

Digital Agent - Bulk BYOD Guide

Cart creation

New & existing customers

- Connected Laptops w/ IMEIs (up to 99 devices)
- Connected Tablets w/ IMEIs (up to 99 devices)
- Smartphones w/ IMEIs (up to 99 devices)



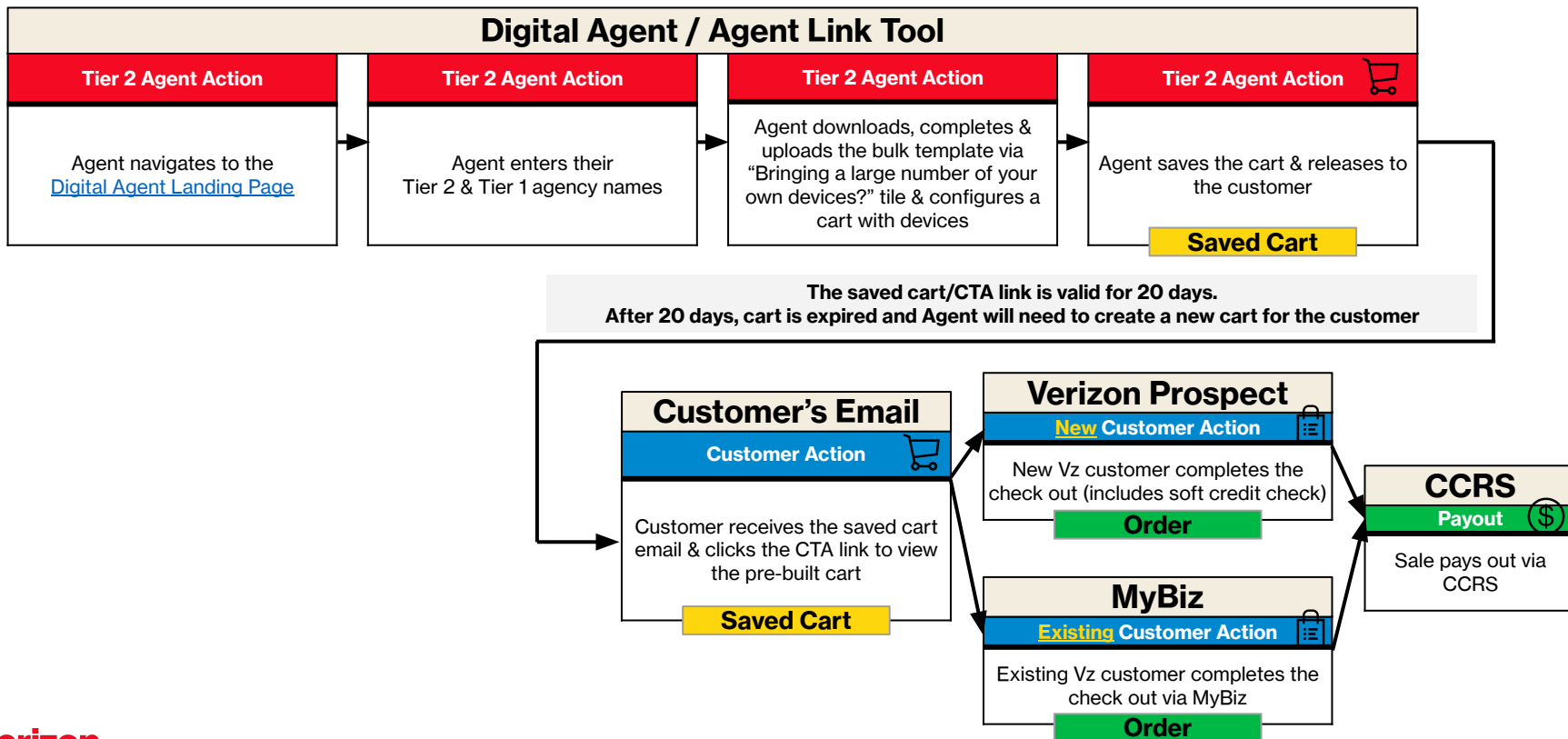
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Bulk BYOD - Digital Agent Support Resources

Stage	1st Level	2nd Level	3rd Level
Cart Creation	Tier 1 Digital Agent	Verizon Channel Manager	DA Intake Form (PEG) Can be submitted by Tier 1 or Tier 2 Agents SLA = 24-48 Hours (Same day acknowledgement)
Customer Checkout/ Cart Conversion	Tier 1 Digital Agent	Verizon Channel Manager	
Pending Order (Successfully Submitted)	BGCO: 800.922.0204	DA Intake Form (PEG) Can be submitted by Tier 1 or Tier 2 Agents	
Post Sale	BGCO: 800.922.0204	SLA = 24-48 Hours (Same day acknowledgement)	

Bulk BYOD - Digital Agent Cart to Order Overview



Bulk BYOD cart creation

New & existing customers

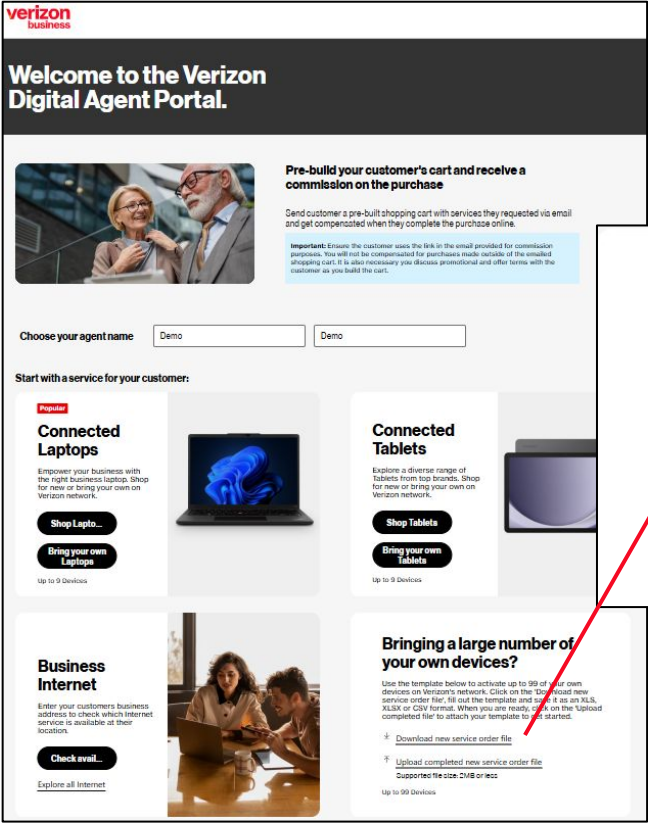
(Up to 99 devices - IMEIs required)

Bulk BYOD - Landing Page & Bulk Tile Selection

- Agent to navigate to the [Digital Agent Landing Page](#)
- Agent to enter their Tier 2 & Tier 1 selections in the “Choose your agent name” fields

Notes:

- T2 & T1 agency names are case sensitive
- T2 & T1 agency names must match the exact formatting assigned during onboarding
- System will validate accurate T1 & T2 relationship combination
- Agent to click “Download new service order file” within the “Bringing large number of own devices to Verizon?” tile. This will prompt download of the bulk template



Bringing a large number of your own devices?

Use the template below to activate up to 99 of your own devices on Verizon's network. Click on the 'Download new service order file', fill out the template and save it as an XLS, XLSX or CSV format. When you are ready, click on the 'Upload completed file' to attach your template to get started.

- Download new service order file
- Upload completed new service order file
- Supported file size: 2MB or less
- Up to 99 Devices

Bulk BYOD - Template Completion

Note: Current Digital Agent functionality allows up to 99 connected laptops, connected tablets and/or Smartphones per cart

- Once the template is downloaded, Agent to complete the template:
 - Up to 99 IMEIs/Device IDs can be added via Column A (*required field*)
 - IMEIs can be connected tablets, connected laptops, smartphones or a combination of those device types
 - If more than 99 IMEIs are provided, the system will yield an error
 - SIM Card IDs can be added via Column B, if desired (*optional field*)

[illegible]

Bulk BYOD - Template Upload

- Once the Agent has completed & saved the template, Agent to proceed with upload to the landing page:
 - Click "Upload completed new service order file"
 - Select the desired file for upload
 - XLS, XLSX or CSV formats accepted
- Once the file is successfully selected for upload, a Captcha box will appear. Agent to check the box to indicate you are not a robot



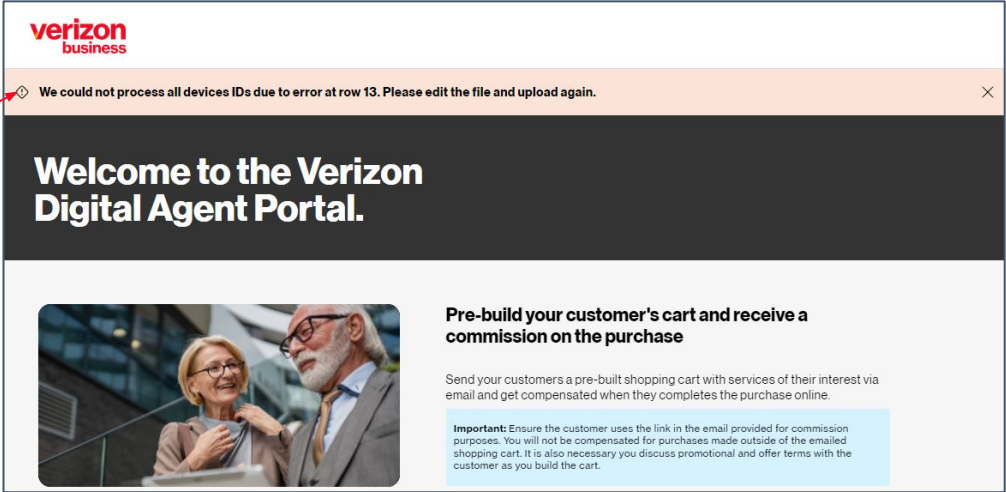
Bulk BYOD - Captcha Completion

- Once the Agent checks the box that they are not a robot, the Captcha screen will appear and requires the Agent's participation to complete
 - Note: Depending on the selections made, multiple captcha screens may be required to verify



Bulk BYOD - Upload Error

- In the event there is an error with one or multiple IMEIs provided on the template:
 - Error message will return at the top of the landing page
 - Error will indicate the row number(s) for IMEIs with errors
 - Error message will not provide detail on why the error occurred
- Agent to verify the IMEI and process via another bulk upload or manual BYOD flow



Bulk BYOD - Upload Success - Plan Selection

- Once the Captcha has been verified and the template upload successful, the Agent will be brought to price plan selection screen:
- Agent to select the desired price plan for the devices entered
- When a price plan is selected, the Agent will have the ability to apply the plan to that device or all devices

Connected Laptop 1 of 7

Galaxy Chromebook Go
Your own device

[Compare pricing and features](#)

\$15 monthly discount on a new \$30 Business Unlimited Tablet Start plan. [Details](#)

Business Unlimited Tablet Start

Select plan

\$30 /line per month
Taxes, fees and Economic Adjustment Charge apply.

This plan includes:

- Unlimited 4G LTE data with network management
- 5G Nationwide included
- Mobile Hotspot unavailable
- Video streaming at 480p

Broadband Facts
Verizon Business
Business Unlimited Tablet Start
Mobile Broadband Consumer Disclosure

Monthly Price **\$30**

This Monthly Price is not an introductory

Business Unlimited Tablet Pro

Select plan

\$40 /line per month
Taxes, fees and Economic Adjustment Charge apply.

This plan includes:

- Unlimited 4G LTE data with network management after 35 GB/line/month
- 5G Nationwide included
- Mobile Hotspot/ethernet reduced to speeds up to 600Kbps (4G LTE & 5G Nationwide) and 3 Mbps (5G UWB) after 15GB/line/month
- Video streaming at 1080p
- Unlimited 5G UWB Included w/ 4K video streaming in 5G UWB area

Tablet Discount:

- 50% off Business Unlimited Tablet Pro plan with a smartphone on our Business Unlimited Pro plan

Broadband Facts
Verizon Business
Business Unlimited Tablet Pro
Mobile Broadband Consumer Disclosure

Monthly Price **\$40**

This Monthly Price is not an introductory

Apply this plan to all tablets?

Apply to all Only this device

Bulk BYOD - Cart Summary

- Once the price plan selections are made for all devices, the Agent will be brought to the cart summary page:
 - Agent to review selections for accuracy
 - Agent can make modifications by selecting the “back” arrow
- Once the cart summary is confirmed accurate, Agent to click the “Save Cart” button

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Due today
\$0.00*

Due monthly
\$206.86*

Continue

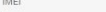
Shopping cart

7 items

Save cart Clear cart

Wireless phones & devices



Samsung Galaxy Chromebook Go
Your own device
IMEI: 
SIM Type: Physical SIM
New Verizon SIM Card
No thanks, I'll use my own SIM
[Edit](#) [Remove](#)

\$0.00

\$0.00

Plan
Business Unlimited Tablet Start
[Edit](#)

\$20.00/mo

Was ~~\$26.00~~

Protection
Decline Device Protection
[Edit](#)

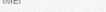
\$0.00

Additional fees
Economic Adjustment Charge

\$0.98/mo

Applied promotions & discounts
All Contracts - No Port In Nationwide \$10 Off



Samsung Galaxy Chromebook Go
Your own device
IMEI: 
SIM Type: Physical SIM
New Verizon SIM Card
No thanks, I'll use my own SIM
[Edit](#) [Remove](#)

\$0.00

\$0.00

Plan
Business Unlimited Tablet Start
[Edit](#)

\$30.00/mo

Protection
Decline Device Protection
[Edit](#)

\$0.00

Additional fees
Economic Adjustment Charge

\$0.98/mo

Order summary

Due today: \$0.00*

Incl. est. taxes, fees apply.

Due monthly: \$206.86*

Monthly surcharges, taxes and fees apply.

Economic Adjustment Charge (7) \$6.86

Have a promo code?

*Shipping cost and taxes are subject to change during checkout. Activation/upgrade fee/line up to \$35; restocking fee per device up to \$50. An Economic Adjustment Charge/line/mo may also apply. \$0.98 for basic phones & tablets; \$2.98 or \$3.97 for smartphones & data devices and for wireless business internet plan lines. Subject to business agreement, Calling Plan & credit approval. Either an Offer Recovery Fee or up to \$650 Early Termination Fee may apply. If applicable, your line's Offer Recovery Fee will be the sum of device discounts plus device credits you receive. Offers & coverage, varying by svc, not available everywhere; see vzw.com. Monthly charges are shown before taxes, and VZW surcharges/line/mo (including 35.8% Fed. Univ. Svc.; \$1.95 (voice)/\$0.06 (data-only) Admin Chrg. \$0.19 (voice)/\$0.02 (data-only) Regulatory Chrg). Your organization may qualify for better pricing when the final price is calculated upon checkout. In some states, sales tax is calculated on the full retail price or the VZW cost of the device you purchase, and not on the discounted price you pay. Some users may not be permitted to bill charges to their account, purchase order, and/or credit card. This may prevent you from completing your order online today. CA and NY calculate tax based on full retail value of the item(s) purchased. MA calculates tax on whichever is greater: full retail value or Verizon's cost of the item(s) purchased.

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Bulk BYOD - Save Cart & Release to Customer

- Upon clicking “Save Cart”, the Tier 2 Agent will be presented with a pop up module.
- To save the cart & send to the customer, the Tier 2 agent must complete the 4 required fields:
 - Customer Email Address
 - Where the saved cart email will be sent
 - Tier 2 Agent’s Email Address
 - Where cart creation confirmation will be sent
 - Tier 2 Agent’s First Name
 - Tier 2 Agent’s Last Name
- Once all 4 fields are completed, agent to click “Submit” to release the cart to the customer. A cart ID will display, which confirms successful cart creation.
 - **Note: This is not an order submission.** Upon clicking “Submit” you have successfully created a saved cart.
 - The customer’s action is required to complete checkout of the cart and convert to an order

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Enter your information to save your order details.

The customer’s cart will be active for twenty(20) days.

Customer Email Address

Agent’s Email address

Agent First Name

Agent Last Name

Promos, pricing, and availability in your customer’s cart might change by the time they return. Check with the customer to ensure they complete the cart and don’t have any questions.

The information provided will be used in accordance with our terms and conditions set out in our [Privacy Policy](#). California residents can view our [California Privacy Notice](#).

Submit

No thanks

Bulk BYOD - Successfully Saved Cart

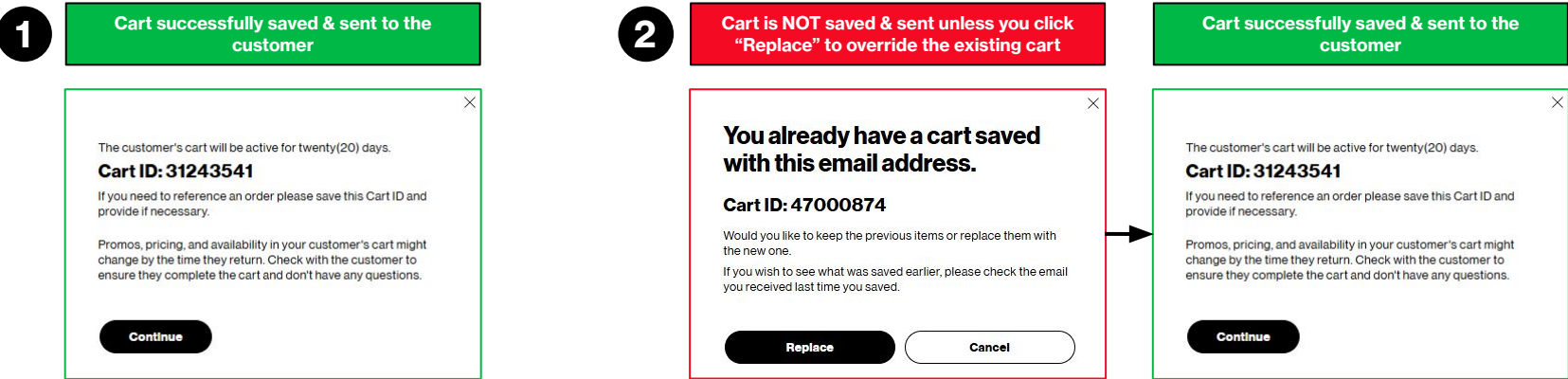
- Once the Agent enters the required items on the pop up module and clicks “Submit”, they will see one of two messages:

Cart confirmation

- Cart was saved successfully and released to the customer
- OR

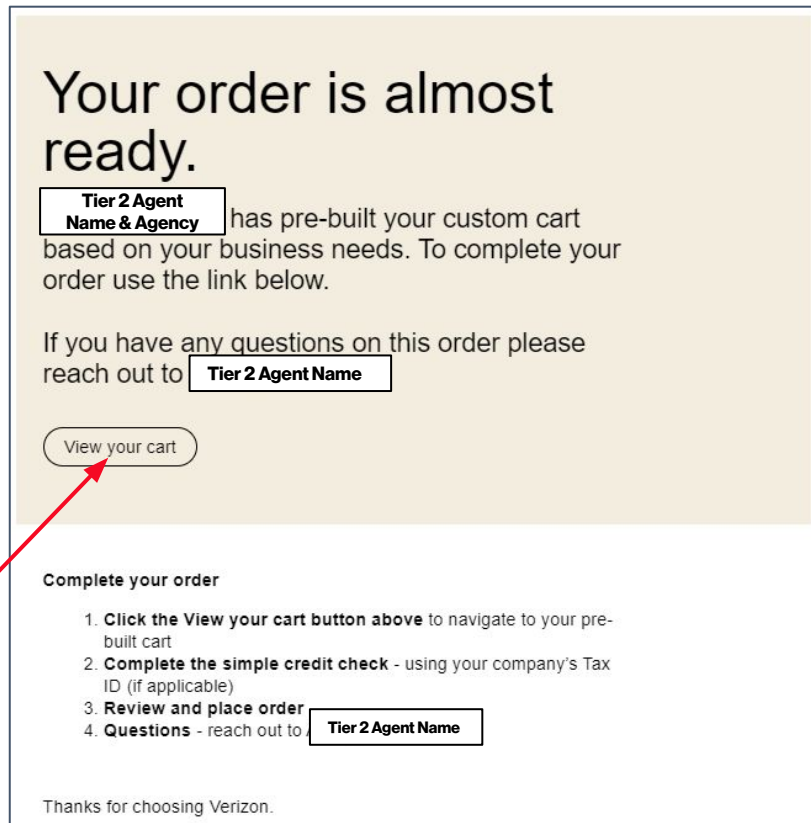
“You already have a cart saved with this email address.”

- Cart has not been saved or sent
- Customer must complete checkout for the previously created cart first OR if the Agent wants to replace the previously created cart, click “Replace” to send the current cart, which will override the previously created cart



Bulk BYOD - Customer Saved Cart Email

- The customer will receive an email from VZWMail@ecrmemail.verizonwireless.com with a link to the saved cart that was created by the Tier 2 Agent
 - If they do not receive, have the customer check their junk/SPAM folder
- Email includes:
 - CTA link that takes the customer to the pre-built/saved cart
 - Link to the Broadband Facts
 - Steps required to complete their order
 - Tier 2 agent's name in the event they have questions
- **Customer must click on the CTA link (View your Cart button) to view the saved cart & initiate the checkout process**



Bulk BYOD - T2 Agent Cart Confirmation Email

- The Tier 2 agent will receive an email confirmation to acknowledge the cart was successfully created & sent to the customer. Email will include the below detail:
 - Customer's Email address
 - Where the saved cart email was sent
 - Cart Creation Date (Date Created)
 - Cart ID
- Note: No additional email correspondence will be sent to the Tier 2 agent regarding this cart unless the customer converts the cart to an order (i.e. no reminders of upcoming cart expiration)
- Cart conversion email details are available on page 30

Confirmation of Submission: Customer Digital Agent Cart

Digital Agent Cart Details Submitted

Customer Email:

Date Created:

Cart ID:

Bulk BYOD - Customer Action Required

- Now that the Agent has completed cart creation and released the cart to the customer, the responsibility is now on the customer to convert the saved cart to an order.
 - There can only be 1 cart per customer (customer email address). The saved cart email cannot be resent.
 - The customer has **20 days** from the date the cart was sent to complete the checkout.
 - If they fail to complete the checkout process within the 20 days, a new cart will need to be created by the Agent.
- The checkout process differs depending on if the customer is new to Verizon or has existing services. See below for which checkout process applies:

1

New Customer

Prospect

If the customer is new to Verizon, they will complete checkout via Prospect.

OR

2

Existing Customer

MyBiz

If the customer is existing, they will complete checkout via MyBiz.

Note: MyBiz customers must login to complete checkout with the **Primary Contact** role. End Users and view only SPOCs do not have the correct access

For step by step guides on the customer checkout process, please access the respective devices guide via Allego:

- [Digital Agent - Tablets Guide](#)
- [Digital Agent - Laptops Guide](#)
- [Digital Agent - Smartphones Guide](#)

Documents include:

- New Verizon cart to order conversion (customer checkout via Prospect) &
- Existing Verizon cart to order conversion (customer checkout via MyBiz)

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