

DID NOT UNDERSTAND

Example 1: All of the registrant's info is verified to be correct and the account is cancelled because the customer did not understand the services. In this case the account would be stroked out as telephone, info verified, request refund (if needed), cancel account (did not understand). There would be NO further notes needed on this account.

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CANCEL ACCOUNT (CHANGED MIND)

CANCEL ACCOUNT (DID NOT AUTHORIZE)

CANCEL ACCOUNT (NO REASON GIVEN)

CANCEL ACCOUNT (BUSINESS NUMBER)

CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)

CANCEL ACCOUNT (DOES NOT REMEMBER)

CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

Account Notes:"

VoiceMail2Telephone

Info VerifiedRequest Refund

"Request To Cancel Account (Did Not Understand)

Finish Call

DID NOT AUTHORIZE

Example 2: The AH does not know the registrant and the only information that matches the AH is the telephone number. In this case the account would be stroked out as telephone, request refund (if needed), cancel account (Did not Authorize). A notation would be made to include: AH name, address, and contact number.

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CANCEL ACCOUNT (DOES NOT REMEMBER)

CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

Account Notes:"

Request Refund

Request To Cancel Account (Did Not Authorize)AH Jane Doe 123 Anywhere St Dubuque

Ia 52003 contact number 563 582 9501

Finish Call

BUSINESS ACCOUNT

Example 3: The AH is a business. In this case the call would be stroked out as telephone, refund requested (if needed), cancel account (Business Number) A notation would be made to include: businesses name, person the CSR spoke to, a contact number and the address of the business.

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CANCEL ACCOUNT (NO REASON GIVEN)

CANCEL ACCOUNT (BUSINESS NUMBER)

CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)

CANCEL ACCOUNT (DOES NOT REMEMBER)

CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)

B2B CANCEL REASON - FROM FULFILLMENT

B2B CANCEL REASON - FROM BILLING

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

REQUEST FOR ADDRESS (ADDITIONAL REFUNDS)

Account Notes:"

Request Refund

Request To Cancel Account (Business Number)ADC 301 Data Ct Dubuque Ia 52003

"Contact Kim (title within company) 563 582 9501 reg employee or reg unknown

Finish Call

CHANGED MIND

Example 4: All of the registrant's info is verified to be correct and the account is cancelled because the registrant changed their mind about using the services. In this case the account would be stroked out as telephone, info verified, request refund (if needed), cancel account (changed mind). There would be NO further notes needed on this account

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CANCEL ACCOUNT (DID NOT AUTHORIZE)

CANCEL ACCOUNT (NO REASON GIVEN)

CANCEL ACCOUNT (BUSINESS NUMBER)

CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)

CANCEL ACCOUNT (DOES NOT REMEMBER)

CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

Account Notes:"

VoiceMail2Telephone

Info VerifiedRequest Refund

" Request To Cancel Account (Changed Mind)

Finish Call

NO REASON GIVEN

Example 5: All of the registrant's info is verified to be correct and the account is cancelled without any reason given by the registrant. In this case the account would be stroked out as telephone, info verified, request refund (if needed), cancel account (no reason given). There would be NO further notes needed on this account

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CANCEL ACCOUNT (CHANGED MIND)

CANCEL ACCOUNT (DID NOT AUTHORIZE)

CANCEL ACCOUNT (NO REASON GIVEN)

CANCEL ACCOUNT (BUSINESS NUMBER)

CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)

CANCEL ACCOUNT (DOES NOT REMEMBER)

CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

Account Notes:"

VoiceMail2Telephone

Info VerifiedRequest Refund

"Request To Cancel Account (No Reason Given)

Finish Call

DOES NOT REMEMBER

Example 6: All of the registrant's info is verified to be correct and the account is cancelled because the registrant states they don't remember registering for the service or that they did not do this even though all of the information matches. In this case the account would be stroked out as telephone, info verified, request refund (if needed), cancel account (does not remember). There would be NO further notes needed on this account.

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<input type="radio"/> ELECTRONIC CORRESPONDENCE	<input type="radio"/> LOA REQUEST

TYPE OF INQUIRY

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<input type="radio"/> EMAIL RETURNED	<input type="radio"/> CANCEL ACCOUNT (CHANGED MIND)
<input type="radio"/> CHANGE OF GENERAL INFORMATION	<input type="radio"/> CANCEL ACCOUNT (DID NOT AUTHORIZE)
<input type="radio"/> CHANGE OF BILLING INFORMATION	<input type="radio"/> CANCEL ACCOUNT (NO REASON GIVEN)
<input type="radio"/> QUALITY CONTROL CANCEL	<input type="radio"/> CANCEL ACCOUNT (BUSINESS NUMBER)
<input type="radio"/> QUALITY CONTROL REFUND	<input type="radio"/> CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)
<input type="radio"/> CALL FORWARDED TO EXECUTIVE COUNCIL	<input checked="" type="radio"/> CANCEL ACCOUNT (DOES NOT REMEMBER)
<input type="radio"/> INFO VERIFIED	<input type="radio"/> CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)
<input type="radio"/> REQUEST REFUND	<input type="radio"/> RE-INSTATEMENT OF ACCOUNT
<input type="radio"/> MISC NOTE	<input type="radio"/> REQUEST TO CHANGE PASSWORD
<input type="radio"/> MAIL RETURNED	

Account Notes:"

VoiceMail2Telephone
Info VerifiedRequest Refund
Request To Cancel Account (Does Not Remember)

Finish Call

UNAUTHORIZED HOUSEHOLD MEMBER

Example 7: The registrant is known to the AH but not authorized to make changes to the phone bill. Please note ANYONE who is known to the AH qualifies the account to be stroked out as HOUSEHOLD member. In this case the account would be stroked out as telephone, request refund (if needed), cancel account (household member). A notation would be made to include: AH name and the relationship of the AH to the registrant and that the address is correct. (Please refer to the Note Abbreviation sheet for abbreviations.)

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CANCEL ACCOUNT (CHANGED MIND)

CANCEL ACCOUNT (DID NOT AUTHORIZE)

CANCEL ACCOUNT (NO REASON GIVEN)

CANCEL ACCOUNT (BUSINESS NUMBER)

CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)

CANCEL ACCOUNT (DOES NOT REMEMBER)

CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

Account Notes:"

VoiceMail2Telephone

Request Refund

"Request To Cancel Account (UnAuth Household Member)AH Jane Doe reg Husb addy ver

Finish Call

AUTHORIZED HOUSEHOLD MEMBER

Example 8: The registrant is known to the AH and authorized to make changes. Please note ANYONE who is known to the AH qualifies the account to be stroked out as HOUSEHOLD member. In this case the account would be stroked out as telephone, request refund (if needed), cancel account (household member). A notation would be made to include: AH name and the relationship of the AH to the registrant and that the address is correct. (Please refer to the Note Abbreviation sheet for abbreviations.)

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TYPE OF INQUIRY

<input type="radio"/> GENERAL ACCOUNT / NO CHANGES MADE	<input type="radio"/> CANCEL ACCOUNT (DID NOT UNDERSTAND)
<input type="radio"/> EMAIL RETURNED	<input type="radio"/> CANCEL ACCOUNT (CHANGED MIND)
<input type="radio"/> CHANGE OF GENERAL INFORMATION	<input type="radio"/> CANCEL ACCOUNT (DID NOT AUTHORIZE)
<input type="radio"/> CHANGE OF BILLING INFORMATION	<input type="radio"/> CANCEL ACCOUNT (NO REASON GIVEN)
<input type="radio"/> QUALITY CONTROL CANCEL	<input type="radio"/> CANCEL ACCOUNT (BUSINESS NUMBER)
<input type="radio"/> QUALITY CONTROL REFUND	<input type="radio"/> CANCEL ACCOUNT (UNAUTH HOUSEHOLD MEMBER)
<input type="radio"/> CALL FORWARDED TO EXECUTIVE COUNCIL	<input type="radio"/> CANCEL ACCOUNT (DOES NOT REMEMBER)
<input type="radio"/> INFO VERIFIED	<input checked="" type="radio"/> CANCEL ACCOUNT (AUTH HOUSEHOLD MEMBER)
<input type="radio"/> REQUEST REFUND	<input type="radio"/> RE-INSTATEMENT OF ACCOUNT
<input type="radio"/> MISC NOTE	<input type="radio"/> REQUEST TO CHANGE PASSWORD
<input type="radio"/> MAIL RETURNED	

Account Notes:"

VoiceMail2Telephone
Request Refund
"Request To Cancel Account (Auth Household Member)AH Jane Doe reg Husb addy ver|

Finish Call

GENERAL ACCOUNT/NO CHANGES MADE

Example 9: Account holder calls to find out about the service but doesn't want to cancel or account holder calls and the account is already canceled. If the account is already cancelled, do not stroke the account out with the cancellation reason again. In either of these cases the account would be stoked out as telephone and general account/no changes made. A notation is not necessary but could be added for additional information.

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B2B CANCEL REASON - FROM FULFILLMENT

B2B CANCEL REASON - FROM BILLING

RE-INSTATEMENT OF ACCOUNT

REQUEST TO CHANGE PASSWORD

REQUEST FOR ADDRESS (ADDITIONAL REFUNDS)

Account Notes:"

VoiceMail2 Telephone

General Account / System Question - No Changes Made

Finish Call

REFERRAL NOTE EXAMPLES

CONFIRMATION/INFORMATION EMAIL REQUEST

A registrant/AH requests that a confirmation email be sent confirming the cancellation and refund of an account, or additional information. An Inquiry is processed with the following notation: Confirmation email re cc. Make sure the email address is correct above, if not make changes.

Account Number - 197195 Sale Date - 3/10/2004 Voice Print Number -
800 Number - 8885666421 Sale Time - 2:03:55 PM
Site Sold -
Billing Information - 1- VoiceXpress (BCI) Product Code -15- Country Wide Voice (VX/BCI) - \$12.95 per month (FL resident on ACH Transactions \$1.19 State Tax and \$.75 Local Tax for \$14.89)
Customer Service Phone - 800-367-8006 Customer Service Email Address - support@myVoiceXpress.com
Processing Center Address - PO Box 15624 Clearwater FL 33766

http://training.vmcallscenter.com/ - CommonTraining - Windows Internet Explorer provi... Active

Please Complete all boxes for Refund Request

Email Address
BORN NATIVESTYLE82@DEMO.COM

First Name: DEMO Last Name: MUELLER

Address: 515 KUAFMANN

City: DEMO State: IA Postal Code: 52001

Contact Phone Number: 6635581803 Amount Charged: 0.00 Amount Tax: 0.00

Explanation
confirmation email re cc

Save

Product	Agent	Date & Time	Note

AMOUNT

DATE	AMOUNT
004	12.95
004	12.95
004	12.95
004	12.95
004	12.95

CONFIRMATION/INFORMATION LETTER REQUEST

A customer/AH requests that a letter be sent confirming the cancellation and refund of an account or additional information. An Inquiry is processed with the following notation: Confirmation letter RE CC. The name, address, city, state, and zip would be entered for the recipient of the letter in the referral screen. This information would not have to be notated at the end of the call; the system automatically enters it for the CSR.

Account Number - 197195	Sale Date - 3/10/2004	Voice Print Number -
800 Number - 8885666421	Sale Time - 2:03:55 PM	
Site Sold -	Ip Address -	
Billing Information - 1- VoiceXpress (BCI)	Product Code - 15- Country Wide Voice (VX/BCI) - \$12.95 per month (FL resident on ACH Transactions \$1.19 State Tax and \$.75 Local Tax for \$14.89)	
Customer Service Phone - 800-367-8006	Customer Service Email Address - support@myVoiceXpress.com	
Processing Center Address - PO Box 15624 Clearwater FL 33766		

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Please Complete all boxes for Refund Request

Email Address

First Name

Last Name

Address

City

State

Postal Code

Contact Phone Number

Amount Charged

Amount Tax

Explanation

Product	Agent	Date & Time	Note

AMOUNT
004 12.95
004 12.95
004 12.95
004 12.95
004 12.95

CONFIRMATION/INFORMATION FAX REQUEST

A customer/AH requests that a fax be sent confirming the cancellation and refund of an account or additional information. An Inquiry is processed with the following notation: Confirmation fax RE CC. The CSR would then enter the fax number that it is to be sent to in the notation portion of the referral. This information would not have to be notated at the end of the call; the system automatically enters it for the CSR.

Account Number - 197195 Sale Date - 3/10/2004 Voice Print Number -
 800 Number - 8885666421 Sale Time - 2:03:55 PM
 Site Sold - Ip Address -
 Billing Information -1- VoiceXpress (BCI) Product Code -15- Country Wide Voice (MX/BCI) - \$12.95 per month (FL resident on ACH Transactions \$1.19 State Tax and \$.75 Local Tax for \$14.89)
 Customer Service Phone - 800-367-8006 Customer Service Email Address - support@myVoiceXpress.com
 Processing Center Address - PO Box 15624 Clearwater FL 33766

Active

http://training.vmcallscenter.com/ - CommonTraining - Windows Internet Explorer provi...

Please Complete all boxes for Refund Request

Email Address
 BORNATIVESTYLE82@DEMO.COM

First Name Last Name
 DEMO MUELLER

Address
 515 KUAFMANN

City State Postal Code
 DEMO IA 52001

Contact Phone Number Amount Charged Amount Tax
 5635561603 0.00 0.00

Explanation
 confirmation fax re cc 563 582 9501

Save

Product	Agent	Date & Time	Note

Account
 Account Notes
 Cancel Account
 End Call

DATE	AMOUNT
2004	12.95
2004	12.95
2004	12.95
2004	12.95
2004	12.95
AMOUNT	

SIGN UP CONFIRMATION

This includes all of the information we received to set up the voice mail account. We do not send this to accounts that are "Did not authorize" or "Business numbers where they do not know the registrant. We do not offer these to the callers unless they ask. If you are requesting this please be sure to indicate how it is to be sent, i.e., Sign up confirmation letter by mail.

Account Number - 331304 MailBox Number - 331304 Sale Date - 2/5/2005 Voice Print Number -
800 Number - 8662233514 Sale Time - 10:29:20 PM
Site Sold - http://register.freeze.com Ip Address - 207.250.236.104
Billing Information -1- VoiceXpress (BCI) Product Code -89- VoiceXpress/TPPV/GC (VX) - Voicemail Service With Grocery Coupon Co-Reg with Freeze

CommonTraining - Windows Internet Explorer provided by WSLive, LLC - (privileged.)
http://training1.dadata.net/SupervisorQue/Asp/ReferralRequest.asp

Please Complete all boxes for Refund Request

Email Address: CAROLINELEIBER@DEMO.COM

First Name: DEMO Last Name: LEIBER

Address: 925 12TH AVE #2

City: DEMO State: OR Postal Code: 97138

Contact Phone Number: 9997179210 Amount Charged: 0.00 Amount Tax: 0.00

Explanation: sign up confirmation letter by mail/fax/email

Save

	AMOUNT
	14.95
	14.95

***We can only send this information when the registrant, a close family member, or when an employee registers and the business owner requests one.**

***Punctuation cannot be used in the referral system.**

CHECK REQUEST

A paper check would be requested if the customer's phone was disconnected or if the LEC rejected our credits. Make sure all of the AH's information is correct. Please notate in the explanation phone disconnected or Lec reject.

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http://training1.dadata.net/SupervisorQue/Asp/ReferralRequest.asp

Please Complete all boxes for Refund Request

Email Address: DEMO@AOL.COM

First Name: DEMO Last Name: DUNIVAN

Address: 14671 N CASCADE RD

City: DEMO State: IA Postal Code: 52003

Contact Phone Number: 5635565784 Amount Charged: 25.90 Amount Tax: 2.74

Explanation: phone disconnected received final bill per (floor support)
OR lec credit reject per (floor support)

Save

178
After 30 days \$12.95 per
ax for \$14.89)

Account Is Active

No
 No
 No

Account
Account Notes
Cancel Account
End Call

Product	Agent	Date & Time	Note	TRANSACTION DATE	REQUESTED DATE	TRANSACTION AMOUNT
FULL		10/20/2003	ACH MONTHLY BILLING	10/18/2003	11/18/2003	12.95
FULL		9/18/2003	ACH MONTHLY BILLING	9/18/2003	10/18/2003	12.95
REFUNDS PENDING						

*If the tax is unknown please add a note that the note of tax unknown.

*If you notated the account addy ver and the check is being sent to a different address, please add a note to the account that the check is being sent to a different address.

Dadata Supervisor Call Back Form

Customer service representative _____

Company name on the phone crystal_____ *i.e., solo voice, united communications etc.*

Customer's name_____

The phone number being charged_____

Call back number(*Write n/a if it's the same number being charged*)_____

Briefly describe why they need to talk to a supervisor_____

Make sure the phone number is correct and that you have verified as much information as possible

REVERSING REFUND REQUESTS

You have issued credits through the system and now the customer has advised you:

- I no longer have this telephone number or
- My LEC has already issued the credits

This should be prevented by asking the customer ahead of time if any credits have already been issued.

Because you have already initiated the request you now have to notify your supervisor immediately to cancel the refund(s). You can do this by using the Customer Service Referral System. This allows you to make an online inquiry or notification directly to your supervisor so that they can process the cancellation. Follow this process below to create a request to cancel credits.

- Click the REFERRAL bar on the account screen
- A REFERRAL BOX will pop up on the screen
- Click on INQUIRY
- Enter the reason for the cancellation of the refund/credits in the Explanation Box
Ex. Reverse all credits issued in error
or Reverse November credit issued in error
- Click on Save

The Inquiry will then be processed directly to the supervisor's queue, which they monitor all throughout the day.