



2.4 Verification Procedures for all Photobiz Customers

I. Standard Account Verification for all Calls-in

Effective May 1, 2010, the following procedure should be followed by all departments when answering calls to PhotoBiz:

- A. Ask for the Account ID
- B. Ask for the first and last name (to verify the account)
- C. Ask for the LAST 4 digits of the Credit Card

Once the above information has been verified, assistance to the client may be provided. If the above information is not correct or cannot be verified, the client should be informed that for their safety PhotoBiz will be unable to assist them until this information can be verified.

Note: You may instruct the customer where in their account they can locate this information. For instance, you may advise a customer they can find the last four digits of their credit card number under their My Account section.

Customers who cannot verify this information may be given very general information that does not personally identify the account. For example, if a customer cannot verify the account but simply wishes to know the size of the logo allowed for the current template, or the image dimensions or something similarly general, you can provide that information. If a customer simply wants to know how to do something general such as how to upload a piece of music or how to delete images, you may provide general instructions. Anything specific cannot be given to the customer until they are able to verify the account. Examples of this would be how much image space is left, what the billing date is, what email address is on the account, etc.

If a customer becomes upset over your request to verify account information, you can explain to them that we require this information for their protection. Offer apology for the inconvenience and let them know if they can log in, you can tell them how to find it in their account. If the customer remains uncooperative and demands account information, or otherwise indicates a need to access the account without verification, check with your team lead. Your team lead can take over to assist the customer, or help you work out a solution the customer will find acceptable.

II. Google Apps Email Password Retrieval/Reset

Email account information should be treated with as much confidentiality as account password information. Customers often have sensitive information in their email accounts such as banking site passwords or other very sensitive personal data. Never simply forward a password reset request email to the customer. Instead, follow the procedures outlined below.

Email account password retrieval and/or change requests can be handled by either the Billing or Support departments. When conducting a password retrieval and/or change the following procedure should be followed:

1. Perform the Standard Account Verification as required for all Calls-in.
2. Once you have verified the account, determine if the customer has attempted to submit a password reset request on their own yet. If they have not or they tried and did not receive the email, you should locate the original instructions in their ticket history and attempt to log in to the account yourself. If you are able to log in, verify the secondary email address and update it to the customer's if necessary, then proceed to the next step. If you cannot log in, simply proceed to the next step.
3. Generate a password reset email for them by going to www.google.com/a/theirdomain.com. Note that going to the mail.theirdomain.com link will not give them the option of requesting a password reset link – it must be done from the dashboard login URL.
4. If the confirmation message indicated the link was sent to a non-PhotoBiz address, advise the customer they will receive an email to the email address ending in the suffix provided on the confirmation message, and to follow those instructions to reset their password.
5. If the confirmation indicates it was sent to a photobiz.com email address, advise the customer that you will need to update the secondary email address for them, and ask to call them back. You will need to do a little footwork to determine who the password reset went to. When you do find it, follow the instructions to reset the password to our standard set up password, and then log into the customer's dashboard and update the secondary email address to the one we have on file for the customer.
6. Log out and repeat the password reset process. This will now generate the reset link email to the customer's secondary email address and they will be able to proceed from there. Call the customer and let them know.

If the customer does not have access to the secondary email account any longer, or the email account we have on file matches the domain, use the following procedure:

1. Have customer login to their Photobiz Account and submit a Support ticket requesting a retrieval and/or change and include an email address that is alternate to the one used on the Photobiz account or different than the one that was created through Google Apps.
2. The agent will then login to the Google Apps account (following the above procedure if necessary), change the secondary email to the alternate one stated in the ticket, and resend the password retrieval email that is generated by Google Apps.

III. Photobiz Account login retrieval/ change

Photobiz Account login retrieval and/or change can be handled by either the Billing or Support departments. When conducting an account login retrieval and/or change the following procedure should be followed:

- A. Ask for the first and last name (to verify the account)
- B. Confirm the first and last 4 digits of the Credit Card.
- C. Confirm the address used on the account
- D. Obtain the alternate email address from the customer.
- E. Send the following email to the current address on the account before changing the email address to the alternate email address:

[Customer],

We have reset the PhotoBiz account login email for account ID 100-XXXXX.

If, however, you think this change may have been made in error or fraudulently, please contact our Billing Department toll free at 866-463-7620 option 3, Monday-Friday 9:00 AM EST - 6:00 PM EST.

We are passionate about providing you with the best customer service possible. Thank you for using our services.

F. Change the account to the alternate email address and instruct the customer to click on “Forgot Password?” on the Login screen to send the password information directly to them.

Agents should ensure that the customer has already tried the “Forgot Password?” tool prior to further verification and change to the account. The following are examples in which a customer will need to have their login email address changed:

1. Customer entered a typo in their login email address.
2. Customer’s current email has been hacked and is no longer secure for use.
3. Customer entered in an incorrect email address.
4. Customer’s current email is expired or no longer in use.