



 WINSales 3.0 Training Guide

DATE: 10.17.22


Agenda

- New & Improved WINSales 3.0
- WINSales Legacy vs WINSales 3.0
- Overview of WINSales 3.0
- Accessing WINSales 3.0
- Roles and Permissions
- Maximizing User Experience and Search Results
- Search Filters Defined
- Location Search Defined
- Understanding Grid Card Detail
- Dispositions Defined
- New Customer Order Defined
 - Products: Highlights & Rules, Shopping Cart, Credit, iFrame, SMS Verify, Installation, and General order flow details
 - Nearby, Address Not Found, Upgrade, and Moving Scenario's defined
 - Customer detail, SMS Verify, Payment Options, Installation, and Order Confirmation
- Follow Ups



New & Improved WINSales 3.0

New

- Order Entry Experience
 - Shopping Cart – true ecommerce experience
 - Product Category Optimizations
 - Product Highlights
 - Intuitive product selections and notifications
 - Increased user efficiency to order completion
- One filter page for Grid and Map
 - Grid sorting based off ascending/descending by house #
 - Filter by Voice Only Customers
- User Hierarchy with added Vendor Manager layer
- Completely Re-designed - Kinetic Branded look – Now with a NEW WINSales Branded Favicon 

Improved

- Login straight to the application- saving time
- No more scrolling for filters and Grid functionality – cleaner breakout for all device friendly users
- Faster search methods for single address search
- Enhanced mobile friendly features

WINSales Legacy vs WINSales 3.0

WINSales Legacy in 3.0 Body

- Reporting & Scorecards All
 - Re-routes you to legacy dashboards in a new URL
- SMB Order Flow
 - Re-routes you to legacy SMB order flow in a new URL
- Data Connections and Data Refresh

Issues from Legacy present in 3.0

- Existing Phone Only Customer- API issue outside of WINSales Dev span of control

Roles and Permissions

Roles

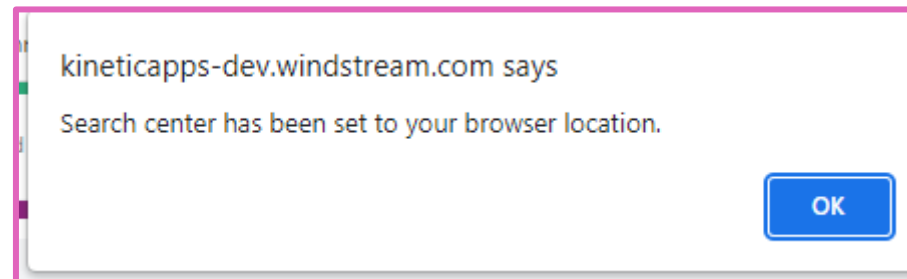
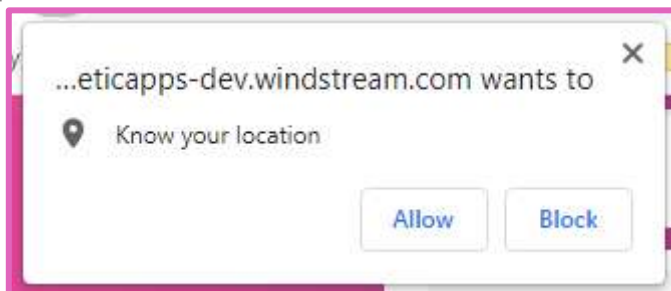
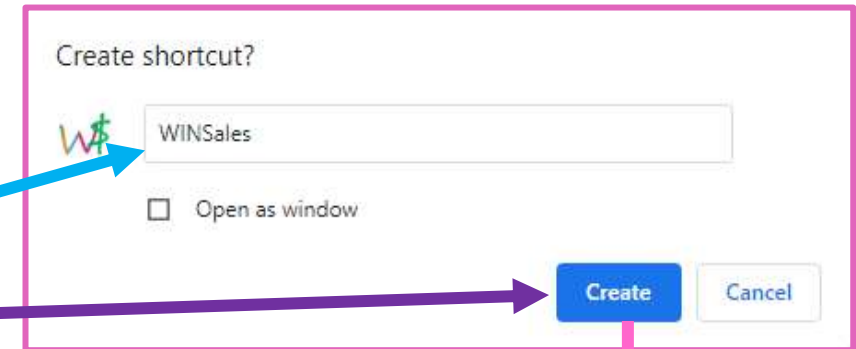
- User
- Team Manager
- Vendor Manager
- WINSales Admin – Internal ONLY

Permissions

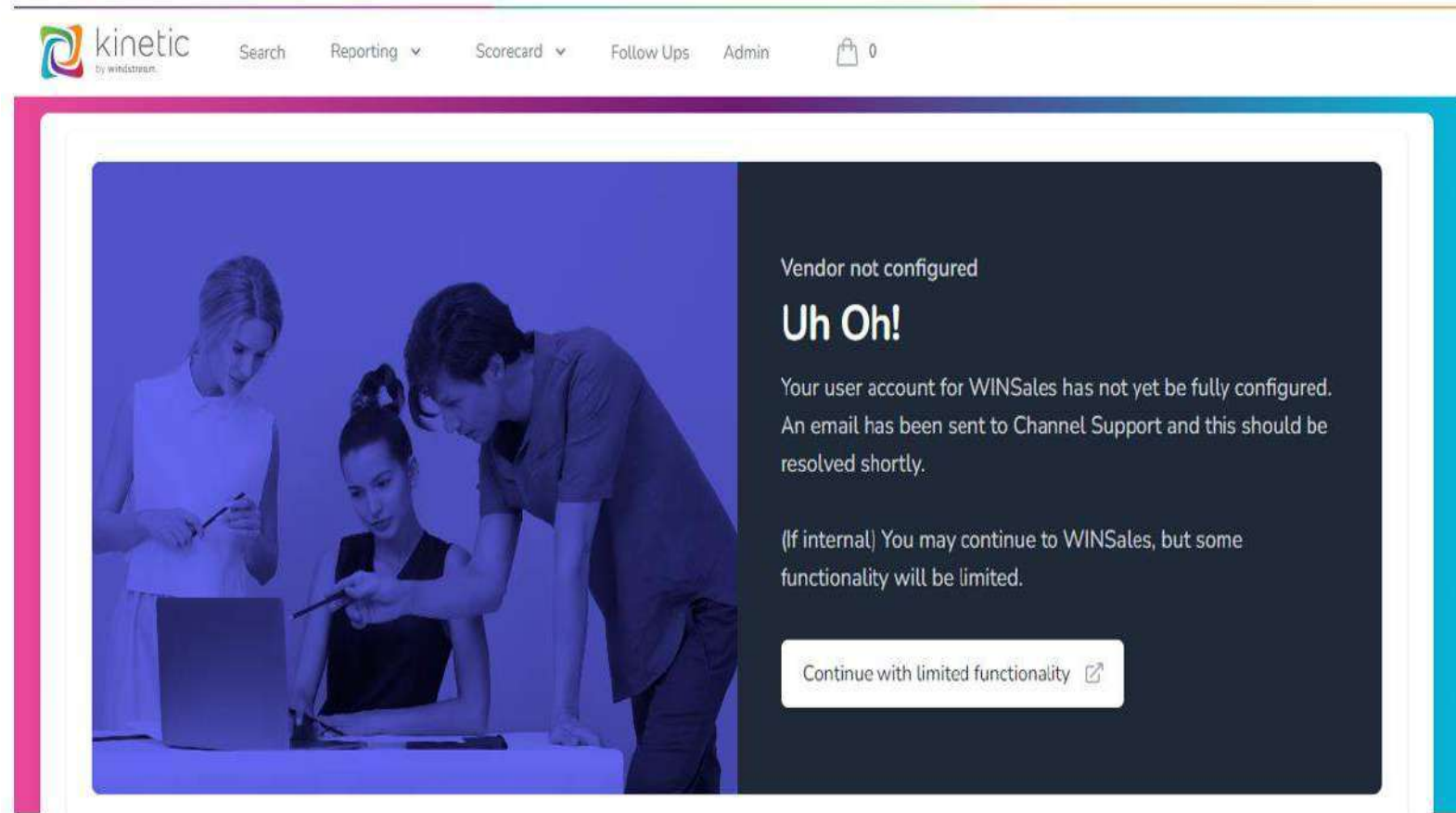
- **User** – will have permission to view ONLY their details
- **Team Manager** – will have permission to view own user details and all users on their team.
 - IE: WIND2D team leads can view only their team and not all other internal teams
 - IE: P10 dealers can only view their sales agents and not any other agents/dealers associated with the overall Vendor
 - IE: DSI dealers can only view their sales agents and not any other agents/dealers associated with the overall Vendor
- **Vendor Manager** – will have permission to view own user details and all users under their VID in WINSales
 - IE: WIND2D Managers can view all agents reporting up to SR Director
 - IE: P10 internal sales and operational leaders can view all agents assigned to their VID in WINSales
 - IE: DSI internal sales and operational leaders can view all agents assigned to their VID in WINSales

Accessing WINSales 3.0

- Always use Chrome when accessing WINSales
 - Browsers like Firefox, Safari, etc. may have performance issues but are compatible with WINSales
 - Do NOT use Internet Explorer as there are compatibility issues with WINSales and can result in false break points and functionality issues.
- Navigate to <https://winsales.windstream.com>
- Save the new application to your desktop for easy access
 - Click the icon to the right of the URL on the 3 stacked dots
 - Select More tools
 - Select Create Shortcut
 - Type WINSales in the dialogue box that appears
 - Click Create
- Log in with your SSO Ping ID credentials
- Accept location services at both the device and browser level



Accessing WINSales 3.0



- If UID is not assigned to a vendor, you will receive this notification. Please get with your NSM and/or Channel Support to grant you permissions needed.
- Channel Support is notified via automation as well for every time an agent receives this notification.

Overview of WINSales 3.0

➤ Features

- Geo location mapping functionality (Near Me)
- Prospecting data intelligence
 - Customer Status, Speeds, Qualification, Pricing, Fiber Footprint visibility, disposition history
- Sales Minded driven dispositions
- Appointment Setting with copy to device calendar capabilities
- Import Lead List- Import marketing assigned/coordinated lead lists
- Campaign Lead List- Self Assigned or Manager Assigned lead lists (location assignments only)
- Sales Reporting & Dashboards – currently redirecting to Legacy

➤ Additional benefits

- Funnel Management platform
- Order Entry Platform
- Territory Management tool
- Order Management tool

➤ System Integrated web-based app with all new Brand

- Device/Mobility friendly experiences
- OS Friendly
- No VPN required



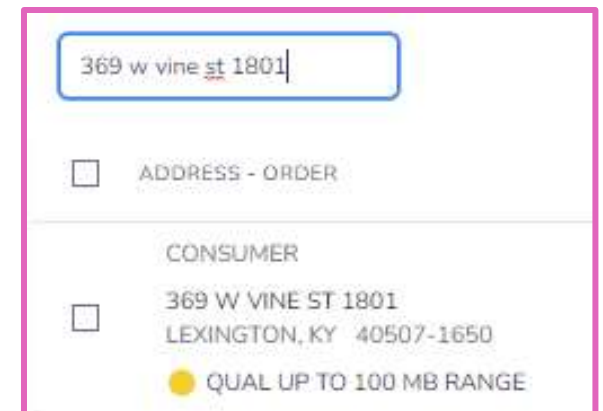
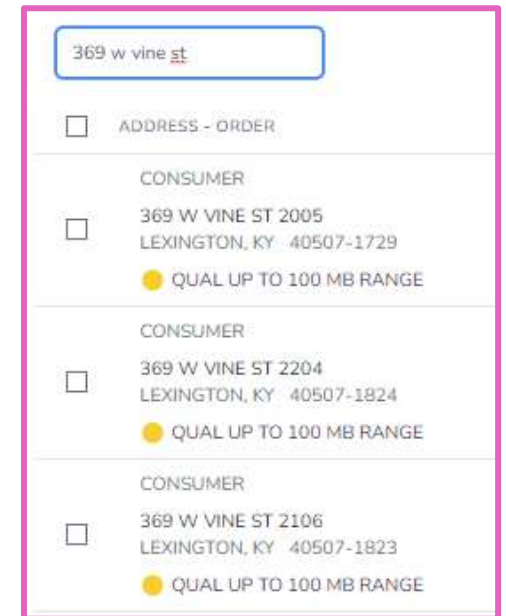
Maximizing User Experience and Search Results

Device Best Practices

- Mobile users may experience a degradation in functionality due to Storage Capacity and possibly network connectivity.
- Chrome and Safari are the optimal browsers

Search Best Practices

- Always clear your search filters – WINSales uses caching to allow user to navigate from page to page and return without having to re-enter previous search. Filters may look clear but if user does not specifically tell WINSales to clear the filters they are still cached.
- Avoid setting filters if you are just searching for a single location. Single search tips below
 - Searching for MDU location- start with the primary address- look at the list of results and modify your search accordingly
 - IE: Desired location is 369 W Vine St Apt 1801, Lexington, KY
 - Start with “369 W Vine St” or “369 W Vine St, Lexington, KY” Grid constantly auto searches with each character typed and city/state is not always necessary.
 - See top right image- 3 results show me my quick address search should look like this “369 W Vine St 1801”, so I type “1801” into my search
 - And exactly what I was looking for pulls right to the top- see image on bottom right
 - Abbreviations, Comma’s, and extra Spaces matter in returning the desired results



Search Filters

Filters ^

Near Me 📍 Searched Address: ✕ ↕ 📍 626 Oak Hill Rd Somerset Kentucky 42503 10 ✕ ↕ Minimum Speed ↕

Maximum Speed ↕ Lead List ↕ Status ↕ Address Type ↕

Pricing Tier ↕ Last Disposition Type ↕ Dispositioned Since 📅 Last Dispositioned By (Employee ID)

Campaign ↕ Has Followup ↕ Next Gen Ready ↕ Voice Cust Flg ↕

Fiber Added Since 📅 Results Per Page ↕

Clear Search

Near Me

Location Found 📍

Location Search

Radius (miles)

Minimum Speed

Maximum Speed

Lead List

Status

Address Type

Pricing Tier

Last Disposition

Dispositioned Since

Last Dispositioned By

Campaign

Has Follow-up

Next Gen Ready

Voice Only Flag

Fiber Added Since

Results Per Page

Filters- Address Search

Location Search Options

- Searched Address
 - Uses Google predictive address search
 - For address search- returns locations based on filters set and starting at that location
- Near Me
 - Searches based off your lat. / long coordinates of the device
 - **DO NOT use this on VPN as it will skew your results because a VPN masks your real location**
 - Must Allow location services at device and browser level to work
 - Returns locations based on filters set and starting at your precise coordinates
- Use All Addresses (Select State)
 - Search based of selected state – State field will appear once option is selected in dropdown
 - Returns locations with starting point in center of state
 - Results vary depending on filters

Filters

Radius (miles)

- Defaulted to 10-mile radius
- Keep search radius between 5-10 miles in high-density areas for optimal app performance.
- Know your device and its limitations regarding upload/download capabilities for large data sets and available memory/storage.

Minimum Speed / Maximum Speed

- Best used for hunting or pre-planning
- Avoid using if you are in market or working a sale real-time
- Making filters too restrictive will limit results and can result in a negative user experience

Fiber Added Since

- Allows agents to search fiber locations since a specified date in time that fiber was added

Next Gen Ready

- Allows agents to search for locations where fiber is fully built out and ready to install without dispatch delays

Filters

Status – 2 options

- Making filters too restrictive will limit results and can result in a negative user experience
- Customer
 - Only filter's locations with an active internet account
 - Record may show active with no speed representation for various reasons including recent install at location not yet billed in CAMS, services are in suspend status, services in disconnect status not yet propagated from CAMS to all systems, etc.
- Prospect
 - Locations with no active internet services on account in CAMS
 - May show current speed at location with Disconnect Flag due to an active balance owed on internet billed products

Pricing Tier

- Allows user to search based on pricing tier
- Making filters too restrictive will limit results and can result in a negative user experience

Filters

Last Disposition

- Allows for quick search of locations with a specific last disposition

Dispositioned Since

- Allows for quick search of locations dispositioned since a specified date in time

Last Dispositioned By

- Allows for quick search of locations last dispositioned by you or another user (depends on user permission levels)

Results Per Page

- Number of records displayed on each page – this does not impact the results of the quick address search
- Options include 10, 25, 50, or 100

Address Type – 2 options

- Displays if the location is either Consumer or Business in Uqual records

Filters

Lead List

- Allows for upload of Marketing Lead lists and the assignment of to active sales agents using Uqual ID for address identifier / match
 - Locations with recent network investments to target
 - Purchased lead lists from a 3rd party
 - Lead lists with internal location data insights

Campaigns

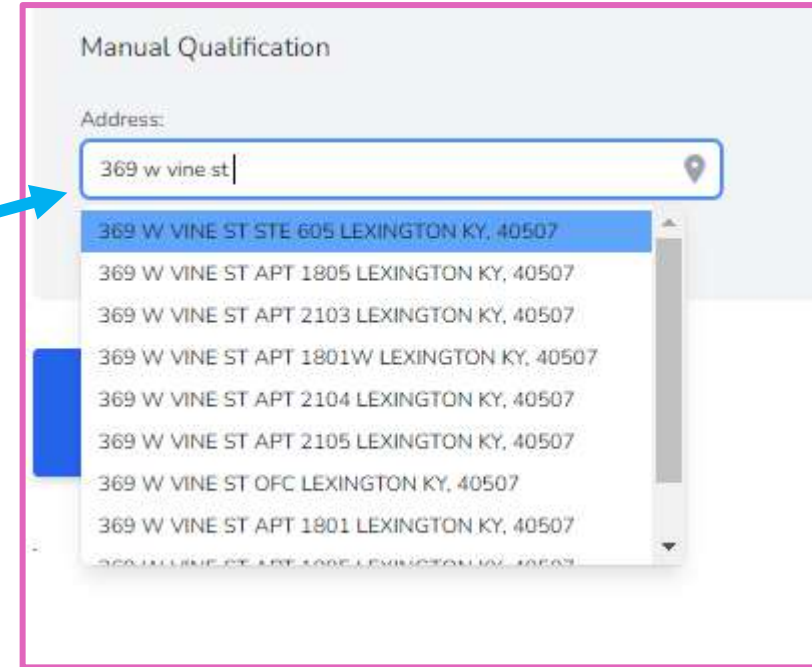
- Can be used for pre-planning selling tactics

Has Follow-up

- Allows agents to schedule follow-up appointments and easily manage appointments
- Great for post order follow-up, customer's not ready to commit, referrals, etc.
- Dispositions currently fed into Follow-ups are Call Back/No Decision Maker, Vacant, Current Provider-Contract, New Order, and Call In Order.

Search Method- Uqual Address Search

- When to use the Uqual Address Search
 - If you are unable to locate the exact address you are searching on the Map or Grid, use this action.
- Begin typing the address in the predictive address search
- Select desired address
- Click Start Workflow



Manual Qualification

Address:

- 369 W VINE ST STE 605 LEXINGTON KY, 40507
- 369 W VINE ST APT 1805 LEXINGTON KY, 40507
- 369 W VINE ST APT 2103 LEXINGTON KY, 40507
- 369 W VINE ST APT 1801W LEXINGTON KY, 40507
- 369 W VINE ST APT 2104 LEXINGTON KY, 40507
- 369 W VINE ST APT 2105 LEXINGTON KY, 40507
- 369 W VINE ST OFC LEXINGTON KY, 40507
- 369 W VINE ST APT 1801 LEXINGTON KY, 40507



Manual Qualification

Address:

800000000000020939786

Selected

800000000000020939786

[Start Workflow](#)

Search Method- Add New Address

- When to use the Add New Address Feature
 - If you are unable to locate the exact address using Location Search or Uqual Address Search
 - *Please ensure you have cleared all filters before entering a new address into the WINSales database
- After selecting Add New Address, you will be directed to complete the form
- Form Field Definitions-Sample
 - Primary# This will be the house number, IE: 5225
 - Pre-directional The direction before the street name IE: N, W, S, E, NW, SE
 - Street This will be street name, IE Poplar Tent
 - Street Suffix IE: RD, AVE, ST, CIR, DR, LN, PKWY
 - Post-Directional The direction immediately following the suffix IE: N, W, S, E, NW, SE
 - Unit Designator APT, SUITE, UNIT, LOT, BLDG
 - Secondary# This is the actual # of the apt/unit; DO NOT put the word apt/unit IE: 1801
 - City This will be the city indicated by USPS
 - State State should be entered as ONLY two alpha characters IE: NC, AL, AR
 - Zip This will be the zip indicated by USPS
 - County This will be the county indicated by USPS
- Zip 4, Win Lat and Win Long are not necessary to complete. Once you have completed the form select Save and Start Workflow

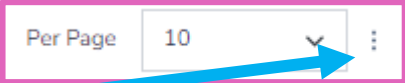
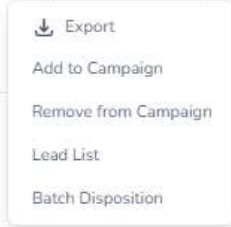
Understanding Grid Card Detail

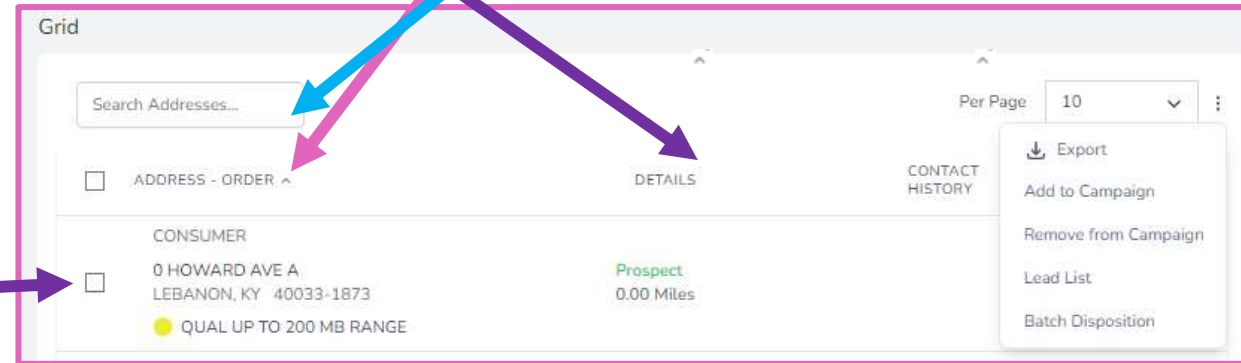
- **Address Type** – Consumer or Business
- **Location** – service location
- **Speed Qualification** – max speed available at location
- **Status** – Customer or Prospect
- **Current Speed** – current speed at location on active CAMS billing account with internet
- **Distance** – distance based on search method type
- **Revenue Flag**- will appear with a check mark if there is an active CAMS billing account Revenue: ✓
- **Voice Only Flag** – will appear with a check mark if there is an active CAMS billing account with phone only Voice Only: ✓
- **Initial Gig Assigned** – date location became Gig qualified Initial GIG Assigned: 2022-04-03
- **Next Gen Ready Flag** – location has fiber that is ready for install without additional engineering work Next Gen Ready: ✓
- **Disconnect Flag** – Account has been disconnected and closed Disconnect: ✓
- **Contact History** – last disposition, date, and total # of dispositions Order
@ 2022-09-29 15:25:22
- **Start Workflow** – easy button to start order or disposition record

Start Workflow

<p>BUSINESS</p> <p>211 MAIN ST MANCHESTER, KY 40962-1259</p> <p>● QUAL UP TO 1 GIG RANGE</p>	<p style="color: green;">Prospect</p> <p>Current Speed (Max): 1024</p> <p>Next Gen Ready: ✓</p> <p>0.00 Miles</p> <p>Voice Only: ✓</p> <p>Disconnect: ✓</p> <p>Revenue: ✓</p> <p>Initial GIG Assigned: 2020-06-19 00:00:00</p>
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Searching and Sorting the Grid

- Must use one of 3 search methods for the sorting to function accurately as it is not designed to handle a sort of any kind with over 5 million locations
- **Search Addresses** – this is your quick address locator. Never scroll to find an address just start typing
- **Address – Order** – This will sort the grid ascending or descending numerically by house #
- **Details** – This will sort the grid ascending or descending based of distance
- Contact History – Sorts ascending or descending based Last Disposition
- Per Page 
- Action Dots 
 - Export- you must select addresses or file will be blank
 - Add to Campaign
 - Remove from Campaign
 - Batch Disposition
 - Check Box to include with action



The screenshot shows a 'Grid' interface with a search bar labeled 'Search Addresses...'. Below the search bar are three sorting options: 'ADDRESS - ORDER', 'DETAILS', and 'CONTACT HISTORY'. A 'Per Page' dropdown menu is set to '10'. A context menu is open over the 'CONTACT HISTORY' option, showing actions: 'Export', 'Add to Campaign', 'Remove from Campaign', 'Lead List', and 'Batch Disposition'. A grid row is visible with a checkbox, 'CONSUMER', '0 HOWARD AVE A LEBANON, KY 40033-1873', 'Prospect 0.00 Miles', and a yellow dot with the text 'QUAL UP TO 200 MB RANGE'.

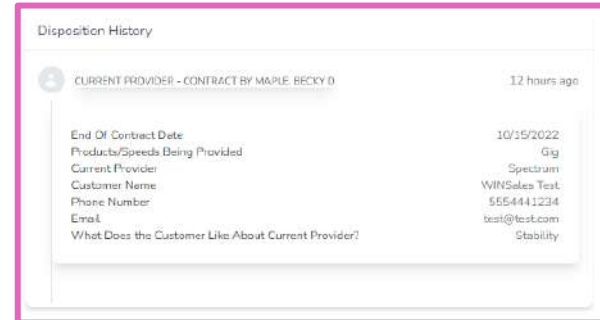
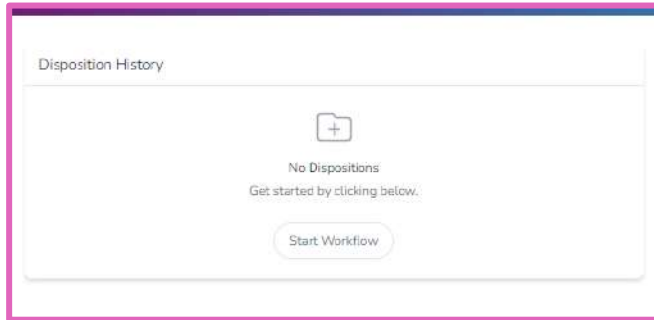


The screenshot shows a 'Batch Disposition' dialog box. It contains the text 'You have selected 4 addresses to batch disposition.' Below this, there is a section titled 'Bulk Dispositions' with four buttons: 'New Customer Or...', 'New S.M.B Order', 'Call In Order', and 'Prodi...'.

Address Details

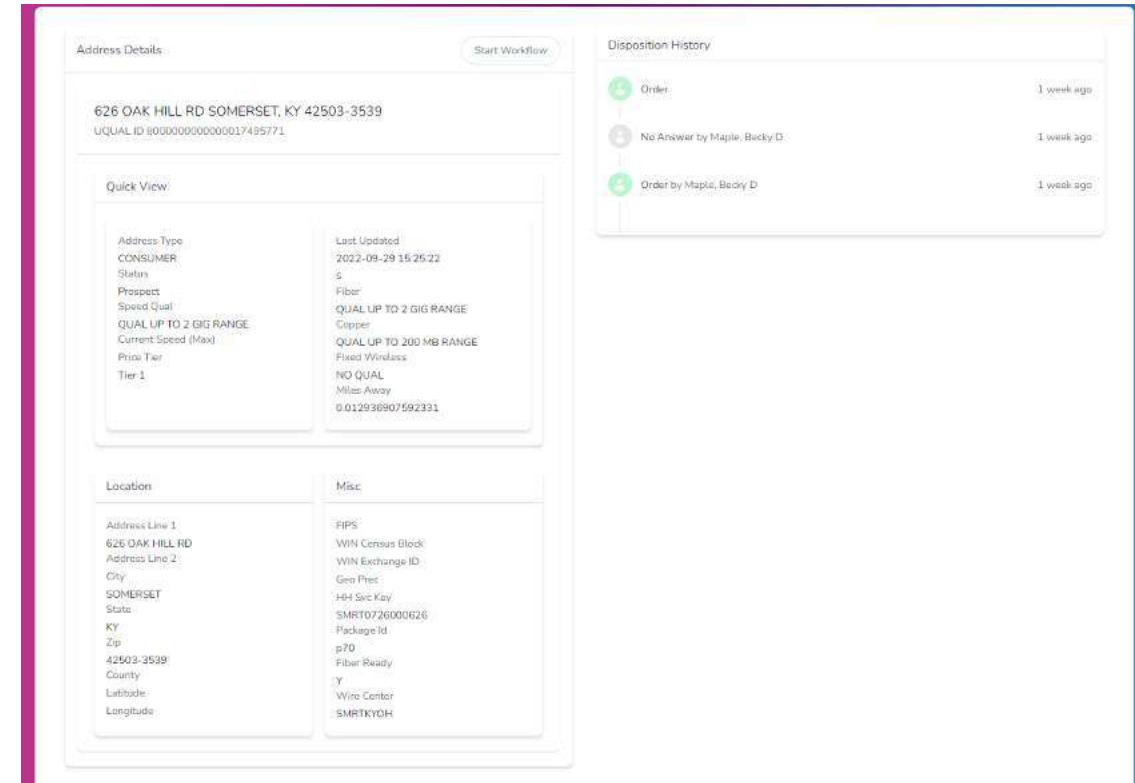
Address Details

- Consists of same detail in Legacy
- All users will still see disposition history just as before

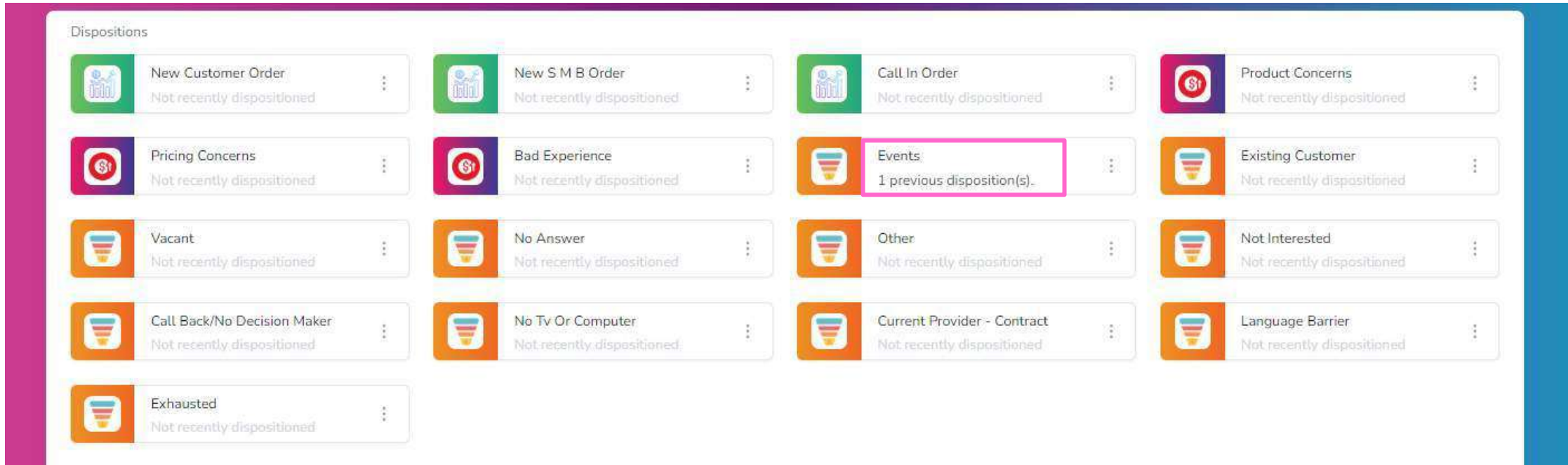


WINSales 3.0 Difference

- Users will only be able to view the meta data completed by them.
- Team Managers will only be able to view the meta data of their team as well as their own.
- Vendor Managers will only be able to view teams under their VID and their own meta data.



Dispositions

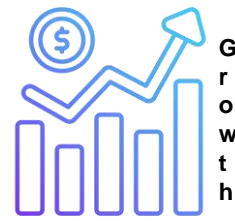


Dispositions

- New Customer Order (Not recently dispositioned)
- New S M B Order (Not recently dispositioned)
- Call In Order (Not recently dispositioned)
- Product Concerns (Not recently dispositioned)
- Pricing Concerns (Not recently dispositioned)
- Bad Experience (Not recently dispositioned)
- Events (1 previous disposition(s))
- Existing Customer (Not recently dispositioned)
- Vacant (Not recently dispositioned)
- No Answer (Not recently dispositioned)
- Other (Not recently dispositioned)
- Not Interested (Not recently dispositioned)
- Call Back/No Decision Maker (Not recently dispositioned)
- No Tv Or Computer (Not recently dispositioned)
- Current Provider - Contract (Not recently dispositioned)
- Language Barrier (Not recently dispositioned)
- Exhausted (Not recently dispositioned)

- New Customer Order
- New SMB Order – redirects to Legacy
- Call In Order
- Product Concerns
- Pricing Concerns
- Bad Experience
- Events
- Existing Customer
- Vacant
- No Answer
- Other
- Not Interested
- Call Back/No Decision Maker
- No TV and/or Computer
- Current Provider-Contract
- Language Barrier
- Exhausted

Call In Order



➤ How to use “Call in Order” Disposition

- If a situation prevents user from placing the order through WINSales
- ISD will provide the order number, confirm the order number you have entered is correct
- **PLEASE NOTE USER MUST CAPITALIZE THE “I” IN THE ORDER NUMBER FOR IT TO CAPTURE STATUS INFORMATION AND REPORT FROM WINDSTREAM DATABASE**
- At a minimum, User should capture the customer Name, Phone, Email, Speed, Product and ISD provided Install Date as this will not be provided in reporting

Disposition Details

Windstream Order Number	Customer Name
<input type="text"/>	<input type="text"/>
Customer Contact Phone	Email
<input type="text"/>	<input type="text"/>
Selected HSI Speed	Selected Bundle
<input type="text"/>	<input type="text"/>
Selected Bundle Adders	Address
<input type="text"/>	<input type="text"/>
City	State
<input type="text"/>	<input type="text"/>
ISD Provided Install Date	
<input type="text" value="Select Date"/>	<input type="text"/>

Product Concerns



- How to use “Product Concerns” Disposition
 - Select the applicable box
 - Add Comments
 - Click Save
- What’s Next
 - Lead will disposition and be available to view under-Search-Filter- Last Disposition
- WIIFM
 - Allows user to understand their business and customer base
 - Provides feedback to Windstream that may later result in area focused network investments.

Disposition Details

<input checked="" type="checkbox"/> Would Purchase25Mb	<input type="checkbox"/> Would Purchase50Mb
<input type="checkbox"/> Would Purchase75Mb	<input type="checkbox"/> Would Purchase100Mb
<input type="checkbox"/> Would Purchase1Gig	Comment <input type="text"/>

Pricing Concerns



- How to use “Pricing Concerns” Disposition
 - Select the applicable box
 - Add comments
 - Click Save
- What’s Next
 - Lead will disposition and be available to view under- Search-Filter- Last Disposition
- WIIFM
 - Allows user to understand their business and customer base
 - Provides feedback to Windstream that may later result in area focused pricing strategies.

Disposition Details

Problem With Internet Pricing Problem With Equipment Rental Costs

Problem With TV/Channel Pricing

Comment

Cancel Save

Bad Experience



Disposition Details

Problem With Speeds Problem With Install

Problem With Billing Problem With Employee Interaction

Comment

Cancel Save

- How to use “Bad Experience” Disposition
 - Select the applicable box
 - Make a note that will help build daily/weekly sales strategy plans. IE: What about the speeds made them unhappy? What happened during install that left a bad taste?
 - Click Save
- What’s Next
 - Lead will disposition and be available to view under- Search-Filter- Last Disposition
- WIIFM
 - Allows user capture as much feedback possible to research and come back with a sales pitch that may help overcome the previous experience
 - Allows user to understand their business and customer base

Events



Disposition Details

Customer Name	Phone Number
<input type="text" value="WINSales"/>	<input type="text" value="5554441234"/>
Email	Products/Speeds Interested
<input type="text" value="test@test.com"/>	<input type="text" value="Gig"/>
Conversation Details	
<input type="text" value="has spectrum, does not like price, F/U on Wed"/>	


- How to use Events Disposition
 - Complete as much information in the fields possible so that when you follow-up with the customer you built rapport. It builds credibility that you are the person they spoke with and will increase your chances of closing the sale by recalling personable moments for them.
- Disposition will appear under- Search-Filter- Last Disposition
- Disposition is intended for Post Event Follow-up if agent was unable to convert to a sale.

Vacant

Opportunity



Disposition Details

Comment	Return Date
<input type="text" value="For Sale Sign in Yard - Sale Pending"/>	<input type="text" value="10/31/2022"/> ✕ 

➤ How to use “Vacant” Disposition

- Add a comment that will be impactful in your selling strategy
- Select date you would like to follow-up
- Click Save without Reminder or Save & Download Reminder
- Save & Download Reminder allows user to download a calendar reminder to your device

➤ What’s Next

- This disposition will appear under- Search-Filter- Last Disposition

➤ WIIFM-“What’s In It For Me”

- Allows you to stay ahead of the competition coming in because we “forgot to go back”
- Allows you to understand your business and customer base

Exhausted or Existing Customer



Exhausted

- This will be your final disposition when you have made multiple unsuccessful attempts to make contact.
- The use of this disposition will be agent preference based on how many times the household has been previously dispositioned. Current best practice is typically 5-7 previous dispositions.

Existing Customer

- Applicable to Phone Only Customers
- Not willing to Upgrade
- No Upgrade Options Available

Disposition Details

Not Willing To Upgrade No Upgrade Options Available

Cancel Save

Call Back / No Decision Maker



➤ How to use “Call Back/No Decision Maker” Disposition

- Complete Comment, Decision Maker’s Name, and Phone Number fields
- Select date you would like to follow-up
- Click Save without Reminder or Save & Download Reminder
- Save & Download Reminder allows user to download a calendar reminder to your device

Disposition Details

Comment	Decision Maker Name
<input type="text" value="Spoke with Becky, currently unhappy with Zito"/>	<input type="text" value="Both - did not share spouse name"/>
Phone Number	Return Date
<input type="text" value="555-777-1313"/>	<input type="text" value="10/5/2022"/>

➤ What’s Next

- This disposition will appear under- Search-Filter- Last Disposition

➤ WIFFM

- Building your pipeline / funnel

Current Provider - Contract



- **How to use “Current Provider- Contract” Disposition**
 - Complete End of Contract Date, Products/Speeds Being Provided, Current Provider, Customer Name, Phone Number, Email, and What does the customer like about their current Provider fields. Capture as much detail possible.
 - Select date you would like to follow-up
 - Click Save without Reminder or Save & Download Reminder
 - Save & Download Reminder allows user to download a calendar reminder to your device
- **What’s Next**
 - It is available in the Search Filter to come back to when ready
- **WIIFM**
 - Allows you to set reminder to follow back up at most effective time
 - Allows user to stay ahead of the competition, proactively speak to their customers, prepare strategy (sales pitch and rebuttals) to position yourself competitively
 - Allows user to understand your business and customer base

Disposition Details

End Of Contract Date	Products/Speeds Being Provided
<input type="text" value="11/25/2022"/>	<input type="text" value="500MB"/>
Current Provider	Customer Name
<input type="text" value="Spectrum"/>	<input type="text" value="Jen"/>
Phone Number	Email
<input type="text" value="555-777-1313"/>	<input type="text" value="jen.rocks@none.com"/>
What Does the Customer Like About Current Provider?	
<input type="text" value="Price, stability, tenure, and cx service"/>	



No Answer, Language Barrier, or No TV/Computer

No Answer

- Make a note that will help build daily/weekly sales strategy plans. IE: Time of day, day of week, holiday, seasonality, etc.

Language Barrier

- Enter Primary language of customer

No TV or Computer

- Comment with customers missing technology that prevented the sale.

How to use

- Make note
- Click Save

WIIFM-“What’s In It For Me”

- Tracks sales efforts, penetration and effectiveness
- Allows user to capture a brief note that will help with future strategic efforts

Disposition Details

Comment

Cancel Save

Disposition Details

Primary Language

Cancel Save

Disposition Details

Comment

Cancel Save

Other or Not Interested



Other

- How to use “Other” Disposition
 - Use this disposition as a last resort not a fall back for not asking more sales related questions or in haste
 - Comment: Make a note that will help you build daily/weekly sales strategy plans. IE: Customer threatened to call police, Customer demanded no further contact, etc.
 - Click Save
- WIIFM-“What’s In It For Me”
 - Tracks user sales efforts, penetration and effectiveness
 - Allows user to understand your business and customer base

Not Interested

- How to use “Not Interested” Disposition
 - Use this disposition as a last resort not a fall back for not asking more sales related questions or in haste
 - Comment: Make a note that will help you build daily/weekly sales strategy plans. IE: Customer hung up-no explanation, Customer would not entertain conversation, etc.
 - Click Save
- WIIFM-“What’s In It For Me”
 - Tracks user sales efforts, penetration and effectiveness
 - Allows user to understand your business and customer base

Follow Ups

Follow Ups

Search Follow Ups... Advanced Search... Only Mine Per Page 10

ID	Address ID	Depo Type	Created At	Created By	Follow Up Type	Follow Up Date	
	800000000000036669636	Call Back/No Decision Maker	2019-07-09 22:58:05	n9977891	Return Date	2019-07-21 00:00:00	Download Reminder
	80000000000001850703	Call Back/No Decision Maker	2019-07-16 21:57:58	e0184207	Return Date	2019-07-18 00:00:00	Download Reminder
	800000000000036724088	Call Back/No Decision Maker	2019-07-24 23:23:56	n9976046	Return Date	2019-07-25 00:00:00	Download Reminder
	WS40085	Order	2019-10-29 19:57:43	e0184913	ISD Provided Install Date	2019-11-06 00:00:00	Download Reminder
	80000000000001932410	Call Back/No Decision Maker	2019-07-05 20:58:03	n9975874	Return Date	2019-07-06 00:00:00	Download Reminder

Follow Ups

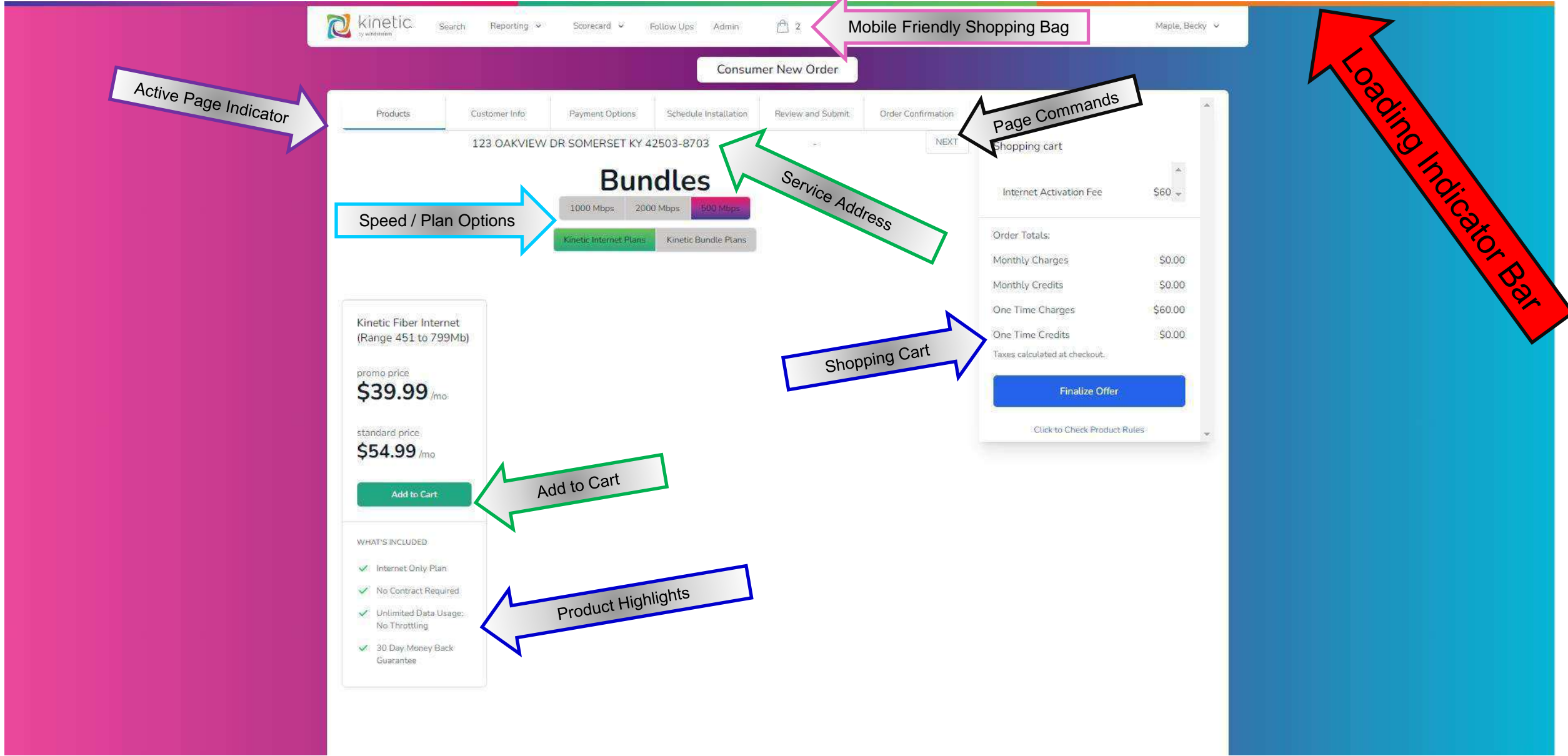
Search Follow Ups... Advanced Search... Only Mine Per Page 10

ID	Address ID	Depo Type	Created At	Created By	Follow Up Type	Follow Up Date	
	80000000000010026406	Call Back/No Decision Maker	2022-10-10 23:41:31	e0183362	Return Date	2022-10-13 00:00:00	Download Reminder
	80000000000016372666	Vacant	2022-10-10 23:35:45	e0183362	Return Date	2022-10-13 00:00:00	Download Reminder
	800000000000095320798	Current Provider - Contract	2022-10-10 23:36:45	e0183362	End Of Contract Date	2022-10-15 00:00:00	Download Reminder
	80000000000041751623	Vacant	2020-09-24 20:03:48	e0183362	Return Date	2020-10-09 00:00:00	Download Reminder
	800000000000095320798	Current Provider - Contract	2022-10-10 23:36:45	e0183362	End Of Contract Date	2022-10-15 00:00:00	Download Reminder
	80000000000023246532	Call In Order	2022-10-10 23:38:12	e0183362	ISD Provided Install Date	2022-10-11 00:00:00	Download Reminder

Follow Ups

- Self
 - Use Follow Ups to easily manage and track follow up commitments with customer's OR for easy order follow up
 - User may only view and download reminders to a device calendar for only their follow ups
- Team Manager
 - Team Manager can view and download reminders to a device calendar for their team and can toggle between Team or "Only Mine"
- Vendor Manager
 - Vendor Manager can view and download reminders to a device calendar for all their vendor teams and can toggle between Team or "Only Mine"

Meet Your New Order Flow



The screenshot shows the 'Consumer New Order' page with several callouts:

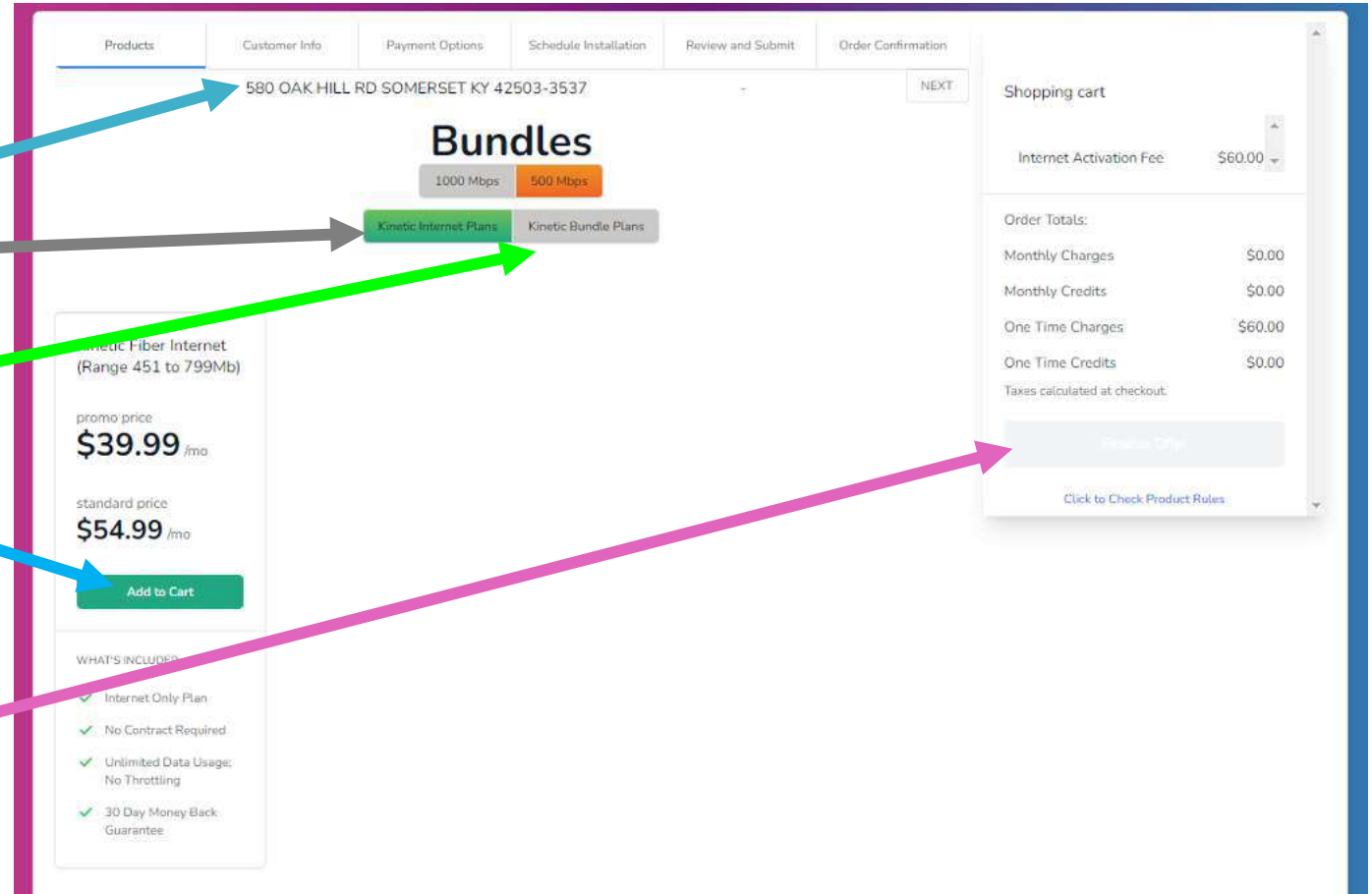
- Mobile Friendly Shopping Bag**: Points to the shopping bag icon in the top right navigation bar.
- Active Page Indicator**: Points to the 'Products' tab in the breadcrumb navigation.
- Page Commands**: Points to the 'NEXT' button.
- Service Address**: Points to the address '123 OAKVIEW DR SOMERSET KY 42503-8703'.
- Speed / Plan Options**: Points to the 'Bundles' section with options for 1000 Mbps, 2000 Mbps, and 500 Mbps.
- Shopping Cart**: Points to the 'Shopping cart' section on the right, which includes an 'Internet Activation Fee' of \$60 and an 'Order Totals' table.
- Add to Cart**: Points to the green 'Add to Cart' button.
- Product Highlights**: Points to the 'WHAT'S INCLUDED' section listing features like 'Internet Only Plan', 'No Contract Required', 'Unlimited Data Usage: No Throttling', and '30 Day Money Back Guarantee'.
- Loading Indicator Bar**: A large red arrow on the right side of the page.

Item	Amount
Monthly Charges	\$0.00
Monthly Credits	\$0.00
One Time Charges	\$60.00
One Time Credits	\$0.00

New Customer Order- Bundles



- Select your speed
- Validate the service address is correct
- Kinetic Internet Plans include Internet only plans
- Kinetic Bundle Plans include Internet and Phone Plans
- Add to Cart once customer has made final selection
 - Accept required disclaimers
 - This will auto-progress to Adders
- Finalize Offer is not available because all product rules have not been met



Disclaimers

Consent Terms

"The voice service you are receiving is delivered via an Internet connection and requires electrical power. If power is lost or if there is a disruption to your Internet connection, your voice service will not work. During the installation, you will be asked by the Windstream Technician to acknowledge this and to provide an electronic consent before installation can be completed. Windstream recommends you maintain an alternative means of accessing 911 services and that you purchase a battery backup to sustain voice service in the event of a power outage. Having a working phone during those times will allow you to call 911, temporarily maintain home alarm systems and any medical alert services. Windstream's equipment is provided with an AC adapter. Battery backup equipment that supplies at least 120VAC@1 amp can be purchased online or from a number of retail stores. The price may vary based on the capacity of the equipment and the length of time the battery will provide power. For terms and conditions regarding your services, please review Windstream's Terms & Conditions at www.windstream.com/about/legal/Terms-and-Conditions." The charges represented here do NOT include the taxes or charges that we pass on to governmental entities AND fees and surcharges associated with your Windstream service. You will receive a confirmation after your order is placed that explains the monthly charges we've discussed today, as well as Windstream generated fees and surcharges: Kinetic Voice (VOIP) product plan includes the following features; Caller ID Deluxe, Enhance Call Waiting, Caller ID on Call Waiting/Spam Call Alert, Call Return, Repeat Dial, 3-way calling, Speed calling 30, Call forwarding, Selective Call Rejection, Selective Call Acceptance, Call Selector, Preferred Call Forwarding, Anonymous Call Rejection, Kinetic Voice Manager, Voicemail/VM to Email, Voicemail Visual, SimRing, Distinctive Ring, Speed Dial, Premium Call Forwarding, and [Click here to view Minnesota Caller ID Disclaimer](#).

I Agree

Consent Terms

"You have subscribed to Windstream's up to XX Mb High-Speed Internet service plan. With this plan you will have download speeds ranging from a minimum of XX Mb to a maximum of XX Mb. While Windstream cannot guarantee speeds or uninterrupted service, Windstream will make every effort to provide you with a quality high speed internet connection. Your connection may be impacted by various factors such as websites, location of equipment in your home, number of connected devices, time of day and network. Windstream's free 24/7 tech support is available to assist with any connection questions and you can find a full list of terms at www.windstream.com/terms" The charges represented here do NOT include the taxes or charges that we pass on to governmental entities AND fees and surcharges associated with your Windstream service. You will receive a confirmation after your order is placed that explains the monthly charges we've discussed today, as well as Windstream generated fees and surcharges

Decline I Agree

Consent Terms

""As a new Kinetic customer, we would like to auto enroll you into paperless billing unless you decline. With paperless billing, you will receive an email each month when your invoice is ready. To view your invoice, make payments and stay up to date on other account information access Go Kinetic (my.gokinetic.com). You may choose to receive a paper bill by accessing Go Kinetic at any time or by calling us, please note a monthly fee may apply. Verbal Sales Scripting for states that cannot assess the fee (NE, NM, NY, PA, OK, TX): As a new Kinetic customer, we would like to auto enroll you into paperless billing unless you decline. With paperless billing, you will receive an email each month when your invoice is ready. To view your invoice, make payments and stay up to date on other account information access Go Kinetic (my.gokinetic.com).""

Decline I Agree

➤ Disclaimer Types

- Technology Type Disclaimers
- Bundle Disclaimers
- Bundle Adder Disclaimers

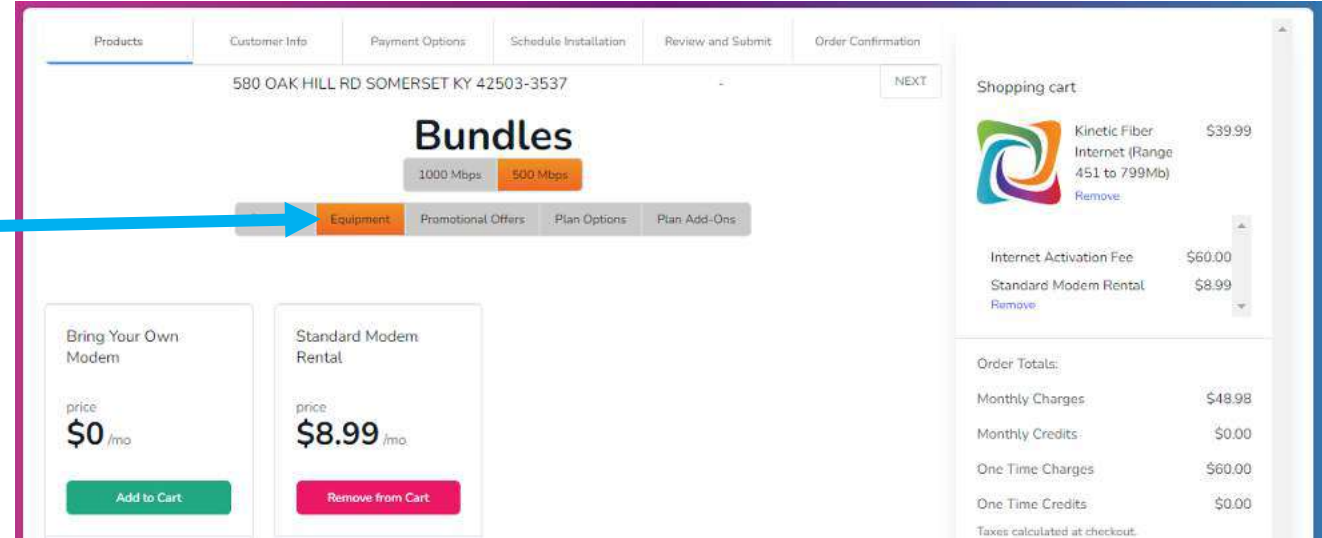
➤ You must Agree to required Disclaimers to Add Products to Cart

- Agent should not Agree to Disclaimer if the customer did not verbally acknowledge agreeance to the disclaimer.
- All disclaimers agreed to WILL appear on the email summary sent to the customer at POS

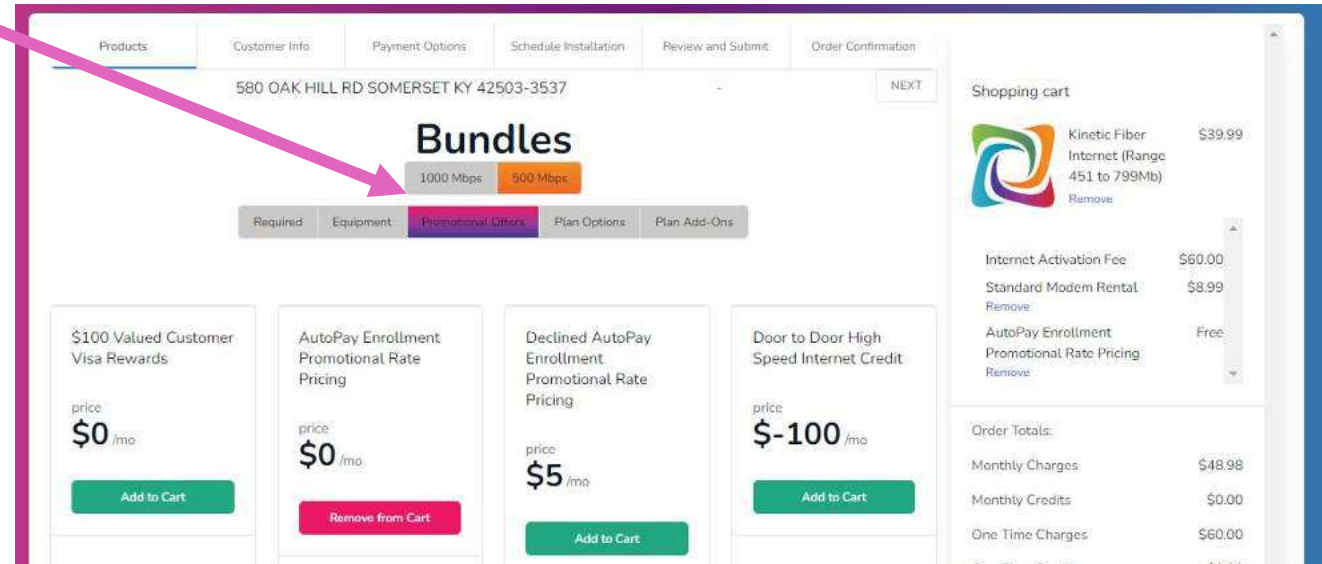
New Customer Order- Adder Flow

Adder Categories

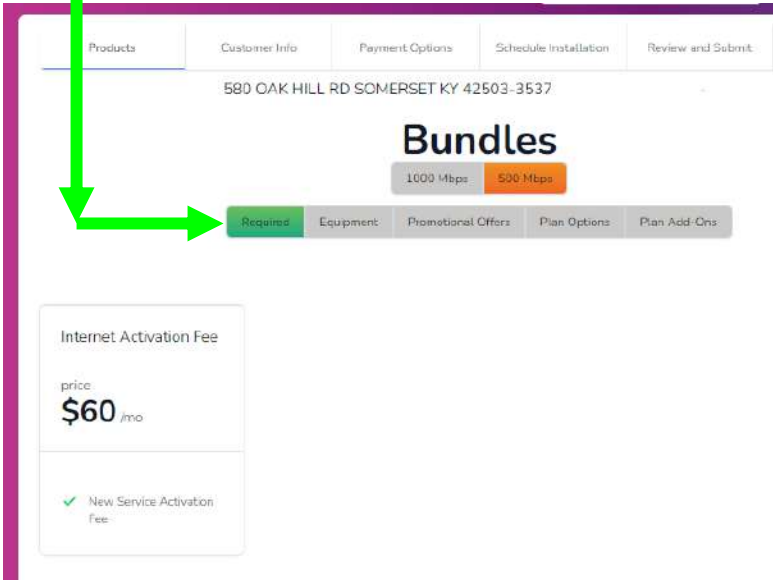
- Required
 - Cannot be removed from Cart
- Equipment
- Promotional Offers



This screenshot shows the 'Bundles' page for a customer at 580 OAK HILL RD SOMERSET KY 42503-3537. The 'Equipment' tab is selected, showing two options: 'Bring Your Own Modem' for \$0/mo and 'Standard Modem Rental' for \$8.99/mo. The 'Required' tab is also visible. The shopping cart on the right includes 'Kinetic Fiber Internet (Range 451 to 799Mb)' for \$39.99, 'Internet Activation Fee' for \$60.00, and 'Standard Modem Rental' for \$8.99. The order totals show monthly charges of \$48.98 and one-time charges of \$60.00.



This screenshot shows the 'Bundles' page for the same customer. The 'Promotional Offers' tab is selected, showing four options: '\$100 Valued Customer Visa Rewards' for \$0/mo, 'AutoPay Enrollment Promotional Rate Pricing' for \$0/mo, 'Declined AutoPay Enrollment Promotional Rate Pricing' for \$5/mo, and 'Door to Door High Speed Internet Credit' for -\$100/mo. The shopping cart on the right includes 'Kinetic Fiber Internet (Range 451 to 799Mb)' for \$39.99, 'Internet Activation Fee' for \$60.00, 'Standard Modem Rental' for \$8.99, and 'AutoPay Enrollment Promotional Rate Pricing' for Free. The order totals show monthly charges of \$48.98 and one-time charges of \$60.00.

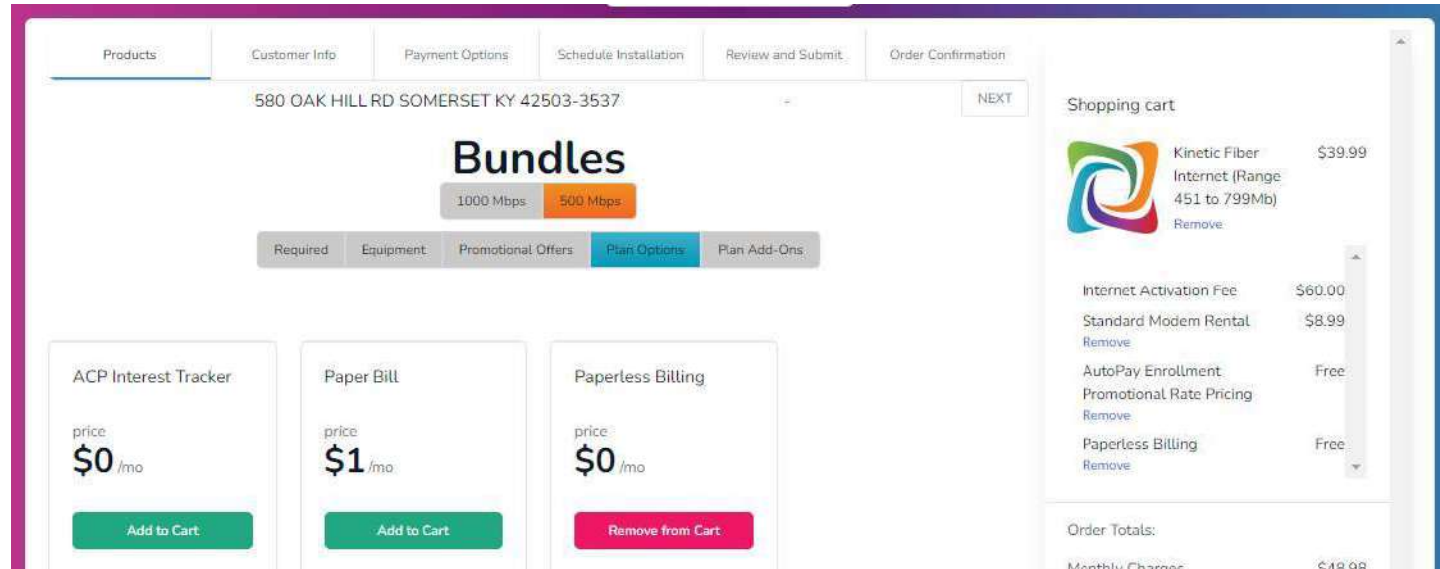


This screenshot shows the 'Bundles' page for the same customer. The 'Required' tab is selected, showing one option: 'Internet Activation Fee' for \$60/mo. The shopping cart on the right includes 'Kinetic Fiber Internet (Range 451 to 799Mb)' for \$39.99, 'Internet Activation Fee' for \$60.00, and 'Standard Modem Rental' for \$8.99. The order totals show monthly charges of \$48.98 and one-time charges of \$60.00.

New Customer Order- Adder Flow Cont.

Adder Categories

- Plan Options
- Plan Add-Ons
 - Include any add on products such as Internet Security, WiFi Extenders, Secure Home, YouTube, etc.



Products | Customer Info | Payment Options | Schedule Installation | Review and Submit | Order Confirmation

580 OAK HILL RD SOMERSET KY 42503-3537

Bundles

1000 Mbps | 500 Mbps

Required | Equipment | Promotional Offers | **Plan Options** | Plan Add-Ons

ACP Interest Tracker
price \$0 /mo
Add to Cart

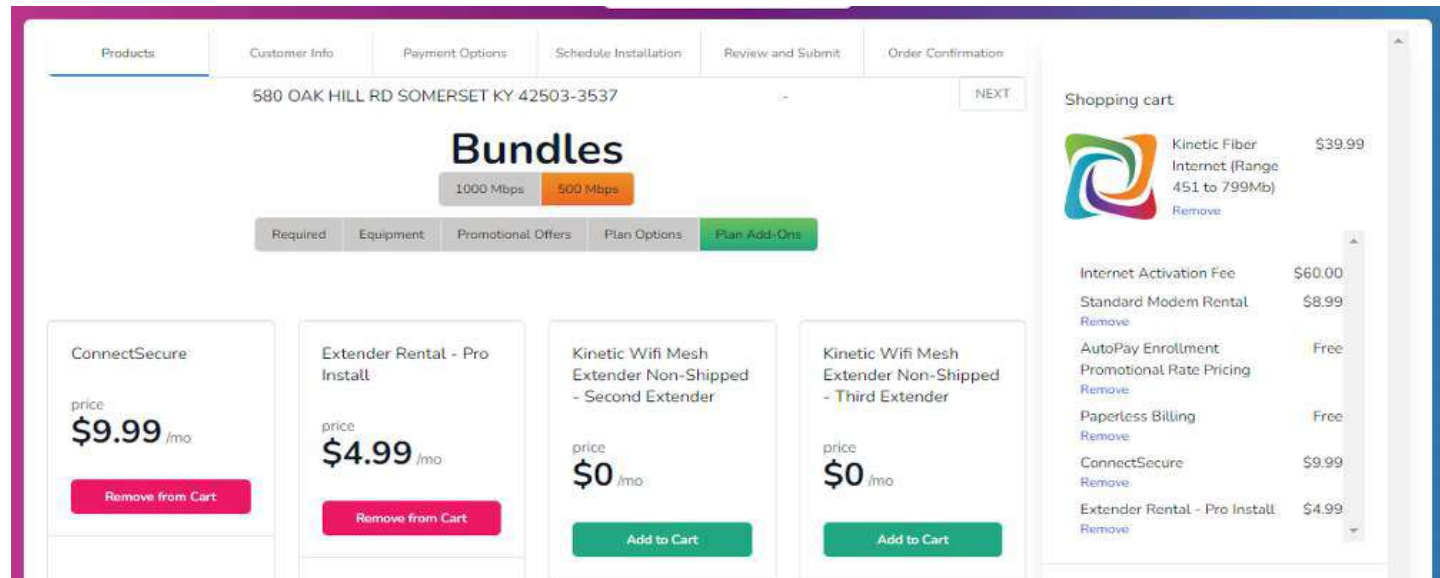
Paper Bill
price \$1 /mo
Add to Cart

Paperless Billing
price \$0 /mo
Remove from Cart

Shopping cart

- Kinetic Fiber Internet (Range 451 to 799Mb) \$39.99
- Internet Activation Fee \$60.00
- Standard Modem Rental \$8.99
- AutoPay Enrollment Free
- Paperless Billing Free

Order Totals: Monthly Charges \$48.99



Products | Customer Info | Payment Options | Schedule Installation | Review and Submit | Order Confirmation

580 OAK HILL RD SOMERSET KY 42503-3537

Bundles

1000 Mbps | 500 Mbps

Required | Equipment | Promotional Offers | Plan Options | **Plan Add-Ons**

ConnectSecure
price \$9.99 /mo
Remove from Cart

Extender Rental - Pro Install
price \$4.99 /mo
Remove from Cart

Kinetic Wifi Mesh Extender Non-Shipped - Second Extender
price \$0 /mo
Add to Cart

Kinetic Wifi Mesh Extender Non-Shipped - Third Extender
price \$0 /mo
Add to Cart

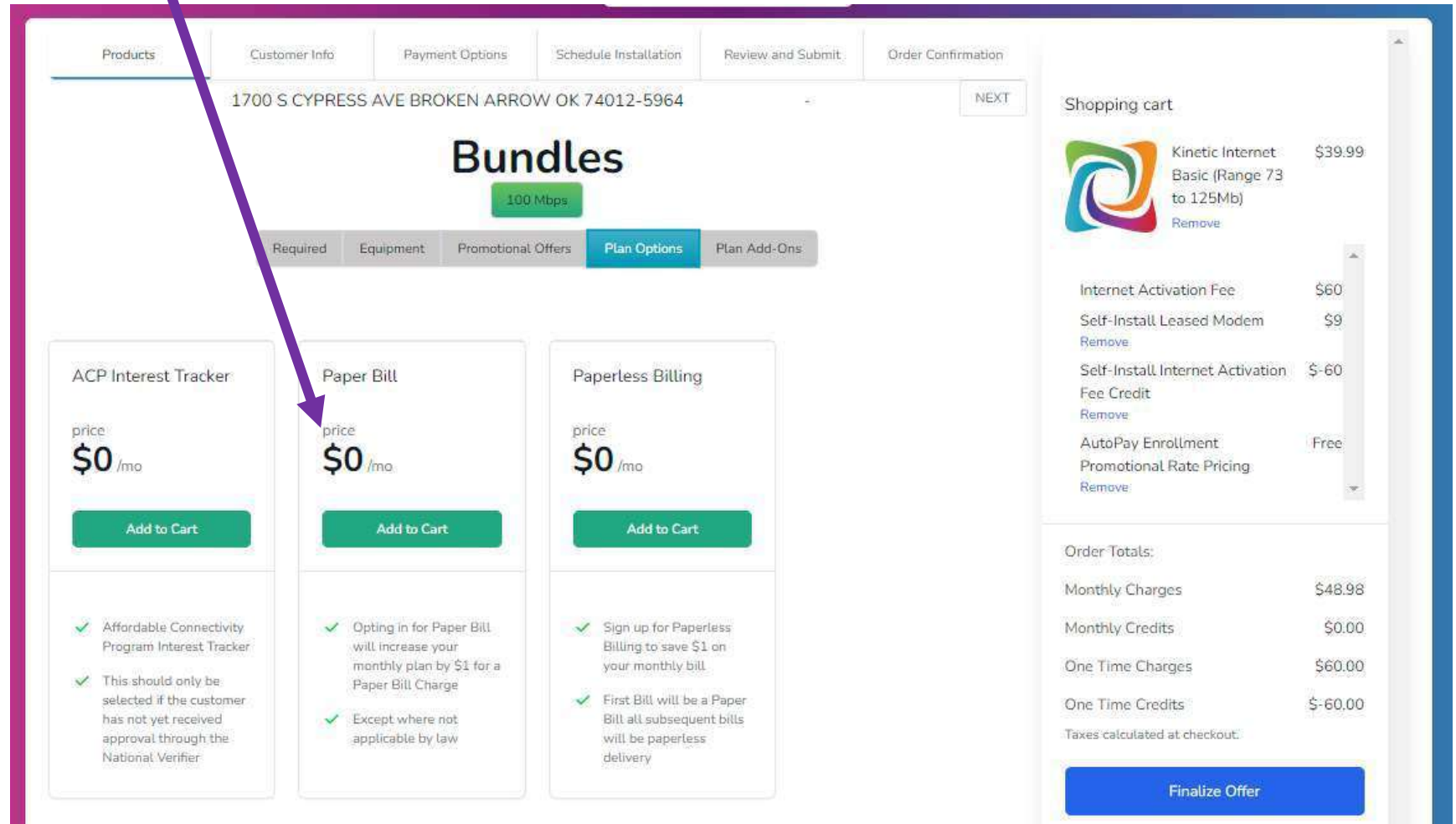
Shopping cart

- Kinetic Fiber Internet (Range 451 to 799Mb) \$39.99
- Internet Activation Fee \$60.00
- Standard Modem Rental \$8.99
- AutoPay Enrollment Free
- Paperless Billing Free
- ConnectSecure \$9.99
- Extender Rental - Pro Install \$4.99

Paper Bill Variation

Paper Bill Fee not applicable by law

➤ Paper Bill Variation example



The screenshot displays a web interface for selecting service bundles. At the top, there are navigation tabs: Products, Customer Info, Payment Options, Schedule Installation, Review and Submit, and Order Confirmation. Below these, the address "1700 S CYPRESS AVE BROKEN ARROW OK 74012-5964" and a "NEXT" button are visible. The main heading is "Bundles" with a "100 Mbps" indicator. Below the heading are tabs for "Required", "Equipment", "Promotional Offers", "Plan Options" (which is active), and "Plan Add-Ons".

Three bundle options are shown in a grid:

- ACP Interest Tracker:** price \$0 /mo. Includes a green checkmark and text: "Affordable Connectivity Program Interest Tracker" and "This should only be selected if the customer has not yet received approval through the National Verifier".
- Paper Bill:** price \$0 /mo. Includes a green checkmark and text: "Opting in for Paper Bill will increase your monthly plan by \$1 for a Paper Bill Charge" and "Except where not applicable by law". A purple arrow points to this option.
- Paperless Billing:** price \$0 /mo. Includes a green checkmark and text: "Sign up for Paperless Billing to save \$1 on your monthly bill" and "First Bill will be a Paper Bill all subsequent bills will be paperless delivery".

Each option has a green "Add to Cart" button. To the right, a "Shopping cart" section lists items and their prices:

- Kinetic Internet Basic (Range 73 to 125Mb) - \$39.99
- Internet Activation Fee - \$60
- Self-Install Leased Modem - \$9
- Self-Install Internet Activation Fee Credit - \$-60
- AutoPay Enrollment - Free
- Promotional Rate Pricing - Free

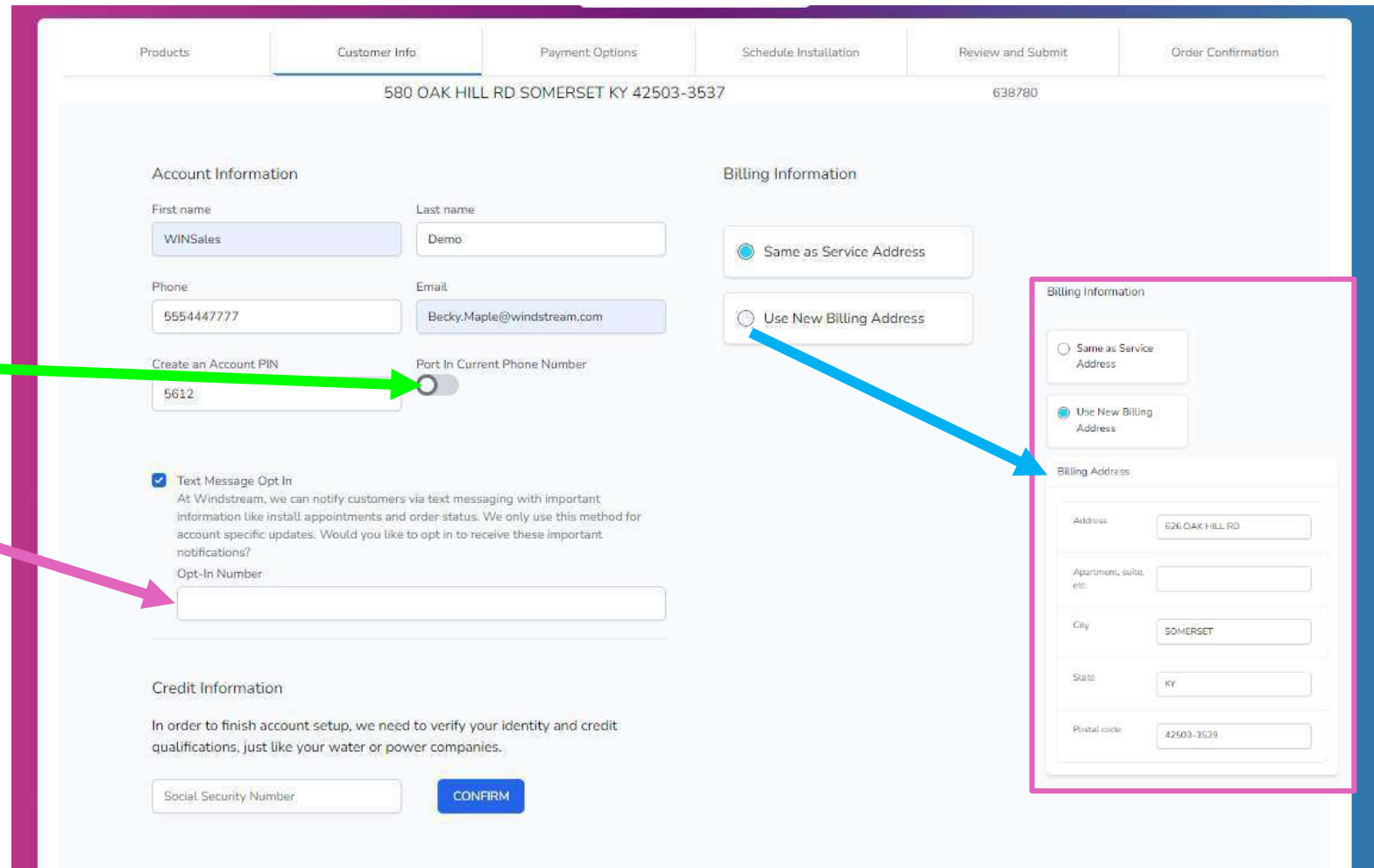
Below the cart, "Order Totals:" are shown:

- Monthly Charges - \$48.98
- Monthly Credits - \$0.00
- One Time Charges - \$60.00
- One Time Credits - \$-60.00

A note states "Taxes calculated at checkout:" and a blue "Finalize Offer" button is at the bottom.

Customer Info

- Complete Customer Info fields
 - First Name
 - Last Name
 - Phone- restricts to 10 digits
 - Email
 - Account Pin- restricts to 4 digits
 - Port In Phone
 - Text Opt In
- If Billing Address different than service address change toggle selection and complete fields
- Enter customer SSN and click confirm to run credit check
 - Restricts to 9 digits
- Do Not click Next- wait for the credit check to run, page will automatically move user to next page when complete.



The screenshot shows a web form for customer information. At the top, there are navigation tabs: Products, Customer Info (selected), Payment Options, Schedule Installation, Review and Submit, and Order Confirmation. Below the tabs, the address "580 OAK HILL RD SOMERSET KY 42503-3537" and phone number "638780" are displayed. The form is divided into several sections:

- Account Information:** Fields for First name (WINSales), Last name (Demo), Phone (5554447777), and Email (Becky.Maple@windstream.com). There are also fields for "Create an Account PIN" (5612) and a "Port In Current Phone Number" toggle switch.
- Billing Information:** Two radio button options: "Same as Service Address" (selected) and "Use New Billing Address".
- Text Message Opt In:** A checked checkbox with the text: "At Windstream, we can notify customers via text messaging with important information like install appointments and order status. We only use this method for account specific updates. Would you like to opt in to receive these important notifications?" Below this is an "Opt-In Number" field.
- Credit Information:** A section with a heading and a paragraph: "In order to finish account setup, we need to verify your identity and credit qualifications, just like your water or power companies." Below this is a "Social Security Number" field and a blue "CONFIRM" button.

Annotations include a green arrow pointing from the "Port In Phone" instruction to the "Port In Current Phone Number" toggle, a pink arrow pointing from the "Text Opt In" instruction to the "Text Message Opt In" checkbox, and a blue arrow pointing from the "Use New Billing Address" radio button to a detailed view of the "Billing Address" section. This detailed view shows fields for Address (626 OAK HILL RD), Apartment, suite, etc., City (SOMERSET), State (KY), and Postal code (42503-3539).

Payment Options – Credit Results

Products Customer Info **Payment Options** Schedule Installation Review and Submit Order Confirmation

BACK 2107 LANE ST KANNAPOLIS NC 28083-4045 637312 NEXT

It looks like based on the credit return, no deposit is required. Approved

Auto-Pay Enrollment

Payment Type

Debit/Credit Card Electronic Check

Credit Card Number

MM YYYY CVV

Store this card/check for future use

By clicking Save Payment Details, you are authorizing Windstream to treat this as your electronic signature and consent for recurring payment transactions from the debit or credit card you provided. You are indicating you understand and accept these terms and conditions.

Save Payment Details

Products Customer Info **Payment Options** Schedule Installation Review and Submit Order Confirmation

40 ROBIN LN MONTICELLO KY 42633-2123 640232 NEXT

Call in Orders can be made at 833.241.0111

Pay Deposit

Enroll in Autopay

No Payment Completed Hold Order for up to 14 days

It looks like based on the credit return, a \$100 security deposit is required. Your deposit will be credited to your account in 12 months if your account is in good standing. Windstream allows you to enroll in AutoPay in lieu of making a deposit payment. Would you like to proceed with enrolling in AutoPay today or payment for Deposit?

Auto-Pay Enrollment

Payment Type

Debit/Credit Card Electronic Check

Credit Card Number

MM YYYY CVV

Store this card/check for future use

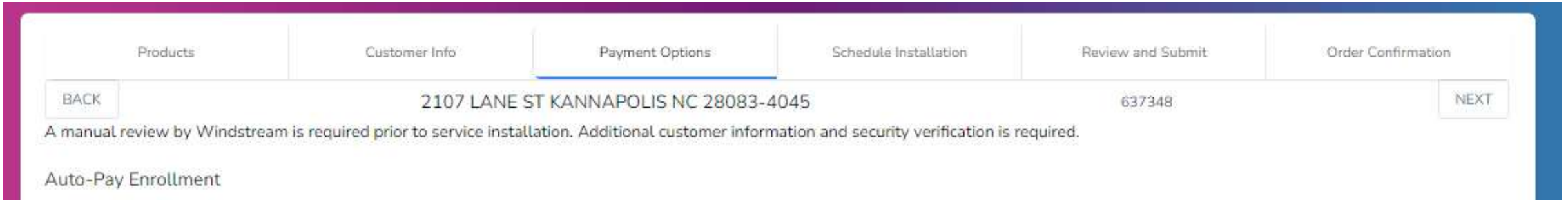
No Deposit Credit Check

- No deposit required
- Not a Manual Review
- Enroll in Autopay – must do this to get \$5 monthly promotional discount

Deposit Required

- Pay Deposit
- Enroll in Autopay
- No Payment Completed Hold Order up to 14 days

Payment Options – Manual Review



Products Customer Info **Payment Options** Schedule Installation Review and Submit Order Confirmation

BACK 2107 LANE ST KANNAPOLIS NC 28083-4045 637348 NEXT

A manual review by Windstream is required prior to service installation. Additional customer information and security verification is required.

Auto-Pay Enrollment

Manual Review

- Additional Customer Verification Required
 - Customer needed for ISD call
 - No due date will be provided at POS
- Additional Agent Verification Required
 - Customer less likely needed for ISD call
 - These instances do not often require the customer present but may result in the customer needing to be present
 - No due date will be provided at POS

Payment Options – Waive Deposit with AutoPay

AutoPay Enrollment \$5 Promotional Monthly Discount

- Customer wishes to setup Autopay to receive \$5 Promotional Monthly Discount
- Select the appropriate Payment Type
- Enter Banking information
- Read the disclaimer
- Check the **BOX** if the customer agrees
- Click **SAVE** Payment Details

AutoPay in Lieu of Deposit

- Customer wishes to setup Autopay in lieu of paying deposit.
- Select the appropriate Payment Type
- Enter Banking information
- Read the disclaimer
- Check the **BOX** if the customer agrees
- Click **SAVE** Payment Details

It looks like based on the credit return, a \$100 security deposit is required. Your deposit will be credited to your account in 12 months if your account is in good standing. Windstream allows you to enroll in AutoPay in lieu of making a deposit payment. Would you like to proceed with enrolling in AutoPay today or payment for Deposit?

Auto-Pay Enrollment

Payment Type

Debit/Credit Card Electronic Check

Credit Card Number

MM YY CV

Store this card/check for future use

By clicking Save Payment Details, you are authorizing Windstream to treat this as your electronic signature and consent for recurring payment transactions from the debit or credit card you provided. You are indicating you understand and accept these terms and conditions.

Save Payment Details

Payment Options - Deposit and AutoPay

Deposit Only

- Customer wishes to pay \$100 deposit
- Select the appropriate Payment Type
- Enter Banking information
- Read the disclaimer
- Check the **Authorization** box **ONLY**
- Click Save Payment Details

Both Deposit and AutoPay

DO NOT use this form if the customer only wants to setup Autopay in Lieu of paying deposit.

- Customer wishes to pay deposit & setup Autopay in lieu of paying deposit.
- Select the appropriate Payment Type
- Enter Banking information
- Read the disclaimer
- Check BOTH **Optional AutoPay** & **Authorization** box
- Click Save Payment Details

It looks like based on the credit return, a \$100 security deposit is required. Your deposit will be credited to your account in 12 months if your account is in good standing. Windstream allows you to enroll in AutoPay in lieu of making a deposit payment. Would you like to proceed with enrolling in AutoPay today or payment for Deposit?

Deposit

Deposit for Windstream Services \$ 100.00

Payment Type

Debit/Credit Card Electronic Check

Credit Card Number

MM YY CVV

Store this card/check for future use

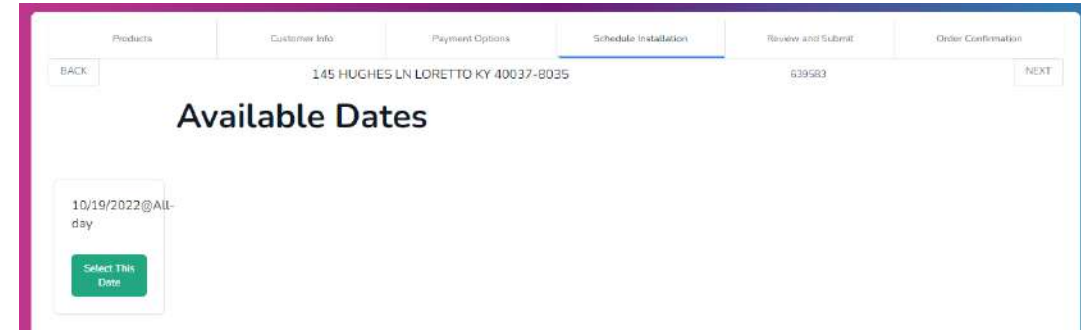
Optional Auto Pay: I understand by checking this box, I am authorizing Windstream to automatically process payment for my monthly bill. I understand that a fee will be charged to my account for each request returned unpaid.

Authorization: By clicking Save Payment Details, I hereby authorize Windstream to charge the account I have specified above. I understand that a fee will be charged to my account for each request returned unpaid.

Schedule Installation

Install dates will be available

- Clean credit check
- Clean PWRO records
- When placing a Nearby Address, MoveTo, or Upgrade order type
- If deposit and/or autopay in lieu of deposit requirement is met



Install dates will NOT be available

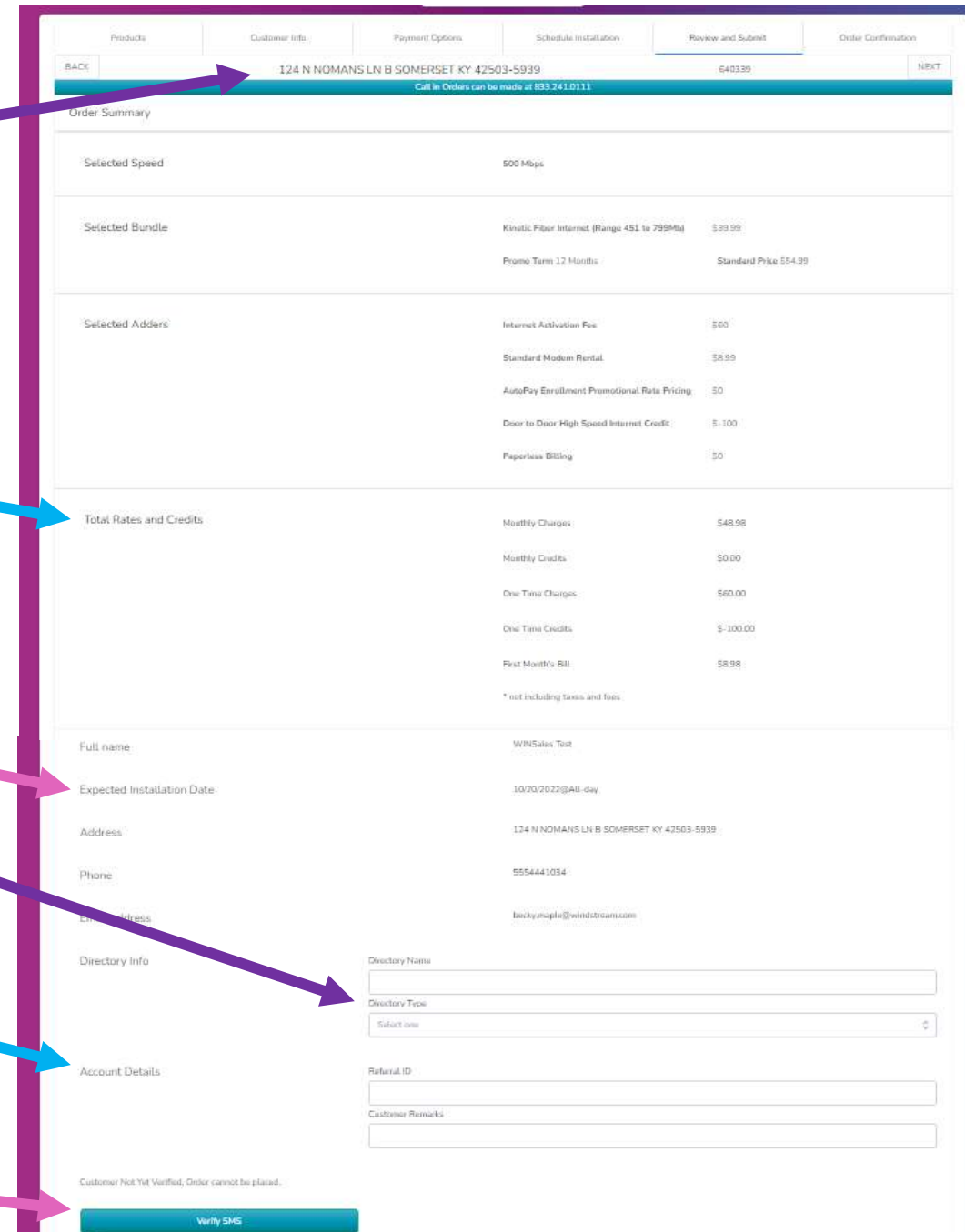
- When placing a Port-in Phone or Address Not Found order type
- Manual Review credit result
- Deposit requirement not satisfied
- Self Install- automatically given next business day due date
- Moving Order

Install Date: No install date provided due to Manual Review required: Click Next

Review and Submit

Order Summary

- Service Address
- Products selected
- Total Rates and Credits
 - Monthly Charges and Credits
 - One-Time Charges and Credits
- Customer Name
- Expected Install Date
- Email Address
- Directory Info
 - Complete if customer is porting in phone
- Account Details
 - Complete Referral ID, Lifeline ID, and Customer Remarks as applicable.
- Verify SMS
- Submit Order



Products Customer Info Payment Options Schedule Installation **Review and Submit** Order Confirmation

BACK 124 N NOMANS LN B SOMERSET KY 42503-5939 640339 NEXT
Call In Orders can be made at 833.741.0111

Order Summary

Selected Speed	500 Mbps
Selected Bundle	Kinetic Fiber Internet (Range 451 to 799MHz) \$39.99 Promo Term 12 Months Standard Price \$54.99
Selected Address	Internet Activation Fee \$60 Standard Modem Rental \$8.99 AutoPay Enrollment Promotional Rate Pricing \$0 Door to Door High Speed Internet Credit \$-100 Paperless Billing \$0
Total Rates and Credits	Monthly Charges \$48.98 Monthly Credits \$0.00 One Time Charges \$60.00 One Time Credits \$-100.00 First Month's Bill \$8.98 <small>* not including taxes and fees</small>

Full name WNSales Test

Expected Installation Date 10/20/2022@All-day

Address 124 N NOMANS LN B SOMERSET KY 42503-5939

Phone 5554441034

Email Address becky.mapple@windstream.com

Directory Info

Directory Name

Directory Type

Select one

Referral ID

Customer Remarks

Customer Not Yet Verified, Order cannot be placed.

Verify SMS

Order Confirmation

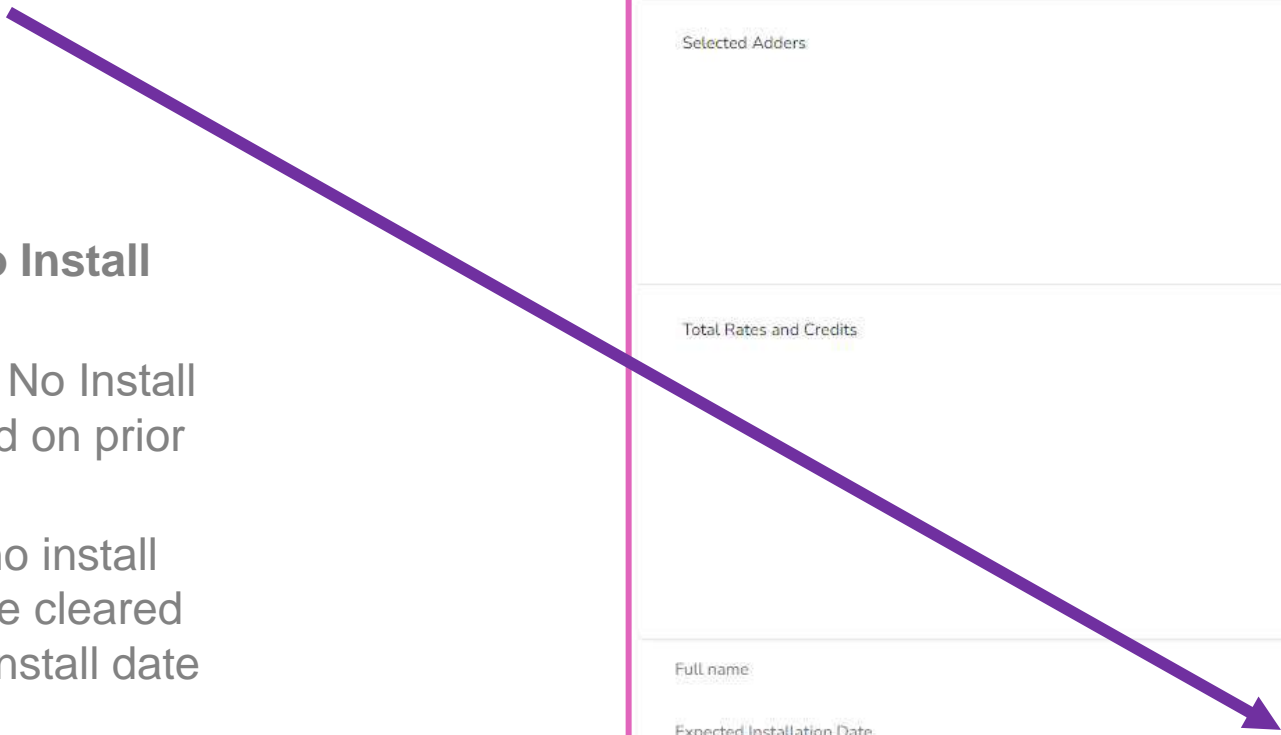
Order Complete- Install Date

- Scenario's you will receive a confirmed Install Date listed on prior slide

Order Complete- No Install Date

- Scenario's for why No Install date was confirmed on prior slide
- If order conf. has no install date- order must be cleared by ISD to receive install date

Order Confirmation		
Order Number: 0206683105641		
Resend Email		
Selected Speed	500 Mbps	
Selected Bundle	Kinetic Fiber Internet (Range 451 to 799Mb)	\$39.99
	Promo Term 12 Months	Standard Price \$54.99
Selected Adders	Internet Activation Fee	\$60
	Standard Modem Rental	\$8.99
	AutoPay Enrollment Promotional Rate Pricing	\$0
	Door to Door High Speed Internet Credit	\$-100
	Paperless Billing	\$0
Total Rates and Credits	Monthly Charges	\$48.98
	Monthly Credits	\$0.00
	One Time Charges	\$60.00
	One Time Credits	\$-100.00
	First Month's Bill	\$8.98
	* not including taxes and fees	
Full name:	WINSales Test	
Expected Installation Date	10/20/2022@All-day	
Address:	124 N NOMANS LN B SOMERSET KY 42503-5939	
Phone	5554441034	
Email address:	becky.maple@windstream.com	



Move To Customer Order Process

Scenario 1

- Customer driver's license is same address as location of order and agent has verified with customer that they DO NOT have an active WIN account with internet services
 - **Click Moving**
 - **Select Date in the future-** this is a required business process rule
 - **Click Load Products** (DO NOT complete address fields)

Scenario 2

- Customer is moving to location soon or customer has recently moved but has not changed their address on driver's license
 - **Click Moving**
 - **Select a Move Date in the future**
 - **Complete all applicable address fields** –failure to capture this address info will cause your order to be held at credit check as this address is what is on file with the credit bureau if they have not yet changed it on their DL.
 - **Click Load Products**

40 ROBIN LN MONTICELLO KY 42633-2123 Call in Orders can be made at 833.241.0111 NEXT

Active service at this address allows for either an upgrade, or new service if the current customer is moving.

Upgrade **Moving**

When a customer is moving to this address in the near future, capture their current address and expected move date.

Expected Move Date:
Select Date
Select a date

Primary #

Pre-directional

Street

Street Suffix

Post-directional

Unit Designator

Secondary #

City

State

Zip

County

Load Products

Active Phone Only Customer Order Process

- Active voice only customer wishes to add an internet line
- We can not place an order for an existing Windstream Internet customer
- By default, Upgrade is selected
- The customer must provide their Windstream billing phone number OR account number to continue
- It will prompt you to verify the customer identity with the last 4 of their SSN
- Please **DO NOT** read this to the customer, they must provide this information to you to continue.

40 ROBIN LN MONTICELLO KY 42633-2123 NEXT

Call in Orders can be made at 833.241.0111

Active service at this address allows for either an upgrade, or new service if the current customer is moving.

Upgrade Moving

If this customer already has high speed internet, this upgrade must be called in using the *Call In Order* disposition.
If this is a phone only customer, please resubmit the request using either the customers phone number or account number, and verify their identity with the last 4 numbers of their social.

Telephone Number

Billing Account Number

Primary #

Pre-directional

Street

Street Suffix

Post-directional

Unit Designator

Secondary #

City

State

Zip

County

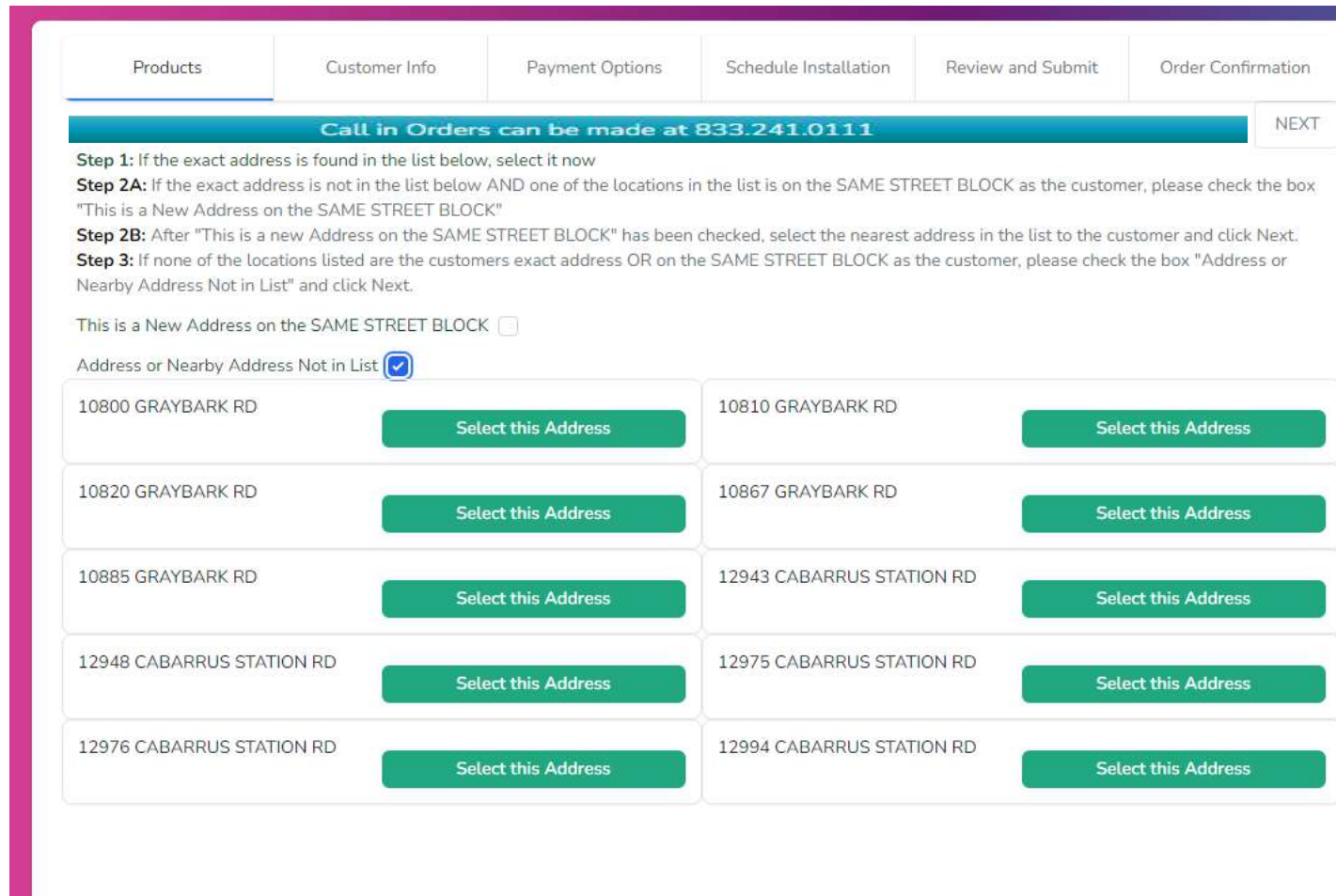
Load Products



Nearby & Address Not Found

User **MUST** follow the correct steps as outlined in the flow. **DO NOT** Proceed if directions can't be followed. These order flows are a privilege that cost **WIN** money when not properly utilized.

- **Step 1:** If the exact address is found in the list below, select it now
- **Step 2A:** If the exact address is not in the list below AND one of the locations in the list is on the SAME STREET BLOCK as the customer, please check the box "This is a New Address on the SAME STREET BLOCK"
- **Step 2B:** After "This is a New Address on the SAME STREET BLOCK" has been checked, select the nearest address in the list to the customer and click Next
- **Step 3:** If none of the locations listed are the customers exact address OR on the SAME STREET BLOCK as the customer, please check the box "Address or Nearby Address Not in List" and click Next



The screenshot shows a multi-step order flow interface with the following components:

- Navigation Tabs:** Products, Customer Info, Payment Options, Schedule Installation, Review and Submit, Order Confirmation.
- Call in Orders:** A teal banner with the text "Call in Orders can be made at 833.241.0111" and a "NEXT" button.
- Instructions:**
 - Step 1:** If the exact address is found in the list below, select it now
 - Step 2A:** If the exact address is not in the list below AND one of the locations in the list is on the SAME STREET BLOCK as the customer, please check the box "This is a New Address on the SAME STREET BLOCK"
 - Step 2B:** After "This is a new Address on the SAME STREET BLOCK" has been checked, select the nearest address in the list to the customer and click Next.
 - Step 3:** If none of the locations listed are the customers exact address OR on the SAME STREET BLOCK as the customer, please check the box "Address or Nearby Address Not in List" and click Next.
- Form Fields:**
 - "This is a New Address on the SAME STREET BLOCK" with an unchecked checkbox
 - "Address or Nearby Address Not in List" with a checked checkbox
- Address List:** A grid of address cards, each with a "Select this Address" button.

10800 GRAYBARK RD	Select this Address	10810 GRAYBARK RD	Select this Address
10820 GRAYBARK RD	Select this Address	10867 GRAYBARK RD	Select this Address
10885 GRAYBARK RD	Select this Address	12943 CABARRUS STATION RD	Select this Address
12948 CABARRUS STATION RD	Select this Address	12975 CABARRUS STATION RD	Select this Address
12976 CABARRUS STATION RD	Select this Address	12994 CABARRUS STATION RD	Select this Address

New SMB Order

New SMB Order

- SMB is not wired up to 3.0 at launch.
- Clicking the disposition is currently a link to redirect you to Legacy WINSales in a new tab.
- Once you complete your order you can pivot back to 3.0 and complete the disposition details that will auto-pop from previous click

Disposition Details

Windstream Order Number	Session Id
<input type="text"/>	<input type="text"/>
oid	Business Name
<input type="text"/>	<input type="text"/>
Phone Lines	Primary Contact Name
<input type="text"/>	<input type="text"/>
Primary Contact Phone	Primary Email Address
<input type="text"/>	<input type="text"/>
Account Level Adders	Qualified Speed
<input type="text"/>	<input type="text"/>