



EE ID – CREATING

STEP ONE

From the Hub select 'New Customer'

STEP TWO

Select your customers 'Contact Reason' from the drop-down list.

Select 'Customer Overview' icon from the aqua banner located near the top of the page.

STEP THREE

Capture the customer's name and date of birth information.

STEP FOUR

Capture the customer preferred methods of contact for phone and email and select 'Continue'

Note: The mobile number does not need to be an EE number.

TIPS

The details captured form the foundations of the EE ID which will be setup later



EE ID – CREATING (2)

STEP FIVE

Ask the customer the vulnerability question and answer 'Yes' or 'No' to unlock next steps.

“ Tell the customer

Let's make your account personal to you. Do you require us to record any additional support you need on your account, such as the ability to connect any services, like alarms to your landline, your bill in an easier-to read format or any help installing your equipment?

Yes

No

Product availability check ^

Run a check to see what's available

Run product availability check

STEP SIX

You can now run a product availability check for the customer.

STEP SEVEN

Later in the journey, this tell the customer message is shown.

“ Tell the customer

You will be sent an email within the next few minutes you can use to set up your "digital identity". Your "Digital Identity" will allow you to set up and manage all of your accounts including features such as account security and viewing your bills and payments. Please check your junk email folder if you can't see it in your inbox.

☐ Tick to confirm the customer is aware this email will be used for their "Digital identity".

It's an important message about their digital identity. The customer needs to follow the email instructions or will have problems when their EEID not being correctly activated. Always guide the customer to log into their account via the website or app to finish the process.

There's even a check box here to ensure it's something they are aware of.

That's everything for creating an ID, the next page looks at regrading from BT.

TIPS

The activation link expires after 3 days. It's important we encourage customer to activate their EE ID.



EE ID – REGRADING FROM BT



Customer Selection

0214563455

Customer Identities will show all of the customers which match your search.

If you don't see the person you're speaking to, or if the customer is calling about somebody else's account, please open the account from the Account Results tab.

Customer Identities		Account Results		Search Again	
Account Holder	Contact Details	Account	Products & Services	Matched Against	
Mr Robert Huck Test	Not Found	0214563455		Products & Services	<button>Select</button>

SEARCHING

The customers account should pop up for you as normal with the information they've entered in the IVR. You can always search for the customer's account otherwise.

The customer is appearing in the **account results tab**, meaning there isn't an **EE ID**.

***Note – We should always ask the customer if they have an EE Mobile or have previously setup an EEID account.**

LANDING

Once you've selected the account, you'll see the Hub change to purple, indicating this is a BT Customer.

Select the customer's name from the drop-down list and chose the appropriate service.

You can see in the 'Held In' column, the details are stored in consumer.com for BT. This would be Excalibur or Harlequins for EE.

Select 'Continue' to move to verification.

Account Holder: Mr Robert Huck Test

Customer Name:

Choose a product below:

PRODUCTS & SERVICES

Role	Number	Account	Service Status	Held In	Selected
Account Holder	07483886607	0214563455	Inactive	Consumer.com (Legacy)	☒

POSSIBLE CONNECTIONS

Unable to display possible connections for the search criteria.

Different Account General Support Continue

CUSTOMER OVERVIEW

Once we've verified the customer we can launch 'Customer Overview' to start the order journey of Regrading the customer from BT Broadband to New EE Broadband.

Once we have confirmed the best package for the customer you will land on the 'Personal Details' screen. This is when you can inform the customer of their shiny New EE ID .

***Note – If the customer has BT ID they'll still retain it for to access previous bills and other BT services.**

Hub

Albert

Customer Overview



Search...



Advanced Search

New Customer

Hub Home

Tell the customer

You will be sent an email within the next few minutes you can use to set up your "digital identity". Your "Digital Identity" will allow you to set up and manage all of your accounts including features such as account security and viewing your bills and payments. Please check your junk email folder if you can't see it in your inbox.

☐

Tick to confirm the customer is aware this email will be used for their "Digital identity".

TIPS

Once the order has been submitted the customer will receive an email with their activation link. The activation link expires after 3 Days, so it's important to encourage the customer to activate their EE ID soon.