen shows a progress bar with five steps: 1. PACKAGE (1 Upgrade), 2. VERIFICATION (OTP Verification Successful), 3. DEVICE FINANCE CHECKS (Successful), 4. DELIVERY (1 Standard Delivery), and 5. ACCEPTANCE. A 'SUMMARY' panel on the right shows the basket ID (0031608676), a phone number (0749), and payment options (Pay Now, Pay Monthly). A 'Create Session' button is visible below the progress bar. A modal titled 'PREFERRED COMMUNICATION METHOD' is open, showing 'Contact Method' (SMS selected, Email unselected) and a 'Contact Number' field. A 'Cancel' button and a 'Save' button are at the bottom of the modal. A red dotted line points from the 'Create Session' button to the modal. A red circle highlights an edit icon (pencil) next to the text 'A link to complete the device finance documents will be sent to'.

1 PACKAGE | 1 Upgrade

2 VERIFICATION | OTP Verification Successful

3 DEVICE FINANCE CHECKS | Successful

4 DELIVERY | 1 Standard Delivery

5 ACCEPTANCE

SUMMARY
BASKET ID: 0031608676

0749

Pay Now

Google Pixel 7 128GB Black Free

Delivery Charge Free

Pay Monthly

Create Session

A link to complete the device finance documents will be sent to

PREFERRED COMMUNICATION METHOD

Contact Method
☒ SMS ☐ Email

Contact Number

Cancel Save

EXCALIBUR HYBRID -- COMPLETING THE ORDER

Click 'CREATE SESSION'

Once the finance documents show as 'READY TO SEND' – click 'SEND TO CUSTOMER'

The screenshot displays the 'ACCEPTANCE' stage of the Excalibur Hybrid order process. The top navigation bar shows 'Home > Basket' and 'Basket | Sales Entity: RTOB | Store ID: 04147 - RETAIL OUTBOUND | BAN Available Spend: £199.39'. The main content area is divided into two sections. The left section, titled '5 ACCEPTANCE', shows a progress bar with five steps: 1 PACKAGE (1 Upgrade), 2 VERIFICATION (OTP Verification Successful), 3 DEVICE FINANCE CHECKS (Successful), 4 DELIVERY (1 Standard Delivery), and 5 ACCEPTANCE. Below the progress bar, a mobile phone icon with the number '074' is shown, followed by a link to complete the device finance documents. A 'Create Session' button is visible. The right section, also titled '5 ACCEPTANCE', shows a 'Re-Send Session Link' button. Below this, the 'Agreements' section lists three items: 'Key Information', 'Pre-contract Credit Information', and 'Your Flex Pay Credit Agreement'. Each item has a 'READY TO SEND' button. At the bottom right, there is a 'Time To Think' button and a 'Send To Customer' button. A 'Please Note' section at the bottom states: 'You will also pay a further £11.33 per month via direct debit for this device agreement'.

EXCALIBUR HYBRID – COMPLETING THE ORDER

Once the customer has signed the documents, the status will update to 'SIGNED BY CUSTOMER' – note, sometimes you may have to click 'REFRESH'

Click 'VALIDATE AGREEMENT'

0'

A link to complete the device finance documents will be sent to 079 [i](#) [e](#)

Re-Send Session Link

Agreements

[View Lightico Session](#) | [Refresh](#)

Key Information

SIGNED BY THE CUSTOMER

Pre-contract Credit Information

SIGNED BY THE CUSTOMER

Your Flex Pay Credit Agreement

SIGNED BY THE CUSTOMER

Time To Think

Validate Agreements

Please Note

You will also pay a further £11.33 per month via direct debit for this device agreement. Your documents and details can be found in My EE.

New plan commitment period for 07496895504 is from 04 Jul 2023 to 04 Jul 2025. The dates may change depending on the delivery date of the equipment.

Send Confirmation Email with order details

☒ Yes ☐ No

Email
JANE COM

☐ I have confirmed order summary as detailed above and informed the customer of relevant regulatory scripting and T&C's. (Please see Albert for further guidance)

EXCALIBUR HYBRID – COMPLETING THE ORDER

If the customer needs Time to Think or review the documents then click 'TIME TO THINK'. The customer will be sent a link to the documents



The customer now has 48 hours to return to take the discussed deal. After this the deal will need to be rebuilt. Stock is not held or reserved for Time to Think orders. Ensure the customer understands delivery guidelines could change when they return. You must never discourage a customer from using Time to Think. Ensure you explain stock timelines factually.

1 PACKAGEApple iPhone 12 Pro 5G 128GB Gold | Smart Plan 10GB | Add Line Flex Pay

2 VERIFICATION | OTP verification successful

3 FLEX PAY CHECKS | Successful

4 DELIVERY | In Store Delivery

5 ACCEPTANCE

TIME TO THINK

Are you sure you want this offer under Time to Think?
Please inform the customer, to call back within 48 hours to resume the offer.

CANCEL

CONFIRM

A link to complete the flex pay documents will be sent to 07234345656

RE-SEND SESSION LINK

SUMMARY

Line 1

Agreement Number 0000000

Pay Now

Apple iPhone 12 Pro 5G 128GB Gold£80.00

Physical SIMFree

Pay Monthly

DEVICE

Apple iPhone 12 Pro 5G 128GB Gold£20.00

PLAN

Smart Plan 10GB£35.00

If the customer has accepted the documents, click 'VALIDATE AGREEMENT & CONTINUE'.

EXCALIBUR HYBRID – COMPLETING THE ORDER

Once validated – the status will update again (click refresh)

Ensure you have selected 'YES' to email confirmation.

Tick the confirmation box for summary and then click 'CONTINUE'

0

A link to complete the device finance documents will be sent to 07943288409

Re-Send Session Link

Agreements

View Lightico Session

Refresh

Key Information

UPLOADED TO DMAAS

Pre-contract Credit Information

UPLOADED TO DMAAS

Your Flex Pay Credit Agreement

UPLOADED TO DMAAS

Time To Think

Validate Agreements

Please Note

You will also pay a further £11.33 per month via direct debit for this device agreement. Your documents and details can be found in My EE.

New plan commitment period for 07496895504 is from 04 Jul 2023 to 04 Jul 2025. The dates may change depending on the delivery date of the equipment.

Send Confirmation Email with order details

☒ Yes

☐ No

Email Address

JANE.4 BT.COM

☒ I have confirmed order summary as detailed above and informed the customer of relevant regulatory scripting and T&C's. (Please see Albert for further guidance)

Block

PLAN

EE Full Works £40 L22APF06

Add-ons

Free

Total (inc. VAT)

Pay Monthly £51.33

Device £11.33

Plan £40.00

£11.33 Device Pay Monthly

£40.00 Plan Pay Monthly

Continue

INTERNAL V1.2

43

EPOS-- PAYMENTS

If Excalibur Prompts for a payment you must take this first in EPOS from the customer

Search for the relevant Article and enter the amount Excalibur is asking for and the BAN as the reference

You can only take payments by card from the customer

Cash Price should only be used when the customer is paying the cash price for the device (Not used to indicate a payment by cash). If an EUF is required use the following VAS in EPOS

Pay Now

iPhone 13 Mini 5G
128GB Midnight

Free

Early Upgrade Fee

£78.13

Pay Monthly

DEVICE

iPhone 13 Mini 5G
128GB Midnight

£18.02

PLAN

EE All Round iP
125GB £34 L22IPL29

£23.80

Add-ons

Free

Total (inc. VAT)

Pay Now

£78.13

Pay Monthly

£41.82

Device

£18.02

Plan

£23.80

Article	Tariff Description	Till Receipt
950021437	FLEX PAY CASH PRICE	FLEX PAY CASH PRICE
950019599	FLEX PAY UPFRONT COST	FLEX PAY UPFRONT COST

Article	Tariff Description	Till Receipt
950021436	FLEX PAY EUF	FLEX PAY EUF

EXCALIBUR HYBRID – COMPLETING THE ORDER CONT...

You must now make the payment using the Franchisee dedicated card for Flex Pay up-front costs

Select Use a different debit/credit card

Select 'CHAT' and No to register Card Details

6 PAYMENT

Please make customer aware all applicable 'Pay Now' payments will be taken as one single payment

MasterCard

**** * 0784

Expires on 12/2024

Use a different debit/credit card

Customer Contact Method

Chat

Voice

Register card details

Yes

No

£9.94 Device Pay Monthly

£40.00 Plan Pay Monthly

£50.00 Pay Now

Submit

Google Pixel 7 128GB Black

£9.94

PLAN

EE Full Works £40 L22APF06

£40.00

Add-ons

Free

Total (Inc. VAT)

Pay Now

£50.00

Pay Monthly

£49.94

Device

£9.94

Plan

£40.00

You must not use any registered cards on the account

INTERNAL V1.2

45

EXCALIBUR HYBRID -- COMPLETING THE ORDER CONT...

A pop-up will appear. Click 'COPY' to copy the payment link

Note – if the customer paid within Excalibur using one of their existing registered cards – the order would be completed once payment cleared

The screenshot displays the 'PAYMENT' step of the Excalibur Hybrid order completion process. A modal pop-up is centered on the screen, showing a URL: <https://ee.relayplus.com/OZXkRWwfvHwnTNB0lgKz>. A red 'Copy' button is located next to the URL. Below the URL, there is a list of radio button options: 'Link Opened', 'Name Entered', 'Entered Long Card Number', 'Expiry Date', 'Card Security Code / CVC', and 'Payment Submitted / Complete'. A 'Cancel' button is at the bottom right of the modal. In the background, the payment form is visible, showing a progress bar with steps: 2 VERIFICATION, 3 DEVICE FINANCE, 4 DELIVERY, 5 ACCEPTANCE, and 6 PAYMENT. The 'PAYMENT' step is currently active. Below the progress bar, there are options for 'Please make customer aware' and 'Use a different device'. At the bottom of the form, there are radio buttons for 'Chat' and 'Voice' under 'Customer Contact Method', and 'Yes' and 'No' under 'Register card details'. A 'Submit' button is at the bottom right of the form. The bottom of the screen shows pricing options: £9.94 Device Pay Monthly, £40.00 Plan Pay Monthly, and £50.00 Pay Now.

EXCALIBUR HYBRID -- COMPLETING THE ORDER CONT...

Open Advisor Hub and Launch 'TEMPLATE MESSAGES'

Enter the CTN for the device being used to process the payment and click 'OPEN'

Click 'BILLING & PAYMENTS' and 'PAYMENT'. Select 'SECURE PAYMENT LINK'

The image displays two screenshots of the Excalibur Hybrid Advisor Hub interface. The top screenshot shows the 'Template Messages' page with a search bar and an 'Open' button. The bottom screenshot shows the same page with a list of templates on the left and a 'Secure Payment Link' template selected. A red circle highlights the 'Secure Payment Link' template in the list. A red arrow points from the 'Open' button in the top screenshot to the 'Secure Payment Link' template in the bottom screenshot. A red circle highlights the 'Secure Payment Link' template in the bottom screenshot. A red arrow points from the 'Secure Payment Link' template in the bottom screenshot to the 'Send SMS' button in the bottom screenshot.

Paste the URL link
Excalibur provided into
the template replacing
secure_payment_url

Click 'SEND SMS'

EXCALIBUR HYBRID -- COMPLETING THE ORDER CONT...



Remember to enter the Franchisee card details

Once the payment has been processed you will receive a tick under the payment screen on Excalibur Hybrid. Click 'OK' to complete the order

Hi from EE. We're sending you this message so we can take a secure payment. Please click the secure link below and follow the instructions:

<https://ee.relayplus.com/yfgmYYoQ4WPMYq8u5Ev>

This link is unique to your current transaction, and it can only be used once. It will also timeout in 10 minutes. Once submitted, we'll process the payment and will tell you when it's successful. If you're not expecting this message and/or you're not currently in contact with EE please call [150](tel:150) immediately.



Pay To: EE

Purpose of Transaction: Account Payment

Transaction Reference: 1100_110000217

Total: £0.10

A fee of £0.10 has been added for the card you are using. To remove, an alternative card should be used.

Please enter your card details

Cardholder's Name:

Card Number: 

Expiry Date: Security Code:

powered by 





Success!

Your payment has been processed successfully

Amount: £1.00

Authorization Code: 049017

Transaction Reference: 1-369447442022125

Payment Reference: 463217729

You may now close this page

Secured by 

EXCALIBUR HYBRID – COMPLETING THE ORDER CONT...

Once the order has been successfully completed – the following message will appear

The screenshot displays the EE Excalibur Hybrid account dashboard. At the top, a teal navigation bar contains the EE logo and icons for CTN, Create, Complaints, Memo, Orders, and End. Below this, a user profile section shows details like Password, Credit Class (Very Good), Type (Consumer), My EE (Yes), With EE (2 Years), and Address (16 Prior Place Grove Wantage Oxford...). A green success message banner at the top of the main content area reads: "Upgrade Order 1 177 is submitted successfully". The dashboard is divided into several sections: "OVERVIEW" showing an Account Balance of £0.00, Bill Day (4th), Payment Day (12th), and Payment Method (Direct Debit); "RECENT BILLS" with a bar chart showing bills for Apr 23 (£58.09), May 23 (-£16.58), and Jun 23 (£94.37); "LAST PAYMENT" showing £77.79 paid successfully via Direct Debit on 12 Jun 2023; and a "MEMO" section with a dropdown menu set to "Account Update". A "Make Payment" button is located in the Overview section, and an "Add" button is in the Memo section.

Upgrade Order 1 177 is submitted successfully

OVERVIEW

Account Balance
£0.00

Bill Day
4th

Payment Day
12th

Payment Method
Direct Debit

Extra Billed Charges for Last Month: –

Details

Devices on Finance
2

Details

RECENT BILLS

Projections | History

3 Months Average: £45.29

£58.09 Apr 23

-£16.58 May 23

£94.37 Jun 23
Last Bill

LAST PAYMENT

Payment History

£77.79 Paid Successfully

Direct Debit | 12 Jun 2023

MEMO

History

Memo Type

Account Update

Details

Add Case ID

Add

Make Payment

LIGHTICO – CONTINGENCY PROCESS

If you see this error message, there is a problem with the integrated links between Excalibur and Lightico. Press 'OK' to proceed with the contingency process

!

Sorry, the document information is not received yet, or the connection with screen share may have failed. Retry after a few seconds by clicking Validate Agreement or Refresh. Only if unsuccessful a number of times, [Initiate BCP Process](#)

×

A link to complete the Flex Pay documents will be sent to 6

RE-SEND SESSION LINK

Agreements

View Lightico Session | Refresh

Key Information

SHARED WITH CUSTOMER

Pre-Contract Credit Information

SHARED WITH CUSTOMER

Your Device Credit Agreement

SHARED WITH CUSTOMER

TIME TO THINK

VALIDATE AGREEMENTS

LIGHTICO – CONTINGENCY PROCESS

Click 'COPY – FINANCE
BCP TOOL'

Contract Sharing Details

[COPY TO FLEX PAY BCP JOURNEY](#)

Please Note

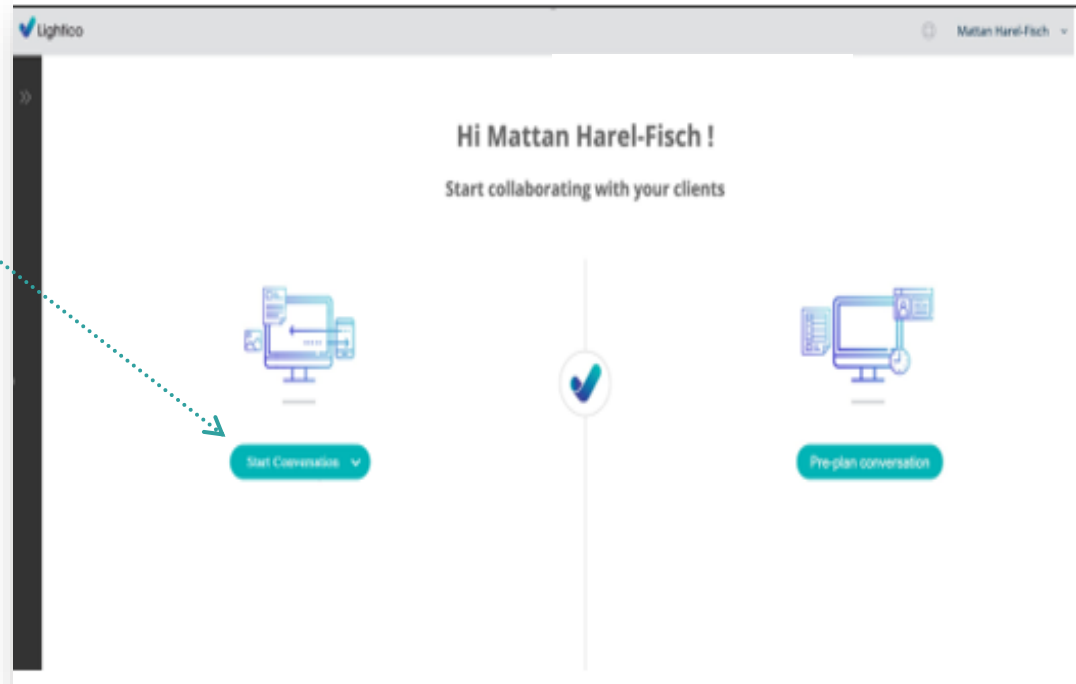
- **View Bill Projections** with in the summary tab for both the customers estimated pro rata next bill and future bills.
- New commitment period for New Line is from **19 Apr 2021** to **18 Apr 2023**. The dates may change depending on the delivery date of the equipment.
- A confirmation email with order details will be sent to **john.....@mail.com** 

☐ I have confirmed order summary as detailed above and informed the customer of relevant regulatory scripting and T&C's. (Please see Albert for further guidance)

CONTINUE

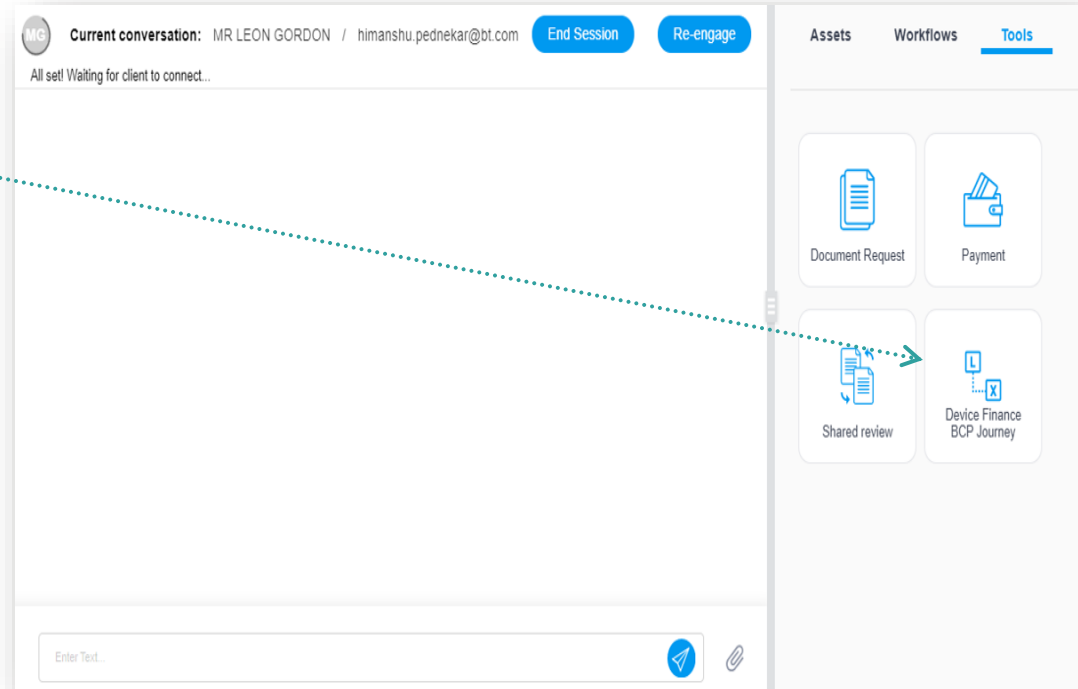
LIGHTICO – CONTINGENCY PROCESS

Click 'START
CONVERSATION'



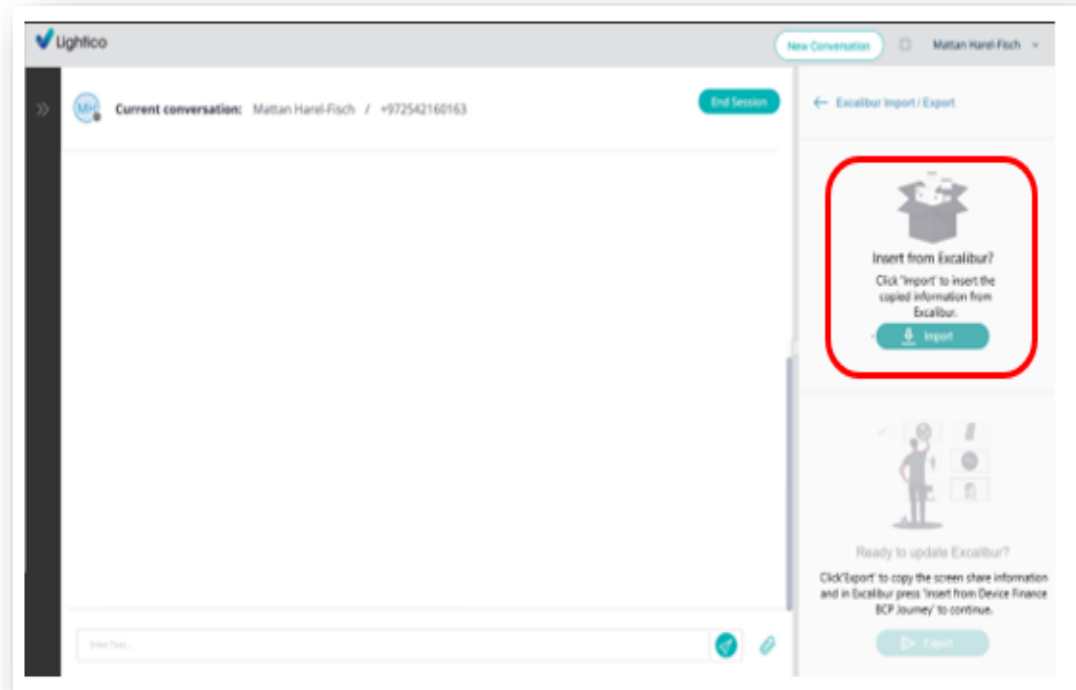
LIGHTICO – CONTINGENCY PROCESS

Click 'DEVICE FINANCE
BCP JOURNEY'



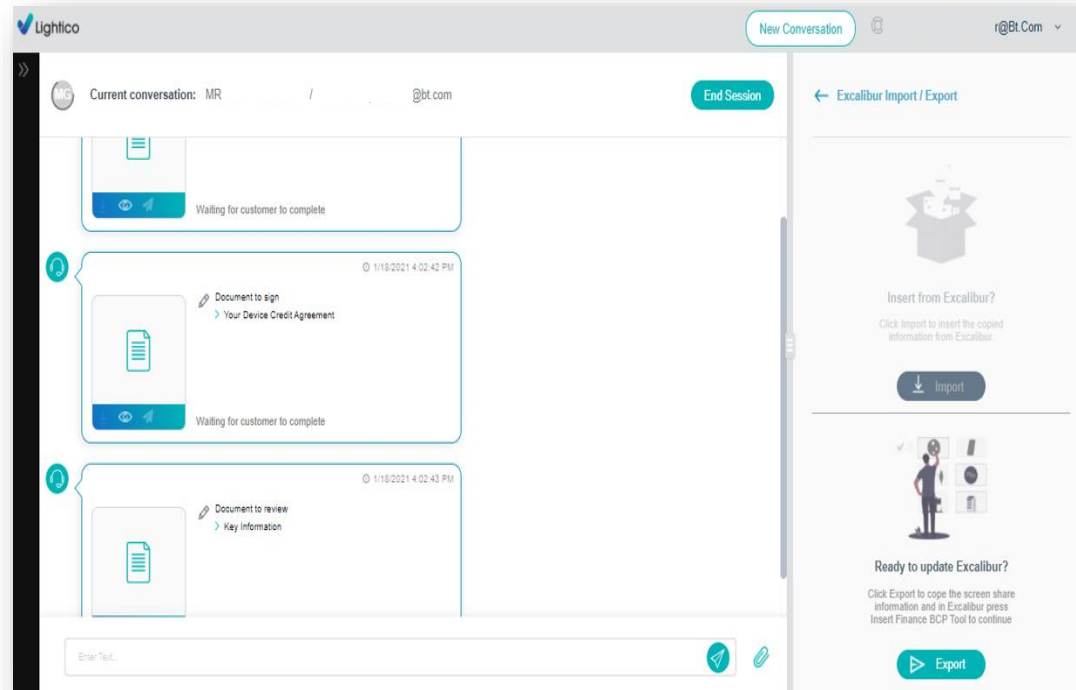
LIGHTICO – CONTINGENCY PROCESS

Click 'INPUT'



LIGHTICO – CONTINGENCY PROCESS

When the customer has either acknowledged or signed as required, the 'WAITING FOR CUSTOMER TO COMPLETE' note will be removed. Click 'EXPORT' to continue



LIGHTICO – CONTINGENCY PROCESS

Click 'INSERT –
'FLEX PAY BCP JOURNEY'

Contract Sharing Details

 Information copied. Go to the standalone screen share system, select tools & paste the information into the journey. For more information, please refer to Albert

INSERT FROM FLEX PAY BCP JOURNEY

Once successful – you will get
the following message. Ensure
to tick the confirmation box

Please Note

- **View Bill Projections** with in the summary tab for both the customers estimated pro rata next bill and future bills.

- New commitment period for New Line is from **19 Apr 2021** to **18 Apr 2023**. The dates may change depending on the delivery date of the equipment.

- A confirmation email with order details will be sent to **john.*****@*****.com**

☐ I have confirmed order summary as detailed above and informed the customer of relevant regulatory scripting and T&C's. (Please see Albert for further guidance)

 The BCP Process is successful with all agreements signed by the customer.

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CONTINUE

Next Click 'CONTINUE' and
follow the guide from page 39
to complete the order

EXCALIBUR HYBRID – TIME TO THINK

If the customer needs Time to Think or review the documents then click 'TIME TO THINK'. The customer will be sent a link to the documents



The customer now has 48 hours to return to take the discussed deal. After this the deal will need to be rebuilt. Stock is not held or reserved for Time to Think orders. Ensure the customer understands delivery guidelines could change when they return. You must never discourage a customer from using Time to Think. Ensure you explain stock timelines factually.

The screenshot displays the checkout interface for an Apple iPhone 12 Pro 5G 128GB Gold. The process is divided into five steps: 1. PACKAGE, 2. VERIFICATION, 3. FLEX PAY CHECKS, 4. DELIVERY, and 5. ACCEPTANCE. A modal titled 'TIME TO THINK' is open, asking for confirmation to proceed with the offer. The modal text reads: 'Are you sure you want this offer under Time to Think? Please inform the customer, to call back within 48 hours to resume the offer.' Below the text are two buttons: 'CANCEL' and 'CONFIRM'. To the right of the modal, a 'SUMMARY' section is visible, showing the device price (£80.00) and the monthly payment (£20.00). At the bottom of the screen, a link to complete the flex pay documents is provided, along with a 'RE-SEND SESSION LINK' button.

Step	Step Name	Status
1	PACKAGE	Apple iPhone 12 Pro 5G 128GB Gold Smart Plan 10GB Add Line Flex Pay
2	VERIFICATION	OTP verification successful
3	FLEX PAY CHECKS	Successful
4	DELIVERY	In Store Delivery
5	ACCEPTANCE	

TIME TO THINK

Are you sure you want this offer under Time to Think?
Please inform the customer, to call back within 48 hours to resume the offer.

[CANCEL](#) [CONFIRM](#)

A link to complete the flex pay documents will be sent to [07234345656](#)

[RE-SEND SESSION LINK](#)

SUMMARY

Line 1	
Agreement Number	0000000
Pay Now	
Apple iPhone 12 Pro 5G 128GB Gold	£80.00
Physical SIM	Free
Pay Monthly	
DEVICE	
Apple iPhone 12 Pro 5G 128GB Gold	£20.00
PLAN	
Smart Plan 10GB	£35.00

If the customer has accepted the documents, click 'VALIDATE AGREEMENT & CONTINUE'.

EXCALIBUR HYBRID -- RESUMING TIME TO THINK

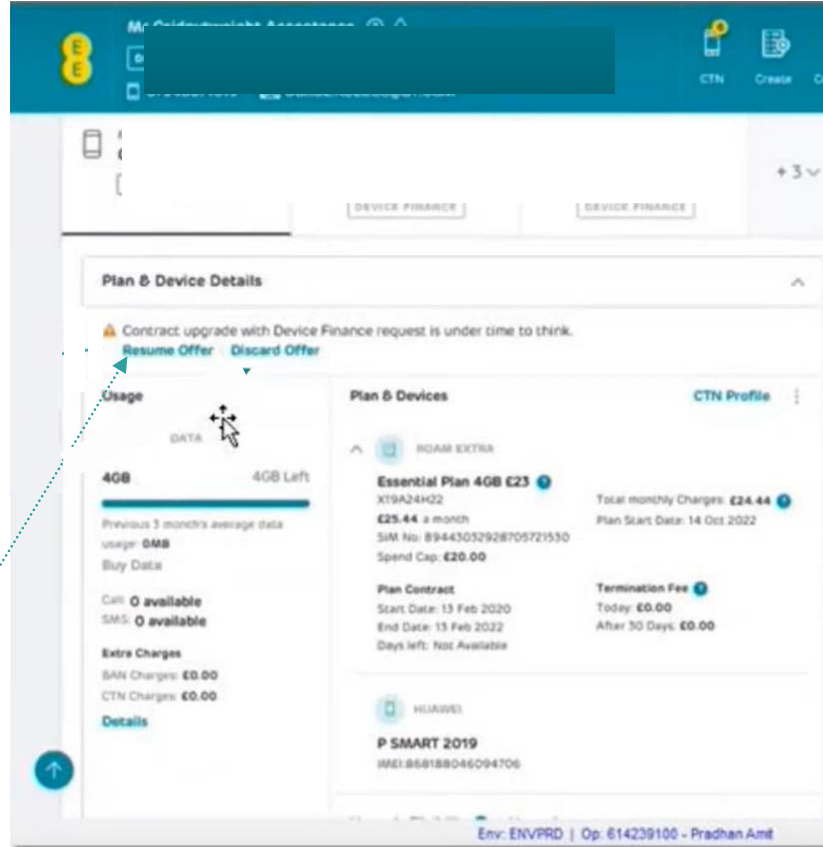
Cancelled - Time to Think order that has been cancelled. A new order will need to be processed

Expired - An order where more than 48 hours has passed. A new deal will need to be built

Resume - the current offer is still active- you may continue with the same deal

Discard Offer - to clear the current offer and build a new one

Open the BAN in Excalibur and Select 'RESUME OFFER' to continue. (Follow the KHG from the beginning to complete the sale)



If the customer is no longer eligible to upgrade or does not have enough available spend the order will not be allowed

Only cancel Time to Think orders if the customer does not want to go ahead

VERSION CONTROL

Version	Date	Reason for change	Owner of change
1.2	07/09/23	Updated Franchise discount section – upfront cost must include the total of customer's contribution. Example page added.	Nargis Mohamed
1.1	04/09/23	Added 'EUF VAS' to EPOS page	Nargis Mohamed
1.0	02/07/23	Pack updated to support Franchise	Nargis Mohamed