



KNOW-HOW-GUIDE EARLY UPGRADE

Using Store Stock

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RULES

Process

- This process should only be used if you receive an error in Domino and Excalibur Web Lite.
- All proofs must be completed before processing any connection – see Proofs and Identifications policy in Albert.
- This process must not be used for Flex Pay – see Flex Pay policy for guidance.
- All sales must be processed manually in EPOS and Contract Tool must be completed.

Compliance

- Store Leaders must check pricing and device costs are correct as per Pricebook.
- All sales will be subject to validations

Support

- If you need support whilst completing a sale using this process, contact RIO

APPLICATION TYPE GUIDANCE

The screenshot shows a software window titled 'Application Information'. It contains various fields for contract details. The 'Application Type' dropdown menu is open, showing a list of options. A dashed line connects the 'PRE->POST MGT.' option in the dropdown to the 'Application Type' field in the form.

Type	Description
R	Regular
U	Upgrade
P	Pre Pay Reg
C	Change of Owner
BO	Bulk Order
LF	Load DLR File
PM	Pre->Post Mgt.

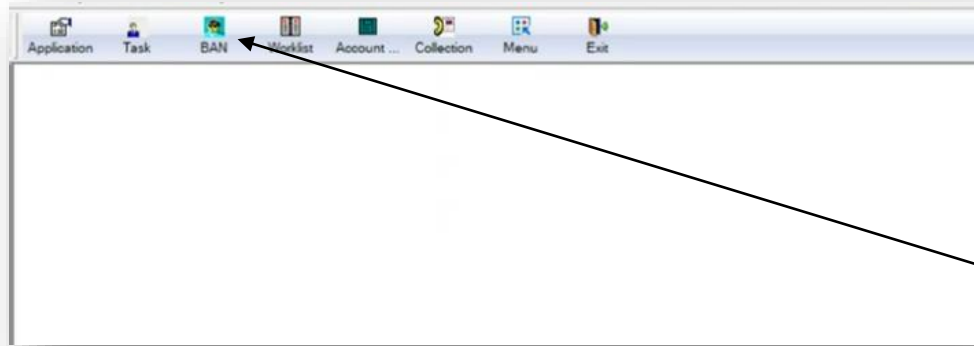
i APPLICATION TYPE:
New – 'R'
Add Line – 'R'
PRE to Post – 'PM'
Upgrade – U

i When selecting an Add Line (can also be Pre to Post add line) you must ensure you have also selected 'EXISTING ACCOUNT'

i When completing a brand-new line (can also be Pre to Post), ensure that you have also selected 'NEW ACCOUNT'

i When completing an upgrade, ensure that you have also selected 'EXISTING ACCOUNT'

EARLY UPGRADE



Select BAN

Type:

BAN	Account Type	Ban Status	BAN Status Date	CTN Status	CTN Status Date	Customer Name	CTN
4	Private User	Open	06/12/2022	Active	06/12/2022	MR RETAIL	YCA
3	EE Internal Acc	Open	25/11/2016	Cancelled	14/10/2022	CT8000 T	JYC

< >

Rows Retrieved: 2 out of Total: 2

i
In this scenario, the customer has already paid the EU fee in EPOS. Domino has given an error message

Click 'BAN' at the top

Enter the customer's CTN and click 'GET'

If more than one account pulls up, ensure you select the correct one. Click 'OK'

EARLY UPGRADE

Plan & Device Details

Usage

DATA

Unlimited

Previous 3 month's average data usage: OMB

[Buy Data](#)

Call & SMS: Unlimited

Extra Charges

BAN Charges: £0.00

CTN Charges: £0.00

[Details](#)

Plan & Devices

[CTN Profile](#)

ROAM EXTRA

Full Works £69

X23APF07

£69.00 a month

SIM No: 8944303

Spend Cap: £0 ^^

Plan Contract

Start Date: 20 Jan 2023

End Date: 20 Jan 2025

Days left: 441

Total monthly Charges: £0.00

Plan Start Date: 19 Sep 2023

[Change Plan](#)

Termination Fee

Today: £0.00

After 30 Days: £0.00

MODEL NOT AVAILABLE

IMEI:0000000000000000 - [Update IMEI](#)

Upgrade Eligibility | [Upgrade](#)

Once the account opens, click
'UPGRADE'

EARLY UPGRADE

Home > Basket

Basket | Sales Entity: CUST

EDIT SALES ENTITY

Sales Entity

Store ID

AJ32 - EE Retail

04539 - T-MOBILE (UK) LTD

Cancel

Save

Select Sales Entity to Proceed Further

Where the basket is – click the edit pencil icon

Enter your SEC code and Store Code

Ensure you have entered the correct store details – if entered incorrectly the sale may not count

Click 'SAVE'

EARLY UPGRADE

[Home](#) > Basket

Basket | Sales Entity: AJ32 | Store ID: 04539 - T-MOBILE (UK) LTD [🔗](#)

1 PACKAGE ▼

📱 07 6 +

Select offer to proceed with the configuration.

☒ Retrieve from Compass ☐ Build Order Manually

Continue

SUMMARY

07371 ^

No records to display

Click
'RETRIEVE FROM COMPASS'

If the offer does not pull over, select 'BUILD ORDER MANUALLY'. This must match the original Compass Plus deal that was built

EARLY UPGRADE

1 PACKAGE

0737

+

0737

Mr Retail Implementation

1 Early Upgrade

1

'Full Works £109' will be upgraded with 24 month contract and a device shown below.

Device

	PAY MONTHLY	PAY NOW
SAMSUNG GALAXY S23 ULTRA 512	—	£1349.99
BACK ORDER		
000000000300029983		
Device Discount	—	-£1349.99

Plan

	PAY MONTHLY	PAY NOW
Full Works £109	£109.00	—
X23APF27 24 month contract		
Spend Cap: £0.00		
YSTHSDISP	- £10.90	—
10% Add Line discount		
Effective Date: 06 Nov 2023 Expiry Date: NA		

SUMMARY

0737

Pay Now

SAMSUNG GALAXY S23 ULTRA 512

Free

Minute One Premium Samsung Galaxy S23 Ultra

Free

Early Upgrade Fee

£554.57

Pay Monthly

Full Cover

£14.00

Full Works £109 X23APF27

£98.10

Add-ons

Free

Total (inc. VAT)

Pay Now

£554.57

Pay Monthly

£112.10

Once the deal has been pulled over and the basket has been built successfully, this will show in the 'SUMMARY'

Ensure to check this before proceeding

The Early Upgrade amount that the customer must pay, will show here too

Click 'OK'

EARLY UPGRADE

Insurance	PAY MONTHLY	PAY NOW
YFC2I1250 Full Cover	£14.00	Free
Sim	PAY MONTHLY	PAY NOW
☐ SIM Required Physical SIM	—	Free
Fees	PAY MONTHLY	PAY NOW
Early Upgrade Fee	—	£554.57 Already Paid
Excluded Services	PAY MONTHLY	PAY NOW
Total (Inc. VAT)	£112.10	£554.57

[Upgrade Another Line](#) [Continue](#)

If the customer requires a SIM replacement, tick 'SIM REQUIRED'

As the customer has already paid the EU fee in EPOS – click 'ALREADY PAID' and 'CONTINUE'

If the payment has not gone through, do not click 'ALREADY PAID'. This must be paid through the Chat process later



All payments must be validated with a receipt. This will be monitored

STANDARD UPGRADE

07:

Products

SAMSUNG GALAXY S23 ULTRA 512

Fulfilment Options

Store Stock

#	Products	Serial No.
1	SAMSUNG GALAXY S23 ULTRA 512	IMEI Number

☐ I have confirmed order summary as detailed above and informed the customer of relevant regulatory scripting and T&C's as found in Albert and Guided help.

Receipt Number

Pay Now

SAMSUNG GALAXY S23 ULTRA 512

Free

Minute One Premium Samsung Galaxy S23 Ultra

Free

Early Upgrade Fee

£554.57

Pay Monthly

Full Cover

£14.00

Full Works £109 X23APF27

£98.10

Add-ons

Free

Total (inc. VAT)

Pay Monthly

£112.10

£112.10 Pay Monthly

Submit

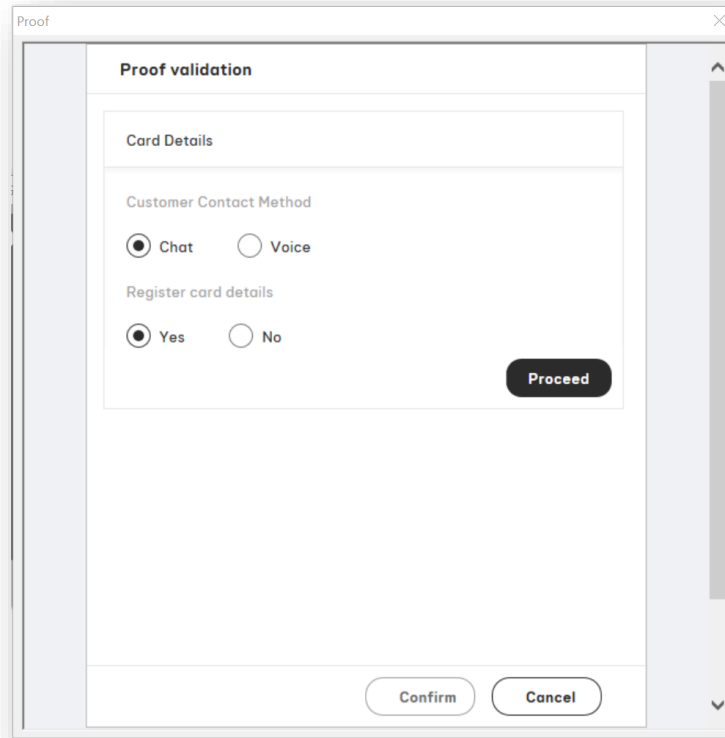
Enter the IMEI of the new device. If you have ticked for a new SIM, you will be required to enter the SIM number here too

Select the confirmation box once you have completed going through the regulatory scripting and the T&C's

Enter the EPOS Receipt number (see next slide for EU fee payment if not paid)

Click 'SUBMIT' to complete the connection. You will then be presented with a URN and Agreement number – ensure to make a note of this for Contract Tool.

EARLY UPGRADE



The screenshot shows a 'Proof' dialog box with a title bar containing a close button. The main content area is titled 'Proof validation' and contains three sections: 'Card Details', 'Customer Contact Method', and 'Register card details'. The 'Card Details' section is currently empty. The 'Customer Contact Method' section has two radio buttons: 'Chat' (selected) and 'Voice'. The 'Register card details' section has two radio buttons: 'Yes' (selected) and 'No'. A 'Proceed' button is located to the right of the 'Register card details' section. At the bottom of the dialog box are 'Confirm' and 'Cancel' buttons.

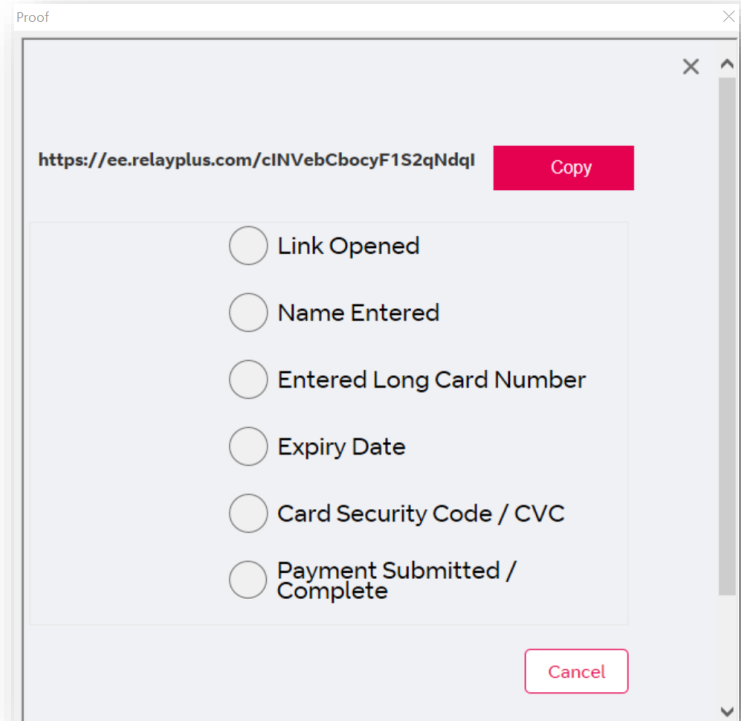
If the EU fee still needs to be paid,
the system will prompt a payment
request before activation

Select 'CHAT'

Ask the customer if
they would like their card
information to be registered
if not already and select
accordingly

Click 'PROCEED'

EARLY UPGRADE



The screenshot shows a window titled "Proof" with a close button (X) in the top right corner. Inside the window, the URL <https://ee.relayplus.com/cINVebCbocyF1S2qNdql> is displayed next to a red "Copy" button. Below the URL is a list of six steps, each with a radio button:

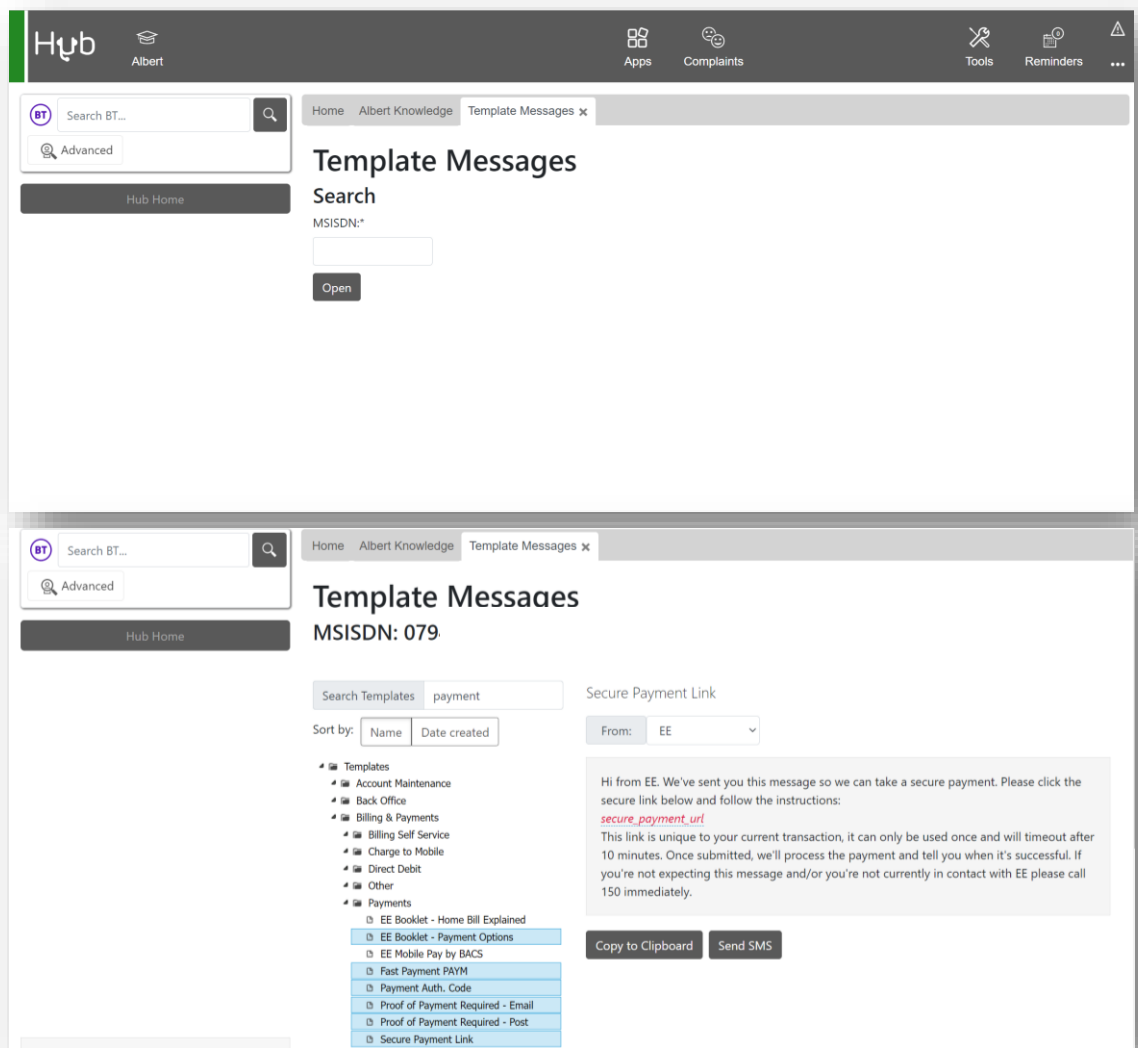
- ☐ Link Opened
- ☐ Name Entered
- ☐ Entered Long Card Number
- ☐ Expiry Date
- ☐ Card Security Code / CVC
- ☐ Payment Submitted / Complete

A red "Cancel" button is located at the bottom right of the window.

Select 'COPY' to copy the link

Keep this screen open

EARLY UPGRADE



Open Advisor Hub and
Launch 'TEMPLATE MESSAGES'

Enter the customer's existing CTN
and click 'OPEN'

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

Paste the URL link
Excalibur provided into
the template replacing
secure_payment_url

Click 'SEND SMS'

EARLY UPGRADE

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/yfgmVYYoO4WPMYq8u5Ev>

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: 5902_1303050247

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*

secured by 



Sycurio



Success!

Your payment has been processed successfully

Amount: £1.00

Authorisation Code: 049617

Transaction Reference: 1-3684474420221125

Payment Reference: 463217729

You may now close this page

Secured by **Sycurio**

The customer will receive an SMS with a payment link

Advise the customer to click on the link and enter their card details to process the payment

 The customer must enter card details themselves on their own device. Under no circumstances can you view or enter any card details or use a store device to process a payment

EARLY UPGRADE

Take Chat Payment

Re-CopyCopied

✓ Link Opened

✓ Name Entered

✓ Entered Long Card Number

✓ Expiry Date

✓ Card Security Code / CVC

✓ Payment Submitted / Complete

CancelContinue

If the payment was successful, then the customer will see a 'SUCCESSFUL' message on their device

The screen you had open will turn green and each section will have a green tick. Click 'CONTINUE' to proceed

EARLY UPGRADE

Plan & Device Details

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[Buy Data](#)

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[Details](#)

Plan & Devices

CTN Profile

ROAM EXTRA

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MODEL NOT AVAILABLE

IMEI:0000000000000000 - [Update IMEI](#)

Upgrade Eligibility

[Upgrade](#)

Once the payment has been successful, the system will automatically present you with a URN and Agreement number. Ensure to make a note of this for Contract Tool

VERSION CONTROL

Version	Date	Reason for change	Owner of change
1.0	23/11/23	Document Creation	Nargis Mohamed