

# EE Processing with Chess Partner



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# Introduction to EE



# Introduction to EE

This guide is designed to help submit your EE work to the Chess Partner Support teams. It covers commissionable and ad-hoc service requests.

Should you have queries that are not covered by this guide, please contact your dedicated support team or your Partner Relationship Manager.

All contact details can be found at the end of the guide.



# EE Processing with Chess Partner

## What do I need?

All requests should have the relevant completed network request form, purchase order and / or the Chess Partner Workbook. Proofs may also be required from your customer for certain requests.

## Proof Criteria

- All proofs must be dated within 3 months.
- Contain the full company name.
- Address as listed on the network account.
- Business proofs must be in a PDF format.

## Accepted Proof Types

- UK bank or building society business credit or debit card (Please cover account number and sort code, card number and CVC).
- UK bank or building society business account statement (Please cover account number and sort code).
- UK business credit card statement (Please cover account number and sort code).
- Business utility bill (Gas, Water, Electric, Council Tax and Fixed telephone statements).
- Existing mobile phone bill (excluding EE, Orange or T-Mobile bills).
- Business VAT registration certificate.
- Certificate of Incorporation (COI) or change of company's name.
- Certificate of charity registration.
- HMRC (Inland Revenue) statement.
- Business premises leasing / rental agreement.

## BUSINESS TYPE

## REQUIREMENTS

### Small Business (1-99 employees) Sole Trader / Self Employed

- 1 proof of ID and,
- 1 proof of Address and,
- 1 Business Proof.

### Large Business (100 (+) employees or LTD Registered)

- 2 Business proofs for New Connections and,
- 1 Business proof for Upgrades or additional New Connections to an existing account.

## EE Processing with Chess Partner

### Purchase Order Requirements

When obtaining a purchase order from your customer you will need to ensure it contains the following information:

- Be on an official company Purchase Order.
- The full company name and where applicable registration number.
- The full trading address, including registered office if it is different from the trading address.
- The contact information for the customer.
- Signed and dated within the last 30 days Full breakdown of all hardware required i.e. iPhone X, hardware credit of £XXX, No Kit Required.
- Full breakdown of tariff and bolt on requirements and the costs associated.
- Contract term stated.
- The name of the signee must be clearly printed along with their company role.

# Partner Wise

- **Partner Wise** is the Chess price book for all networks. In here you will find the latest product codes, prices and promotions.
- Please ensure you register to use this [HERE](#)
- When connecting, resigning or tariff changing you must refer to the product code with EE on their connection templates and through their gateway.
- An example of what the code looks like is shown below:

4GEE plans	Product Code
Bus 50GB £46 24M D	XB1924DQ1

- Please ensure on your Purchase Orders you include the product code, product name and price point.

# EE Processing with Chess Partner

## Chess Partner Workbook

This is a Chess document designed to ensure all partners use the same terminology and latest versions of network forms for their requests. It also ensures you give all information required for the desired task first time, preventing delay. This enables the team to work with accuracy and speed, two of our blueprint promises to partners.

If, after selecting your network (i.e EE) and task you see a hyperlink\* to the latest form, you just need to save the workbook as it is. Ensure you send the workbook along with any completed network forms indicated.

**Please Note:** If you have already saved the network forms to your computer, there is no need to save again.

When the workbook is sent along with the accompanying network forms, it pulls information on you, your requests and the network resulting in swifter processing times for all.



# EE Knowledge

EE is made up of Small Business and Corporate accounts.

## Small Business

Serves the majority of EE customers. Account numbers for SB accounts start with '1' and are only 9 characters in length. SB accounts are for employee numbers up to 99. When looking for price plans, please ensure you are selecting the 'Small Business' section of **Partner Wise** for the latest up-to-date information and pricing for the account type.

## Corporate

Houses large business accounts for companies with 100 or more employees. It provides the partner with the ability to build lead and sharer plans to better suit customer needs. Business account numbers are 8 characters in length and start with numbers between 0-9 on the first digit of the account number. E.g. (range from 01234567 to 99999999).

If you are unsure, please speak to Partner Support, your Customer Experience Leader or your Business Development Manager.

The tariffs are non-transferable between the account types.



# EE Credit Check and Connection Form

EE use the fewest network forms, which is great news for processing. Their main form combines credit check tabs, commissionable actions and ad-hoc. It also has a mandatory compliance tab which must be filled out in order to proceed.

Here, we aim to simplify a few areas of the form to ensure it's correctly completed.

## Compliance – MANDATORY

**Tab 1** must be completed for any action the form is to be used for. Work will not be processed without it.

### EE Small Credit Check

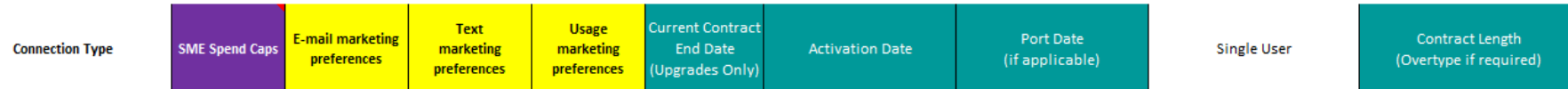
### EE Large Credit Check

**Tab 2 / 3** will need to be filled out for credit checks for new and existing accounts. The information required is highlighted clearly and must be completed in full (where applicable).

**Tip:** You will only be required to state the highest talk plan tariff price and code from **Partner Wise** for the small credit check. For large business, all tariffs and handset details, must be given.

**Tip:** At the bottom where it states 'customer proofs' please give the name / type of proof attached along with the for additional clarification. Please name all proof files the same.

## EE Credit Check and Connection Form



<b>Connection Type</b>	New / Upgrade / Port.
<b>SME Spend Caps</b>	Please indicate the Spend Cap required for your customer. This is how much they are permitted to over spend on their current tariff before a restriction is placed. This is to prevent bill shock.
<b>Marketing Preferences</b>	Please ensure you complete this for GDPR compliance.
<b>Current Contract End Date</b>	Upgrades only, please supply.
<b>Activation Date</b>	Date required for connection / port temporary number. This cannot be a weekend date or public holiday date.
<b>Port Date</b>	Date for the porting number to go live.
<b>Single User</b>	For corporate leader / sharer connections.
<b>Contract Length</b>	30 day / 12 / 24 months.

## EE Credit Check and Connection Form

Temporary / Box Number (must be given on EE Corp)	Port-in/Upgrade/ Migrating Number	SIM	IMEI	PAC Code (if applicable)	User Name	Days to be rolled over if applicable (Corp)	Months to be rolled over if applicable (EE SB)
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**Temporary / Box Number / Migrating Number** Temp and box number found on sims suitable for connection and port. This number can be connected so a user is active and their porting number will port over the top of this later the same day (or a pre-logged date).

**Port In / Upgrade / Migrating Number** As suggested.

**Sim** Required for new, port, migration (not upgrade).

**IMEI** Required if bar required for lost / stolen. Please supply for new handsets and changes upon upgrade.

**Pac Code** For ports only.

**Username** Optional. Can be added via partner workbook at a later stage.

**Days to Be Rolled over Corp and EE SB** Supply as accurately as possible. On SB 12 months, upgrade only permitted in last 30 days. 24 and 36 month tariffs can upgrade within the last 6 months. Please check with support before process if unsure.

## EE Credit Check and Connection Form

Product Code/ Description 1	Discount Code/ Description 1	Comments/Special Instructions	URN / Reference (Provided by EE)	Agreement Number (Provided by EE - EE Small/TMUK only)	Monthly Recurring Charge (OPTIONAL)	Talkplan/ Bundle Benefits (OPTIONAL)
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**Product Code** Your agreed tariff code. This needs to be as per the code in **Partner Wise**. Boxes 2 and 3 can be used for bolt on codes and any other services (i.e. Wifi calling).

**Discount Code** If agreed with Business Development Manager, please input here. Also referred to as a DA.

**Comment / Special Instructions** Place any notification here to add roaming bars, premium rate call bars etc or ask for roaming NOT to be barred.

**URN Reference / Agreement Number / Monthly Re-occurring Charge / Talkplan** Please leave blank for EE use only.



# How do I? – Processes and Forms

## REQUEST TYPE AND FORM REQUIREMENTS

## PROCESS

### Credit Check

**Required:** PO, Proofs, Credit Check Form, EE Contract, Partner Workbook.

Partner Workbook Select: EE >> Credit Check >> **Credit Check Form Link** >> Fill out **GREEN** text boxes.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

### New Connections – New Account

**Required:** PO, Network Form, EE Contract, Partner Workbook.

Partner Workbook Select: EE >> Connections New Account >> **New Connections – New Account Form** >> Fill out **GREEN** text boxes.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.



## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Existing Account Connections

**Required:** PO, Network Form, EE Contract, Partner Workbook.

#### Upgrades / Resigns

**Required:** PO, Network Form, EE Contract, Partner Workbook.

### PROCESS

Partner Workbook Select: EE >> Connections Existing Account >> **New Connections-Existing Account Form Link** >> Fill out **GREEN** text boxes.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

Partner Workbook Select: EE >> Connections Resign >> **Upgrades / Resign Form Link** >> Fill out **GREEN** text boxes.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### **New and Existing Account Ports**

**Required:** PO, Proofs (new account only), Network Form, EE Contract, Partner Workbook.

### PROCESS

Ensure a credit check has already been performed to set up a new account or add ports to an existing account. See 'Credit Check' for more information.

Partner Workbook Select: EE >> Connections Port New Account >>

**Port New Account Form Link** >> Fill out **GREEN** text boxes.

#### **OR**

Partner Workbook Select: EE >> Connections Port Existing Account >>

**Port Existing Account Form Link** >> Fill out **GREEN** text boxes.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Migration

**Required:** PO, EE Contract, Partner Workbook.

#### Transfer of Ownership / CAT Transfer

**Required:** PO, EE Contract (if resigning at the same time) and / or a customer letter of Instruction, CAT transfer form, Partner Workbook.

### PROCESS

Partner Workbook Select: EE >> Migration >> **Migration Form Link.**

Save and send all documents to your support team.

Please note: Migration is only relevant when migrating Orange / T-mobile customers to EE.

Partner Workbook Select: EE >> Connections Transfer >>

**Cat Transfer Form Link.**

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Billing

**Required:** Partner Workbook and any additional documents to support query i.e. bills, customer letter of Instruction.

### PROCESS

#### General Queries

Partner Workbook only is required for both platforms. Select: EE >> Billing Query (Freetype) >> Fill out all **GREEN** text boxes.

#### Bill Date Change

Letterheaded, signed instruction letter indicating the new requested date (This must include customer name and account number).

Partner Workbook is required for both platforms. Select: EE >> Billing Date Change >> Fill out all **GREEN** text boxes.

#### Amount In Query

Partner Workbook is required for both platforms. Select: EE >> Amount in Query >> Fill out all **GREEN** text boxes.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Billing

**Required:** Partner Workbook and any additional documents to support query i.e. bills, customer letter of Instruction.

### PROCESS

#### DD Amendment

Letterheaded, signed instruction letter indicating the new requested details. This must include customer name and EE account number.

Partner Workbook is required for both platforms. Select: EE >> DD Amendment >> Fill out all **GREEN** text boxes.

#### Online Billing / Bills

Online billing for EE is set up by the end user or partner. Chess support do not have the ability to set this up or reset password for the billing platform.

This will be required should you or the customer wish to access monthly billing.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Tariff Change

**Required:** EE Network Connection Form,  
Partner Workbook.

These can also be called through to the team (max. 5).

#### Sim Swap

**Required:** EE Network Connection Form,  
Partner Workbook.

These can also be called through to the team (max. 5).

### PROCESS

To establish the correct code please refer to **Partner Wise** for up to date tariffs and pricing.

Partner Workbook Select: EE >> Tariff Change >> **Tariff Change Form Link**.

Save and send all documents to your support team.

Partner Workbook Select: EE >> Sim Swap >> **Sim Swap Form Link**.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### **Bobs Report (Corporate Only)**

#### **Looking Glass Report (Small Biz Only)**

**Required:** Partner Workbook.

#### **Add / Remove Bolt On**

**Required:** EE Network Connection Form,  
Partner Workbook.

One off 30 day / non-chargeable requests can be called through. Re-occurring chargeable bolt-ons must be submitted on the form.

### PROCESS

Partner Workbook only is required.

**BOBS** Select: EE >> Bobs Report >> Fill out all **GREEN** text boxes.

**LG** Select: EE >> Looking Glass Report >> Fill out all **GREEN** text boxes.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

EE >> Add Bolt On >> **Bolt On (Add or Remove)**

Save and send all documents to your support team.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

### PROCESS

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#### Add / Remove Bars

**Required:** Partner Workbook.

These can also be called through to the team (max. 5).

Partner Workbook only is required.

Select: EE >> Bar type (Full, Roaming etc) >> Fill out all **GREEN** text boxes.

Save and send to your support team. Please place the customer name in the subject line of your email.

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#### Add / Change / Remove Divert

**Required:** Partner Workbook.

These can also be called through to the team (max. 5).

Partner Workbook only is required.

Select: EE >> Diverts >> Fill out all **GREEN** text boxes.

Save and send to your support team. Please place the customer name in the subject line of your email.



## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Add / Change / Remove Usernames

**Required:** Partner Workbook.

These can also be called through to the team (max. 5).

#### Account Address Change

**Required:** Partner Workbook, Customer letter of Instruction.

### PROCESS

Partner Workbook Select: EE >> Username >> **Username Form Link**.

Save and send all documents to your support team. Please place the customer name in the subject line of your email.

Letter of instruction must include: Old address info, the new details, account name and account number. It must be signed by the account authority.

Partner Workbook Select: EE >> Address Change >>  
Fill out all **GREEN** text boxes.

Save and send to your support team. Please place the customer name in the subject line of your email.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

#### Unlatch Request (Phone Unlock)

**Required:** Partner Workbook, Customer letter of Instruction, Network Form.

#### Check Warranty (Failed Device)

**Required:** Partner Workbook.

### PROCESS

Cost of unlatch is £8.99. Written confirmation (on letterhead) from the customer acknowledging the cost and acceptance of the charge which will appear on their EE bill. It can also only be actioned after being with the network 6 months or more.

Partner Workbook Select: EE >> Unlatch Request >> [Unlatch Request Form Link](#) >> Fill out all **GREEN** text boxes.

Save and send all documentation to relevant partner email.

Partner Workbook Select: EE >> Check Warranty (Failed Device) >> Fill out all **GREEN** text boxes.

Save and send all documentation to relevant partner email.

## How do I? – Processes and Forms

### REQUEST TYPE AND FORM REQUIREMENTS

### PROCESS

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#### PUK and PUK 2 CODE

**Required:** Partner Workbook.

Partner Workbook only is required.

Select: EE >> PUK Code (or PUK 2 Code) >> Fill out all **GREEN** text boxes.

Save and send to your support team. Please place the customer name in the subject line of your email.

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#### Disconnection / PAC

Small Business – Instructed by the customer to EE directly.

Corporate – Please contact your Partner Support team.

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#### Bereavement

**Required:** Death Certificate, Customer letter of Instruction.

This is due to be added to the next release of the partner workbook. Please contact support via phone for processing in the interim.

**Please note if the number is on a LTD account and is in a contract term, the LTD company is liable to continue the contract until it expires.**



# Additional Info – Spend Cap

## What is a Spend Cap?

A Spend Cap is an option you can choose to limit how much you spend on top of your monthly plan from certain types of included charges. A Spend Cap is a simple way you can take control of your charges and help avoid unexpected bills.

## What's covered by a Spend Cap?

- UK voice calls, UK text messages, UK picture messages, UK data run on rates, Calling abroad from the UK.
- Roaming voice, text and data.
- Access charges to premium numbers and numbers beginning with 09, 118, 083, 084, 085, 087, 070.
- Premium rate texts sent from your mobile.
- Call divert charges, Calls via text relay, Calls to 123, Calls to bypass services, 07744 and 07755 Paging services.
- Calls to satellite numbers and planes.

## What's NOT covered by a Spend Cap?

- Monthly plan charges, and other recurring charges.
- One-off data passes, Buying add-ons or extras, like extra minutes, BT Sport, Apple Music, or any purchase made via charge to mobile.
- Service charges for premium numbers and numbers beginning with 09, 118, 083, 084, 085, 087, 070.
- Premium rate texts you receive.
- Insurance.
- Admin fees.

This usage will be billed, even if an EE Business Spend Cap is in place.

# Additional Info – Spend Cap

## Is data included in the EE Business Spend Cap?

Depending on your EE Business plan, data usage can be capped in different ways.

### Non Business Connect

Data already has its own in-plan limit, and is separate from the EE Business Spend Cap. If you reach your in-plan data limit, buying a data pass allows you to use more data on top of your plan.

The cost of the data pass will always be added to your bill, even if you've reached your EE Business spend cap that month.

### Business Connect

If you reach your in-plan data limit, you can continue to use data at the charges detailed in your plan – what we call 'run on rates'.

These data charges will count towards the Spend Cap you set – so your data use could be limited in a month if all your out-of-plan usage combined adds up to your EE Business Spend Cap.

# Additional Info – Spend Cap

## Spend Caps – General Overview

A new OFCOM regulation called the Digital Economy Act is coming in to effect from 1st October 2018. The regulation states that communications providers for mobile services must not enter into a contract with a new or upgrading customer without giving them the option to set a monthly Spend Cap to cover certain types of charges over and above their standard price plan cost. It is applied on the EE connection template.

- New and upgrading customers must now be offered the option to set a Spend Cap.
- Customers can choose to opt-out and not have a Spend Cap.
- Customers will be able to add, remove and change their chosen Spend Cap in-life.
- Spend Cap will align to the bill cycle and refresh each time the plan renews.
- Customers will be notified when they reach 80% and then 100% of their cap.

**Once a customer has reached 100% of their Spend Cap they:**

- Will still be able to use any remaining inclusive allowances and free services.
- Will still be able to access chargeable services not included in the cap.
- Will not be able to use chargeable services included in the cap.

More detailed information can be found in this guide under: **Additional Info – Spend Caps**

You can also contact your Partner Support Team, CEL or Business Development Manager.





# Glossary

## QUERY / INFORMATION

## ANSWER

<b>How do I transfer old Orange / T-Mobile accounts into EE when re-signing?</b>	A process called a flag change is used when changing legacy Orange and T-Mobile accounts into EE Small Business or Corporate accounts. The process takes a max of 5 working days, so if you have any accounts ensure you factor this into your resign plans.  Please speak to your Business Development Manager to start the process.
<b>EE Coverage Checker</b>	<b>Check <a href="#">HERE</a></b>
<b>Product Code</b>	Tariff code found on <b>Partner Wise</b> .
<b>AGN</b>	Agreement Number, provided on completion of commissionable work.
<b>URN</b>	Transaction ID provided on completion of commissionable work.
<b>BPS</b>	EE Business Partner Support.
<b>CED</b>	Contract End Date.
<b>Bobs Reports / Looking Glass Report</b>	Corporate and Small Biz account overview reports.
<b>PAC</b>	Porting Authorisation Code. To take your mobile number to another provider = but terminate your contract with them.
<b>STAC</b>	Service Terminating Authorization Code. Given to a new provider to terminate the old contract and old number with a former provider.
<b>MPN</b>	Mobile Number Port
<b>CTN</b>	Customer Telephone Number

# Summary and Contacts

Should you find an EE query that is not covered by this guide or on the partner workbook, please notify your support team by phone. They will assist and instruct so you can continue with your query in the first instance and we will update our information to all partners accordingly.

If you have any issue completing the network forms or you require a training session for you or your teams please contact your partner relationship manager.

## Have a question for us?

### **Business Partner Support**

Telephone: 03301 598 025

Email: [businessPartner@chessPartner.co.uk](mailto:businessPartner@chessPartner.co.uk)

### **Premium Partner Support**

Telephone: 03301 598 026

Email: [premiumPartner@chessPartner.co.uk](mailto:premiumPartner@chessPartner.co.uk)

### **Elite Partner Support**

Telephone: 03301 598 027

Email: [elitePartner@chessPartner.co.uk](mailto:elitePartner@chessPartner.co.uk)

## Contacts

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