



EE ID – MANAGING AND LINKING

A vertical menu with a three-dot icon at the top. The menu items are: Restart Verification, Additional Needs, Marketing Permissions, Manage Identity, and Create a Temporary Connection.

WHEN IS EE ID MANAGEMENT NEEDED AND WHY?

There may be times when a customer needs our help to update parts of their EE ID. These include changing contact details or updating their username. We start this journey by clicking the three dot menu and clicking 'Manage Identity'.

The screen has a title 'Manage a Customer Identity' with a person icon. Below the title is a subtitle: 'Use the options below to make changes to the customer's ID.' There are four expandable sections: Personal Details, Online & Digital Information, Contact Details, and Products & Services. Each section has a downward arrow on the right.

This screen has 4 options that are expanded by default: Personal Details, Online & Digital Information, Contact Details and Products & Services.

The section is titled 'Personal Details'. Below the title is a note: 'Please follow Albert guidance to update the customer's personal details in their Billing Accounts.' There are three input fields: 'First Name*', 'Last Name*', and 'Date of Birth*'. Each field has a light blue border and a small 'x' icon on the right.

Personal Details: This shows the customer's name and date of birth. Typically, you won't be able to change any details in this section as it's read-only. Any updates need to be made in Consumer.com or Excalibur – Albert will have more information.

If you have a new customer, you'll be able to capture these details as part of the profile set up.

The section is titled 'Online & Digital Information'. Below the title is a note: 'See Albert for more information on how the customer can reset their Online password.' There are two input fields: 'Username:' and 'Online Account Status:'. The 'Username:' field has a 'Change' button next to it. The 'Online Account Status:' field has a green 'Active' button. Below the input fields is a note: 'If the customer has lost control of their online account, Lock Online Access to report the problem to the Trust and Safety Centre for investigation.' There is a 'Lock' button.

Online Information: This is their EE ID username. We can change this if needed. This is where we'll also see the status of the EE ID, it can be 'active', 'unconfirmed' and 'Protected'.

We can also lock a customer's account here, an important option if the customer feels they've been a victim of fraud so we can prevent further changes.

TIPS

Remember, a username must always be in the form of an email address.

If we see a blank username field, it means the customer didn't click the activation link or hasn't fully setup their EE ID. We should ask the customer to try logging in to ee.co.uk. There will be a button to resend the activation link within the Online & Digital Information section if needed.



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Contact Details

Check the contact details are still correct. The customer will need to provide at least one mobile telephone number or email address as a preferred point of contact.

Preferred Mobile Number:

Preferred Email Address:

Contact Details: The customer should always have at least one piece of contact information. If we need to change any of this we can simply type over the details that are saved. You then click "Verify". This will send a One Time PIN to the customer just to confirm it's them.

Products & Services: The final part lets us see the Products and Services the customer has linked to their ID and lets us link other accounts to this one, such as mobile accounts on different BAN's or linking an EE Mobile account to a New EE Broadband account.

Products & Services

You can see the customer's products and services below. If the option to add another account is not available, please make sure that you have verified the customer successfully using Advisor Hub

 1 Mobile  Add Account				
Role	Number	Account	Service Status	Held In
Account Owner				
	0748	187656701	Active	Excalibur Web

WHAT IS LINKING?

The act of 'Linking' is to associate other products and accounts to one identity. By doing this, customers and Guides can see all products they have across the different brands. An action needs to be taken to link products to an identity – this doesn't happen automatically. Customers can do this themselves on the web or app, and Guides can do this using the Hub and the 'Add Account' function.

We also have the option to 'temporarily link' accounts to discuss multi product benefits.

Adding Products & Services

To link another Product or Service for this customer, you must complete verification on the account you want to link.
Please note, the customer's personal details must match. Check the first name, last name and date of birth. See Albert for more information.
Click Continue to start a search, or click Back to return and manage the customer's identity.

Back

Continue

Add Products & Services

Bring more to your Customer Identity

Use the options below to search, or select a possible related account.

Select search type:

Phone Number

Search

PERMANENT LINKS

From the 'Manage Identity' screen you can setup a permanent connection. You'll have to validate the other account that is being linked and a pop up reminds you. You'd click 'add account' and then 'Continue'. After that you just search for the account that's going to be added and validate it with a One Time Pin. After that, it'll appear in the list of linked accounts.

Sometimes the Hub won't allow you to link and will show you a stop-sign. If you see this, hover over the icon and it'll tell you why you're unable to link. Albert will have supporting information.

DON'T FORGET!

!If a customer is placing an acquisition Mobile order with us, and they already have (or are moving to) New EE Broadband, you need to ensure the mobile BAN is linked to the identity set up during their broadband order journey otherwise the customer will lose their discounts. You can do this in Hub after you've placed the order in Excalibur.

TIPS

Remember that personal details have to match for us to link accounts. Things to look out for are:

Matching first and last name
Matching date of birth



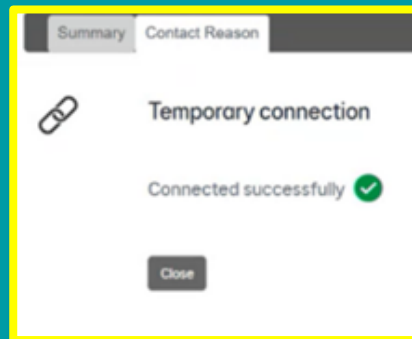
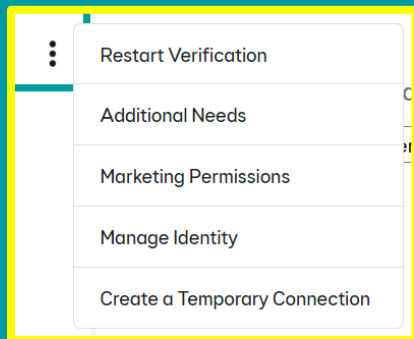
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TEMPORARY LINKS:

Rather than permanently linking two accounts, an option to temporarily link accounts is available. It means we can have both the EE Mobile and the BT Home account within the Hub, allowing us to manage a customer's household together, it also lets us see any multi product benefits the customer is entitled to once moved to EE.

Most importantly though, it prevents Early Termination Charges for a customer moving to EE from BT. A temporary connection needs to be set up before completing the migration to EE or the customer will get charged. To start the process, land the EE Mobile account or the EE ID first then we can start the temporary link process.

From the 3 dots, you can quickly select 'Create a Temporary Connection', this will let you search and validate the BT Home customer you are linking to, followed up with a confirmation of the connection.



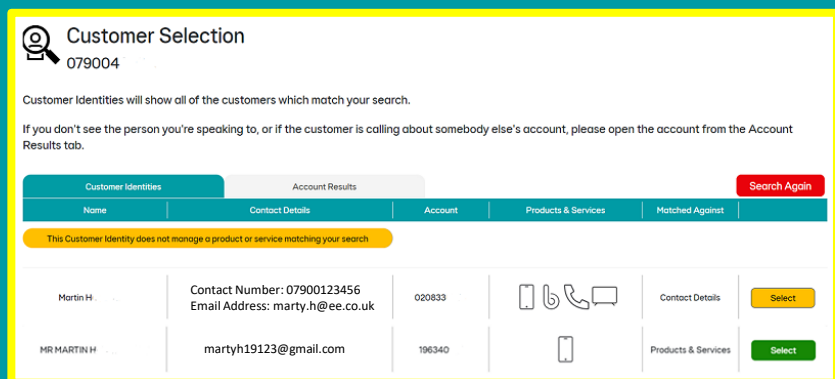
Once we've made the temporary connection – we need to click back into the EE Interaction (the Hub will turn Aqua) and launch the Customer Overview from there.

MERGING

There are some scenarios where a customer may have products linked on separate IDs.

For example, Martin has his Mobile Account linked to his old Gmail email address. He's set up a new EEID using his ee.co.uk email address and is unable to link his mobile account to it.

Because his mobile account is already linked to his unused EE ID, we'll need to merge the 2 EE IDs together. This would go to our Service teams.



The process for this is on Albert: EE Home Billing > Self Serve > New EE ID found > I've got two logins.

TIPS

It's always a good practice to check that the EE ID is active before we start the temporary link process to avoid complications during the Order Journey.