
Telstra Enterprise – Telstra Order Exchange (TOX) Customer Portal

Adaptive Mobility Fund (AMF)

Business unit
Telstra Enterprise

Issue date
7/08/2026

Document ID
CP21

Audience

Enterprise Customers using Telstra Order Exchange (TOX) Customer Portal.

Summary

The purpose of this document is to provide an overview of the Adaptive Mobility Fund in Telstra Order Exchange (TOX):

- Adaptive Mobility Fund and Offers
- Adaptive Repayment Option
- Adaptive Mobility Fund Contributions
- Adaptive Mobility Fund and Telstra Order Exchange (TOX)
- Customers Adaptive Mobility Fund - Redeeming funds
- Adaptive Repayment Option partially charged to the Adaptive Mobility Fund
- Adaptive funds reporting

Definition of Terms:

- **AMF:** Adaptive Mobility Fund
- **ARO:** Adaptive Repayment Option covers both hardware and accessories.

Adaptive Mobility Fund:

The Adaptive Mobility Fund can be used to redeem eligible hardware/devices and accessories.

Telstra may, at their discretion:

- Move a customer's Adaptive Mobility Fund balance to another program at a determined multiplier, in which case the terms of that program will apply to funds transferred
- Suspend contributions or redemptions
- Claw back any contributions made
- Determine the products and services that will contribute and can be redeemed

CP21 Adaptive Mobility Fund (AMF)

Important: Split fleet customers

Customer who chooses to split their fleet and have some services under a DSA (Digital Service Agreement) on adaptive mobility and other services under a panel agreement/CSA/BSA on other plans may have separate fund balances.

Adaptive Mobility Offers:

A customer qualifies for the Adaptive Mobility Fund when they are on Telstra Adaptive Mobility plans under a Digital Service Agreement, are onboarded into Telstra Order Exchange, and have active services that generate agreed monthly or upfront contributions into the fund.

Purchases that contribute to the Adaptive Fund	Purchases that can be used for redemption of an Adaptive Fund balance
This example is based on standard pricing (OCT). If a customer has <u>100 active</u> Adaptive Mobility Services on the \$55 plan on the 1st of the coming month, 10% of the total will be paid to the Adaptive Mobility Fund. e.g. $100 \times 55 = \\$5,550$ $10\% \text{ of } \\$5,550 = \\$550$ \$550 will be contributed to the Adaptive Mobility Fund	Outright mobile hardware and accessories
The plan rate excludes any optional bolt-ons purchased by the customer	Adaptive Repayment Option (ARO)

Adaptive Repayment Option (ARO):

Adaptive Repayment Option (ARO) is a payment option for the purchase of hardware and accessories where monthly payments are made over 12 or 24 months based on the full RRP. ARO is charged at account level and not at service level, thus purchases can be made for hardware and accessories without having to purchase a plan at the same time. *

- *It is a requirement that the number of devices purchased on an ARO must not exceed the number of services connected on Adaptive plans under the customer's CIDN. Therefore, at the time of purchase the customer may be required to purchase a plan with an ARO to meet this condition (only applicable to devices).
- All Adaptive repayment options are charged at the first of the month and there is no pro rata.
- Any ARO enabled customer will be able to order any accessory with no restrictions on the quantity, provided that the Recommended Retail Price (RRP) of the accessory is >\$24. All accessories less than \$24.00 can be purchased outright.
- An accessory must be >\$24.00 to be eligible for ARO.

Adaptive Mobility Fund Contributions:

There are two (2) ways funds can be contributed to a customer's Adaptive Mobility Fund in Telstra Order Exchange (TOX):

- Monthly Contribution **or**

CP21 Adaptive Mobility Fund (AMF)

- Upfront Contribution (requires pre-approval)

Note: By default, all Adaptive mobility customers will receive a monthly contribution unless an upfront contribution is pre-approved by Telstra.

Monthly Contributions

If the Customer's policy includes monthly contributions, the accrued amount/rebate will be allocated to the Adaptive Mobility Fund (in TOX) on the first calendar day of every month based on a set of rules that has been set up for each Customer.

The standard default contribution is 10% of the customer monthly plan amount e.g. a \$55 Adaptive plan contributes \$5.50 per month into the customer's Adaptive funds balance. However, Telstra may approve a different contribution amount for eligible customers.

Upfront Contributions

- Require Telstra pre-approval through the Telstra salesperson.

Contributions Expiry Date:

- Each contribution made will have an automatic expiry date of 12 months i.e. Funds not used within the agreed active period will expire. If the contributions are not redeemed within the specified period of time, i.e. 12 months, the remaining funds will expire.
- In the event that the default term of 12 months is different to the agreed expiry date upon the signing of the contract, the actual expiry date will be detailed in the policy that is assigned to that customer.

Important to Note: What happens to the contributions if the customer cancels their plan(s) mid-month?

- There is no pro rata calculation of contributions in the event that a plan(s) is cancelled during the month
- Telstra Order Exchange will look at how many plans the customer has active at the end of each month and then based on that information and on the first calendar day of each month Telstra Order Exchange will contribute into the customer's fund. E.g. customer has 100 plans and cancels 50 plan mid-month; the contribution will be based on the remaining 50 plans.

Adaptive Mobility Fund and Telstra Order Exchange:

Telstra Order Exchange (TOX) will:

- show the customer the Adaptive Mobility funds balance in real time
- automatically debit the balance in real time for the customer after they have made an eligible purchase
- every month automatically increment the customer's balance on the first day of each calendar month based on the number of adaptive mobility plans that are active
- monitor the number of services in line with the customer's policy

In Telstra Order Exchange (TOX), customers will:

- be set up by default with a fund in Telstra Order Exchange (TOX), initially that fund will be zero dollars
- be able to see in real time, as they are making a purchase of hardware, what funds they have in their balance which they can select to draw down from to offset the cost of the product

CP21 Adaptive Mobility Fund (AMF)

- give the customer the ability to download the report of their balances and what transactions have occurred

Note: The funds are loaded into the customer's fund in Telstra Order Exchange (TOX) as excluding GST, but the customer will see including GST.

In Telstra Order Exchange (TOX), there are three (3) statuses for a fund:

1. Active
2. Suspended
3. Expired

Suspended

Non-OCT: The fund is on hold because the customer has not met the eligibility requirements for that fund as per their policy.

Example:

A customer has an upfront policy which states that they must have 100 active services in order to receive the upfront agreed contribution of \$10,000. Telstra Order Exchange will monitor the policy and if it falls under the 100 services, Telstra Order Exchange will suspend the balance or any balance of the fund that they have not drawn down on until the minimum requirements are met.

Customers Adaptive Mobility Fund - Redeeming Funds:

When a customer purchases eligible products or services and they wish to redeem contributions from their Adaptive Mobility Fund, they can choose either to:

- a) offset the entire cost of the hardware using their Adaptive funds balance, **OR**
- b) partially offset the cost of the hardware using their Adaptive funds balance

Note:

- A customer must have enough funds to redeem against a purchase
- Telstra will provide customers with a real time view of their Adaptive Mobility fund balance at the time of the order
- Redemptions will show as an upfront credit on the customer's invoice, e.g. customer purchases a \$1200 device on ARO over 24 months @ \$50 per month and offsets the entire cost of that device using their Adaptive funds. In this case the customer will be issued an upfront credit of \$1200 on their account and will be charged \$50 per month for the ARO.

CP21 Adaptive Mobility Fund (AMF)

When a customer chooses 'Purchase with Adaptive Repayment Option' they will then be required to select the payment term

Information about the purchase(s) and the payment option will be available in the Shopping Cart

Adaptive Repayment Option Redemption:

- When entering the amount of funds to redeem against an ARO purchase, this is the amount that will be applied as an upfront credit on the customer's account to offset the monthly device repayments eg customer purchases a \$1200 device on ARO over 24 months @ \$50 per month and offsets the entire cost of that device using their Adaptive funds. In this case the customer will be issued an upfront credit of \$1200 on their account and will be charged \$50 per month for the ARO.

A Customer can choose to redeem funds using Adaptive Mobility by entering an amount up to or equal to the RRP of the device. E.g. this device has been added by selecting ARO over 12 months which has an \$84 monthly cost which equates to \$1008. In this case an upfront credit of \$1000 will be applied on the customer's billing account to offset the monthly payments of \$84.

Adaptive Funds are redeemed at account level. The redeemed fund amount will remain as a credit on your account until consumed by all monthly charges on that account.

CP21 Adaptive Mobility Fund (AMF)



Home Services Tracking Tools Start order

JohnCPM CustomerTest

Home / Device / APPLE IPHONE 11

Item(s) (Inc GST)	Monthly recurring fee \$84.00	One - off fee \$0.00	First month fee \$84.00
			Over the term device fee (12 Months) \$1,008.00

Billing options

Billing options

Billing account

(Test_MICA_uat)

Adaptive Mobility Fund redemption amount

Current Adaptive Mobility Fund Balance: \$2,078.00 (Inc GST)

Promo code

Validate promo code

E.g. this device has been added by selecting ARO over 12 months which has an \$84 monthly cost which equates to \$1008. In this case, the customer did not redeem any funds to pay for the ARO monthly repayment.

Adaptive Funds are redeemed at account level. The redeemed fund amount will remain as a credit on your account until consumed by all monthly charges on that account.

Adaptive Funds Reports:

Adaptive funds reports are available to customers under the reporting section. Please view section TOX Reports.