Self-serve Add Product PSR Doc Gen Process (12/1/16)

User in HERO Pro

- Add Products Online
- Save Products
- Submit to HERO
- Confirm best number to reach CO
- Call CO back?
- Walkthrough: Fin Docs ready for CO Approval
- Walkthrough: Fin Docs ready for CO Approval
- Walkthrough: PO IDV & DocuSign
- Walkthrough: Display reason code

System

- System moves state machine to "Product & Price Added"
- Is MFA cleared?
- Create call back case in OpsWeb
- Create email only case in OpsWeb
- System moves state state machine to "Products Submitted"
- Five9s assigns case to PSR
- System moves state machine to "Fin Docs Sent" to CO
- System sends email to CO
- System moves state machine to "Fin Docs Sent" to CO
- System sends email to CO
- System moves state machine to "Product & Price Added"
- System sends email to CO

PSR

- Products match requirements?
- PSR Generates Docs
- Call CO back?
- PSR calls CO at best phone number
- Is PSR able to reach CO?
- PSR closes case with reason code
- PSR confirms Doc Gen & Confirms Terms with PO
- PSR calls CO at best number
- Is PSR able to reach CO?
- PSR able to resolve issue?
- PSR closes case with reason code
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- PSR tried reaching CO 2 times?
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