O2 Processing with **Chess Partner**

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Introduction to O2

Introduction to O2

This guide is designed to help submit your O2 work to the Chess Partner Support team.

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.

O2 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
- UK bank or building society business account statement
- UK business credit card statement
- Business utility bill (Gas, Water, Electric, Council Tax and Fixed telephone statements)
- Existing mobile phone bill (excluding O2 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

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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
- Spend Cap legislation states a discussion must be had with customers to help them to make a decision to benefit them. Please add Spend Cap information to the Purchase Order.

O2 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. O2) 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. Copies of this and all O2 forms are updated on our Airtime Resources section of the Chess Partner website.

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.

02 Processing Documents

O2 Automation Hub Guide

O2 have one billing platform for their business customers, keeping their tariffs easy to follow. Because of this, they keep the need for multiple network forms down.

O2 operate the majority of their ad-hoc and commissionable work on the Automation Hub.

This document covers everything from connections, ports and resigns to sim swaps, username changes and bars.

This document is updated every time new tariffs or promotions are launched.

For this reason it is important that the Chess marketing bulletins are cascaded round to process and support teams to ensure the work is processed right first time.

If you are ever unsure you can either check our Airtime Resources under the 'O2' section or check with your support team.

We have created a guide specifically on this to help you – '**How to Use O2's Automation Hub**'.

It features up to date instructions on all major actions and a photo guide to how the request should look so you can keep on track. If you require more help, you can request training on this, and any network process, by contacting your Partner Experience Leader.

O2 Credit Check – How To

On the O2 credit check form the bottom four tabs indicate the types of account you can credit check for.

Sole TraderPartnership	Charity	Limited Company	All Additional Lines

"All Additional Lines" is used for credit checking an existing O2 business account for extra lines, no matter the account type.

Please ensure that you fill out all boxes highlighted **Blue** or your request may be delayed.

We strongly advise the sending of proofs for all new account set ups.

This is Best Business Practice as it offers protection to you by further checking the end users information and business.

If you do not provide these, a credit check can be completed however should it defer, the request will go on hold until they are sent into the ticket.

Note: Any request over 14 lines will refer to Credit Management, which requires proofs by default.

Please ensure proofs are sent in all cases of 14 lines or more. *Failure to provide will result in a processing delay.*

A list of accepted proofs can be found on Page 5 of this guide.

Top Tip – *Please ensure you fill out the Tariff required box with the price as well as the tariff name.*

O2 Transfer of Ownership – How To

O2 Consumer to O2 Business

If a number is directly with O2 (consumer) and you're adding it to an existing O2 business account, follow the below steps:

Step 1 Send in the credit check form for however many lines on the existing business account. You use the 'additional lines' tab of the credit vet form for this. Wait the team response.

Step 2 Once approved and you have the BG reference (including the zeros), submit your TOO form on a new ticket. Ensure the billing addresses on both the 'Existing Customer' and 'New Customer' sections are exactly as per the O2 bills for both parties. TOO's have a 5 day SLA and incorrect addresses count for over 75% of rejections.

Top Tip *– The customer will be signed into a new 24 contract term (unless stated otherwise i.e. 36 months) along with the TOO, when moving consumer to business, so you do not need to submit an automation hub, but you do need to provide a network contract & PO. Ensure the 'TARIFF' section of the TOO is filled out with a valid business tariff.*

O2 Transfer of Ownership – How To

O2 Consumer to O2 Business

If a number is already held on an O2 Business account and you're adding it to an different O2 business account, follow the below steps:

Step 1 Send in the credit check form for however many lines on the gaining business account. You use the 'additional lines' tab of the credit vet form for this. Wait for the team response.

Step 2 Once approved and you have the BG reference (including the zeros), submit your TOO form on a new ticket. You only need to complete the DD section of the form if the business account is changing details.

If the number is still in contract, it is possible to move it without resigning. Do **NOT** fill out the tariff section in the 'new customer details' segment if this is the case.

If you are wishing to resign the number when it moves to its new account, wait for the TOO to complete and then submit an automation hub resign request for the number as per the normal resign process.

Failure to resign upon completion of the TOO process will mean it will NOT transfer to your revenue share code.

02 Step By Step Process Instructions

How Do I? – Processes and Forms

Request Type + Form Requirements	Process
Credit Check (See page 8) Required: PO + Proofs + Credit Check Form + O2 Contract + Partner Workbook	Partner Workbook select: O2 >> Credit Check >> Link to latest O2 credit check form 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 + Automation Hub + O2 Contract + Partner Workbook	Partner Workbook select: O2 >> Connections New Account >> Link to latest O2 Automation Hub Save and send all documents to your support team. Please place the customer name in the subject line of your email.
Existing Account Connections Required: PO + Automation Hub + O2 Contract + Partner Workbook	Partner Workbook select: O2 >> Connections Existing Account >> Link to latest) 2 Automation Hub Save and send all documents to your support team. Please place the customer name in the subject line of your email.
Upgrades / Resigns Required: PO + Automation Hub + O2 Contract + Partner Workbook	Partner Workbook select: O2 >> Connections Resign >> Link to latest O2 Automation Hub 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 + Form Requirements	Process
New + Existing Account Ports Required: PO + Automation Hub + O2 Contract + Partner Workbook	*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: O2 >> Connections Port New Account >> Link to latest O2 Automation Hub **OR** Partner Workbook select: O2 >> Connections Port Existing Account >> Link to latest O2 Automation Hub Save and send all documents to your support team. Please place the customer name in the subject line of your email.
Migration Required: PO, Automation Hub, O2 contract, Partner Workbook	Partner Workbook select: O2 >> Migration >> Link to latest O2 Automation Hub Save and send all documents to your support team.

How Do I? – Processes and Forms

Request Type + Form Requirements	Process
Transfer of Ownership (see page 9 & 10) Required: O2 Contract (if resigning at the same time) and/ or a customer letter of Instruction, Transfer of Ownership transfer form & Partner Workbook	Partner Workbook select: O2 >> Connections Transfer >> O2 TOO form Save and send all documents to your support team. Please place the customer name in the subject line of your email.
Billing Required: Partner Workbook & any additional documents to support query i.e. bills, customer letter of Instruction	**General Queries** Partner Workbook only is required for both platforms. Select: O2 >> Billing Query (Freetype) >> Fill out all GREEN text boxes. **Bill Date Change** Letterheaded, signed instruction letter indicating the new requested date or email thread. This must include customer account name and number and for email trails include the from and to email, date and time sent. Partner Workbook is required for both platforms. Select: O2 >> Billing Date Change >> Link to latest O2 Automation Hub **Amount In Query** Partner Workbook is required for both platforms. Select: O2 >> Amount in Query >> Fill out all GREEN text boxes.

Request Type + Form Requirements	Process
Billing Required: Partner Workbook & any additional documents to support query i.e. bills, customer letter of Instruction	**DD Amendment** Letterheaded, signed instruction letter indicating the new requested details. This must include customer name and O2 account number. Partner Workbook is required for both platforms. Select: O2 >> DD Amendment >> Link to latest O2 Automation Hub **Online Billing/Bills** Set up for MY O2 can be completed by supplying the below: End User access: Customer name, email, phone number and date+ time available to activate the link and pin. This can be called through to the team. Please note that the link and pin are only valid for 15 mins for security. We strongly advise you call through when your customer is ready to act. Reset links can be called through to the team. Admin Access: **Please call to set up End User access first.** Once an End User set up please submit a ticket for a billing request stating the account details, the end user set up information and this will be actioned. Admin access cannot be call through to the team as it must be sent to O2 for checks and process. *Please note in the case of a SPLIT account, we can only provide End User Access to show the numbers on Chess' base.* Using the Workbook, please enter the information into the 'Billing Query (Freetype)' drop down.

How Do I? – Processes and Forms

Request Type + Form Requirements	Process
Tariff Change Required: Automation Hub + Partner Workbook	To establish the correct code please refer to Partner Wise for up to date tariffs and pricing. Partner Workbook select: O2 >> Tariff Change >> Link to latest O2 Automation Hub Save and send all documents to your support team.
PAC & STAC Requests Required: Automation Hub + Letter of intent from customer *(typed, signed, dated)* *Only Bulk requests of 26+ are processed by Chess. Anything lower the customer contacts O2 by phone or live chat to receive their PAC.*	Partner Workbook select: O2 >> Sim Swap >> Link to latest O2 Automation Hub Save and send all documents to your support team. Please place the customer name in the subject line of your email.
DMG Request Required: Automation Hub **DMG reports are limited to 4 in a 12 month period.*	Partner Workbook select O2 >> DMG Report >> Link to latest O2 Automation Hub Information on the types of DMG available can be found in the Automation Hub guide. Save and send all documents to your support team.

How Do I? – Processes and Forms

Request Type + Form Requirements	Process
Add/Remove Bolt On Required: Automation Hub + Partner Workbook *One off 30 day/ non-chargeable requests can be called through. Re-occurring chargeable bolt-ons must be submitted on the form*	Partner Workbook select O2 >> Add Bolt On >> Link to latest O2 Automation Hub Save and send all documents to your support team.
Add/Remove Bars Required: Automation Hub + Partner Workbook *These can also be called through to the team (max. 5)*	Select: O2 >> Bar type (Full, Roaming etc) >> Link to latest O2 Automation Hub Save and send to your support team. Please place the customer name in the subject line of your email.
Add/Change/Remove Divert Required: Partner Workbook *These can also be called through to the team (max. 5)*	Partner Workbook only is required. Select: O2 >> 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 + Form Requirements	Process
Add/Change/Remove Usernames Required: Partner Workbook + Automation Hub *These can also be called through to the team (max 5)*	Partner Workbook select: O2 >> Username Change >> Link to latest O2 Automation Hub Save and send all documents to your support team. Please place the customer name in the subject line of your email.
Account Address Change Required: Partner Workbook + Automation Hub + Customer letter of Instruction	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: O2 >> Address Change >> Link to latest O2 Automation Hub Save and send to your support team. Please place the customer name in the subject line of your email.
Unlatch Request (Phone Unlock) Required: Partner Workbook + Customer letter of Instruction + Automation Hub	Partner Workbook Select: O2 >> Unlatch Request >> Link to latest O2 Automation Hub Save and send all documentation to relevant partner email.
Warranty Handset Replacement Required: Partner Workbook + Automation Hub	Partner Workbook Select: O2 >> Warranty Handset Replacement >> Link to latest O2 Automation Hub Save and send all documentation to relevant partner email.

How Do I? – Processes and Forms

Request Type + Form Requirements	Process
PUK & PUK 2 CODE Required: Partner Workbook	Partner Workbook only is required. Select: O2 >> PUK Code (or PUK 2 Code) >>>> Follow Link OR Fill out all GREEN text boxes (Puk 2) Save and send to your support team. Please place the customer name in the subject line of your email.
Disconnection Required: Partner Workbook + Signed Letter of Instruction (listing the numbers) + Automation Hub	Select: O2 >> Disconnection >> Link to latest O2 Automation Hub Save and send to your support team. Please place the customer name in the subject line of your email.
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.***

Glossary

Additional Info & Glossary

QUERY / INFORMATION	ANSWER
O2 Coverage Checkers	Check HERE
Network Fault Checker **Text alerts to the end user can be set up when reporting via this form.*	Check HERE
I need further help with the automation hub, can you help?	The Auto Hub guide has so much content, we made it it's own home HERE If you require further training or for a large group
Gateway report	Basic screen shot of the account. Requested by phone for up to 5 accounts at a time only.
ROE	Rules of Engagement request- please contact your team for support with ROE queries.

Summary

Should you find an O2 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 issues completing the network forms or you require a training session for you or your teams please contact your Partner Experience Leader.

Business Partner Support
Telephone: 03301 598 025
Email: businessPartner@chessPartner.co.uk

Premium Partner Support
Telephone: 03301 598 026
Email: premiumPartner@chessPartner.co.uk

Elite Partner Support
Telephone: 03301 598 027
Email: elitePartner@chessPartner.co.uk

Contacts

Hollie Jervis
Partner Experience Leader

Telephone: 0777 590 8228
Email: HollieJervis@chesspartner.co.uk

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.

How will a customer be alerted?

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.

Free of charge usage?

- Calls to customer services within the UK and Europe Zone
- Calls to customer services whilst roaming in Rest of the World
- Voice calls to Emergency Services
- NHS 111 Service whilst in the UK
- Pan European Helplines 116 calls to 0800 / 0808 whilst in the UK and Europe Zone

Additional Info - Spend Cap

What usage is covered by a Spend cap?

Any chargeable usage outside of the monthly allowance or outside of any Bolt On allowance such as::

- Additional calls, texts and data usage when your standard bundle or Bolt On allowance has run out.
- Calling and texting non-geographical or premium rate numbers aside from those premium rate numbers relating to charities which sit outside your Spend Cap, as set out below.
- Calling and texting any international number from the UK (unless international calling is included in your monthly allowance).
- Calling and texting any number outside of our Europe Zone (excluding the UK) when you're in our Europe Zone.
- Calling, texting and using data when you're in a country which is outside of our Europe Zone (excluding the UK).
- Calling directory enquiry services.
- The charge you pay to O2 for accessing any third-party services.

Additional Info - Spend Cap

What usage is NOT covered by a Spend cap?

- Recurring elements of bills such as your Airtime Plan, Device Plan, and insurance.
- The price for purchasing a Bolt On which you opt-in to e.g. Rest Of World Pass.
- Any charity donations made from your phone.
- Any charges relating to the management of your account which includes, but is not limited to, paper bills, itemised paper bills and late payment fees.