



EE ID – IDENTIFYING ACCOUNT TYPE

Customer Identities

Account Results

RESULT TABS

Customer Identities - We've identified an EE ID matching the details – we should select this.

Account Results - The customer has no EE ID, or a legacy ID.

Customer Identities

Account Results

Search Again

Account Holder

Contact Details

Account

Products & Services

Matched Against

Mr Philip James

Not Found

0226496862



Products & Services

Select

EE MOBILE WITH NO EE ID:

You'll see the product in the **Account Results** tab. Click select to verify the customer. We'll need to **migrate** the ID by selecting the three dots menu and pressing the "Create / Migrate Identity" option.

- Restart Verification
- Additional Needs
- Create / Migrate Identity
- Create a Temporary Connection

LEGACY EE BROADBAND:

You'll see the product in the **Account Results** tab. Check the Account, Products and Services columns to make sure it's the correct account and click select to verify the customer.

If the customers to regrade to New EE Broadband, they'll be set up with a New EE ID as part of the Customer Overview journey.

BT BROADBAND / MOBILE:

You'll see the product in **Account Results** tab. Check the Account, Products and Services columns to make sure it's the correct account and click select to verify the customer.

You'll then **manage** the BT customer as normal unless they want to change to EE, you'd then need to **regrade** to New EE to link their broadband to an EE ID.

EE MOBILE AND BT BROADBAND:

If you'd like to manage the BT broadband, search for the account number or their landline number. You'll see the **Account Results** tab. Click select to verify.

If we search for their contact number, we'll see results under **Customer Identities** and **Account Results**. We should always access BT account through the **Account Results** tab.

IF THEY HAVE AN EE ID, BUT NO PRODUCTS ATTACHED:

Customers can sign up for an EE ID without having any products or services with us (through the website or app).

If we search for their contact email address or phone number, this will show in the **Customer Identities** tab. You'll see there's no products or services linked, and a banner to warn you. Click on Select to verify the identity. You'll then be able to help with the customer query or add new products through Customer Overview.

Note – We should confirm that the EE ID is active before adding products or services.

TIPS

Remember, if it's the Customer Identities tab – this means the customer has a New EE ID, or is in the process of setting one up. If it's the 'Account Results' tab - this means the customer doesn't have an EE ID or has a Legacy EE ID. This is where we can also find BT Customers. You will always see an Aqua colour at this stage, even if they're BT.



EE ID – IDENTIFYING ACCOUNT TYPE (2)

Customer Identities		Account Results			Search Again
Name	Contact Details	Account	Products & Services	Matched Against	
EXRAONE EETEST	Contact Number: 07947462930 email address: exraonelegacyid@yopmail.com	207458303 0228391133		Products & Services	Select

IF THEY HAVE AN EE ID:

If the customer has an EE ID (or is in the process of setting one up) they'll appear under the **Customer Identities** tab.

MULTIPLE IDENTITIES:

Customer Selection
07483220726

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
Name	Contact Details	Account	Products & Services	Matched Against	
PHYLIP JAMES	Contact Number: 07483220726 Email Address: Phyljames@gmail.com	187656701		Products & Services	Select
This Customer Identity does not manage a product or service matching your search					
Phylip James	Contact Number: 07483220726 Email Address: Phylip.james@bt.com	Not Found	Not Found	Contact Details	Select
This Customer Identity does not manage a product or service matching your search					
PhylJames NYtest	Contact Number: 07483220726 Email Address: pohlident@yopmail.com	Not Found	Not Found	Contact Details	Select
This Customer Identity does not manage a product or service matching your search					
Phylip James	Contact Number: 07483220726 Email Address: phylip.james@bt.com	Not Found	Not Found	Contact Details	Select

A common scenario when a customer comes through is multiple identities being displayed. The Hub runs a check against the number that's contacted us, or we've searched for, and shows every account that number is linked to. This could be an authorised user on someone else's account for example. Ultimately, this number has been associated to four different accounts.

HOW TO CHOOSE THE CORRECT IDENTITY:

- 1. Check the Matched Against column:** The top result is found because it matches a product that has been linked to the identity. The other results are matched because that mobile number is listed as a contact number on another identity. If it's matched against the contact details, it's unlikely this is the identity we need to select.
- 2. Look for banners:** The Hub tells you in the yellow banner that "This customer doesn't manage the product I searched for" – that's the second clue.
- 3. Look at the Products and Services:** If you look at the Products and Services column, this will tell you if they have broadband, mobile or TV linked to their identity. This is a good indicator that this identity is active.
- 4. Look for the green Select button:** Look for the green Select button in the Customer Identities tab. This indicates what we searched for (e.g. mobile number or account number) matches a service that's already linked to their identity. There should only be ONE green Select result.

TIPS

If we're told an EE ID already exists (Customer Overview in Orbit) but can't find it - the quickest resolution will be to ask the customer to visit ee.co.uk and attempt the forgotten password journey. Once they've regained access, their EE ID will migrate over to a New EE ID and become searchable in Hub.

Alternatively, try setting up the customer with a New ID by following the 'New Customer' journey.



EE ID – VERIFYING A CUSTOMER

VERIFICATION STEPS:

Once we have selected the appropriate identity or account, we'll move into the 'products and services' screen. Here we should make sure that we select the correct asset (and customer name if we're dealing with an Account Result).

PRODUCTS & SERVICES

1

Mobile

Role	Number	Account	Service Status	Held In	Selected
Account Owner	07483220726	187656701	Active	Excalibur Web	☒

We then move to the Verification screen where we have different ways of verifying the customer. We should always lead with One Time Pin in the first instance, as this is the most secure way to verify the customer.

Verification

Time to expire: 3:56 s

Please select the most appropriate option below.

One Time PIN

To send a One Time PIN, select the send option to the right of the appropriate destination.

07483220726

Send One Time PIN

phyljames@gmail.com

Send One Time PIN

THE NEW FLOATING BUTTON:

To support you with identifying and validating customers, there will be a help and guidance button displayed on the Advisor Hub landing page as of the 16th of January.

Customer Security

Customer Selection

073752

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

Name	Contact Details	Account	Products & Services	Watched Against
This Customer identity does not manage a product or service matching your search.				

This will open a new page with infographics and guidance all about landing the correct customer. If you're ever unsure, check the information held in the 'Help and Guidance' page.

TIPS

We'll always verify the Account Holder when dealing with a New EE ID. Third Party contacts will need the Account Holder to pass verification.