
Telstra Enterprise – Telstra Order Exchange (TOX) Customer Portal

Ordering New Devices with Plans and Using Adaptive Mobility Funds (AMF)

Business unit
Telstra Enterprise

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Document ID
CP08

Audience

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

Summary

This document provides detailed instruction on how to purchase new devices with plans and using Adaptive Mobility Funds (AMF).

Note: These screens have been recorded using the Telstra Admin access. The screens may vary depending on the assigned role type and user permissions.

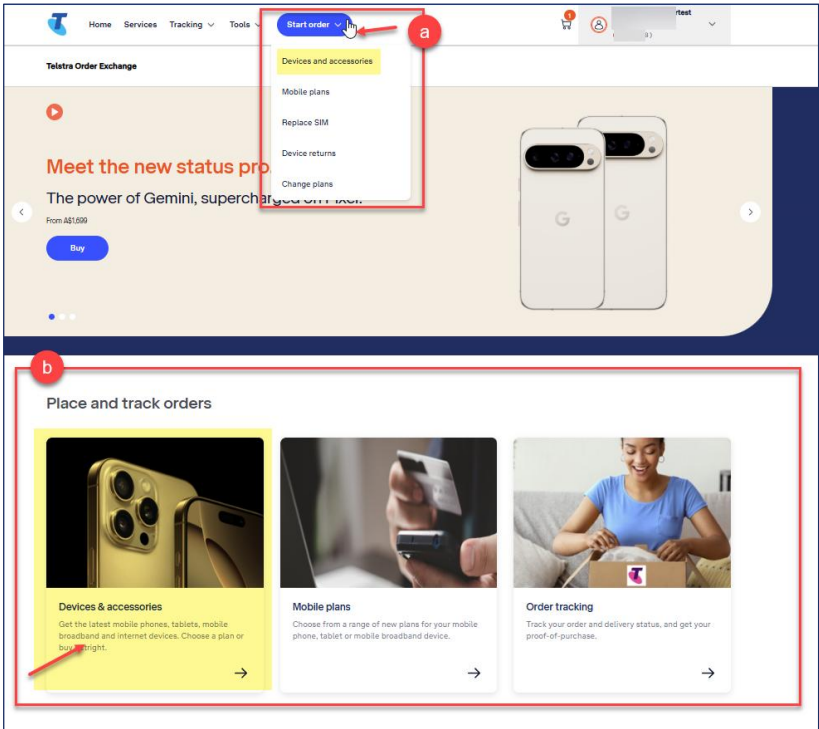
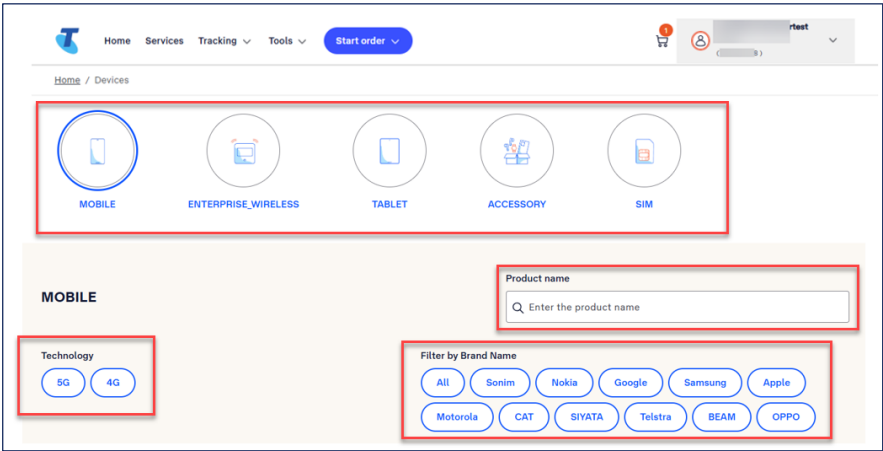
Business Rules:

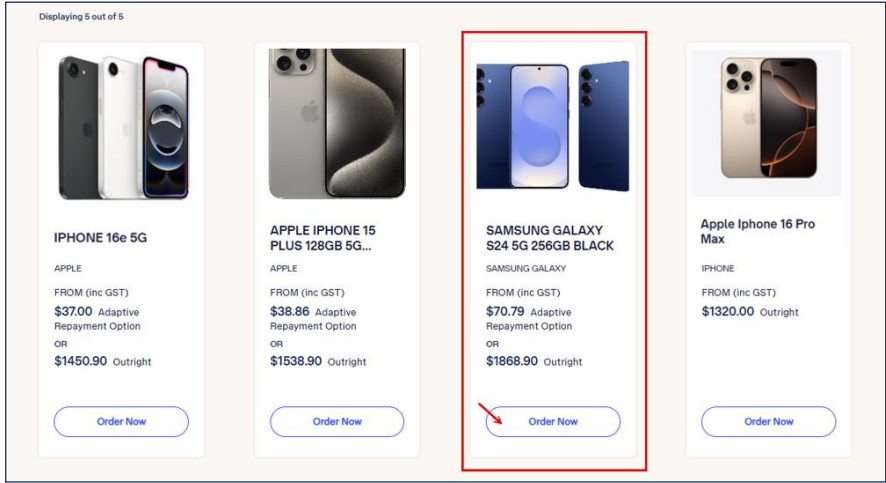
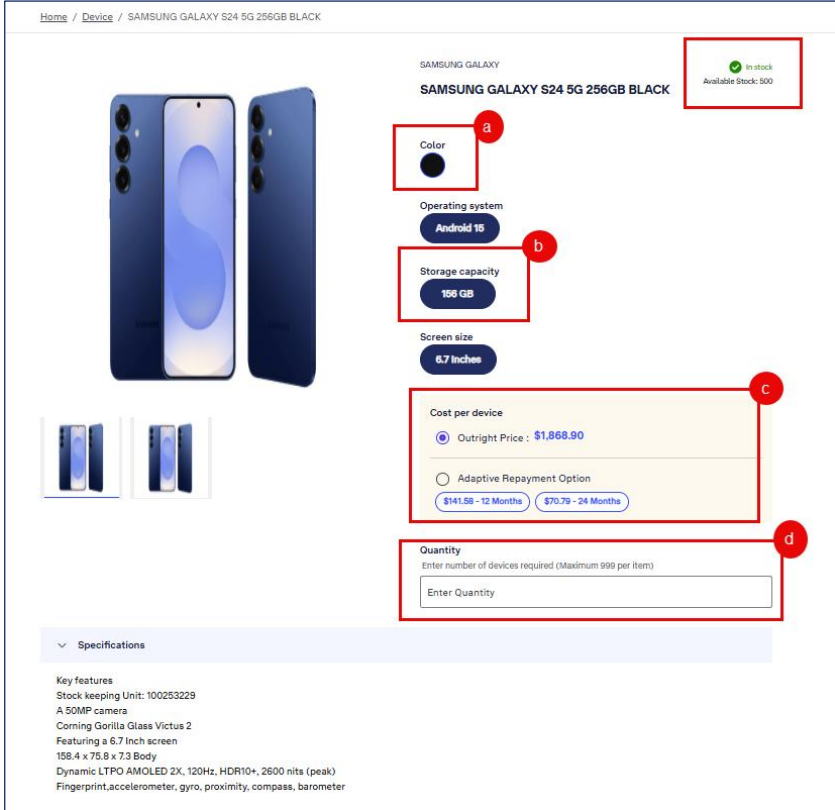
- Stock levels in TOX is a live feed and can change rapidly based on ordering activity. All stock levels in TOX are an approximation at the time of order confirmation and are based on Enterprise TOX.
- Stock Level Indicator will be shown during the ordering process. This is based on the stock thresholds set on a per SKU level. Below is the stock level indicator definition to guide you when placing an order.
 - **In Stock** (✓) – example is when a threshold is set to 1500 units, and the available stock in the system shows 1501 units and above.
 - **Low Stock** (i) – example is when a threshold is set to 1500 units, and the available stock in the system shows 1499 units and below.
 - **Out of Stock** (▲) – this is when the available stock in the system reaches 4 units and below or stocks are in backorder.
- TOX looks for a stock indication within the 'Configure your device' screen and within the 'Checkout' screen ensuring an updated stock status in the event the items are left in the cart for a period of time.
- Stock is allocated after the order is submitted.
- In the event the order requires approval, once the order is approved (by the Customer Admin) the order will proceed to stock allocation based on updated levels. In the event the required stock is not available the order will move to Backorder status.

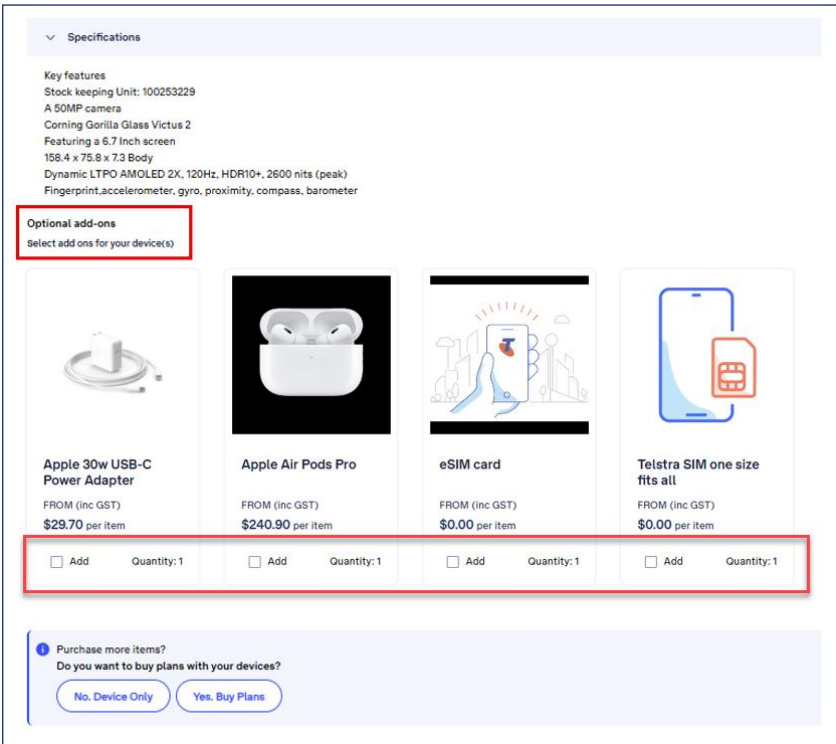
- ARO (Adaptive Repayment Option) and Leased order types will only show the TOX order number and NOT your Customer PO number within the bill if order is processed automatically. This is when there is a unique PO reference number being used for these 2 order types.
- Any ARO enabled customer will be able 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 must be purchased outright.
- An accessory must be >\$24.00 to be eligible for ARO.
- Other order types such as normal outright order, will show Customer PO number if there is one entered by the user. Otherwise, TOX order number will be reflected on the bill.
- All **new LANES** customers will now require a minimum 50 services as part of the initial activations via Telstra Order Exchange (TOX). After the initial 50 LANES services become active, there is no further quantity limitation in placing a LANES service order (any quantity configuration between 1 to 5000).
- **Existing LANES** customer or for customers who already have LANES, the new minimum activation requirement is not applicable.

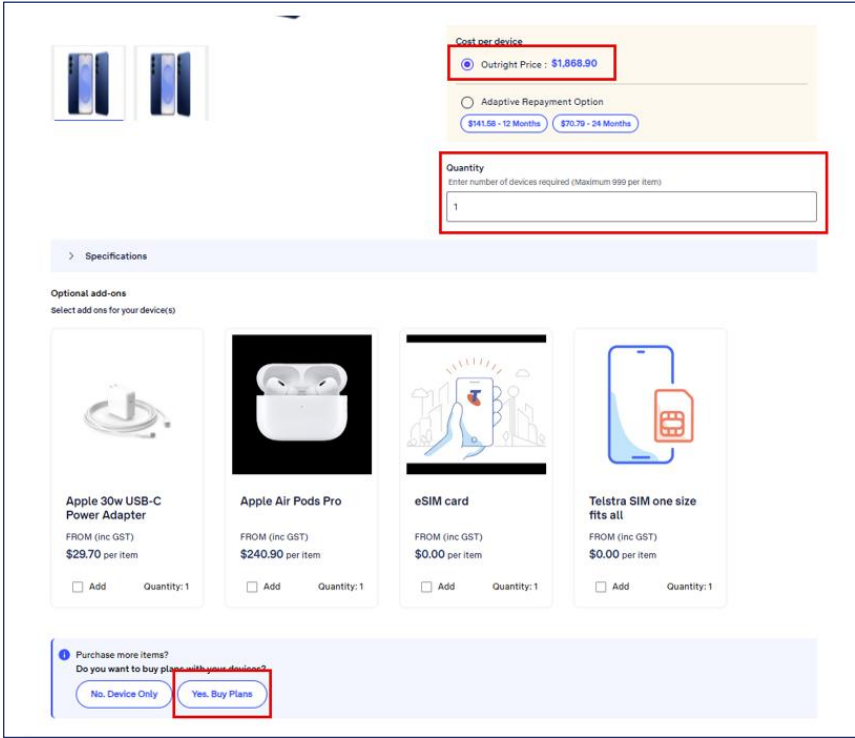
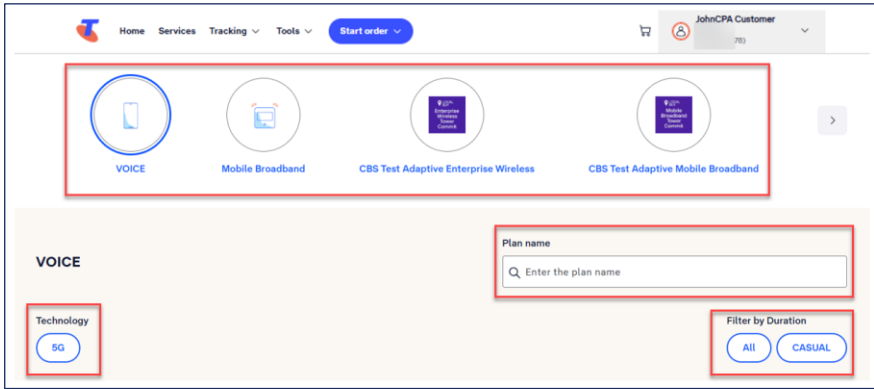
Payment Terms Definition:

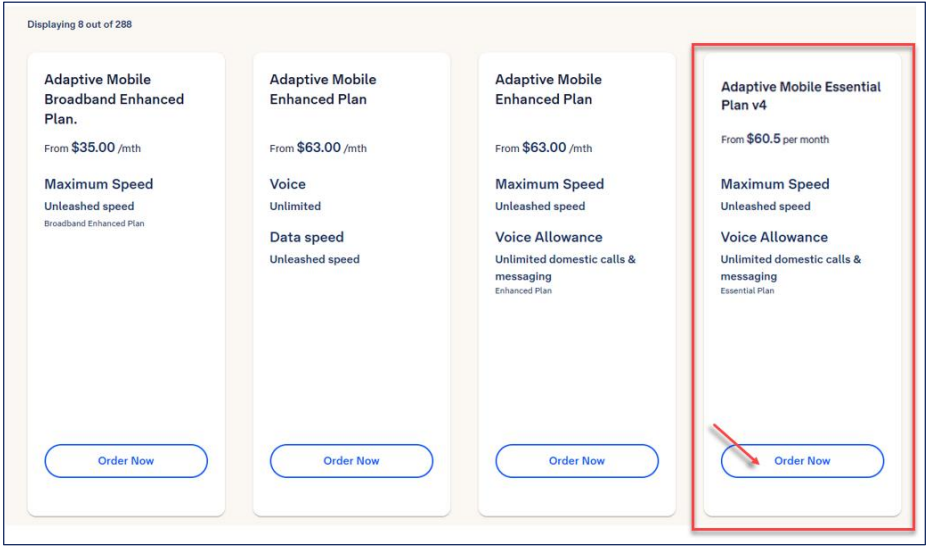
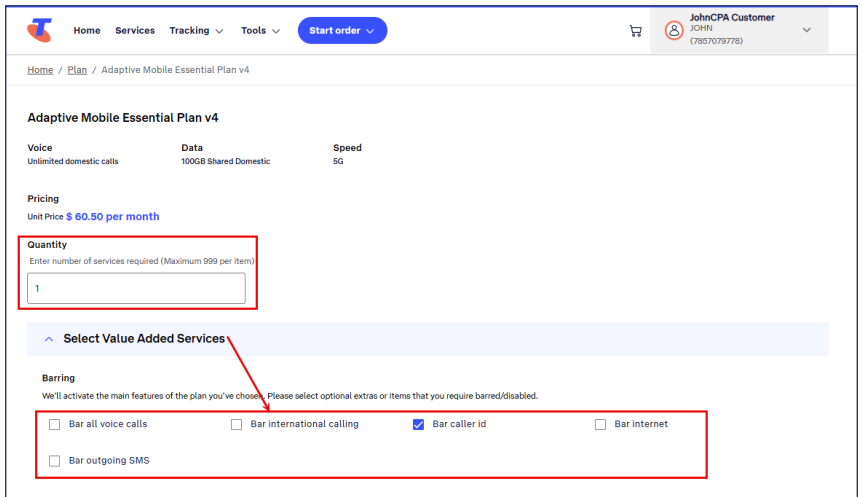
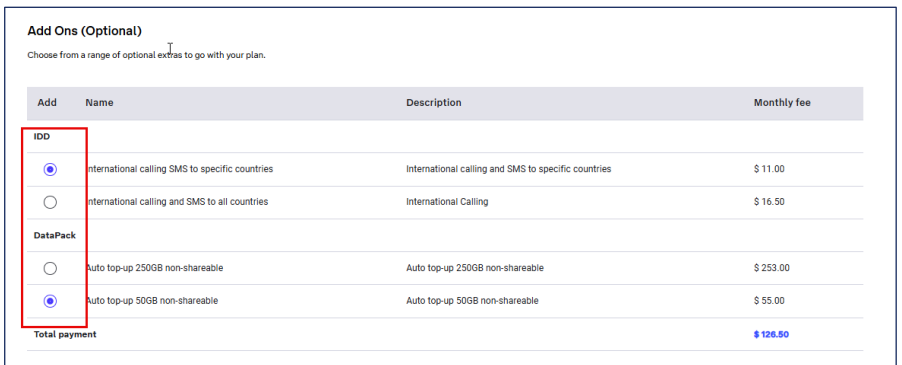
- **Outright:** Buy a device outright and you own it.
- **Adaptive Repayment Option:** Repay the recommend retail price (RRP) of any eligible device or accessory over either 12 or 24 months.

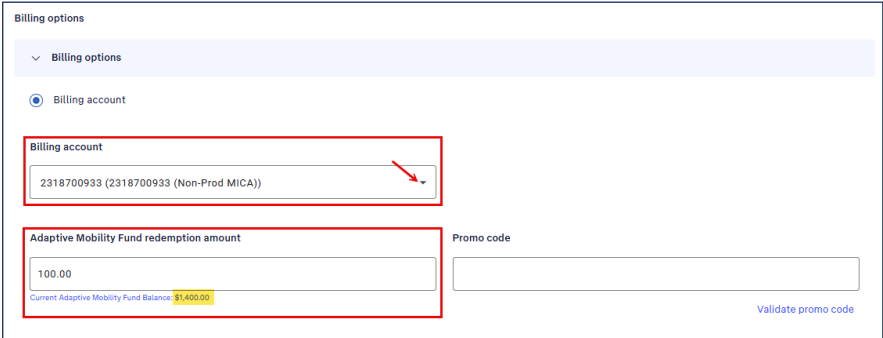
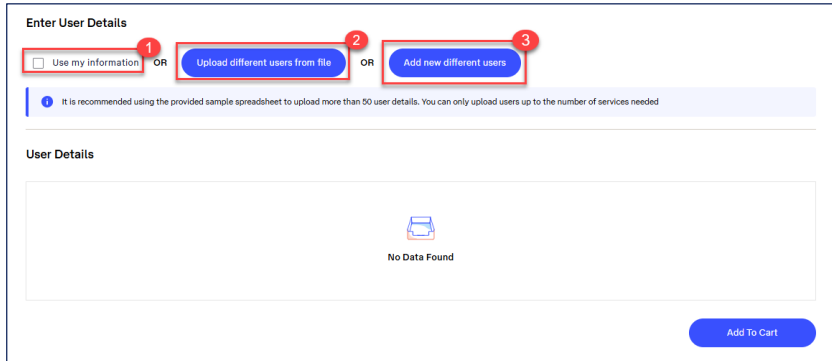
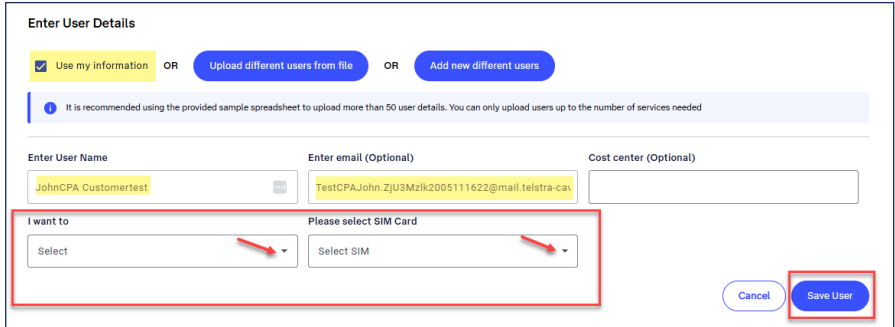
Step	Description	Detailed Actions
1	On the Home page, there are 2 ways to place an order: a) through the Start Order menu dropdown b) through the tiles under Place and Track Order section In this scenario, click on Devices and Accessories. You will then get navigated to the product ordering catalogue page.	
2	Click on the device type to see the range of products. Filtering options as per below: - Select 5G or 4G network as desired. - Choose a brand or select All to view the complete range. - Or you can type in the product name on the search field.	

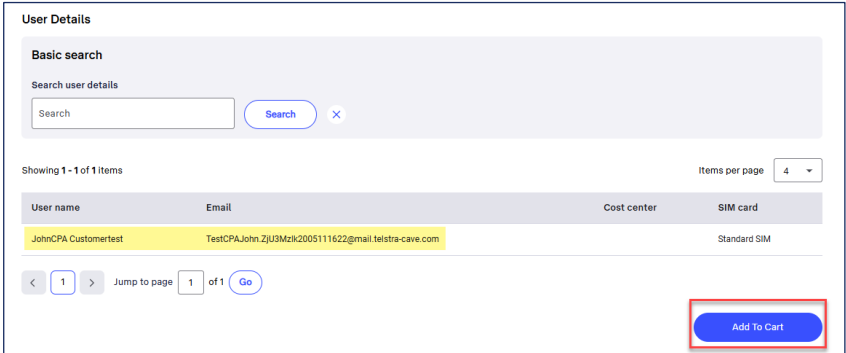
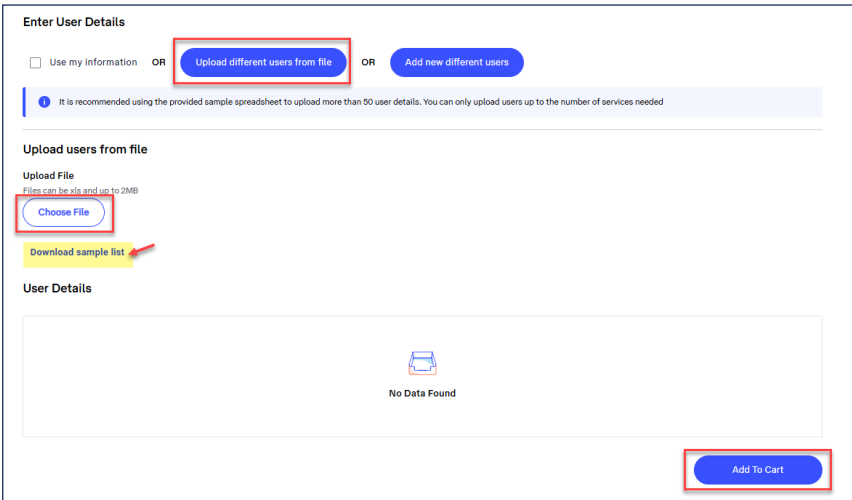
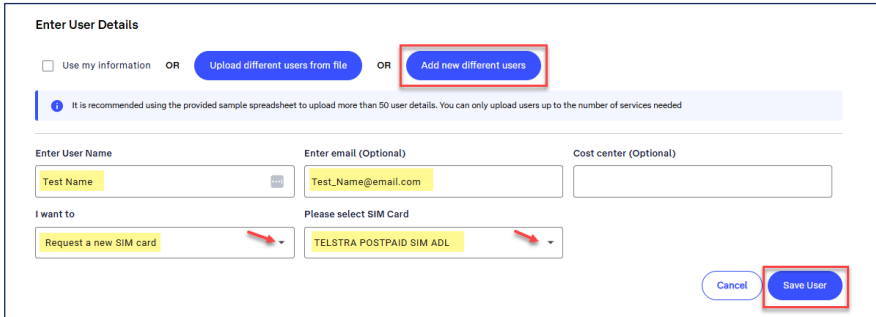
Step	Description	Detailed Actions
3	You will then be presented with the list of devices based on your selection in the step above. Select the device you need to purchase by clicking on the corresponding Order Now button. In this example, we choose Samsung Galaxy S24 5G Black. Note: Each device specifies a buying option i.e. Outright, Adaptive Repayment Option, etc. with the corresponding amount for each payment option.	
4	Configure your device and select payment option: - Select the colour (where applicable) - Choose the storage capacity (where applicable) - Select your preferred Payment Option term (please refer to the payment terms definition section on top of this document) - Enter Quantity Notes: - There is a stock indicator on the top right of the page as highlighted. - Maximum order quantity depends on the unit price of item you are ordering: - o More than \$0, maximum order qty is 999 - o If it is amounting to \$0, maximum order qty is 5000 - In the event you enter a quantity over maximum order limit, TOX will show	

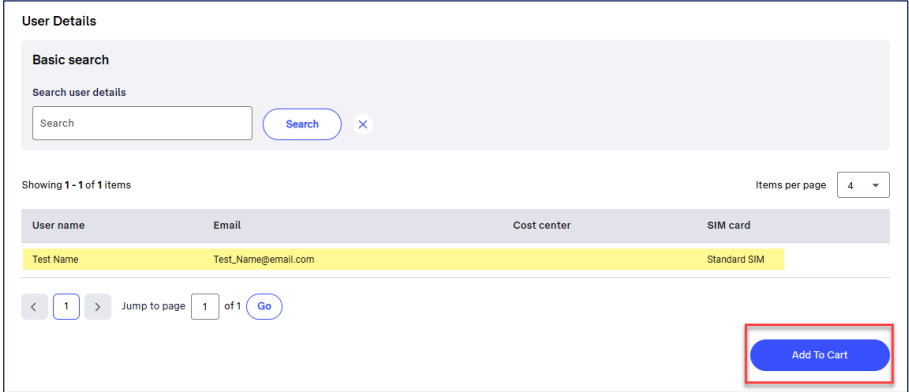
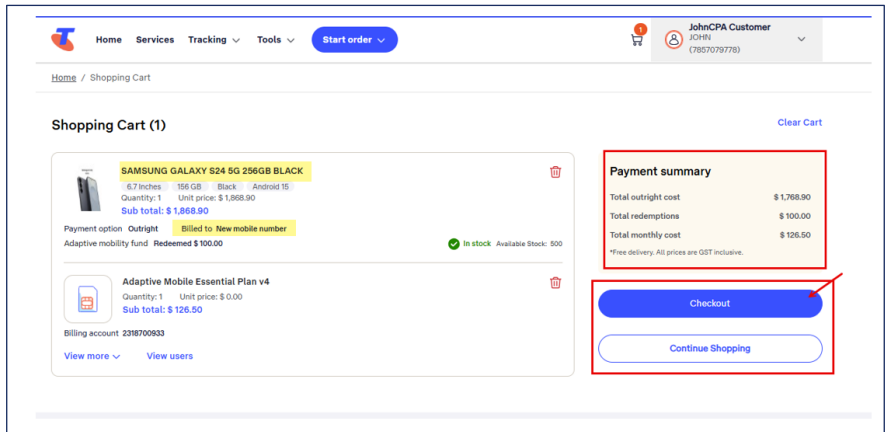
Step	Description	Detailed Actions
	an error message in red text. - If the device/item is out of stock, there is a stock indicator warning that will show on the upper right of this page (⚠️ Out of stock). - If the device is out of stock, you can: ➤ Choose a different device, or ➤ Order the item now and receive it at a future date.	
5	Optional add-ons Some devices might have options to purchase add-ons for your chosen device. If you wish to purchase tick Add as indicated for each accessory identified. Note: Quantity for the selected accessories gets defaulted based on the quantity inputted in the step above.	

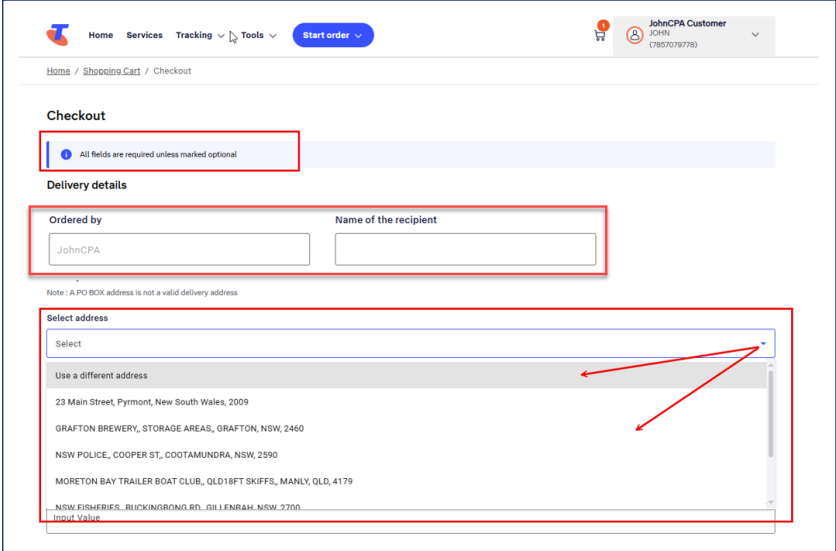
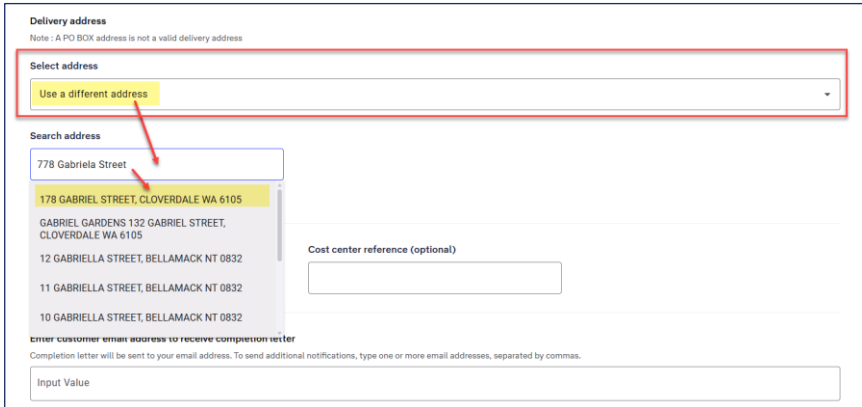
Step	Description	Detailed Actions
6	You will have the option to buy plans for your new device. If you already have a plan and just need a new device, click on No. Device only. If you need to purchase a new plan to go with your device, click on Yes. Buy plans This will take you to the Plans page where you will be able to choose your plan. In this example, the order has been configured as per below: - Outright as the payment option - Quantity of 1x - No Add-Ons - Yes, Buy Plans	
7	Click on the plan type to see the range of eligible plans. Filtering options as per below: - Select 5G or 4G network as desired. - Choose a plan term to go with your device. - Or you can type in the plan name on the search field.	

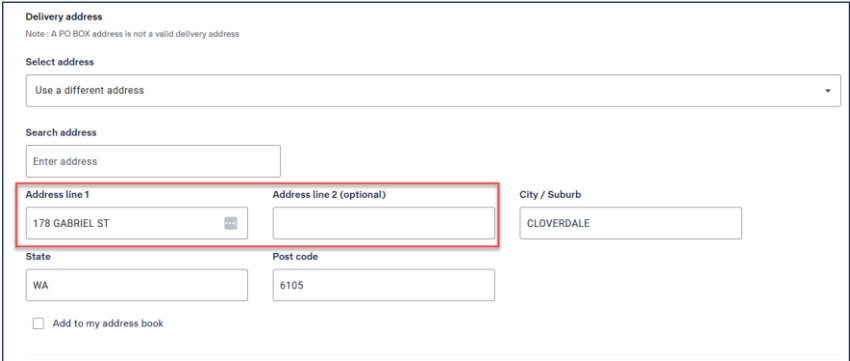
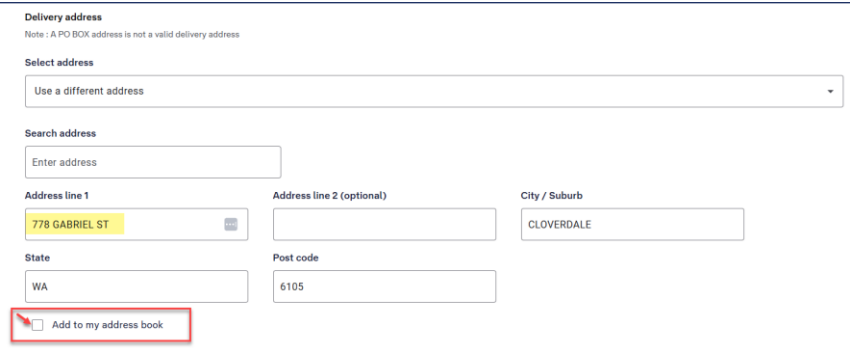
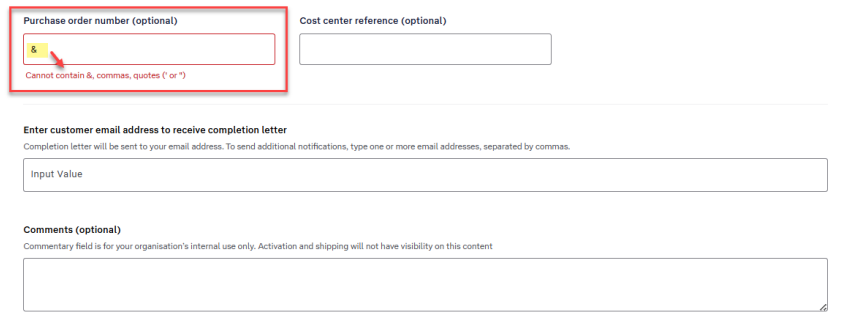
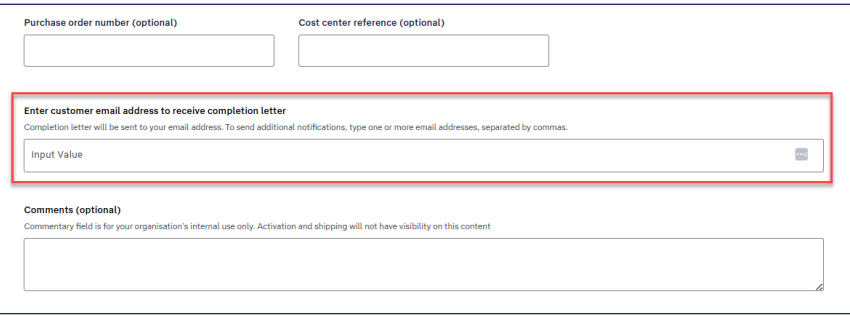
Step	Description	Detailed Actions
8	Choose your plan and click on Order Now .	
9	The quantity is set by default based on the quantity you put in when you choose a device. Note: The main features of the plan you've chosen will be activated automatically. You need to select or tick the box for items that you require to be disabled/barred.	
10	Choose your Add-ons (optional).	

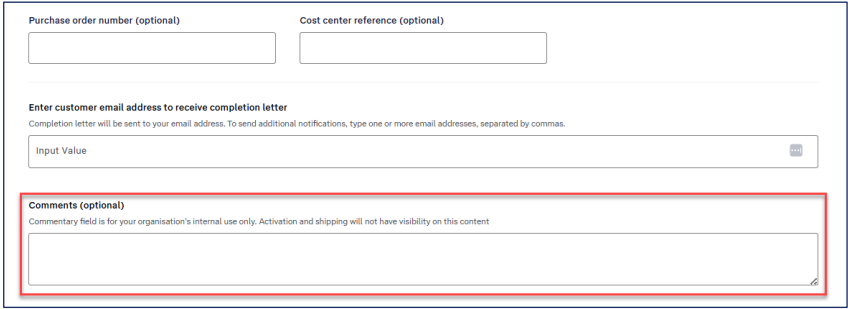
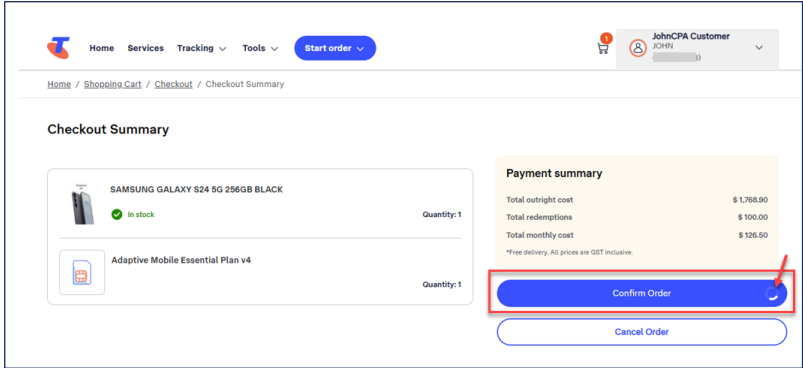
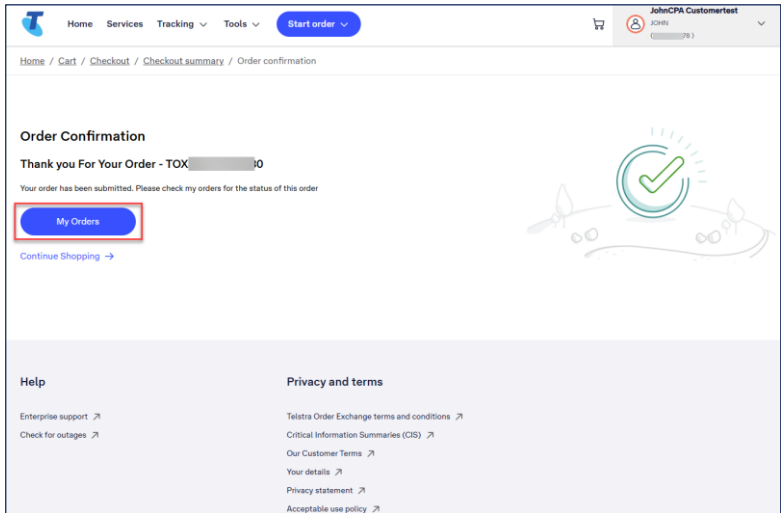
Step	Description	Detailed Actions
11	Select your Billing account from the dropdown. If you are a customer with Adaptive Funds, Enter the Amount on the designated field if you need to use the funds with this purchase. <i>In this example, we input \$100 as the fund redemption amount.</i> Notes: - Your current fund balance is stated below the Amount field. System will throw an error if you try to redeem more than your fund balance. - The fund balance will show \$0 if the customer is a new Adaptive Customer who has not accrued any funds, has redeemed or emptied their fund balance, or is not eligible for Adaptive Fund Redemption.	
12a	Enter User Details. <u>3 ways to enter user details:</u> - Use your own user information or - Upload users from file or - Add new users	
12b	If you choose <i>option 1</i>, put a tick on the box, then some of the fields will automatically be populated with your details. Click on the 2 dropdown fields (mandatory fields) as highlighted. For this particular scenario we will select below details for the specific field:	

Step	Description	Detailed Actions
	- I want to: Request a new SIM card - Please select SIM Card: TELSTRA POSTPAID SIM Then, click on Save User button.	
12c	Once user details have been added, click on Add To Cart button to proceed to the next page.	
12d	If you choose <i>option 2</i>, click in Upload different user from file button. Use the sample list template as highlighted in yellow. Once populated with user details, save the files. Click on Choose File button to upload the files. Once file / template is uploaded, click on Add to Cart button to proceed to the next page.	
12e	If you choose <i>option 3</i>, click on Add new different users button. Enter the user details on the designated fields and select details from the dropdown fields accordingly. For this particular scenario we will select below details for the specific field: - I want to: Request a new SIM card - Please select SIM Card: TELSTRA POSTPAID SIM	

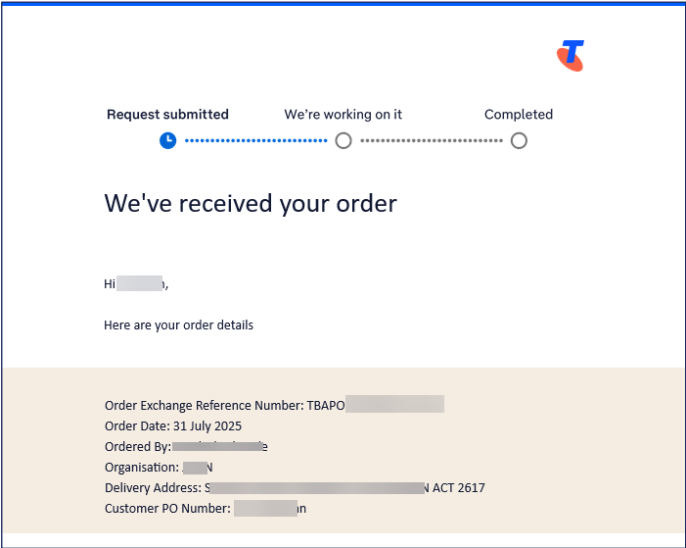
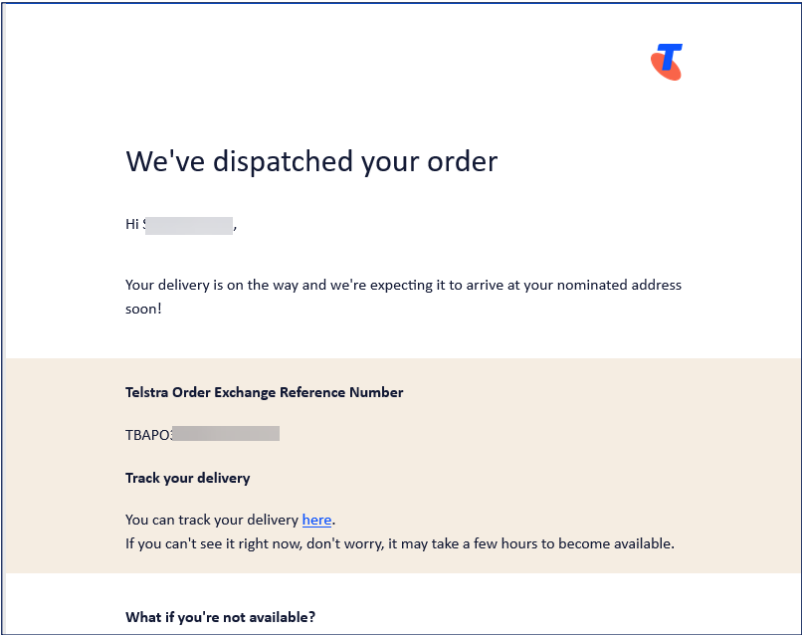
Step	Description	Detailed Actions
	Then, click Save User button.	
12f	Once user details have been added, click on Add To Cart button to proceed to the next page.	
13	This will add the transaction to the Shopping cart. At this point, you can “Continue shopping” or click on Checkout to finalise the purchase. Tip! Based on this ordering flow, the device will be billed to the new mobile number as highlighted in yellow. If the device needs to be billed to a nominated billing account, it needs to be added in the order as a separate line item. i.e. you first select the device by itself without a plan (step 4) or select a plan without a device. Then once you reach this shopping cart page, you select Continue Shopping to add the plan in this single order or a device depending on what item you choose first. Note: Payment summary section will show breakdown of your selected Payment Option accordingly. • Total redemptions: Amount of the Adaptive Funds you entered • Total outright cost: Amount of the device.	

Step	Description	Detailed Actions
	Total monthly cost: Amount for selecting Adaptive Repayment Option (ARO)	
14	Enter the delivery details following the prompts. Notes: - Populate all the fields unless marked “<i>optional</i>”. - Select the address from the dropdown field, otherwise, select “<i>Use a different address</i>”	
15	If you choose to use a different address, you need to search the address from the designated field as highlighted. Then, select the correct address from the list provided. If the address is not on the list, select an address that match the <i>Suburb, Post Code, and State</i>. In this example, we choose the 1st record from the dropdown list.	
16	Once you select an address record, click on the pencil icon to modify the address details	

Step	Description	Detailed Actions
17	You can now modify Address Line 1 and 2 as highlighted with the correct details. Note: City / Suburb, State and Post Code cannot be edited. If this is incorrect, go back to the previous step.	
18	Once you modify the address, you have option to add this record in the company address book / profile by putting a tick on the box as highlighted. Scroll down to continue populating the remaining fields.	
19	In the event, you need to add a Customer based Purchase Order Number, use the designated field as highlighted. When a special character is entered into this field, which is not acceptable in the backend system, an error message will be shown: Cannot contain &, commas, quotes ('or ''). Note: All other characters are acceptable as long as there is no error message.	
20	Customer email address field can be used if you need to send email notifications and completion letter to other email address aside from your email address in TOX records.	

Step	Description	Detailed Actions
21	Comments field is for your organisation's internal use only. Activation and shipping will not have visibility on this content.	
22	Scroll down to Checkout Summary section. Once all fields are populated, click on Confirm Order button to submit the order. Note: While your order is getting submitted, a processing icon will appear inside the Confirm Order button.	
23	Once order has been submitted, the Order Confirmation page will display. Click the My Orders button to navigate to the My Orders page in TOX.	



Step	Description	Detailed Actions
24	The customer who is the recipient of the ordered items will also receive an Order Confirmation email with a summary of the order details. Note: This is only when order was submitted successfully.	
25	Once the order has been dispatched, you will receive a Dispatch Notification. Note: The email will automatically be sent to the Primary Admin of that CIDN and any other email added to the Order Notification field in the checkout screen.	



Step	Description	Detailed Actions
26	Once order delivery has been completed, the customer (recipient of the package) will receive an Order Completion email with Order Completion Letter as an attachment which provides details of the order. Note: Charges are triggered after the delivery is successful and charges appear on the customer's account when the order status is completed.	
end of process / steps		