



Welcome to the **DIRECTV** Family

Congratulations! You are approved to start selling DIRECTV!

To help get started, we've put together a **Welcome Kit** which should help cover the basic questions you have and help you start achieving activations.

The **Welcome Kit** is divided into five basic sections. The first section is **PART ONE | Getting Started**. This section will cover Training, Current Offer, How You Are Paid, and Setting Up Your Order Entry System. The second section is **PART TWO | Go To Market Strategy** which will talk about our co-op program and how to best utilize this great resource. The third section, **PART THREE | Hardware**, discusses the hardware you will need to be familiar with in selling DIRECTV, and the fourth section, **PART FOUR | Software**, will do the same with the required software. Finally, the last section is of the kit is **PART FIVE | Reporting** which will breakdown the reporting process for you.



FlippingBook Quick Guide.

The FlippingBook platform you are currently using enables you to perform a few features to enhance your experience. All of the following features can be found in the toolbar displayed under the document window.



Zoom.

Clicking the magnifying glass icon will zoom into the document. A slider will also appear allowing you to adjust the degree in which you can zoom in or out.



Bookmark.

If you wish to bookmark a certain page for quick reference later, you can click the tag icon in the lower-left to bookmark the current page you're viewing. A sidebar will appear giving you the option to add notes before you add the bookmark to your existing pages.



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Part One | Getting Started

DIRECTV

Request Your AT&T Unique User ID (UUID)

As an AT&T LSP Dealer, one of the most important elements you and your sellers will receive is an AT&T User ID (UID) and Global Logon Password.

At AT&T, these two elements are used to:

- Access myCSP: AT&T's award winning enterprise knowledge management system (replacing Dealer Center September 2017).
- Enable Wireless: Coming soon, LSP Dealers will be onboarded to place wireless orders (additional details to be communicated separately). All Dealer Principals and their sellers must have a UID to participate.
- Access Other AT&T Tools: Including Mobile Sales Tool (MST), ePlaybook (part of MST) and more.

IMPORTANT REMINDER: As defined in section 1.6 of the dealer agreement, all dealer persons that access AT&T systems and/or place orders are assigned a unique login.

STEP 1: REQUESTING DEALER PRINCIPAL AT&T UID

Beginning the UID creation process is easy, simply click the secure link below to complete and submit the required information to AT&T.

1. Visit AT&T LSP Dealer Principal UID Creation Form (Dealer Principal's only)
2. Complete all required fields
3. Review the What to Expect and FAQ sections
4. Submit form to send to AT&T

Reminder: It will take an average of 8-10 business days to complete your request for an AT&T UID.

STEP 2: REGISTERING AT&T UID WITH GLOBAL LOGON

1. Register your AT&T UID with a Global Logon (password) using the Global Logon Job Aid.

STEP 3: REGISTERING AT&T UID FOR DEALER PERSONS

1. Dealer Principal may login to AT&T Seller Portal (<https://www.e-access.att.com/agentportal/cpportal>) with their AT&T UID and Global Logon password.

2. Follow the Seller Portal Job Aid to request AT&T UIDs for each Dealer Person.

3. Once you have requested AT&T Unique IDs for your Dealer Sellers in the Seller Portal you will receive an email from CinglePoint2@awsmail.att.com approximately 8-10 working days later with their AT&T Unique IDs

4. Instruct your Dealer Persons to complete their Global Login using the Global Logon Job Aid.

Training.

You've become a new dealer for DIRECTV but there is a lot to learn. Your **Territory Manager** will be coming to see you soon to offer, in person, 1-on-1 training to help get you started. In the meantime, we provide some additional resources that could help get you started today.

DSI systems Dealer Training Calendar

Instructions: Choose a Product or Category for the training that you're interested in. Your results are filtered based on your choices.

Product:

- DIRECTV RESIDENTIAL
- DIRECTV COMMERCIAL
- DIRECTV L & I
- DIRECTV MDU
- exede INTERNET
- vivint.
- SolarCity

Category:

- Opportunity
- Onboarding
- Sales
- Operations
- Features & Benefits
- Marketing
- Technical

Available Trainings:

- Opportunity
- Sales 101
- Onboarding
- Fees & Services
- Latest Offer
- Hardware
- Order Entry
-

May

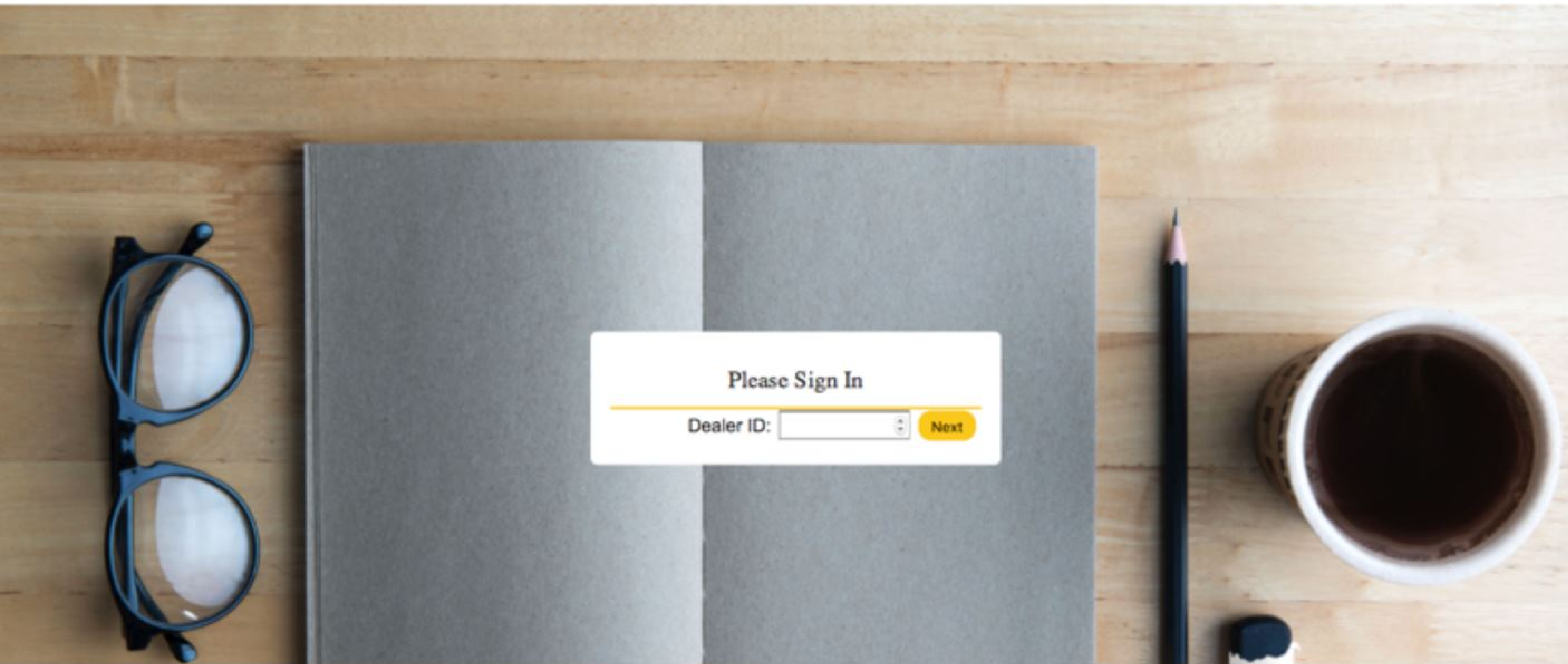
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4 12:00 PM CDT DTV RES - Opportunity 1:00 PM CDT Vivint - Opportunity 3:00 PM CDT Exede - Opportunity	5	6 12:00 PM CDT DTV COMM - Offer & Guide 1:00 PM CDT Vivint - OnBoarding	7
8	9	10	11 12:00 PM CDT DTV RES - Opportunity 1:00 PM CDT Vivint - Opportunity 3:00 PM CDT DTV COMM - Opportunity	12	13 12:00 PM CDT DTV RES - Offer & Guide 1:00 PM CDT Exede - Basics & Offer	14
15	16 12:00 PM CDT DTV RES - OnBoarding	17	18 12:00 PM CDT DTV RES - Opportunity 1:00 PM CDT Vivint - Opportunity 3:00 PM CDT	19	20 12:00 PM CDT DTV COMM - Offer & Guide 1:00 PM CDT Vivint - OnBoarding	21

DSI Training Calendar.

We offer many classes to help teach and develop dealers via webinar. 30 minutes of class time and 15 minutes of Q&A after provides a great opportunity to gain a background on DIRECTV and the offers in the market place. Our onboarding classes give you the basic understanding for what you need to know before your visit with your territory manager.

SIGN UP TODAY - Simply click the link below, find a time that is right for you and register. You will get a calendar reminder in your email that you can save to your electronic calendar.

VISIT DSI TRAINING CALENDAR



DSI University.

If you don't have the time during the day or your class isn't offered at a time convenient for you, we have DSI University at your disposal. The same classes we have for webinar are recorded and stored online where you can view them at your convenience. Simply click on the link below and follow the prompts. You will need your DSI Dealer Number to enter the site.

[VISIT DSI UNIVERSITY](#)

TM and BDR.

You have two great resources to help you navigate your way with DIRECTV and inside DSI. Our Territory Manager (or TM) is the outside sales person who will come and see you. They are responsible for managing our face to face relationship. Your Business Development Manager (or BDR) handles all of the day-to-day account management duties, such as product expertise, technical assistance, placing orders, and being your go-to person at DSI. Either can be reached at **1-800-888-8876**.

Useful DIRECTV Contacts.

Here are some other numbers to keep handy:

DIRECTV RETAIL SERVICES

The Dealer Center is a great resource for product and program information, dealer policies, and the portal to marketing tools and online training. When you have questions about your dealer account, follow these guidelines:

For commission related inquiries, complete the **Commission Escalations Form** located under Processes and Forms and email it to:

CommissionEscalations@DIRECTV.com

For access card requests, email: Access@DIRECTV.com

For general questions of a non-urgent nature, email: RetailServices@DIRECTV.com

For all other inquiries, contact Retail Services **Monday - Friday, 9:30am - 7:30pm ET.**

Phone: **1-800-323-1994**

Fax: **303-712-4966**

 [View Products & Functionality of Support Team](#)

DIRECTV CUSTOMER SERVICE

Handles residential customer inquiries only. **24 hours a day, 7 days a week.**

Phone: **800-DIRECTV (800-347-3288)** for new subscribers only

Phone: **800-531-5000** for existing customers

 [Contact Us](#)



Useful DIRECTV Contacts CONTINUED.

DIRECTV EN ESPAÑOL CUSTOMER SERVICE

General support is available **8am - 1am EST, 7 days a week.**

Customer Service: 1-800-531-5000

Technical support is available **24 hours a day, 7 days a week.**

 [Contact Us](#)

DIRECTV MERCHANDISE FULFILLMENT

Point of Sale materials for authorized DIRECTV dealers available **24 hours a day, 7 days a week.**

Phone: 800-227-0827

Fax: 949-608-5622

**Mailing Address: DIRECTV Merchandise Fulfillment
P.O. Box 15235
Irvine, CA 92623-5235**

DIRECTV MARKETING CENTER SUPPORT SERVICE

Available **Monday - Friday, 8am - 8pm ET.**

Phone: 866-241-7690

Email: directvsupport@brandmuscle.com

DIRECTV CORPORATE OFFICE

Available **Monday - Friday, 12pm - 8pm ET.**

Phone: 310-535-5000

**Mailing Address: DIRECTV, Inc.
2230 E. Imperial Hwy
El Segundo, CA 90245**

DIRECTV SALES OFFICES - EAST

Phone: 770-437-4160

**Mailing Address: 2849 Paces Ferry Road, Suite 360
Atlanta, GA 30339**



Useful DIRECTV Contacts CONTINUED.

DIRECTV SALES OFFICES - CENTRAL

Phone: **847-384-3900**

Mailing Address: **9700 W. Higgins Road, Suite 700
Rosemont, IL 60018**

DIRECTV SALES OFFICES - WEST

Phone: **310-535-5000**

Mailing Address: **2230 E. Imperial Hwy
El Segundo, CA 90245**

COMMERCIAL SALES

Phone: **888-200-4388**

INSTALLER ACTIVATION LINE

Phone: **877-235-6139**

DIRECTV INSTALLER SERVICE AND SUPPORT

Phone: **866-237-0700**

Menu Option 1: Technician modifications (formerly the OMG function)
Available 8am - 11pm ET.

Menu Option 2: ISS technician and installation verification support*
Available 8am - 11pm ET.

* Please note the activation IVR functionality and phone number (800-738-4388) did not change.

CO-OP PROGRAM CONTACT INFO

Contact your **DIRECTV Co-Op Account Manager** for support with online access, claims, balance, reimbursement and general guideline questions. Please remember that in order to be reimbursed for co-op expenses, you will need to fill out and return a new ACH form. You can now submit this form electronically. See the **Owners Manual** on the site for steps on how to get started and see the **Fact Sheet** for a program overview.

DIRECTV Co-Op Program Administration

Website: www.directvcoop.com

Phone: **602-438-2320 ext. 2276**

Email: directvcoopsupport@acbcoop.com



Sara Plus Integration

SaraPlus is a proprietary order-entry solution from DSI Systems, fully integrated with DIRECTV. Click and see below for more information, as well as the registration page. Sign up for the best order-entry management available.

SARA PLUS WEBSITE

SARA PLUS REGISTRATION



ORDER ENTRY

- ▶ AT&T/DIRECTV and Exede internet orders in one convenient location for **fast and easy bundling**
- ▶ Provides the easiest way to enter in any type of order
- ▶ Quickly final all services available to a customer based on address in seconds
- ▶ Full integration with multi-channel order entry with AT&T/DIRECTV and Exede full integration

BUSINESS MANAGEMENT

- ▶ Pay reconciliation with AT&T/DIRECTV
- ▶ View and pay employees through SARA Plus business management

SCHEDULING

- ▶ Look at each installer on a daily, weekly, or monthly basis
- ▶ Assign each installer a job with ease using our drag-and-drop capability
- ▶ View details of each scheduled installer individually or all at once
- ▶ Schedule your bundle installs in one calendar easily

BUSINESS REPORTING

- ▶ Statistical and aggregated reporting that assists in managing your business efficiently
- ▶ Up-to-the-minute tracking of bundle attachment rate
- ▶ Track your bundle orders from sales to completion
- ▶ View reports on Customers, Sales, Employees and more!

INVENTORY MANAGEMENT

- ▶ Manage inventory from each local warehouse
- ▶ Manage inventory on your installer's truck/van
- ▶ Assign inventory to a warehouse or truck with a simple drag and drop feature
- ▶ Add inventory using a file, or simply type in a SKU to get the item added

MOBILE

- ▶ Allows the dealer and the installer to view what is available on the truck
- ▶ Mobile SARA Plus gives the driver a schedule he can manage just by using their smart phone
- ▶ Quick scan installation allows the installer to get the job done faster

Support System

SUPPORT SYSTEM FOR RETAIL DEALERS

MyCSP

MST

ePLAYBOOK

Getting To Know Your DIRECTV Resources.

Get your business off the ground using 5 great resources:

1. ONLINE TRAINING

From the home page of the dealer center, in the portal to your left, you and your staff can access pre-recorded online training. **Modules are available 24/7!** Included are all the basics that a new dealer needs to know:

- LMS: Sales training on a wide variety of vital sales topics
- Installation certification
- Satellite installation training
- Sales help
- And much more!

2. FRONTLINE FOCUS

Frontline Focus are weekly updates that can be found on MyCSP. The updates contain breaking news and information you need to know as a DIRECTV dealer including topics like **offer details, compensation announcements, programming updates and tips on enhancing your business.** Be sure to check MyCSP for Frontline Focus updates.

3. WELCOME SESSION VIA WEB CONFERENCE

DIRECTV staff hosts weekly training sessions for new dealers. This session is an overview of the resources available on the dealer website. Dealers and their staff are welcome to attend.

Wednesday at 1:00pm ET/10:00am PT

Thursday at 4:00pm ET/1:00am PT

- To participate:
- ✓ Call **1-888-299-9680**, use participate code **9641376**
 - ✓ On your computer, log on at <http://directv.adobeconnect.com/r29kh5mwfgx/>
 - ✓ Select *Enter as Guest*
 - ✓ In the chat window, type in your first and last name, company name, state, corp ID, DIRECTV ASM partner name and distributor partner

NOTE: Popup blockers should be turned off for the session.

Getting To Know Your DIRECTV Resources CONTINUED.

4. DIRECTV RETAIL SERVICES

The Dealer Center is a great resource for marketing tools, product and program information, dealer policies and online training. When you have questions about your dealer account, follow these guidelines:

For commission related inquiries, complete the **Commission Escalations Form** located under **Processes and Forms** and email it to:

CommissionEscalations@DIRECTV.com

For access card requests, email: Access@DIRECTV.com

For general questions of a non-urgent nature, email: RetailServices@DIRECTV.com

For all other inquiries, contact Retail Services **Monday - Friday, 9:30am - 7:30pm ET.**

Phone: **1-800-323-1994**

Fax: **303-712-4966**

5. AREA SALES MANAGER OR DISTRIBUTOR REPRESENTATIVE

Contact your **Area Sales Manager (ASM)** or **Distributor Representative (if you are non-fulfillment)** for any other questions regarding your dealer account, including:

- Guidance on developing your business
- Confirmation of hardware buy-down start date
- Questions regarding compensation
- Hardware inventory questions (non-fulfillment dealers)




DIRECTV Training Modules.

Please make sure to go to DIRECTV's LMS System and complete the 9 webinars under **New Dealer Training**.

VISIT DIRECTV SALES TRAINING

3 rewards come your way for completing all trainings:

1. \$500.00 in co-op advertising dollars deposited in your account to help you start marketing your business.
2. \$100.00 in merchandise money so you can start to outfit your crew.
3. Knowledge of how to enter your first order, how to claim your co-op, how to use the online dealer center and much more!

New Dealer Onboarding (Residential) - REQUIRED		Overall Status
Title	Status	Incomplete
Basics: Overview (Residential)	Not Attempted	
Basics: Hardware and Features (Residential)	Not Attempted	
Basics: Programming (Residential)	Not Attempted	
 Dealer Center Overview (Residential)	Not Attempted	
Selling DIRECTV Bundles (Residential)	Not Attempted	
Advanced Receiver Services	Not Attempted	
Home Networking Basics	Not Attempted	
Co-op Marketing Website	Not Attempted	
Order Entry FFL - Residential	Not Attempted	
Order Entry Non-FFL - Residential	Not Attempted	
 July 2016 Summer Promotions Video (Optional)	Not Attempted	
 July 2016 Summer Promotions Training (Required)	Not Attempted	

Current Offer.

WELCOME TO THE SUMMER ENTERTAINMENT OFFERS/PROMOTION GUIDE

Effective July 15 through November 11, 2017

2 YEAR PRICE GUARANTEE!

Get 3 premium services for the same guaranteed price for 2 years!

HD DVR monthly service included!

Monthly equipment fees included for Wi-Fi Gateway, HD DVR and up to 3 additional receivers!

Starting at \$99.99/mo. for 2 years!

TV Highlights

**VIEW CURRENT
RESIDENTIAL OFFER**

NATIONAL OFFER

SALES GUIDE

COMMERCIAL | Effective 5.21.17



**BEST PRICES
BEST PACKAGES**

**VIEW CURRENT
COMMERCIAL OFFER**

ONLY
WITH AT&T

NEVER PAY OVERAGES AGAIN

OUR BEST UNLIMITED DATA DEAL NOW INCLUDES HBO®

After 22GB of data usage, AT&T may slow speeds.

AT&T UNLIMITED PLUSSM

1 LINE
\$90/mo.

2 LINES
\$145/mo.
Additional lines \$20/mo. each

Prices after discount with AutoPay & paperless bill.¹

- **HBO** Included
HBO credit starts w/in 2 bills²
- 10GB Mobile Hotspot Per Line
After 10GB, hotspot speed limited to max of 128Kbps
- Stream High-Definition Video With Our Fastest Speed
After 22GB of data usage, AT&T may slow speeds. Plan includes Stream Saver. Stream video in HD quality, when available, with Stream Saver turned off.
- **Save \$25/mo.** for life on DIRECTV and DIRECTV NOW³
- Add a tablet for \$20/mo.
Single line requires addition of AT&T Unlimited Tablet Plan⁴

AT&T UNLIMITED CHOICESM

1 LINE
\$60/mo.

2 LINES
\$115/mo.
Additional lines \$20/mo. each

Prices after discount with AutoPay & paperless bill.¹

- 3Mbps Max Speed
After 22GB of data usage, AT&T may slow speeds
- Standard-Definition Video Streaming
Video streamed at max of 1.5Mbps (about 480p)
- Add a tablet for \$20/mo.
Single line requires addition of AT&T Unlimited Tablet Plan⁴
- **Save \$25/mo.** on DIRECTV NOW³

PLUS, International Perks:

- ✔ Unlimited text to over 190 countries
- ✔ Unlimited talk to Mexico and Canada
- ✔ Plan use in Mexico and Canada with no roaming charges*

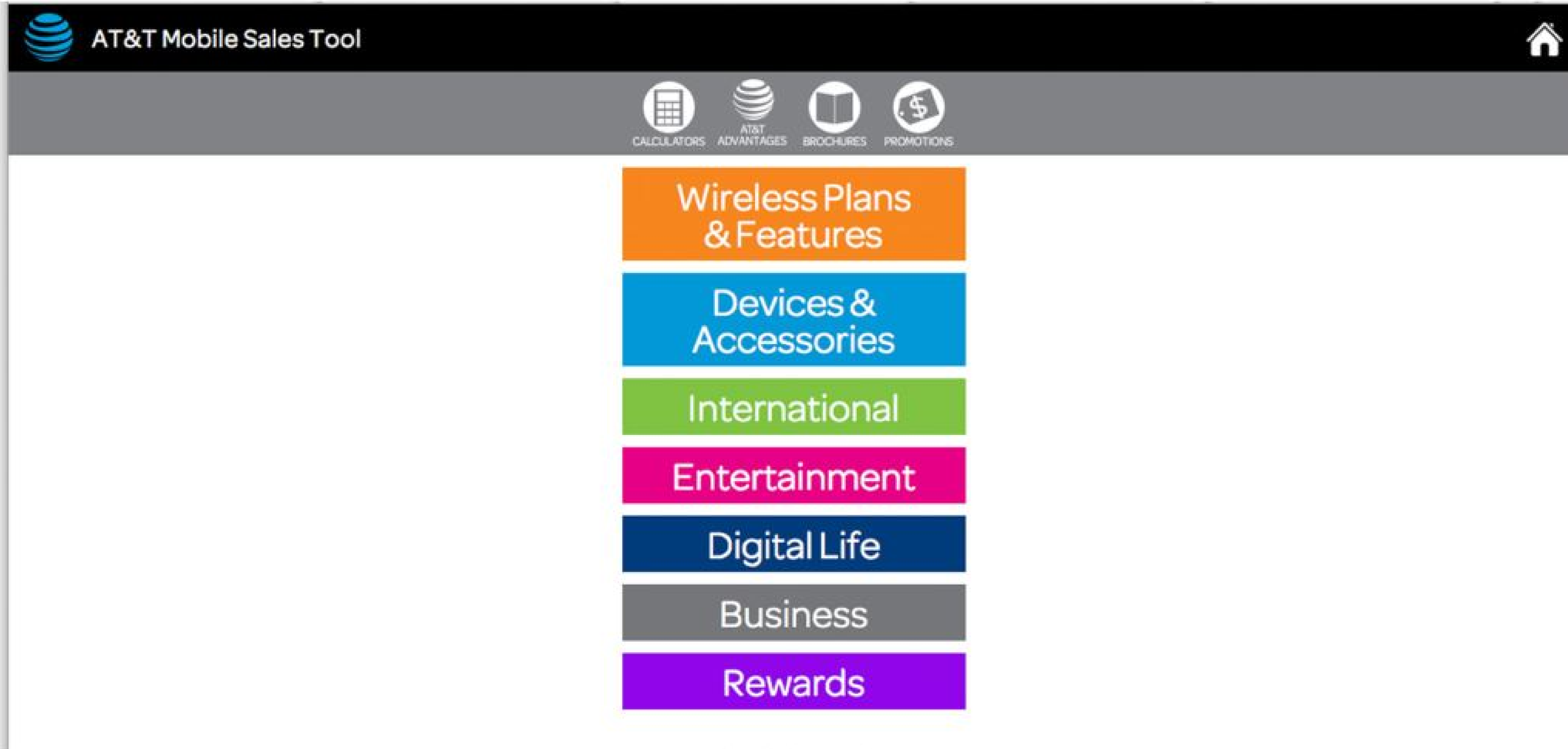
*Roaming feature may be removed if voice, text, or data usage in Mexico and/or Canada exceeds 50% of total voice, text, or data usage for two consecutive months.

¹ Discount is \$5/mo. on single lines & \$10/mo. on multi-lines. AutoPay excludes credit cards. Discount starts in 1-2 bill cycles. ² Wireless only/DIRECTV NOW customers receive 3 live channels; residential DIRECTV/U-verse TV customers receive live channels avail. for their service. ³ Req's elig. video service. Credit starts w/in 3 bills. For AT&T Unlimited Plus video credit, if you have two elig. video svc, credit may not apply to DIRECTV NOW. Service prices subj. to change. Charges, exclusions & other restr. apply. ⁴ AT&T Unlimited Tablet plan req's single line AT&T Unlimited Plus/AT&T Unlimited Choice plan. After 22GB of data usage, AT&T may slow speeds. Data speed, tethering use and video streaming on tablet plan matches those features on your AT&T Unlimited Plus/AT&T Unlimited Choice plan. See back for more details.



Pocket Guide.

Use the following links to view the [AT&T Mobile Sales Tool](#) from any device.



VIEW AT&T MOBILE SALES TOOL

TV & Internet Bundles TV Offers Internet & Voice

DIRECTV All Included Double Play*

	3Mbps – 6Mbps		12Mbps – 24Mbps		45Mbps		75Mbps	
	Month 1 – 24	Month 25+	Month 1 – 24	Month 25+	Month 1 – 24	Month 25+	Month 1 – 24	Month 25+
SELECT	\$80	\$121	\$90	\$131	\$100	\$141	\$110	\$151
ENTERTAINMENT	\$85	\$131	\$95	\$141	\$105	\$151	\$115	\$161
CHOICE	\$90	\$144	\$100	\$154	\$110	\$164	\$120	\$174
XTRA	\$100	\$151	\$110	\$161	\$120	\$171	\$130	\$181
ULTIMATE	\$105	\$161	\$115	\$171	\$125	\$181	\$135	\$191
PREMIER	\$155	\$214	\$165	\$224	\$175	\$234	\$185	\$244

DIRECTV Spanish All Included Double Play*

	3Mbps – 6Mbps		12Mbps – 24Mbps		45Mbps		75Mbps	
	Month 1 – 24	Month 25+	Month 1 – 24	Month 25+	Month 1 – 24	Month 25+	Month 1 – 24	Month 25+
MAS LATINO	\$97	\$107	\$107	\$117	\$117	\$127	\$127	\$137
OPTIMO MAS	\$80	\$126	\$90	\$136	\$100	\$146	\$110	\$156
MAS ULTRA	\$90	\$145	\$100	\$155	\$110	\$165	\$120	\$175
LO MAXIMO	\$155	\$214	\$165	\$224	\$175	\$234	\$185	\$244

DIRECTV All Included Package Offers include:

- ✓ 2 Year Price Guarantee when bundled with qualifying product (Internet/Voice/Wireless)
- ✓ Monthly lease fees for up to 2 Receivers - \$7 for each additional receiver
- ✓ DVR Service
- ✓ HD
- ✓ Monthly fee for Wi-Fi gateway (with All Included Internet)

Additional DIRECTV Offers:

- ✓ 4K available with ULTIMATE Package and above
- ✓ First 3 months of HBO, SHOWTIME, STARZ and CINEMAX at no extra charge with SELECT through ULTIMATE Packages (\$53.99 Value)
- ✓ 2016 NFL SUNDAY TICKET MAX with CHOICE Package and above (\$359.94 Value)

VIEW POCKET SALES GUIDE

Order Entry.

Initially covered on DIRECTV's **Order Entry** training on their [Learning Module System](#).

How To Cancel Orders.

Be sure to follow the proper process to cancel orders.

Attention non-fulfillment dealer partners: If a customer's order cannot be installed for any reason, please make sure to cancel the order in DWS. This simple 3-step process ensures that the customer is promptly refunded for any charges that were processed at the initial sale.

1

To cancel the order, please retrieve the order through the *Edit Sales Order* option in DWS.



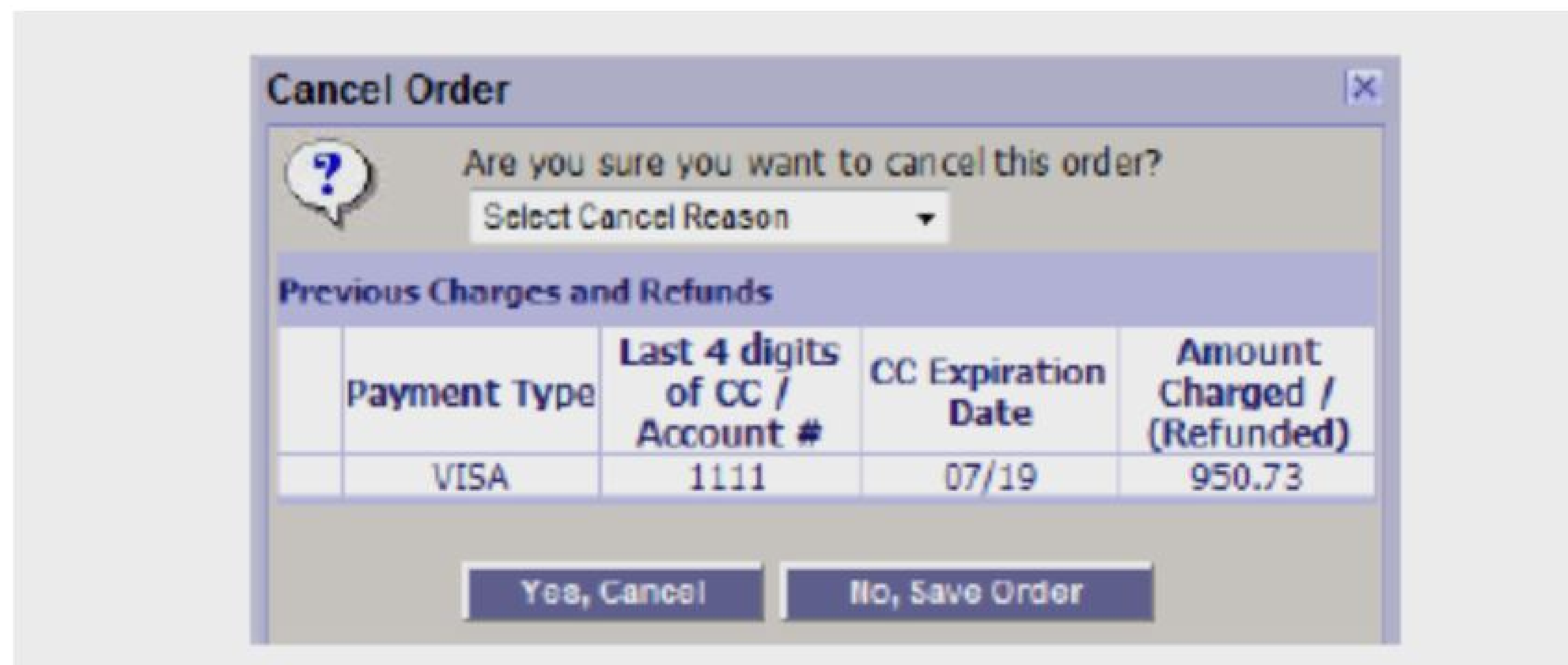
2

Once the order is retrieved, select *Cancel Order*.



3

Choose the appropriate *Cancel Reason* and press the **YES** button to complete the cancellation.





How To Modify Orders.

Please refer to the following reference guide on how to modify orders.

MODIFY ORDER REFERENCE GUIDE

DWS Mobile Activation Guide.

Please refer to the following reference guide on how to activate your account with the [Customer Activation App](#).

DWS MOBILE ACTIVATIONS APP USER GUIDE

Additional Programs & Policies.

DIRECTV provides several different programs for you to offer your customers beyond the video offering. Please refer to the following manuals:

**BUNDLES
REFERENCE GUIDE**

**BUNDLES
CHECK LIST**

**UPGRADES &
WIN-BACKS**

PROTECTION PLAN

**RETURNS &
REPLACEMENT POLICY**

**ACCESS CARD
REPLACEMENT FORM**

**INFORMATION CHANGE FORM
ONLINE DEALER PROCESS**

Activation.

Activation IVR Now Includes Prompt To Deactivate Receivers.

In addition to being the only phone method supported for set-top box (STB) activation, the **Activation IVR** can also be used to deactivate receivers.

When technicians dial the **Activation IVR** line at **(877) 235-6139**, they will now be presented with an option to **"deactivate a receiver"**. When prompted, say **"deactivation"** and provide the requested information to allow the Activation IVR to complete equipment deactivation.

While the best method for STB deactivation continues to be via the handheld, the **Activation IVR** is available as a backup should handheld deactivation not be available.

As a reminder: Effective as of July 1, 2016, the Activation IVR is now the only phone method supported for set-top box (STB) activation. ISS agents no longer activate STBs for any technician. If a technician calls directly into ISS for an activation, they will be transferred to the **Activation IVR** to complete the process. Any activations that are unsuccessfully processed via the IVR will "fall out" to an agent who can complete the activation for the technician manually.

Compliance.

Do Not Call (DNC) Process Reminder.

Federal laws require AT&T to maintain an internal AT&T Do Not Call List for consumers, **AT&T Customers and Non-AT&T Customers**, who specifically request not to receive telephone sales solicitations/telemarketing calls from AT&T.

This is a Quarterly Reminder to reemphasize the DNC process and ability to add an AT&T Customer and Non-AT&T Customer to the Internal AT&T Do Not Call List.

DO NOT CALL PROCESS

Do Not Call (DNC) requests MUST be processed according to the Do Not Call M&Ps:

National DNC List Requests	Refer the consumer to the National Do Not Call Registry at www.donotcall.gov
Internal AT&T DNC List Requests	These are processed by call center Reps for AT&T Customers and Non-AT&T Customers using the Do Not Call Listing Tool

Compliance CONTINUED.

Credit Check Disclosure Requirement Reminder.

What Do I Need To Know?

To **comply** with obligations under the Fair Credit Reporting Act (FCRA), Consumers must give permission **before** their credit is checked with an external agency **and before** their existing internal credit information can be shared within a company to determine their credit worthiness.

Failure to follow these Credit Check Disclosure Requirements can result in **finances and penalties** in addition to **civil action by the Consumer**.

CREDIT CHECK DISCLOSURE REQUIREMENT AND SUGGESTED VERBIAGE

Reps **MUST CONVEY** to the consumer, at the time credit information is obtained **AND** ask the consumer's permission, that to qualify for service:

1. A **credit check may be initiated**, and
2. **Existing credit information** within AT&T companies may be used
3. **Ask permission** to check credit or use existing credit information

SUGGESTED VERBIAGE

"Before I start your order, I will need to initiate a credit check or use your existing credit information on file with AT&T companies. Is that okay?"

OR

"Before I start your order, I will need to use your existing credit information on file with AT&T companies or initiate a credit check. Is that okay?"

"Before I start your order, I will need to **[1]** initiate a credit check or **[2]** use your existing credit information on file with AT&T companies. **[3]** Is that okay?"

OR

"Before I start your order, I will need to **[2]** use your existing credit information on file with AT&T companies or **[1]** initiate a credit check. **[3]** Is that okay?"

Compliance CONTINUED.

CBR Disclosure & Compliance Reminder.

DISCLOSURE REQUIREMENTS:

Prior, express oral consent REQUIRED

AT&T is required to obtain prior, express oral consent before using a Customer's Can Be Reached number (CBR) for informational or service related automated or prerecorded calls/texts and messages to wireless telephone numbers.

What type of automated calls/messages are CBRs used for?

- Account - Account updates and privacy notices
- Billing - Information about bills and payments
- Service - Alerts like scheduling, installation, repairs and outages
- Surveys - Give feedback on current services

Inaccurate CBR and/or CBR Consent entered into AT&T systems may cause:

- 1.** A customer not to receive messages and phone calls that they are requesting and expecting to receive. **This may cause customer dissatisfaction, account disconnection, nonpayment and customers cancelling their AT&T services.**
- 2.** An individual to receive messages and phone calls in error for an account that does not belong to them. **This puts AT&T potentially at risk for lawsuits with substantial civil awards and federal penalties and fines.**

When are the CBR disclosures required?

Since all telephone numbers input into fields on AT&T accounts can be used by ANY business unit or channel for different reasons, **REQUIRED DISCLOSURES MUST BE PROVIDED** and **APPROPRIATE SYSTEM CBR CONSENT OPTIONS MUST BE USED ANYTIME:**

- A contact number is requested
- A contact number is discussed
- Before a CBR is entered into a designated contact number field on a customer's account (primary or Alt CBR)

For existing customers, the account must be authenticated before the CBR disclosure is provided. Only authenticated callers can provide CBR consent or change CBRs on an existing account.

- After account authentication, when validating CBRs on existing customer accounts, reps may tell the customer what CBRs are on the account to enable the customer to determine if the CBRs are still accurate or if they need to be updated.

Compliance CONTINUED.

CBR Disclosure & Compliance Reminder CONTINUED.

DISCLOSURE REQUIREMENTS:

CRM Users - Important CBR Validation Notice

- If CRM displays the CBR validation screen, you are **required** to validate the customer's CBRs.
- **Only** select the confirmed button on the CRM CBR Validation Screen when the required CBR disclosure has been read to the customer and the customer made no changes to their existing CBR(s).
- **Do not** select the confirmed button without reading the required CBR disclosure and validating the CBR(s).

CBR Suggested Verbiages

Words in **BOLD ORANGE** are **REQUIRED** words.

- "May I have a contact number so that we may reach you by **phone** or **text** with **information** about **your AT&T services?**"
- "May I have two contact numbers starting with your cell phone so that we may reach you by **phone** or **text** with **information** about **your AT&T services?**"
- "Is [Number] a good contact number so we can reach you by **phone** or **text** with **information** about **your AT&T services?**"
- "What is a good contact number so we can reach you by **phone** or **text** with **information** about **your AT&T services?**"

What do you do if a customer refuses to provide a CBR?

If a customer refuses to provide a CBR, tell the customer that AT&T requires at least one contact number so they can be reached if there is an issue with their order. Also, tell the customer that you can opt the number out from receiving automated calls and texts for informational and service-related messages.

Suggested Verbiage:

"Mr./Ms. [Customer Name], you are requesting not to receive informational and service-related automated calls/texts messages, which include various service notifications, reminders, confirmations, and other informational type messages. I just want to confirm you do not wish to receive these type of messages at the telephone number(s) provided."

If the customer confirms that they want to opt the CBR provided out for informational and service-related automated messaging, select the CBR Consent "Opt-out (No)".

IMPORTANT: Do not input false or dummy CBRs on the customer's account.

Compliance CONTINUED.

CBR Disclosure & Compliance Reminder CONTINUED.

DISCLOSURE REQUIREMENTS:

What is CBR Consent?

CBR consent captures the customer's preferences for receiving automated informational and service-related messages. Agents **must** make a CBR consent selection each time a CBR is entered or changed on a customer's account.

Global Opt-in: The customer **does not object** to the CBR disclosure and provides a CBR (select opt-in/Yes). Global opt-in provides consent to send any type of automated informational service-related message by phone or text without restriction.

Global Opt-out: The customer **objects** to the CBR disclosure when providing a CBR (select opt-out/No). Global opt-out prohibits the use of the CBR for all types of automated informational service-related messages.

INPUTTING CBRs:

Intentionally inputting a false or incorrect number into a CBR field, for any reason, is falsifying company records and is a COBC violation (*an inadvertent error such as a typo would not constitute a COBC violation*).

- **ONLY** enter telephone numbers into CBR fields that are **provided by a customer**.
- The **"Refused Alt Phone" checkbox MUST BE USED** in CRM when a 2nd CBR is not being input into the system.
- Using the **"Refused Alt Phone" checkbox** is the correct way to proceed with the AT&T Phone, AT&T Internet and U-verse TV order without inputting a false or incorrect telephone number.

Disclosure Process.

Universal Order Receipt Form.

[VIEW FORM](#)

Order Confirmation Form.

[VIEW FORM](#)

DIRECTV Signature Process.

[VIEW PROCESS](#)

DIRECTV Disclosure Requirements.

[VIEW REQUIREMENTS](#)

Part Two | Go To Market Strategy

Sales Process.

Call Flow

BEST! CALL FLOW GUIDE

Overcoming Objections

OVERCOMING OBJECTIONS GUIDE



Ask us about our F15 Sales Strategy to get you your first activation in 90 days.



Co-Op Program.

Every dealer earns advertising dollars, called co-op dollars, for each activation made. DIRECTV pays \$50.00 per activation redeemable at 60/40. The marketing resources document will take you through each tactic you can use, how to claim your co-op dollars, and grow your business using DIRECTV marketing funds.

Co-Op Guidelines

[CO-OP GUIDELINES FACT SHEET](#)

Marketing Resources

[DIRECTV MARKETING HANDBOOK](#)

[LSP MARKETING UPDATE](#)

[MARKETING CENTER](#)

[MARKETING CENTER QUICK GUIDE](#)

Mobile Marketing App

[MOBILE MARKETING APP](#)

Showroom Set-Up.

DIRECTV allows its dealers a free showroom subscription for each dealership. DIRECTV supplies the programming which includes all basic and premium channels, sports channels, and sports packages. **Pay Per View and Adult Content not included.** This is a great way to display DIRECTV's product in your showroom or at an event. You can even display programming via your mobile device.

SHOWROOM AND DEMO ACCOUNTS

Part Three | Hardware



Genie.

Genie is the most advanced HD DVR ever. Genie, only from DIRECTV, is one HD DVR receiver that powers your entire home. So now you can enjoy a full HD DVR experience on every TV in your home, without seeing an inconvenient cable box in each and every room. Genie also avoids recording conflicts by letting you record any 5 shows you want, all at the same time, all in HD.

Genie even recommends new shows you might like, based on what you already watch. And, with a 1 terabyte HD DVR storage drive, there's more than enough room, so you won't have to delete your favorite pre-recorded shows again. An HD DVR so advanced, **your every TV wish is granted.**

DIRECTV GENIE GUIDE



Genie Lite.

Genie Lite is the perfect HD receiver. It features the same superior HD picture and theater-quality sound of DIRECTV's flagship Genie HD DVR. Plus, it easily connects to your home broadband network, unlocking a ton of amazing features right on your TV.

DIRECTV GENIE LITE GUIDE

Part Four | Software



Software
Connected Home |
DIRECTV On Demand |
DIRECTV App



DIRECTV

Connected Home.

Connect to the internet and get more out of your DIRECTV HD DVR. It's absolutely free and expands your entertainment options like never before.

CONNECTED HOME GUIDE

DIRECTV On Demand.

Now with DIRECTV, watch shows you forgot to DVR **from the last 72 hours**, or restart a show that's already in progress. **Never worry about missing a show again.** Plus, now you can go back and watch entire past seasons, so its easier than ever to catch up on the shows you missed.

DIRECTV ON DEMAND GUIDE

DIRECTV App.

Take DIRECTV with you and watch live TV, movies and shows everywhere you go.



DIRECTV APP GUIDE

The Walking Dead on AMC



800-888-8876
www.dsisystemsinc.com

Part Five | Managing Your Business

DIRECTV Reports.

Quick Pay File.

DIRECTV pays dealers weekly but always 2 weeks in arrears. Each week, DIRECTV sends a pay file on Friday and deposits money in your account via ACH, which is available each week, provided activations were done for that week. The report is called the **Quick Pay Report**.

QUICK PAY PROBATION STATEMENTS

Other Reports.

DIRECTV produces other reports to help you manage your business.

- Churn
- ARS Take Rates
- Connectivity Rates
- And More!

DIRECTV DEALER REPORTING SYSTEM

