



CX x Zuora Phase 1 demo & training

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E2E flow demo

Zuora – E2E flow demo

| E2E flow | Description |
|--------------------------------------|--|
| Offline subscription | Create a customer account in Zuora -> create subscription order -> fill in the contract details -> select the base package -> Submit -> Customer received the activation email -> Set password -> Login to the service account and all base features working as expected |
| Add VN to the number pool | Add the VN (Tollfree / DID) to the VN number pool -> insert the details -> submit |
| Offline subscription - Add VN add-on | Select the Customer account -> Create the order / edit the order -> select the VN add-on item -> fill in the details -> submit -> Login to CXDB -> VN successfully provisioned to the service account and available to use |
| Usage charge | Log in to the service account -> test the usage features -> usage record passes to Zuora -> the charges reflect in the invoice |

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Feedback collection

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Q&A

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Other topics

Other Topics

1. Hubspot integration
2. UAT Plan & UAT environment (Zuora sandbox / Zuora production)



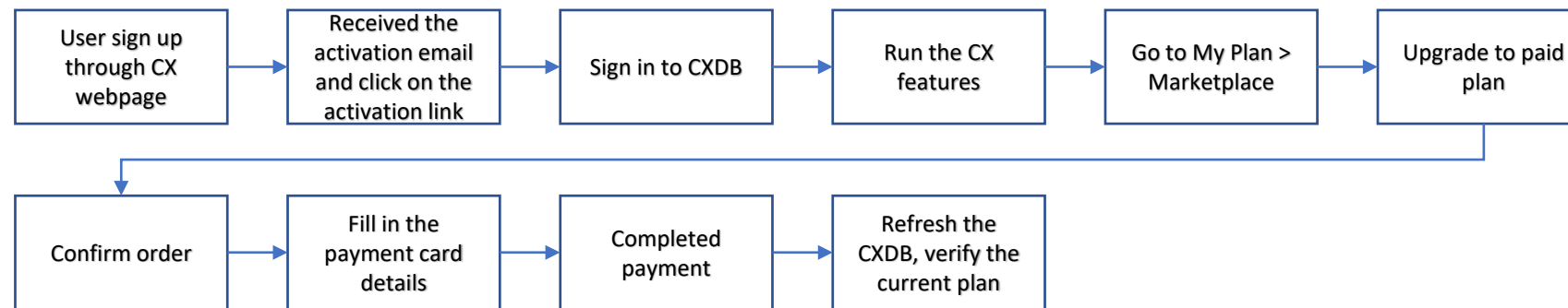
THANK YOU!

CX x Zuora 1st Milestone scope demo use cases

Use cases 1:

The Customer signed up for the Digital Commerce free trial and received the activation email. Once the customer has activated the service account, the admin/staff can start using the base package features. Admin can upgrade to Digital Commerce paid plan by paying with its credit card.

Operation flow:



Expected result:

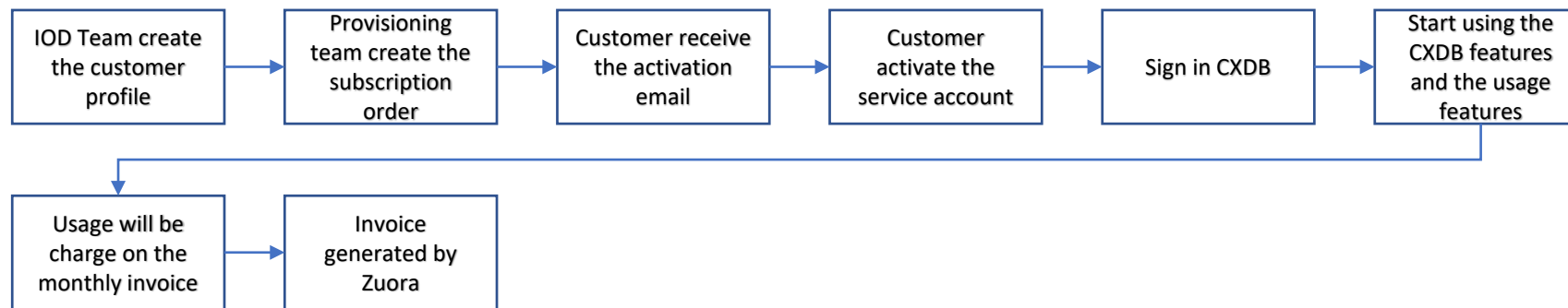
- Customer profile details will be synchronised to Zuora and create the customer account
- Created a new subscription order in Zuora for the free trail plan under the customer account
- Once the customer filled in the payment details and successfully proceed, credit card detail will be stored under the Zuora customer account profile
- Will create a new order for the paid plan with the bill run and payment record

CX x Zuora 1st Milestone scope demo use cases

Use cases 2:

The Customer signed up for the Omnichannel Contact Centre package and received the activation email. Once the customer has activated the service account, the admin/staff can start using the base package features and the usage charge will reflect on the monthly invoice.

Operation flow:



Expected result:

- Able to provision the base package and create the service account
- Able to use all the base package features
- Able to capture the usage and pass it to Zuora
- Zuora can calculate the usage charge correctly
- Invoice generated by Zuora

Out of 1st milestone demo scope:

- Add-on items
- Tollfree/DID add-on
- Package items changes