DIRECTV

L&I Dealer Process Document

L&I call center agents can resolve most opportunity/case escalations between 7AM EST & 11PM EST. They are available 24/7/365 for troubleshooting or account questions.

- The L&I call center customer contact number is **800/888 388 2505.** Payments can be made via the IVR.
- The L&I Dealer line is 888.275.5838. The commercial dealer line is: 844.389.5691
  - **Do not publish these to customer facing material or on websites. This is for dealer use only. Please use the dealer line associated with the correct account type.**
- **Receiver lists are required to place services in pending. Please email receiver lists to commercialdre@att.com at least 48 hours prior to installation.**
- Please do not copy more than one of the below support email addresses. This creates multiple cases, duplicates efforts and causes confusion.
- Weekend escalations. Contact the call center, if no resolution, please engage your ASM.

SFDCSupport@att.com **Think of them as Salesforce IT**. They **cannot** help you escalate OPS, cases or make account changes.	DRESFDC@att.com Internal DTV opportunity/ case escalation point of contact. **They do not make account changes**.	Commercialcontracts@att.com All account, programming and receiver list needs are handled by the Commercial Contracts team.	Commissionescalations@att.com. Questions or issues with dealer compensation.	Commercialvoice@att.com Change of ownership requests.	Retailservices@att.com See page 5.
• New DMP or dealer portal access requests • Password resets • Accounts missing from the dealer portal. • Error messages in Salesforce DMP/Dealer portal • Salesforce Reporting assistance or inquiries • Lead conversion errors • Re-open opportunities	• Opportunity rejection assistance • Case escalation assistance • Purged account escalation • Escalations for accounts in Design review • PTR Escalations	• Change request forms • Billing inquiries • Adjustment requests • Bill copy requests • Account corrections • Existing dealer's contact information • ECF Inquiries • Suspend requests (6- month max) CommercialDRE@att.com • DRE & COM receiver lists	• Dealer compensation inquiries • Compensation escalations • Compensation disputes • Internal dealer ID changes, they do not process property transfer requests. (PTR)	• Change of ownership paperwork, approvals and inquiries. Commercialoyalty@att.com • Disconnect requests. Please include the disconnect reason. Do not request a disconnect if a PTR is being processed.	• Dealer Demo and Showroom accounts. • Basic dealer questions • Dealer password related issues • Compensation website access • Dealer ID corrections. (Not PTR related)

Assistance with case escalation, opportunities in account creation or general account service is available M-F, 8-8 CST.

Dealer Support | DIRECTV FOR BUSINESS

Please do not provide this to customers.

September 2024

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Frequently Asked Questions (FAQ)

1. **How do I cancel or close an opportunity?** Move the opportunity to closed lost (cancel) or won (property activated) Contact SFDCSupport@att.com . with issues when moving an opportunity to closed. Once an opportunity is in build out, it is the dealer's responsibility to move it forward to close it.

2. **Do I create a new OP or change the one that is not correct?** Don't create a new OP. To reopen an opportunity, please include the opportunity. To have account corrections made, the OP stage must be opened to agreement negotiation or sooner. Email SFDCSupport@att.com to reopen.

3. **Lead conversion Errors?** Try to change the opportunity name slightly. Salesforce doesn't like opportunities with the same naming/address. If this doesn't work, reach out to SFDCSupport@att.com.

4. **Sales Stage Escalations?** Please see ***Sales Stage Guidance*** on pages 3 and 4, to determine who owns each sales stage and the correct escalation contact. – Note: The error message "You cannot skip sales stages in L&I", means you must choose the next stage in the flow.

5. **Retail Services/Dealer compensation Issues?** –Retail services can be reached by calling (800) 323-1994 **Hours**: M- F, 9:30 – 7:30 ET. Retail services does not process opportunities or make account changes. Compensation inquiries should be sent to Commissionescalations@att.com.

6. **Change of Ownership (COO)** – New COO requests & paperwork should be sent to Commercialvoice@att.com. If a COO has already been approved, please attach approval email to the opportunity and label the attachment as *COO Approved.* A PTR is not needed when there are new owners.

7. **Tax ID**- Tax ID Updates can be done when no COO is occurring by attaching the tax ID change form to your salesforce opportunity.

8. **Property Transfer Requests (PTR)** – Attach the latest version, include both pages of the form, don't forget to initial page 1. There is a five-day SLA for PTR approval. 3rd party billing accounts that include master billing, must transfer on the bill cycle day. Exceptions made in customer impacting situations only. If an opportunity needs a PTR approval/date escalated, please reach out to DRESFDC@att.com.

9. **Phased Billing** – New Construction only. Requires approval. Attach phased billing schedule and supporting documents to the opportunity. Select "no" if this does not apply to your opportunity.

10. **Tax Exempt –** DIRECTV agents cannot add tax exemption to accounts. Requests must be submitted via the Certify Tax website. Use the following link to create an account https://directv.certifytax.com/custportal.aspx. Note: Certify tax doesn't accept certificates via email, fax or US mail. Escalations can be sent to directv@certifytax.com.

11. **DRE 1 vs. DRE 2 –** DRE 1 is the billing account. Receivers are not activated here. DRE 2+ houses all receivers. Programming added when DRE 1 activates.

12. **Unit count reductions** – ASM/Director approval required for reductions of 5% or more. Please provide construction or other permitted documents as proof. Or proof that two accounts were combined into one and you are separating the systems.

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Opportunity Guidance

Standard (HTL) Business Model Opportunity Sales Stages – COM, Head-end

Opportunity Sales Stage	Stage Comments/Escalation Point of Contact	Stage Owner	SLA
Agreement Negotiation	Dealer Makes Changes to agreements and the opportunity fields at this stage. The dealer "owns" this sales stage.	**Dealer**	N/A
Phased Billing	Phased billing is almost always "no" – If "No" is chosen on the opportunity, this stage will be skipped automatically.	**Sales OPS/DRESFDC**	5 Days
Account Creation	Accounts are created, receiver lists are added. If the 24-hour SLA has not been met, reach out to the call center with any opportunity or case numbers on the L&I Dealer line or reach out to DREFDC@att.com. Allow 24 hrs. for email responses.	**Contracts Team**	1 Day
Build Out	This stage does not auto-skip as of 2024. If an account has purged, moved the account back to account creation and save, so the account can be re-created. Otherwise, move the Opportunity to closed won if the account/agreement has activated.	**Dealer**	1-90 Days
Closed Won	All work has been completed. SFDCSupport@att.com to re-open or change OP details.	**Dealer**	N/A
Closed Lost	This is how you "cancel" an opportunity. SFDCSupport@att.com for closed won/lost opportunity changes.	**Dealer**	N/A

*Reminder – You cannot skip sales stages. Always choose the next stage.

Helpful Opportunity Processing Tips

- To complete an opportunity, you must move it from build out to the next logical stage. In the extended queue, once moved from build out to the next stage, the remainder of stages complete automatically.
- Clearly Label all attachments on opportunities. **Example**: Receiver List, PTR Form, Agreement, COO approval email.
- Delete attachments that no longer apply or are invalid from the opportunity.
- Attach receiver lists in excel format to opportunities before moving to account creation. (If possible) **Programming/agreement terms cannot be added without receiver lists.**
- Receiver lists attached after the account creation stage will not be seen by agents, without an email case. Send receiver lists to CommercialDRE@att.com, 48 hours prior to install.
- **Activate at account creation or Place in pending?** If you do not need to dispatch or there is no new equipment, choose *"activate at account creation"* on the opportunity. Changes will go into effect immediately and there is no reason to call or email. If you choose "*place services in pending*", the new offer will not be activated until DIRECTV is contacted.
- Renewals with subsidy require new equipment.
- **Purged accounts** – Do not start a new opportunity – Pending services on both new and existing accounts purge at 90 days. This information can be quickly re-created with the same OP, if the agreement is still valid.
    - Email **CommercialDRE@att.com** and ask for the account to be re-built.
    - If in HTL Build Out, Move the OP back one stage to account creation. Place a note on the OP stating: *Account Purged – Please re-create account.*
    - Call the L&I Call center, provide your opportunity number, advise you need the account re-created because it has been more than 90 days and has purged.

- **LandISupport.att.com** – Dealer Training materials and guides – Request registration via the URL

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Extended (L&) Business Model Opportunity Sales Stages - DRE, FREE Equipment, AEP, Quick Connect

Opportunity Sales Stage	Sales Stage Notes/Escalation Point of Contact	Stage Owner	SLA
Lead/Site Survey	SFDC Dealer Admin – Dealer owns this stage.	**Dealer**	N/A
System Design	DSI, NACE, P10, PDI, Allbridge – **Contact your distributor for escalations at this stage.**	**Distributor**	3 Days
Design Review	If the 3-business day SLA has not been met, reach out to DRESFDC@att.com **.** They will reach out to the field services team on your behalf.	**Field Services – DRE SFDC**	3 Days
Agreement Negotiation	Dealer Makes Changes to agreements and the opportunity fields at this stage.	**Dealer**	N/A
Phased Billing	**Phased billing is almost always "no"** – If "No" is chosen on the opportunity, this stage will be skipped automatically. DRESFDC@att.com can escalate approvals. If you chose yes in error and it's stuck in the wrong stage, email SFDCSupport to change to this field to "No"	**Sales OPS - DRESFDC**	5 Days
Agreement Review	Anytime an OP is resubmitted from negotiation, allow one day for review. DRESFDC@att.com for questions on agreement rejections.	**Contracts Team**	1 Day
Agreement Approval (PTR)	This stage is used for PTR approvals and has a 5-business day SLA. This stage is skipped if no PTR is required. DRESFDC@att.com for escalations out of SLA.	**OPS - DRESFDC**	5 Days
Account Creation	Accounts are created, receiver lists/programming are added. If the 24-hour SLA has not been met, reach out to the call center with any opportunity or case numbers on the L&I Dealer line or escalate to DRESFDC@att.com. Allow 24 hours for email responses.	**Contracts Team**	1 Day
Equipment Ship	DSI, NACE, P10, PDI, Allbridge – **Contact your distributor.**	**Distributor**	2 Days
Build Out	This stage may auto-skip by Salesforce. Dealers can move the stage back to build out and save, if a distributor needs it back	**Dealer**	1-90 Days
Closed Won	This means all work has been completed. SFDCSupport@att.com to re-open or correct opportunity details. See FAQs. CommissionEscalations@att.com for dealer compensation questions.	**Dealer**	N/A
Closed Lost	This is how you "Cancel" an opportunity. Contact SFDCSupport@att.com for closed won/lost opportunity changes.	**Dealer**	N/A

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Dealer compensation process and tips:

1. **Please verify the commitment code is active before the end of the month in your dealer portal. (steps on next page)**
   a. If you do not see a commitment active on the account, use dealer chat to confirm activation and refresh the portal.

2. **If you see a discrepancy with commission or want to confirm accuracy of a compensation item, open a ticket on** SAP SuccessFactors Incentive Management (callidusondemand.com) . Please allow up to 21 business days for resolution.
3. **If you would like to discuss your concern with a commission SME regarding 1:1's, follow-ups, or second reviews you can email commissionescalations@att.com.**
   a. 2nd Level escalation - Manager and lead review: Issues pending a resolution should be sent to Manager Stephanie Abbink and Lead Jennifer Larson. Please include the DIRECTV Commission case number.
   b. Director Review (3rd level): Long standing issues pending a resolution or no response on follow-ups with manger and lead should be sent to Gabe Ruiz.
4. **The Retail services call center team can answer general compensation questions, here are a few examples:**
   a. What would I be paid for a 150-unit property that takes a specific national offer?
   b. How do I access DTV Comp?
   c. How do I find my quick pay or CSF reports?
   d. I need my password or password reset for DTV Comp.

Dealer actions that could prevent commission from occurring:

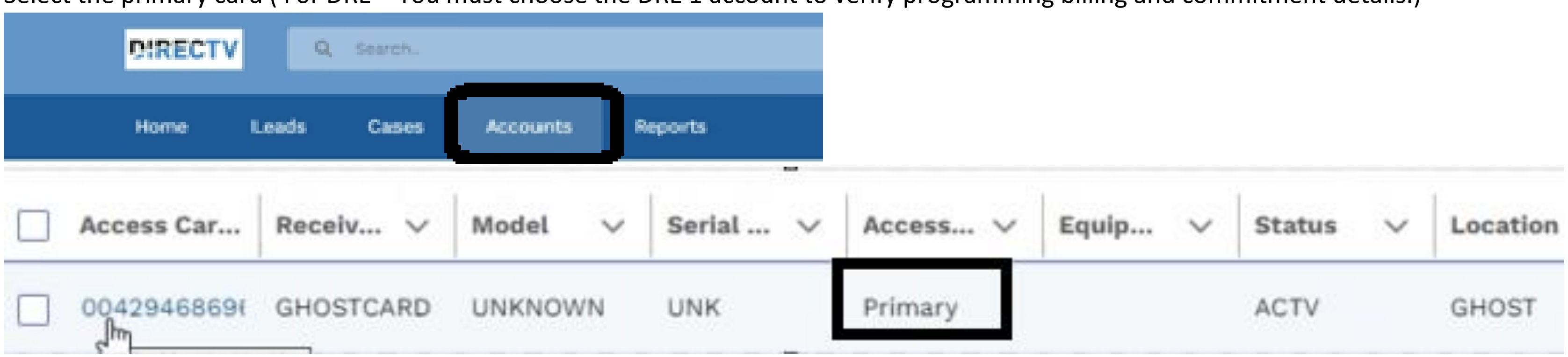
1. **Suspending an account within the first 7-14 days of activation**
   - Accounts must remain active for 2 pay cycles to qualify for compensation. Suspend is a non-commissionable status. Pay cycles are Thursday of each week.
2. **Account Conversion – This includes Fraud/DRE to COM and COM to DRE**
   - Compensation will need to be paid manually in all instances of an account conversion. This includes fraud conversions or converting an existing account to DRE on a 3 year, that is keeping the same equipment.
3. **PPC paid on original sale and customer renewed or changed services within the existing "PPC Duration" window.**
   - PPC will not pay automatically if a new/different agreement is added within 12 months of the original offer that was activated. A manual request must be submitted.
   - If a customer installs a COM or DRE and needs to change to a different system within the first 12 months, manual compensation must be submitted.
4. **Opportunity: Dealer action not completed in SFDC**
   - Call/email/chat not placed to activate a new or renewing agreement.
   - Equipment list was not attached to the opportunity.
   - Incomplete paperwork/rejections were not addressed.
   - Opportunities have not been moved to a closed/won status. – If an opportunity is moved to closed/won, it does not activate anything. Only the L&I call center teams can complete this action.

- Activating equipment before processing an opportunity.
- MSA Brand/Chain information must be provided on both the Dealer Checklist and any discounts must be written in on the agreement. If the non-discounted programming package is selected on the agreement in error, this will cause compensation delays. Please include the correct MSA discount.

5. **Past Due Balance on Existing Accounts**
   - New commitment offers and account changes cannot be completed if the account has a past due balance.
6. **New Account Activations: Missing information or Incorrect Commitment Offers**
   - New accounts missing the commitment offer are paid a $5 PPC, vs. the expected amount.
     - **At activation, please verify all offers and programming were added to the account. The dealer portal displays all services activated or you can confirm via dealer chat.** This includes Premium Channels, Jumbo Property Bonus (Large Property Credit) Strategic Brand Bonus (Correct MSA Programming Packages).

Dealer portal steps to confirm a commitment is active:

- Login to the dealer's portal in Salesforce 360.
  https://directv360.my.site.com/dealer
  - Click Accounts
  - Change the dropdown to "view all accounts".
  - Choose the account you wish to verify.
  - Click on view Equipment & Services
  - Select the primary card (For DRE – You must choose the DRE 1 account to verify programming billing and commitment details.)



- Scroll until you find the commitment. Commitment service codes always start with B. Verify the commitment is ACTV and the date it activated. You can also verify programming and premium channel status here. If you don't see a commitment code, try to "Refresh" the account. There may be a slight delay. If you still don't see it, call or chat to activate/verify the commitment.
  - It can take up 24 hours for the portal to be updated post activation. Please press account refresh if you aren't seeing the details and wait 24 hours.

Equip & Services > 004294691755

Programming

23 items • Sorted by Product Status • Updated a few seconds ago

	Programming Name	Service C...	Price/O...	Price	Sales Tax	Total	Produ...	Activation ...
14	HBO & CINEMAX HD_CMSTV	P102504	1	$0.00	$0.00	$0.00	ACTV	6/1/2016
15	Entertainment_L&I AddOn	P103213	1	$0.00	$0.00	$0.00	ACTV	6/1/2016
16	Entertainment HD_L&I AddOn	P103214	1	$0.00	$0.00	$0.00	ACTV	6/1/2016
17	Entertainment 1s_CmSTV	P103323	1	$0.00	$0.00	$0.00	ACTV	7/14/2021
18	Entertainment 10s_CmSTV	P103324	5	$375.00	$0.00	$375.00	ACTV	7/14/2021
19	Entertainment HD_CmSTV	P103327	1	$0.00	$0.00	$0.00	ACTV	6/1/2016
20	Local Channels_CmSTV No BP	P102647	3	$0.00	$0.00	$0.00	ACTV	1/17/2021
21	Please see the	B5609	16	$0.00	$0.00	$0.00	DISC	12/7/2021
22	5yrProgramming_TrackingHTL	B103333	4	$0.00	$0.00	$0.00	ACTV	6/1/2016
23	SD to HD Migration_Off Commit	B105208	1	$0.00	$0.00	$0.00	DISC	3/22/2019

5yrProgramming_TrackingHTL

Please confirm the commitment is ACTV and that your opportunity has been moved to closed/won for proper compensation. Commitments can also be confirmed by contacting dealer chat support.