



Customer Master Jump Start

Mid America
Computer Corp.
April 2020

Introducing Customer Master

To maximize the benefits of this course, we recommend that you meet the following prerequisites:

- Basic understanding of some telecommunications terms
- Knowledge of your company's policies and procedures
- Knowledge of your company's services and pricing

Additional on-site training is available to your company. Please contact your regional sales manager, client relations manager, or account manager for details. Additional MACC U training is also available upon request.

If you have any questions or comments regarding this course material, we would like to hear from you. Please send an email to Julie Riecken, Training Support Manager, at jriecken@macnet.com.

Customer Master



This course is intended to introduce Customer Master, a billing and customer support product designed and developed by MACC (Mid America Computer Corporation). MACC is a billing services provider specializing in software solutions for the telecommunications industry.

MACC has been serving the telecommunications industry since 1975. Telecom companies across the country recognize MACC's strength and stability as the company serves more than 300 clients in 40 states.

The primary objectives of Customer Master are to provide:

- a repository of information related to your accounts
- data sharing between users
- improved customer satisfaction and response
- reporting tools for management

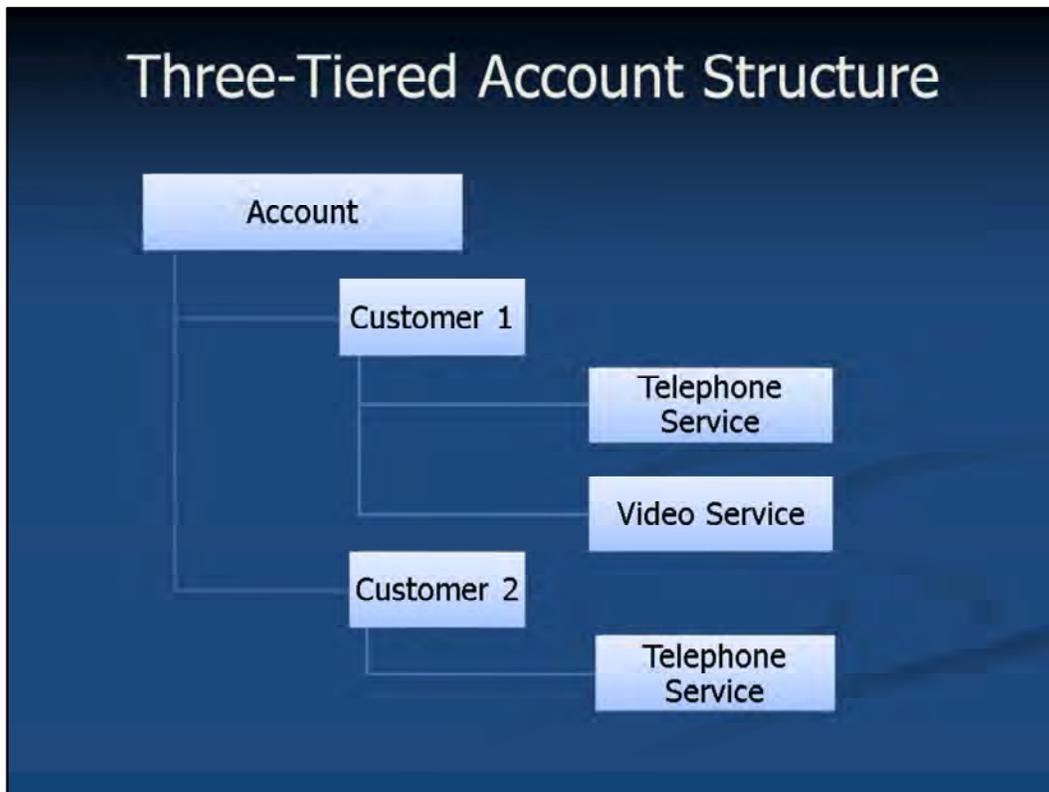
A graphic consisting of two overlapping squares. The front square is blue and contains the text 'Chapter' and the number '1'. The back square is light blue and is partially obscured by the front square.

Chapter

1

What is Customer Master ?

Three-Tiered Account Structure



Before learning about the screens and functionality available in Customer Master, it is important to have a clear understanding of the three-tiered account structure on which Customer Master is based.

The **Account** tier serves as the “parent” or billing tier. An Account may have any number of Customers and these Customers in turn may subscribe to any number of Network services.

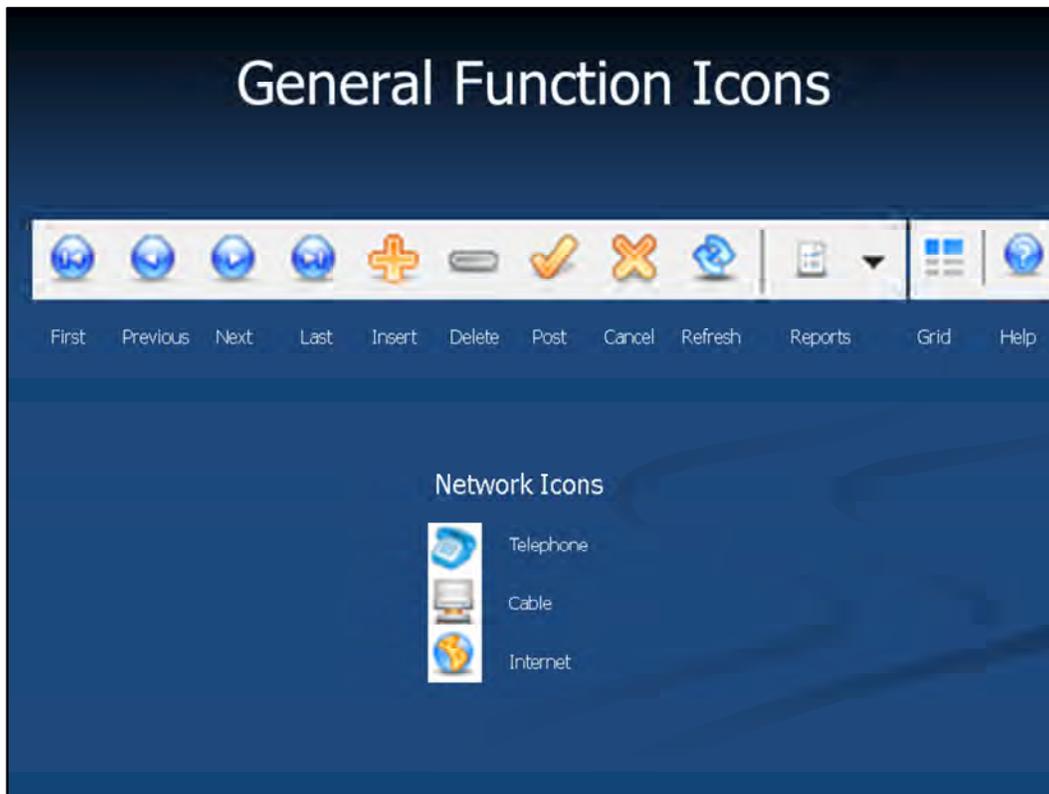
An Account may have one Customer or serve as an umbrella for many Customers. The **Customer** tier is typically the consumer of the service.

A Customer may subscribe to one or more **Network** services such as Telephone, Video/Cable, and Internet. In addition to these three networks that we will use for Jump Start, we also support Cellular, Paging, Security/Alarm Monitoring, Special Circuits and additional types of services billing.

General Function Icons



Utilize the hover-over feature to identify each icon's function. Some of the more commonly used icons are noted on this screen.



Browse icons are used to navigate through individual records. These icons will help you move to the first, previous, next, or last item in a grid.

The Insert icon allows you to insert a new row of data.

Insert/Delete/Edit icons launch data entry boxes to add, update and delete data. The system will not allow you to delete data referenced elsewhere in the database.

The Post icon saves changes.

The Cancel icon cancels the current action.

The Refresh icon renews the data display to keep it current.

When a Reports icon is available the system will provide you with an opportunity to print a report, service order, trouble ticket, receipt and other print options. Most Customer Master reports are also available to export to a .CSV file.

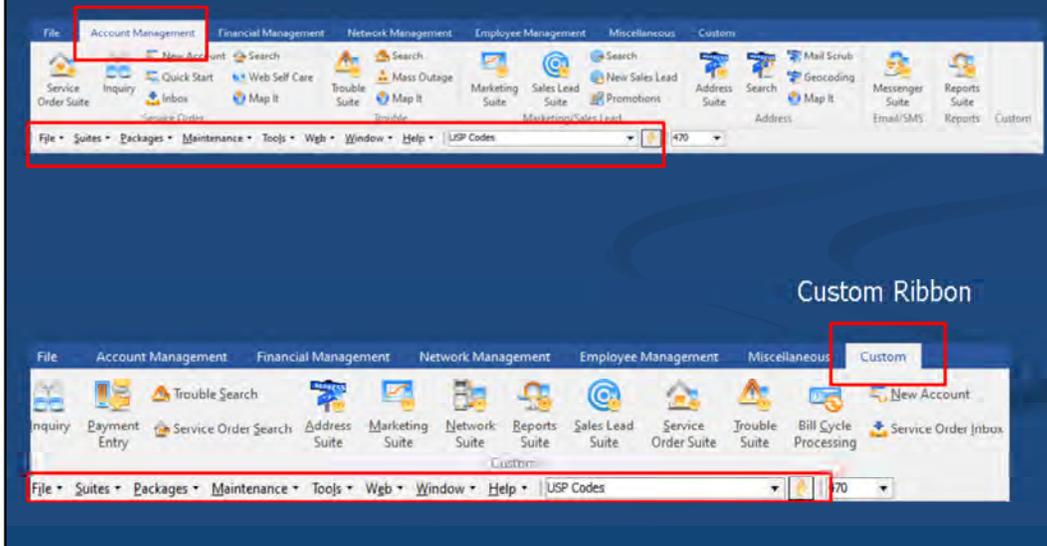
The Grid icon returns you from a detail record in an edit mode to the previous grid.

The Help icon should be used as a resource for field definitions and general functionality.

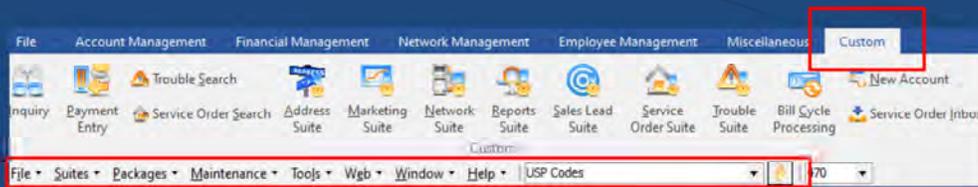
The Network Icons identify the different networks associated with an account.

Ribbon

Account Management Ribbon



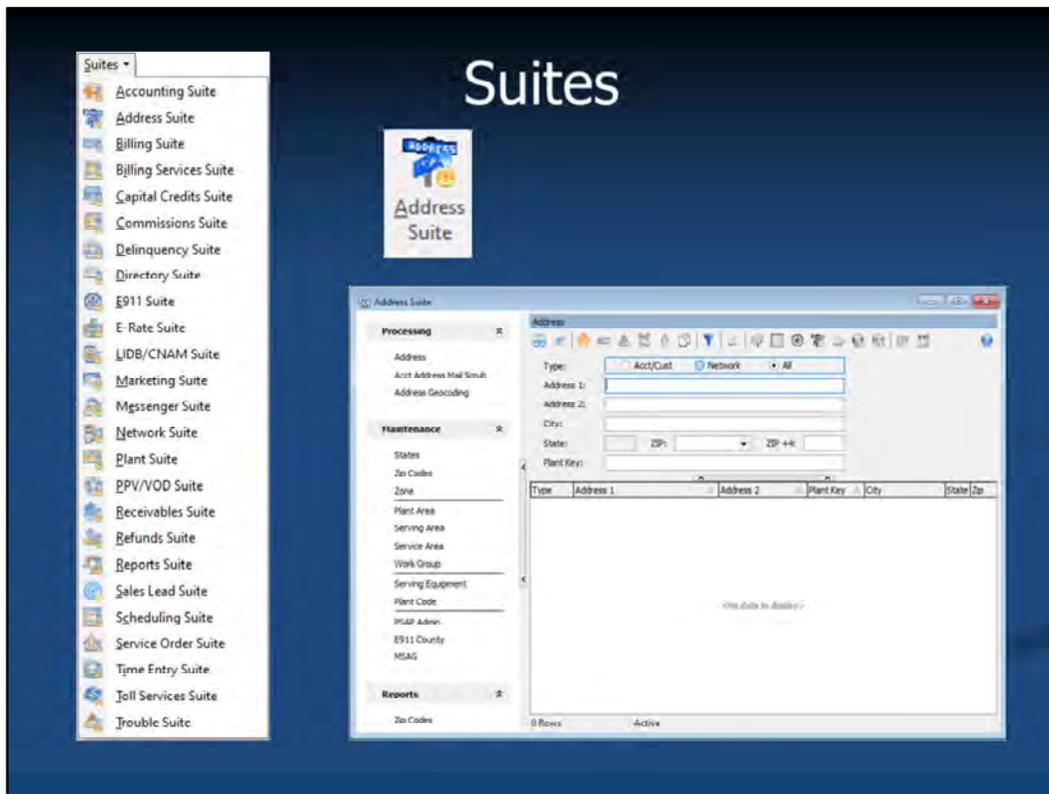
Custom Ribbon



The Ribbon in Customer Master contains 6 tabs along the top: Account Management, Financial Management, Network Management, Miscellaneous, and Custom. Each of the first five tabs allows access to the various functions associated and its respective Suite. Shown here is an example of the Account Management ribbon.

The Custom ribbon provides the user with a more customized experience. You may add or remove items from this ribbon based on your roles and responsibilities. This feature is user specific. An example of a Custom Ribbon is shown above.

Two other items of note – you can also use the menu bar immediately below the ribbon to navigate to various features in the software. There is also a drop-down search feature available, which will help you find other features in the software.



There are several Suites available for each module type. Suites contain everything associated with a specific module organized in one location, making it much easier to navigate maintenance tables and processes within a module. Suites can also be found from the Ribbons in Customer Master.

A great example is the Address Suite. When you choose the Address Suite icon, you can easily access all of the various processes, maintenance tables, and reports related to addresses. It makes it very simple to work on a specific module or process.

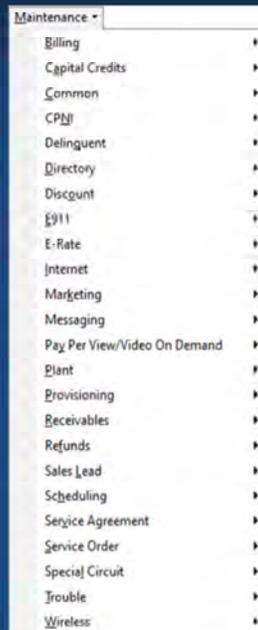
Commonly Used Acronyms

- ACH
- AR
- CARE
- CNAM
- CPNI
- CRM
- E-911
- FCC
- FUSC
- FUSF
- GL
- LEN
- LIDB
- MSAG
- NLAD
- OCC
- OTT
- PPV
- PSAP
- SAC
- SIP
- SLC
- USP
- VOIP

You'll find that many acronyms are used in this industry, and in this session. Here is a brief list of some acronyms and their definitions.

- ACH – Automated Clearing House
- AR – Accounts Receivable
- CARE – Carrier Account Record Exchange
- CNAM – Calling Name
- CPNI – Customer Proprietary Network Information
- CRM – Client Relationship Management
- E-911 – Enhanced 911
- FCC – Federal Communications Commission
- FUSC - Federal Universal Service Charge (or FUSF)
- FUSF – Federal Universal Service Fee/Fund (or FUSC)
- GL – General Ledger
- LEN – Line Equipment Number
- LIDB – Line Information Database
- MSAG – Master Street Address Guide
- NLAD – National Lifeline Accountability Database
- OCC – Other Charge or Credit
- OTT – Over-The-Top
- PPV – Pay-Per-View
- PSAP – Public Safety Answering Point
- SAC – Study Area Code
- SIP – Session Initiation Protocol
- SLC – Subscriber Line Charge
- USP – Unit Sensitive Pricing
- VOIP – Voice Over Internet Protocol

Maintenance Tables



There are several sub-menus available at the Maintenance Menu. These sub-menus contain the tables required to perform functions in Customer Master. These tables typically hold information contained in drop-downs throughout the system. In addition, these maintenance tables may be located in the Suites. Here is an overview of the menus:

Billing – maintenance of various billing-related functionality including bill messages, on-bill ads, and drop inserts.

Capital Credits – for use only with cooperative companies; allocation matrices and capital credit member information.

Common – the majority of the critical database information is housed in Maintenance – Common.

CPNI – maintenance for Level 1 and Level 2 questions, preferences and the CPNI letter.

Delinquent – creation and maintenance of notice types.

Directory – classified headings and directory preferences.

Discount – creation and maintenance of discounts such as Vacation, Employee, Credit Card and ACH.

E911 – includes current E911 addresses and counties, PSAP administrator information and MSAGs.

E-Rate – allows for tracking of schools & libraries funding requests.

Internet – includes tables for Internet types and speeds, domains, IP types and more.

Marketing – Client Relationship Management, Suggestive Marketing and Promotions tables are housed here.

Messaging – stores email and text information for use with service orders, trouble tickets, marketing, and more.

Pay-Per-View/Video on Demand – PPV Provider information which determines the layout of PPV files.

Plant – basic plant information including Plant Area, Codes, Details and more.

Provisioning – maintenance options related to automated network provisioning.

Receivables – access ACH and bank information as well as bankruptcy types and Write-Off categories.

Refunds – maintenance tables used to define Closed Account Refunds, Security Deposit Refunds, and Miscellaneous Open Account Refunds.

Sales Lead – includes maintenance tables related to tracking of Sales Lead prospects.

Scheduling – includes tables used for scheduling Service Orders, Trouble Tickets and other tasks.

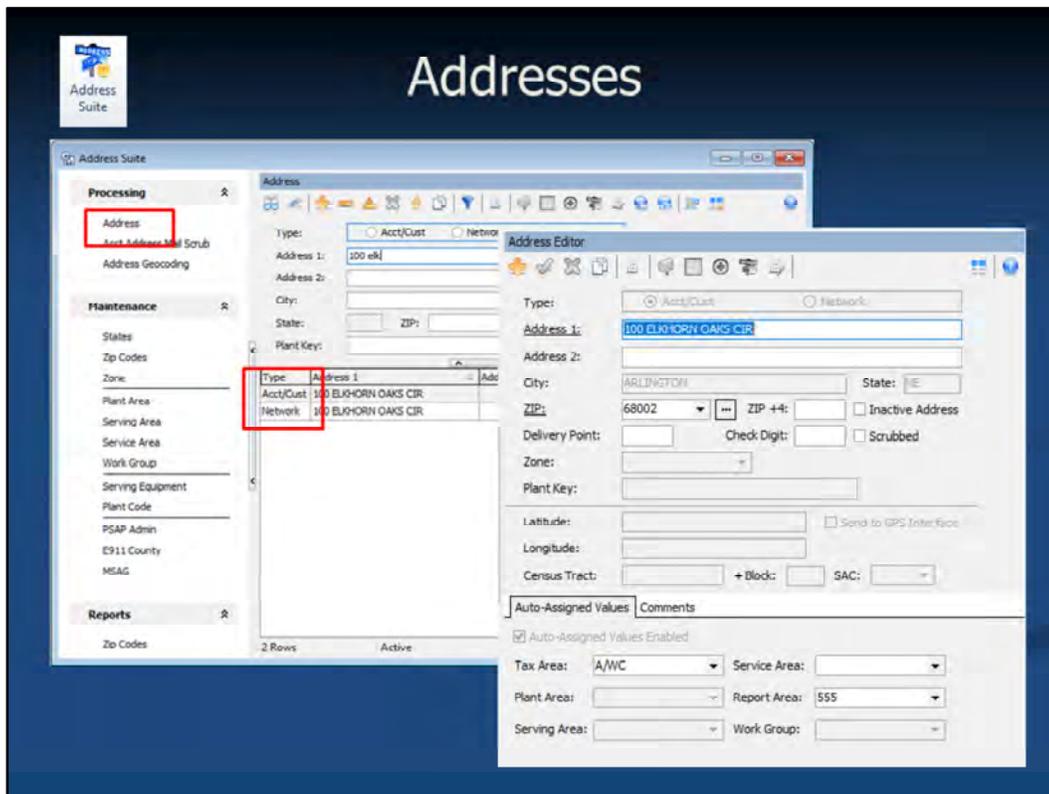
Service Agreement – tables used for tracking of customer maintenance and support agreements.

Service Order – tables used within Service Orders include Classes, Carriers, Tier Status, Stages, Contract information and Equipment Management.

Special Circuit – setup and maintenance of Special Circuit Termination Points.

Trouble – all tables needed to create Trouble Tickets are housed here; Trouble Ticket Preferences are found through File – Preferences – Trouble.

Wireless – houses cellular rate plan setups.



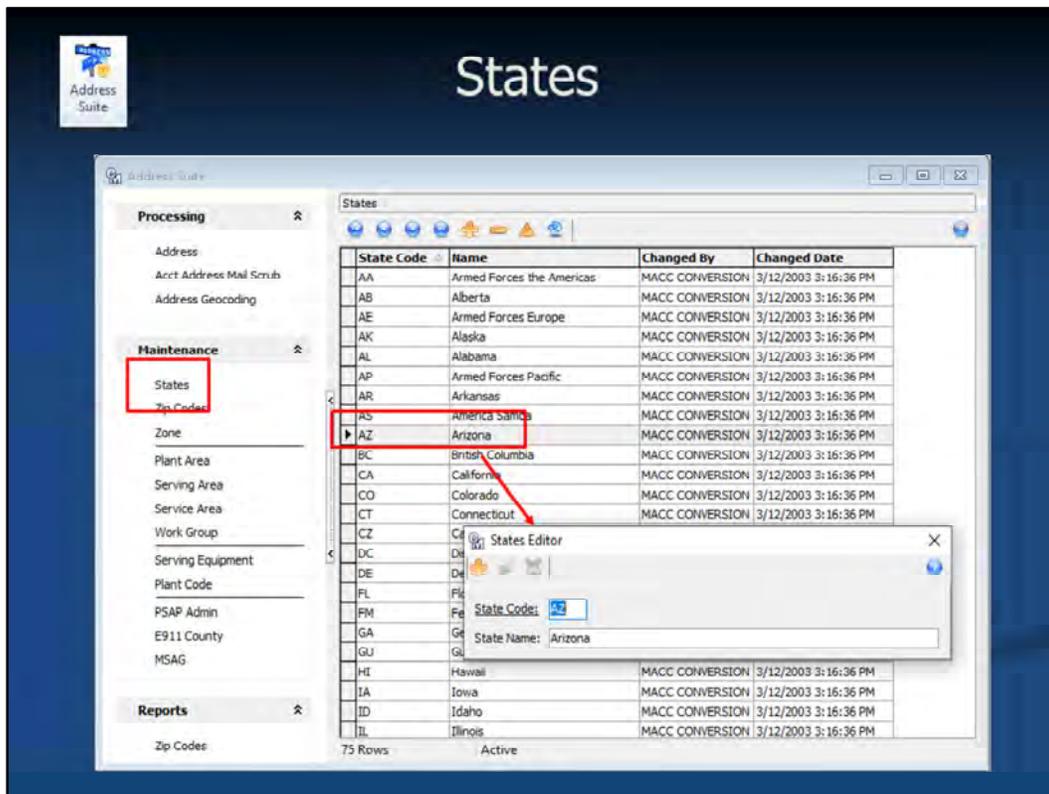
There are several tables at that should be explained further prior to beginning Service Orders. At the Address Suite, every address in your Customer Master database may be managed. There are two types of addresses – Account/Customer tier addresses which are typically used for billing, and Network tier addresses which are service, or physical, addresses.

Search on addresses by entering information in one of the fields and either clicking on the binoculars or using the Enter key. The results will appear in the grid. When searching for an address either through the table or through a Service Order the rule of thumb is “less is more.” To edit an address, highlight the address and double-click or click on the Edit icon to open the Address Editor. To add an address, click on the Insert icon.

From the initial address search window, you can use the Mass Edit button to make edits to Auto-Assigned values on multiple addresses. You can also copy an existing address as well as launch the Address report by clicking on the Report icon on the main address window.

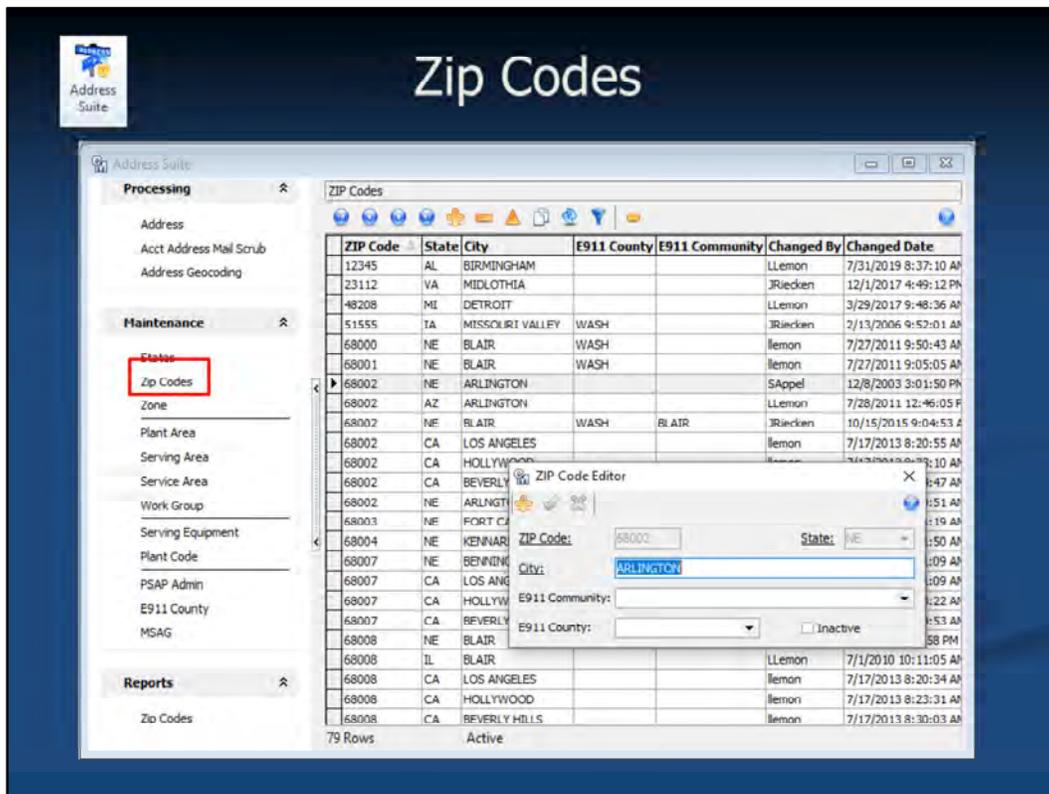
After editing an address, at the Address Editor window you can use the Address Scrub button to verify a network address against the MSAG. You can also use the E911 Automated Address button to associate an E911 addresses to a network address. The Geocode Address button will connect to ESRI (a mapping tool) to retrieve a latitude, longitude, census tract, and census block for the address. The Test Results button will allow you to enter Plant Test Results for that location. The Address Usage report which will list every tier tied to the selected address.

Although addresses can be created while in a Service Order, security roles may prevent certain users from doing so. And, there are benefits to creating an address through the maintenance table, including the use of Auto-Assigned Values and E911 Automation. We’ll look at addresses in more detail later in Jump Start training.



You may find that you'll need to access the States table frequently for management of states. MACC automatically loads all US states and territories as well as Canadian provinces. Any accounts with foreign addresses beyond US territories or Canada would need to be flagged for Pull Bill, hand-addressed and sent from your office.

At the time of conversion, MACC will only load those cities and zip codes that are in your current system. We urge you to review your data prior to conversion in order to avoid bringing over any duplicates or incorrect data.



To enter a new zip code through the Zip code table, navigate to the Address Suite. You'll see all active zip codes by default in the grid. You can click the Insert (+) button to add a new zip, or the Edit (^) button to update an existing zip code.

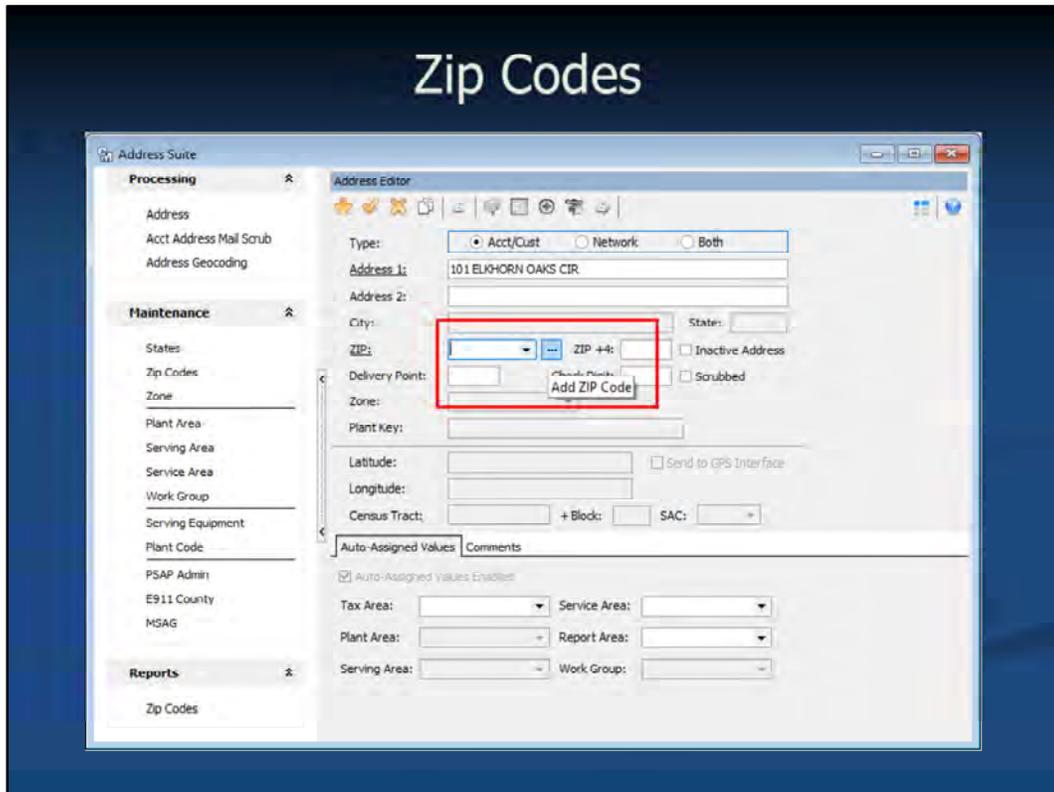
Because there are some situations in which a city and zip code exist in multiple states, Customer Master will allow you to enter the same city and zip code in different states.

You'll probably find you use this table for final billing addresses that exist out of your area of service. In order to create that address, you'll first have to add the city and zip code to the appropriate state. You may also find yourself using this table for your snowbird and vacation accounts.

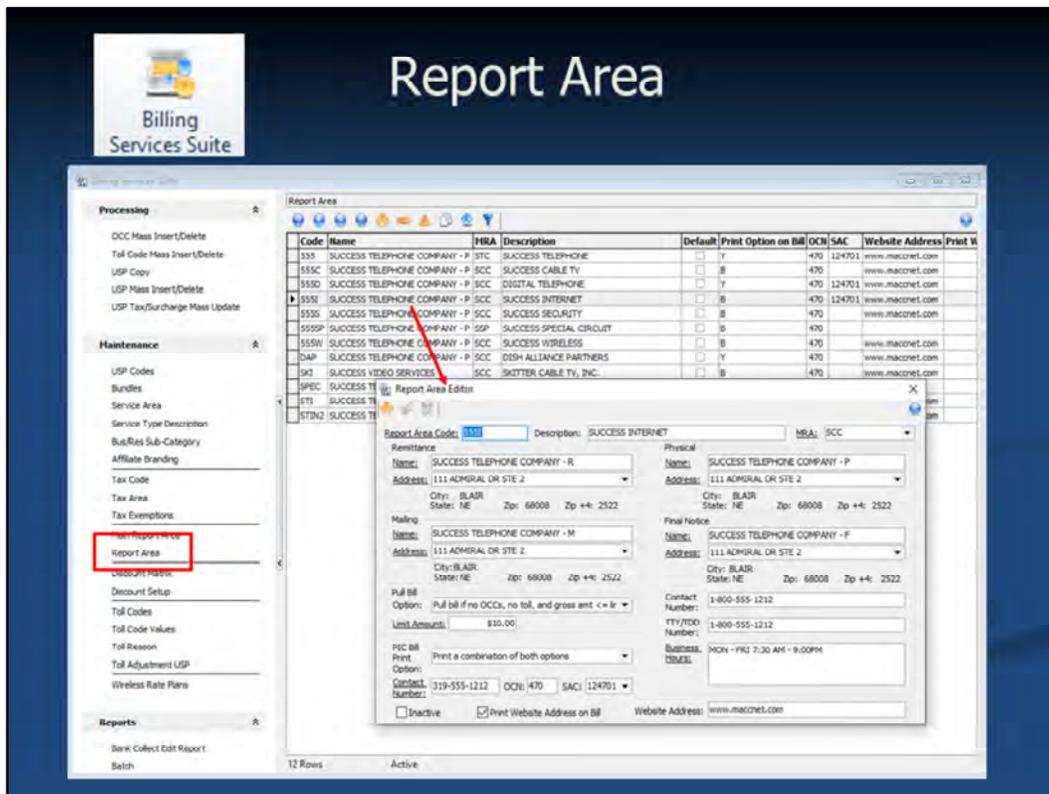
If you have an erroneous zip code in the database, use the Inactive checkbox to inactivate the zip for use on future addresses. It will not inactivate the zip code on existing addresses.

Note that the Zip Codes grid includes filtering on columns – making it easy for you to find all of the zip codes in one particular state.

Zip Codes



In addition to adding a Zip Code from the Zip Codes maintenance table, you can also add a Zip Code directly from the address editor. Simply click on the ellipsis button.



Other tables that will become critical to your business are Main Report Area and Report Area. It's important to understand both before beginning to use Service Order. Both tables can be accessed through Maintenance – Common, or by accessing the Billing Services Suite.

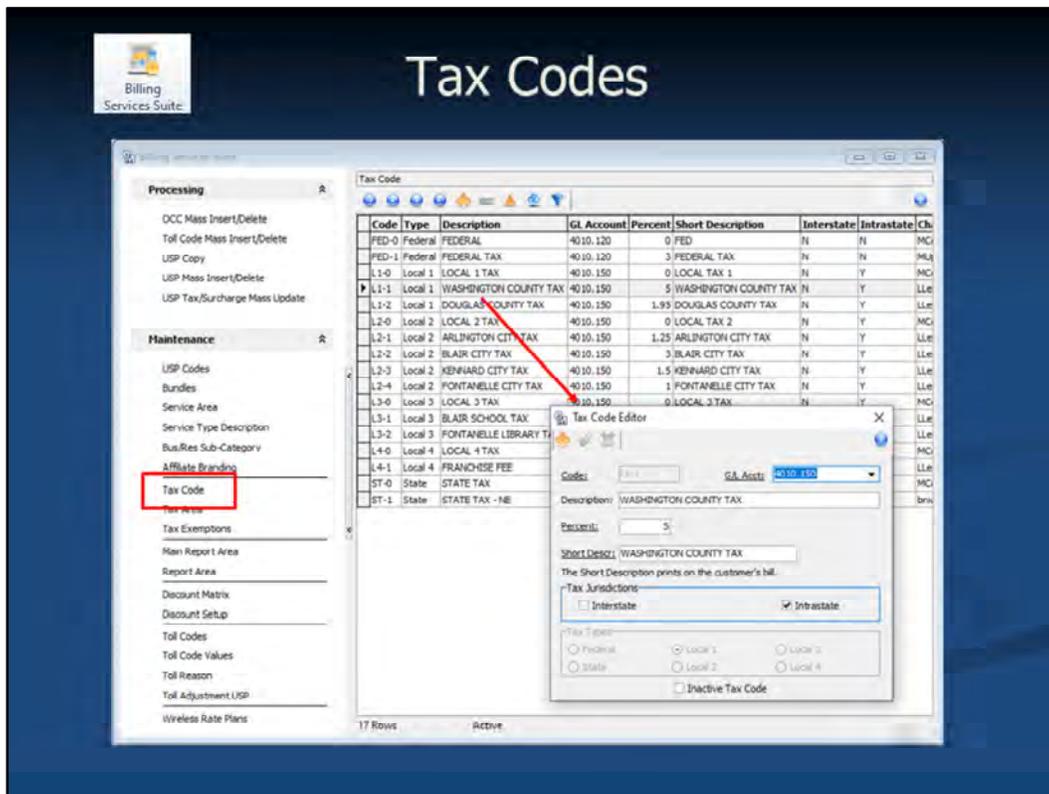
The **Main Report Area** is a method to provide a high level of grouping for reports. It can be used to group business entities together, such as all telephone service or all cable service. We recommend that your Main Report Area(s) correspond with your accounting needs.

The **Report Area** is used to separate information. Typically, the separation is by exchange, by network type or by a combination of both. As a result of the Report Areas arrangement, billing and Customer Master reports may be subtotaled by Report Area definition. In addition, accounts will be assigned their Billing Remittance, Physical, Mailing, and Final Notice addresses based on the Report Area assigned to the Account tier. If you are required to subtotal certain revenues, you'll want to arrange your Report Areas accordingly.

Pull Bill Options allow companies to designate accounts' bills to be returned to the company rather than mailed to the end-user. These options are defaults only. Individual accounts can be flagged for Pull Bill even if they don't meet the criteria here.

PIC Bill Print Option designates what PIC message should appear on the bill.

Contact Number, OCN, Business Hours and Website Address for the company may be designated by Report Area.



Also at the Billing Services Suite, you should see a simple list of each and every tax for which your company may bill. At this time there are six possible tax types available in Customer Master:

- Federal – the Federal Excise tax
- State – State Sales tax
- Local 1 – typically reserved for all county taxes
- Local 2 – typically reserved for all city taxes
- Local 3 – reserved for other taxes such as E911, franchise fees, SILO taxes, etc.
- Local 4 – reserved for other taxes such as E911, franchise fees, SILO taxes, etc.

NOTE: CM allows for as many State and Local 1, 2, 3 and 4 taxes as needed

Keep in mind that taxes in Customer Master are strictly percentage-based. If you have a flat-rate fee of any kind, it must be processed as a USP code. In addition, there are surcharges available in Customer Master that may be handled outside of taxes. Typically, surcharges are used for such things as the FUSF charge and any state USF charges.

A requirement of Customer Master is that for each of the above listed tax types, there must be a 0% tax associated with it. So, MACC will automatically load a FED-0, ST-0, L1-0, L2-0, L3-0, & L4-0 – each with a 0% percentage. These will be considered defaults and will be used as place-holders in the creation of Tax Areas.

Since many times companies do business in multiple counties, cities, etc., we use a numbering system to identify the variety of tax codes. For example, you may have 3 county taxes that may be created:

- L1-1: Washington County Tax
- L1-2: Lincoln County Tax
- L1-3: Jefferson County Tax

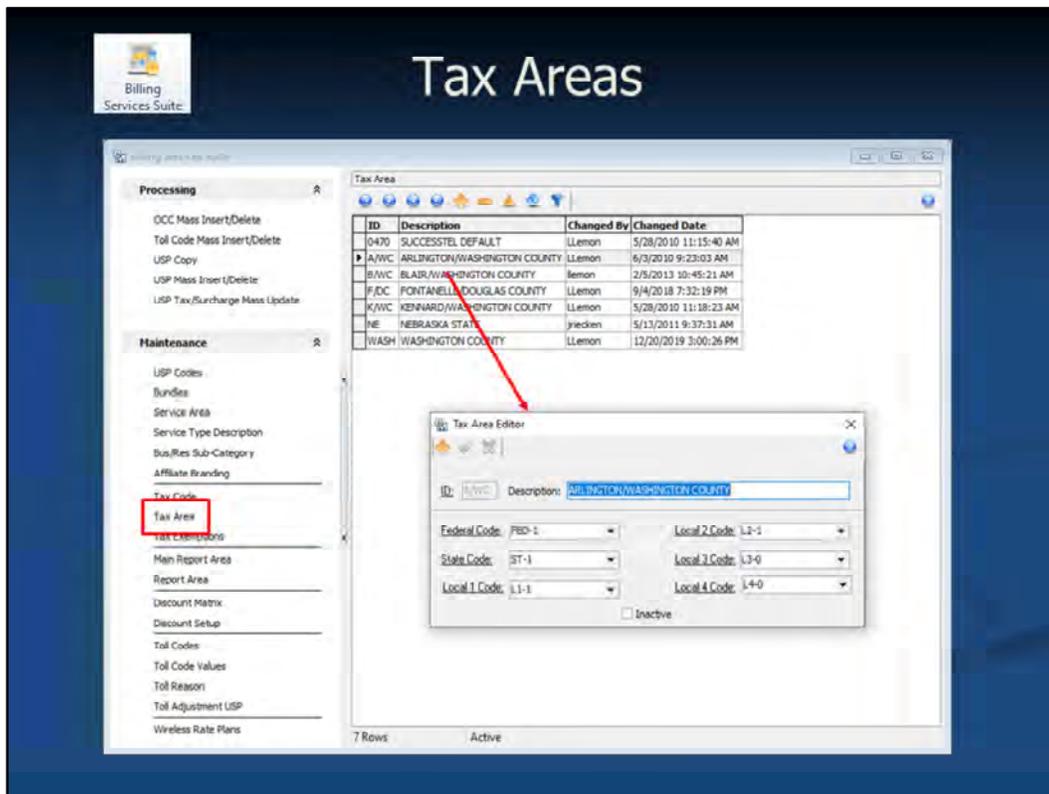
Similarly, if you do business in three cities, your cities may be labeled as:

- L2-1: Arlington City Tax
- L2-2: Blair City Tax
- L2-3: Kennard City Tax

At the Tax Code Editor, you will see a Code and Description associated with the tax. In addition, the tax may be linked to a General Ledger Account Number. This is critical for proper reporting of tax revenues. The label in the Short Description area is the description that will print on the bill.

The Percentage field holds the actual tax calculation percentage. It allows for up to four decimal positions. The Write Off Category is used to create the appropriate Write-Off row for this tax, if you choose to use the Write Off module.

The Tax Jurisdiction indicators are critical for proper taxing of your long distance. If the Tax Code is applicable to Interstate or Intrastate long distance, those indicators must be checked.



Tax Areas are groupings of taxes for easy assignment to accounts. Your Training Conversion Analyst will assist your company in initially arranging Tax Areas to make it easiest for your company to bill your customers properly. It's also important that tax areas are structured properly to provide accurate tax reporting.

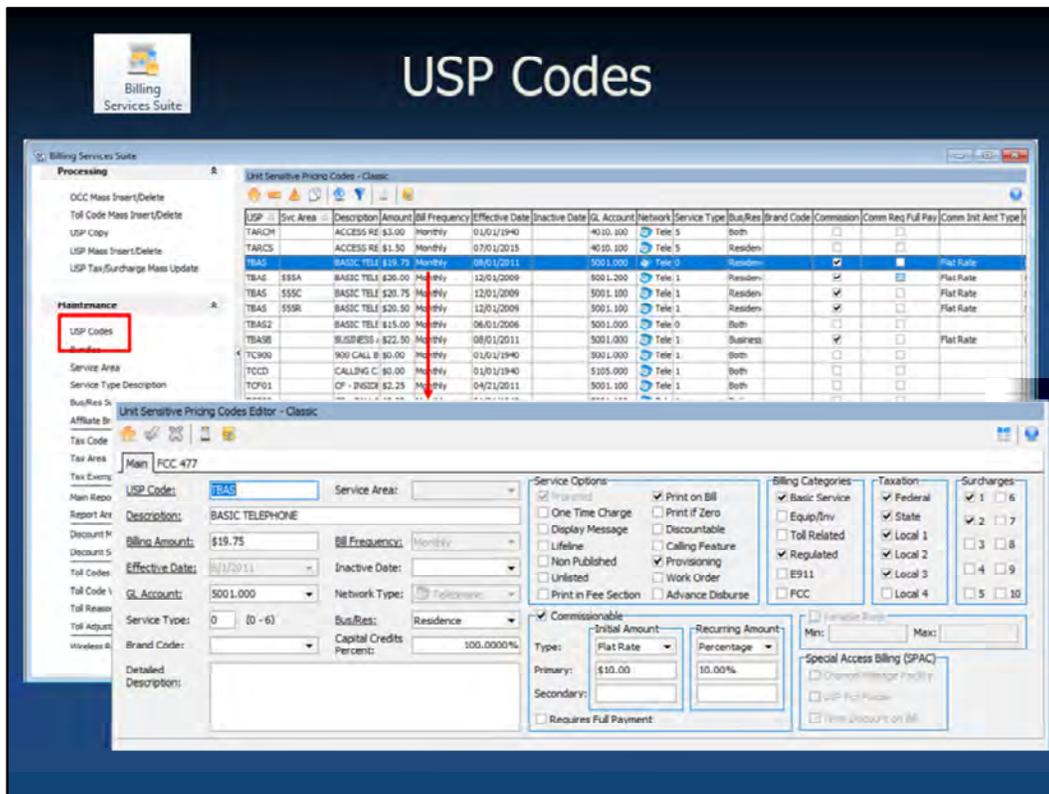
For each Tax Area, there must be one of each of the six tax types. If the tax area does not have one or more of the six tax types, then the default tax code(s) would be selected for those types. In the example shown here, the Arlington Tax Area will include the Federal tax, a State tax, and a Local 1 tax. The Local 2, 3, & 4 tax types are set to the 0% tax, so no tax will be charged on those types.

Tax Areas can be as detailed or simple as you would like. Often, Tax Areas are arranged in city and county combinations to ensure that taxing is properly applied.

Keep in mind that these things must be true for a tax to be calculated:

- The tax has to be included in the Tax Area
- The account has to be set to the correct Tax Area, and the Taxability flags must be flagged (we will discuss this at Service Order)
- The services (USPs) must be flagged for each appropriate tax type

If any of these things are not true, a tax amount will not be calculated for the tax type in question.



Choosing to add or edit a USP code will cause the Unit Sensitive Pricing Code Editor to appear. The following information is stored for each USP (underlined items are required):

Main

USP Code – A unique 5-digit alpha-numeric code used to identify a specific service or charge. The USP code must be unique. The USP Code determines the order in which services are printed on the bill.

Service Area – This feature is used to keep USP codes unique in different areas within a company's service territory. Service Area is typically used to differentiate pricing and availability of services. If all (or most) pricing is the same throughout, and availability of services is the same, then Service Area may not be needed.

USP Description – This is the 40-character description of the service or charge. The USP Description will be printed on the Customer's Bill, Service Order, etc.

Billing Amount – This is typically the recurring charge amount to be billed based on the frequency selected for this USP (usually monthly). If it is a recurring charge, you have the option to make the amount a variable rate by selecting the variable rate option. When this occurs, the term "Billing Amount" will change to "Baseline Amount." This refers to the default amount value on a variable rate code. If this code is used for an OCC or variable rate charge, it is the standard charge or credit amount. If there is not a standard or baseline charge (if it is variable), the amount may be set to \$0, and determined on a case-by-case basis for OCCs.

Bill Frequency – Choose the frequency of billing for this service. Options are Monthly (most common), Bi-Monthly, Quarterly, Semi-Annually, and Annually.

Effective From – This is the first date on which the USP code will be offered, or the first date on which the price (amount) is applicable. You may wish to back-date the initial effective date to accommodate any hand-entry of data that might be needed (USP cannot be used prior to its Effective From date).

Inactive Date – Use this field to enter a date on which this service is no longer offered. The code is grandfathered on accounts currently subscribed to the service, but cannot be chosen to assign to accounts after the Inactive Date. Flagging a code as inactive does not remove it from accounts.

Gen. Ledger # - Choose the GL Account Number to which revenues associated with this USP code should be associated. Revenues will be grouped by GL Account Number on the BL84-series of reports. In addition, the GL Account Number is the link between the Customer Master and Accounting Master interface.

Network Type – If this code pertains to one specific network type, the network should be selected from the drop-down. If this code is not network-specific, this field can be left blank. Charges associated with a USP code that does not have a network type will be considered “Miscellaneous.”

Service Type – This required field can be set to any numeric code from 0-6. Used to group common services together for reporting. Typically a 0 is used for non-recurring charges, and a 1 for recurring charges.

Bus/Res – This drop-down should be set to business, residence, or both – depending on what type of customer can be assigned this code. This will result in some filtering of USP codes in the Service Order module.

Brand Code – If a USP code does not necessarily match the network type (billed on behalf of another service or provider) the Brand Code can be used to distinguish another entity on the bill.

Detailed Description – This free-form field provides further explanation of a USP code. The Detailed Description will not print on the bill. It is informational only.

Capital Credits Percent – This is the capital credit percentage that would be used to calculate monthly patronage. If patronage is not applicable to this code, the percentage should be 0. If the company is not a coop, this field can be ignored.

Service Options

Prorated – Standalone USP codes and Bundles should be prorated when applied to less or more than a full month. When accounts are disconnected or reconnected, duration days and amounts will be adjusted.

One Time Charge – Designates a stand alone USP code intended for an OCC. The stand alone USP codes and Bundles will be filtered when selecting One Time at the USP Selector window. This attribute does not restrict use as a recurring charge.

Display Message – The associated tier level and USP code Description line for a stand alone USP Code will appear in red at the Messages section when the account is accessed at the Inquiry screen. Bundle Elements do not appear.

Lifeline – Basic local exchange telephone or internet service, provided at a discount, to low-income customers. Lifeline service is subsidized by other telephone and internet services or by state and local taxes. The amount may be the lifeline credit amount to be applied to the bill. Will automatically mark the number as Lifeline at the Telephone or Internet screen.

Non Published – Omits the telephone number from published directories and directory assistance. Will automatically make the directory listing non-published if using the directory module.

Unlisted – Omit the telephone number from published directories but **not directory assistance**. Considered a private number. Will automatically make the directory listing Unlist if using the directory module.

Print in Fee Section – Will display the USP Code in the same location as other percentage-based charges including taxes, surcharges and fees.

Print on Bill – The stand alone USP code or Bundle Element will be printed in monthly charges or OCC portion of customer bills.

Print if Zero – The stand alone USP code or Bundle Element will be printed in monthly charges or OCC portion of customer bills even if the Print on Bill is flagged and the amount is zero. *Used sometimes as an indicator for tracking purposes only.

***Discountable** – Allows an Element to be discounted in a Bundle. This allows for USP codes like Universal Service Fees to be included in a Bundle (and they cannot be discounted). If it's not marked, always use the price as recorded in the stand alone USP code. If a stand alone USP code has already been used and discounted in a bundle, then the user cannot remove the check mark to indicate non-discountable. They must first go into all bundles and adjust the charges.

Calling Feature – Indicates the stand alone USP code identifies a calling feature such as *call waiting, distinctive ring, etc.* May be used to run the Calling Features Penetration and Calling Features Prospect reports.

Provisioning – The stand alone USP code or Bundle Element is tied to the switch activation module. This option is available only for USPs and Bundle Elements assigned the Telephone network type. Changes, additions, or deletions of these codes during the Service Order process will be sent to the Switch Activation table.

Work Order - Indicates USP codes that may be used to generate OCCs from the Accounting Master Work Order process, when selected.

Advance Disburse – Used only for coops to designate USP codes eligible to be disbursed in advance of capital credits allocations.

Billing Categories

Basic Service – Considered necessary to use the network's service. If related to the telephone network, local telephone company receives money, PSCs (Public Service Commissions) and PUCs (Public Utilities Commissions) must approve changes. Includes such thing as *dial tone, data transmission capability, access to 911, long distance, and white pages listings*. If this USP code is related to another network (cable, internet, security/alarm, special circuits, pager, wireless), Basic will be the only selection available. Any telephone-related code marked Basic will be asterisked on the bill with a statement below stating "Non-Payment of charges noted with an asterisk (*) may result in disconnection of your local telephone service."

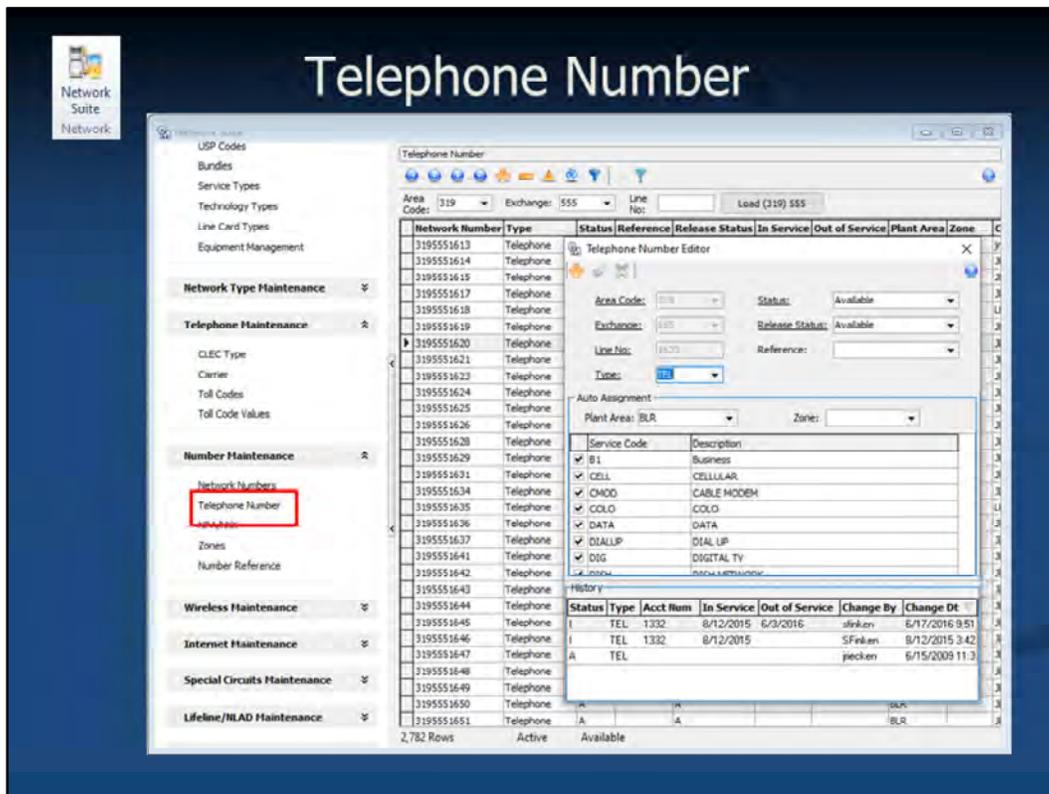
Equip/Inv – When USP Codes are flagged with the Equip/Inv billing category, users can create Write-Off Categories for every network type, to write off equipment, and inventory charges to its own Write-Off Category.

Toll Related – Charges that are related to toll services. Toll related charges cannot be used in combination with E911 and FCC.

Regulated – Offered only by local telephone company. Public Service or Public Utilities Commissions monitor and regulate these features and their charges. Includes such things as *caller ID, call waiting, and toll restriction*.

E911 – (Ex: E911 Surcharge) Flat-rate recurring monthly charge for E911 services. This code cannot be used in combination with Toll Related and FCC. USPs flagged for E911 cannot also be flagged Basic and/or Regulated.

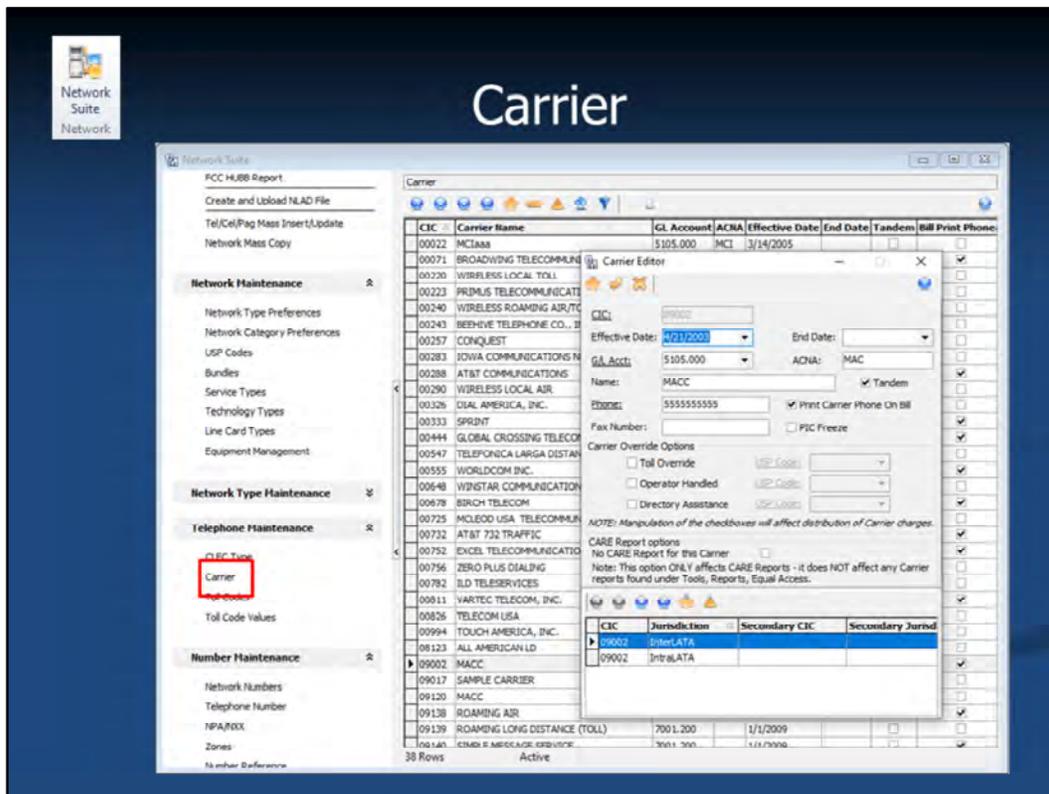
FCC – (Federal Communications Commission) Typically used to distinguish the SLC (Subscriber Line Charge). This code cannot be used in combination with Toll Related and E911. The federal agency empowered by law to regulate all interstate and foreign wire and radio communications services originating in the United States, including radio, television, facsimile, telegraph and telephone systems. The agency was established under the Communications Act of 1934 which also established the principle of universal service. USPs flagged for FCC cannot also be flagged Basic and/or Regulated.



The Telephone Number table contains all phone numbers loaded into the database. The filter icon is useful to filter on:

- All – all numbers regardless of status
- Available – the telephone number is not in use and is available to assign to an account
- Available/Held – the telephone number is not in use and is being held from assignment
- Available/Reserved – the telephone number is reserved for future use by a designated account
- In Use – the telephone number is currently in use by a customer or is recently out of service, and not scheduled to be reissued yet
- In Use/Ported In – the number has been ported in from another service provider (Local Number Portability provision)
- In Use/Ported Out – the number has been ported out to another service provider (Local Number Portability provision)
- In Use/Admin – the number is currently in use for administrative purposes (generally company numbers)
- Intermediate – the telephone number is being used for 3rd party purposes
- Unavailable/Snapback – the telephone number is “snapped back” to another carrier, and shouldn’t go back into the number pool
- Pending – the number has been assigned to a network, but the service order has not yet been applied
- Left In Service – some states require that a range of phone numbers are auto-assigned to vacant locations

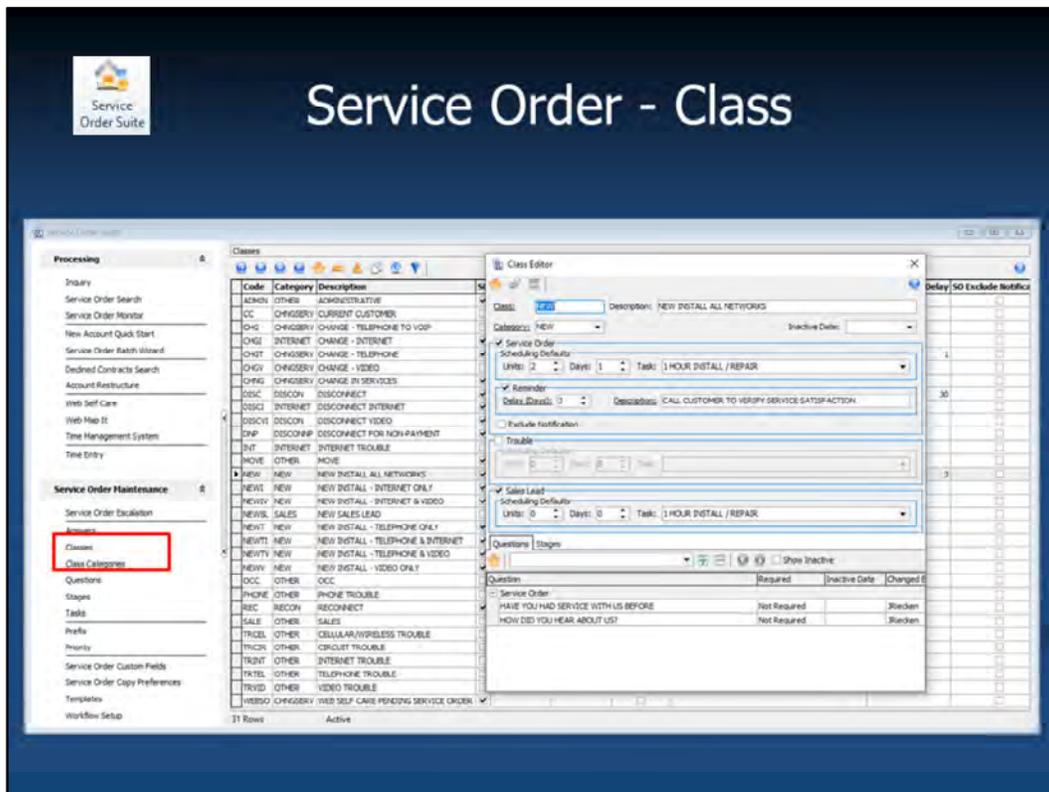
The Telephone Number Editor is accessible through this table. Use this to check the history of the number as well as change the status of the number, if necessary.



The Carrier table is found in the Network Suite. Here, you will be manage information associated with the long distance carriers with access to your switch. Any carrier to which a customer could be PIC'd should be in this table.

At the Carrier Editor, the Carrier's CIC and official Carrier Name (to be printed on the bill) will appear. In addition, if you would like a Carrier Phone number printed on the bill, it is housed at this screen. It is important that the correct GL Account number is assigned for this carrier – so that the billing reports will group any charges for this carrier to the correct General Ledger account. You will also need to indicate the toll jurisdictions associated with each carrier.

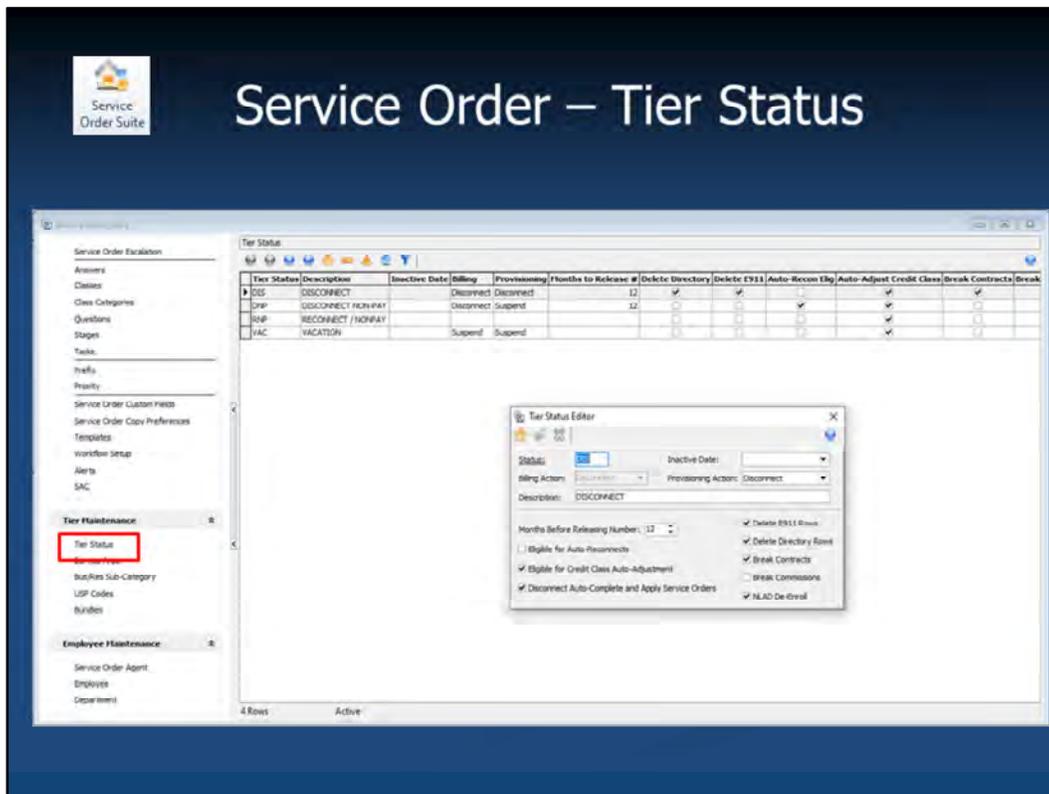
You will only need to access this screen to add or update carrier information. All information will be converted to this screen and reviewed by your TCA during live installation and training.



The Service Order Suite contains tables needed to perform service orders. Classes are basically indicators as to the type of work being done within the Service Order. Classes can be as detailed or as general as you'd like and typically include types like New Install, Change, Disconnect and Reconnect.

Each Class also has the ability to trigger both Questions and Stages. While both are linked through the Class table, stages must be set up and maintained through Maintenance – Service Order – Stage. Both Questions and Stages can also be flagged as required upon Service Order Complete, required upon Service Order Apply or not required.

Classes can also be flagged as Schedulable for use with scheduling functionality.



Disconnect types are housed at the Service Order Suite under Tier Maintenance. During live installation and training, your TCA will assist in developing these statuses. It is important to define each status and the results of using a specific Tier Status.

The Months Before Releasing Number field indicates the length of time before a phone number may be reissued.

The Billing Action determines whether the customer continues to pay for service while that Tier Status is in effect on the tier.

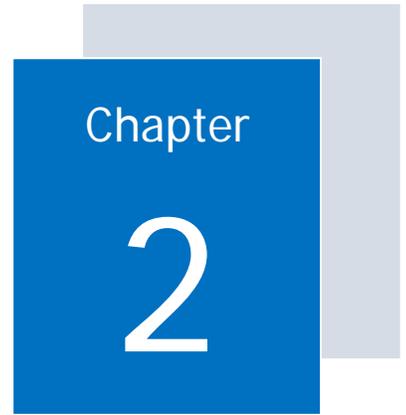
- Disconnect – recurring charges will not continue to accrue
- Suspend – recurring charges continue to accrue
- None – for tracking purposes only

The Provisioning Action determines how the disconnect is handled in the switch as it relates to switch activation and provisioning

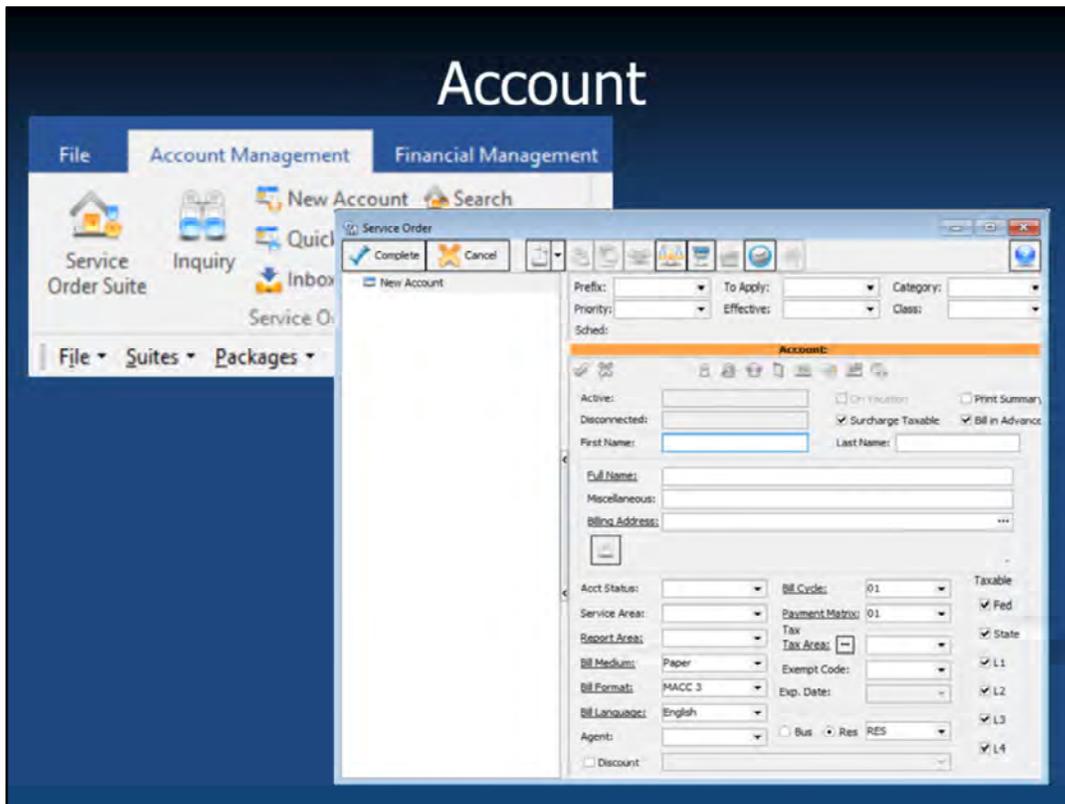
- Disconnect – detail is sent to the switch for disconnection.
- Suspend – a suspend record is sent to the switch.
- None – Switch activation are not changed by this status.

Eligible for Auto-Reconnects indicates the Disconnect for Non-Pay Tier Status, if that status may be reconnected after payment has been received. Eligible for Credit Class Auto-Adjustment can be used to update a credit class assignment based on a tier status change. Disconnect Auto-Complete and Apply Service Orders determines if orders created via the Disconnect Wizard will be automatically completed and applied. If this option is deselected, the orders will remain pending.

At Delete Directory Rows and Delete E911 Rows, the company may determine if the corresponding module should be updated when an account is marked with the associated Tier Status. Break Contracts indicates whether that Tier Status would result in a broken contract. NLAD De-Enroll indicates the Tier Status would de-enroll lifeline accounts from NLAD.



New Install – Templates & Workflow



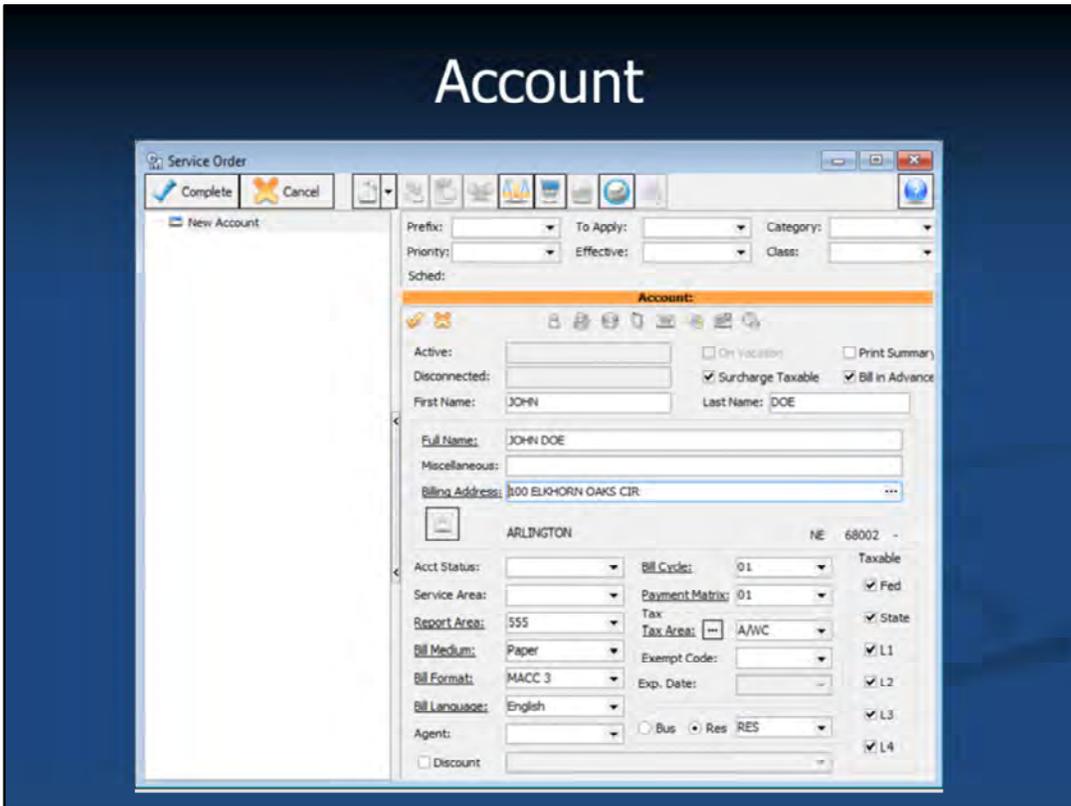
Service Orders are the heart of Customer Master. They're used to create new accounts as well as update existing accounts.

There are three parts to the order layout – the header, the account tree on the left and the information screens on the right. The header will remain throughout the order. The account tree will grow as information is added.

Information in the header includes status buttons – Complete, Apply and Cancel. When the order is first opened and information saved, the order will be in a Pending status. Complete status means the work is finished but the information has not yet been applied and changes can still be made. Apply means the order is fully completed and no further changes can be made.

Effective date is the date the charges will start accruing (unless date changes have been made elsewhere in the order). It's typically the date the order is supposed to be applied, and can be changed at any point until Service Order Apply. Class indicates the type of order – New Install, Change, Disconnect and so on. Choosing a Class auto-populates the Category field and can trigger other options such as Workflow and Stages.

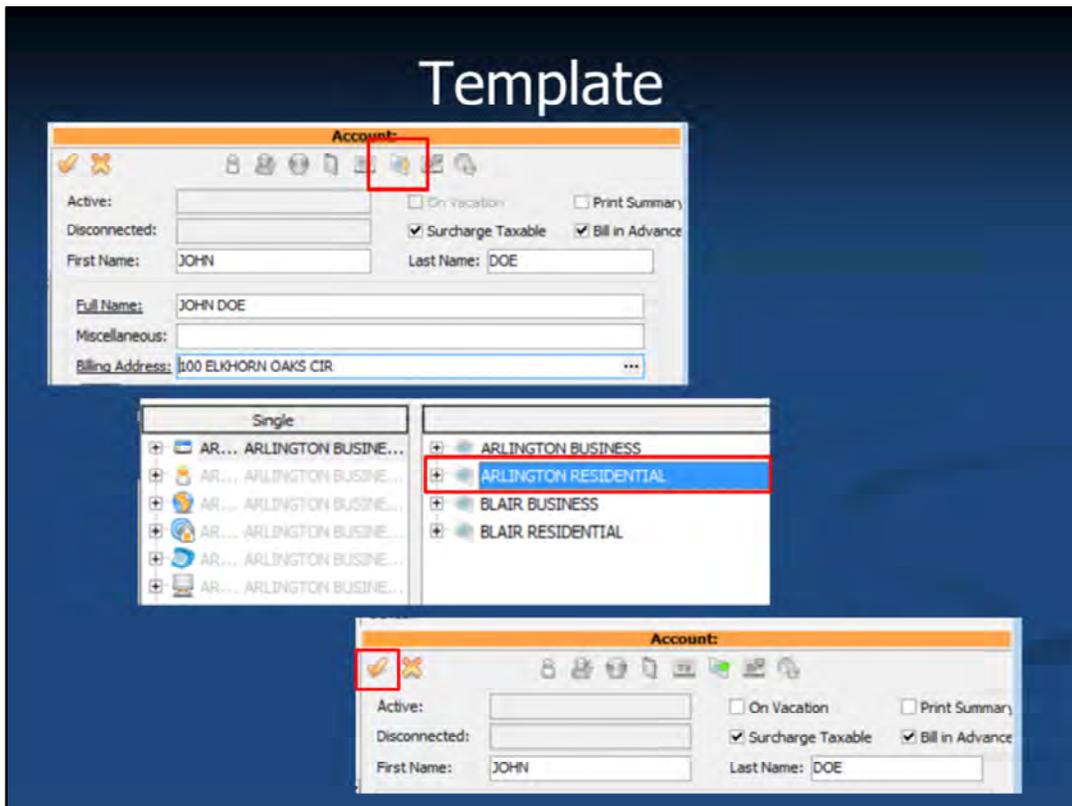
Account



In this exercise, we're going to use both Templates and Workflow to create a New Install for Telephone, Internet and CATV. Templates allow you to pre-set information and values that might be the same for a certain area or type of service. For example, you can include all of the required charges in a Telephone template, such as the basic line charge, E911, ARC and SLC, for a specific location. You can have as many Templates for as many tiers as you'd like. You can also link the tiers together which would basically create your entire account.

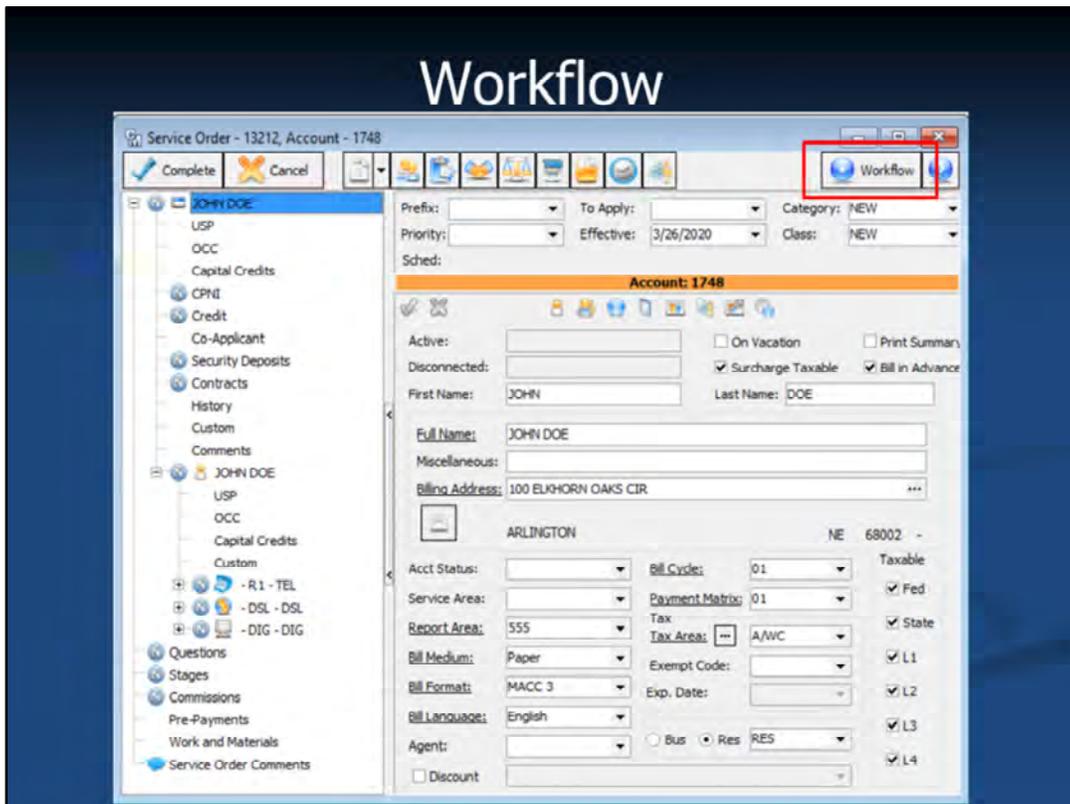
We'll also use Workflow which takes you from screen to screen, in the order you want.

Template



The Templates button will show you single and linked templates available for use. After entering the name and address information, select your template. After choosing a template, post to apply the template and save the network information.

Workflow



Based on the Template setup, all tiers of the account have been created and information added to some of the nodes on each tier. The Effective date, Category and Class have also been populated.

Now, we'll work our way through the order, using Workflow.

Workflow

Service Order - 13212, Account - 1748

Account: JOHN DOE

Account: 1748

Active: On Vacation Print Summary

Disconnected: Surcharge Taxable Bill in Advance

First Name: JOHN Last Name: DOE

Full Name: JOHN DOE

Miscellaneous:

Billing Address: 100 ELKHORN OAKS CIR ...

ARLINGTON NE 68002 -

Acct Status: Bill Cycle: 01 Taxable

Service Area: Payment Matrix: 01 Fed

Report Area: 555 Tax Tax Area: A/WC State

Bill Medium: Paper Exempt Code: L1

Bill Format: MACC 3 Exp. Date: L2

Bill Language: English Bus Res RES L3

Discount L4

Back Next Return to Service Order

Each screen in Workflow has buttons that allow you to advance, go back to previous screens and return to the classic Service Order view. On most screens, choosing Next will save the information you've added to the screens as well as move you on to the next screen. The Help menu and CRM – Client Relationship Management – are also available on each screen.

Stages

Service Order - 13213, Account - 1749
Account: JOHN DOE

Stages

Stage	Step / Task	Seq	Assigned To	Assigned Date	Started By	Started
+	CUST CUSTOMER SERVICE / SALES	1	LINDA LEMON	03/26/2020 07:38 AM	LINDA LEMON	3/26/20
-	DISP DISPATCH FOR PREMISE WORK	2				
+	CO CENTRAL OFFICE	2				
-	BILL BILLING	3				

Back Next Return to Service Order

Stages are what route the order from one employee and/or department to the next.

Questions

Question	Answer	Pre-defined A
HAVE YOU HAD SERVICE WITH US BEFORE	NO	<input checked="" type="checkbox"/>
HOW DID YOU HEAR ABOUT US?	FRIEND/FAMILY/NEIGHBOR	<input checked="" type="checkbox"/>

Questions are a great way to gather marketing and other general information from the customer. You can pose as many questions as you like. Questions are also related to the Service Order Class, so they can be different for different types of orders.

CPNI

Service Order - 13213, Account - 1749

Account: JOHN DOE

CPNI

CPNI Information | Contact Information | Breach Information

Phone Number on Record:

Level 1 Authentication

Question: What are the last four digits of your SSN?

Answer: 0000

Level 2 Call Detail CPNI

Password: NJ VOLLEYBALL

Forgot Password Question: Who is your favorite sports team?

Answer: GO BIG RED

Opt-Out: (Response Must Be Received To DENY Approval For CPNI)

CPNI Approval:

Opt-Out Letter Sent:

Follow-Up Date:

Response Received:

Back Next Return to Service Order

CPNI is Customer Proprietary Network Information. Essentially this controls who has rights to the information on the account.

Credit

Service Order - 13213, Account - 1749
Account: JOHN DOE

Credit

Credit Class: B License:

Reference 1:
Reference 2:
Reference 3:

Prev Address:

Credit ID: 00000000 2nd Credit ID:

Tribal ID:

Prev Phone: Date Disc:
Friend: Friend Phone:

Friend Address:

Employer: Work Phone:
Years at Job: DOB:
Spouse: Spouse DOB:
Spouse Emp:

Pull Bill
Code: End Bill Date:

No Notice In Collections
Expire Date:

Back Next Return to Service Order

The Credit screen houses lots of information. It's typically used to track Credit Class and Credit ID (SSN).

Bank Information

Credit Rating/Bank/Credit Card Information

Credit Report
Rating: [] Model: [] Report Date: []

Bank Information
Bank ABA Number: []
Account Number: []
Type: [Checking]
Effective Date: [] End Date: []
 ACH Auto Pay
 ACH Pre-notified
Discount: []

Credit Card Information
Effective Date: []
Ending Date: []
Card Type: []
Token: []
Exp. Date (mm/yyyy): []
Last Four: []
Advise By: []
Maiden Name: []
Authorized By: []
Card Holder: []
Miscellaneous: []
 Automated Credit Card Payment
Discount: []

eBill Auto Pay
Effective Date: [] End Date: []

The Bank Information screen is accessed through the Credit screen. Here you can retrieve a credit score (if you have the Experian interface), add bank information for auto-bank pay (ACH) and/or add credit card information.

Account Contact Information

The screenshot shows a software window titled "Account Contact Information". It is divided into two main sections: "Personal Information" and "Other Contacts".

Personal Information:

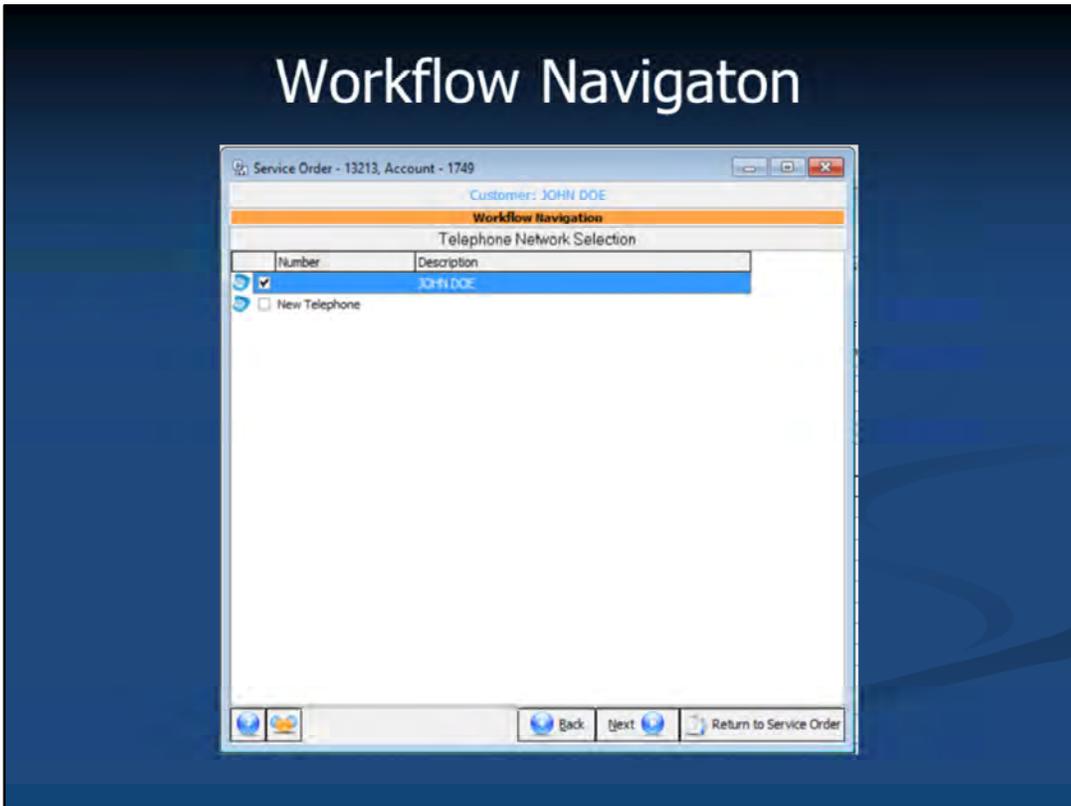
- Phone Number: (123)456-7890, Type: Mobile
- Description: PERSONAL CELL PHONE
- Email Address: nobody@macnet.com
- No Email Welcome Packet Sent
- Confidential Email Address: nobody@macnet.com
- Use for Delinquents Emails
- Email to Text Address: [Empty field]
- Appointment Reminder For: None
- Confidential Email to Text Address: [Empty field]
- Use for Delinquents Text Msg

Other Contacts:

Type	Contact	Description
------	---------	-------------

The Account Contact Information screen is used to house additional contact information such as cell phones, work numbers, email addresses and text addresses. It's always a good idea to include this information as it not only prints on the order, it allows for other means of communication with the customer.

Workflow Navigaton



Because the Customer tier was created through the Template and no changes are needed, we're bypassing it in Workflow and moving on to the Telephone network.

Telephone Network

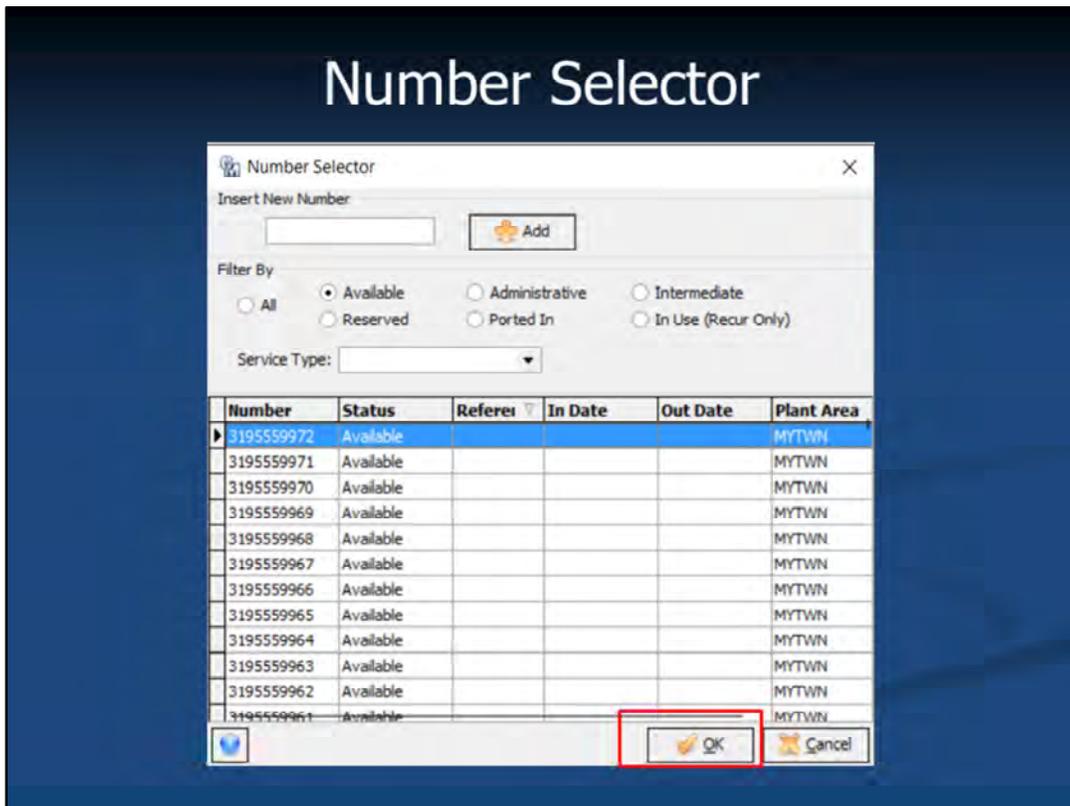
The screenshot shows a software window titled "Service Order - 13213, Account - 1749" with a sub-header "Telephone: - R1 - TEL". The main content area is titled "Network:" and contains the following fields and options:

- Active:** [Empty field] On Vacation Mult Address
- Disconnected:** [Empty field] Surcharge Taxable
- Type:** Telephone (dropdown) **Network Number:** [Empty field]
- Description:** JOHN DOE
- Service Type:** R1 (dropdown) **Technology Type:** TEL (dropdown)
- Line Card Type:** [Empty field] **Trouble Priority:** [Empty field]
- Service Address:** 100 ELKHORN OAKS CIR
ARLINGTON, NE 68002
- Network Status:** [Empty dropdown]
- Service Area:** [Empty dropdown]
- Report Area:** 555 (dropdown)
- Plant Area:** ARL (dropdown)
- Serving Area:** [Empty dropdown]
- Work Group:** ARLINGTON (dropdown)
- Special Needs:** Hearing Medical Condition Physical Speech Visual
- Tax:** Tax Area: [Empty dropdown] A/WC (dropdown)
- Exempt Code:** [Empty dropdown]
- Exp. Date:** [Empty dropdown]
- RES:** Bus Res RES (dropdown)
- Taxable:** Fed State L1 L2 L3 L4

At the bottom of the window are buttons for "Back", "Next", and "Return to Service Order".

Reviewing the information on the Telephone network is always a good idea.

Number Selector



The Number Selector screen will show Available numbers. Different filter options are available if needed. You may also have the ability to manually add a ported-in number.

Cascade Information

Cascade Information

Update Subordinate Information?

What To Update

- Name
- Address
- Report Area
- Service Area
- Tax Area
- Tax Exempt
- Bus/Res
- Phone Number

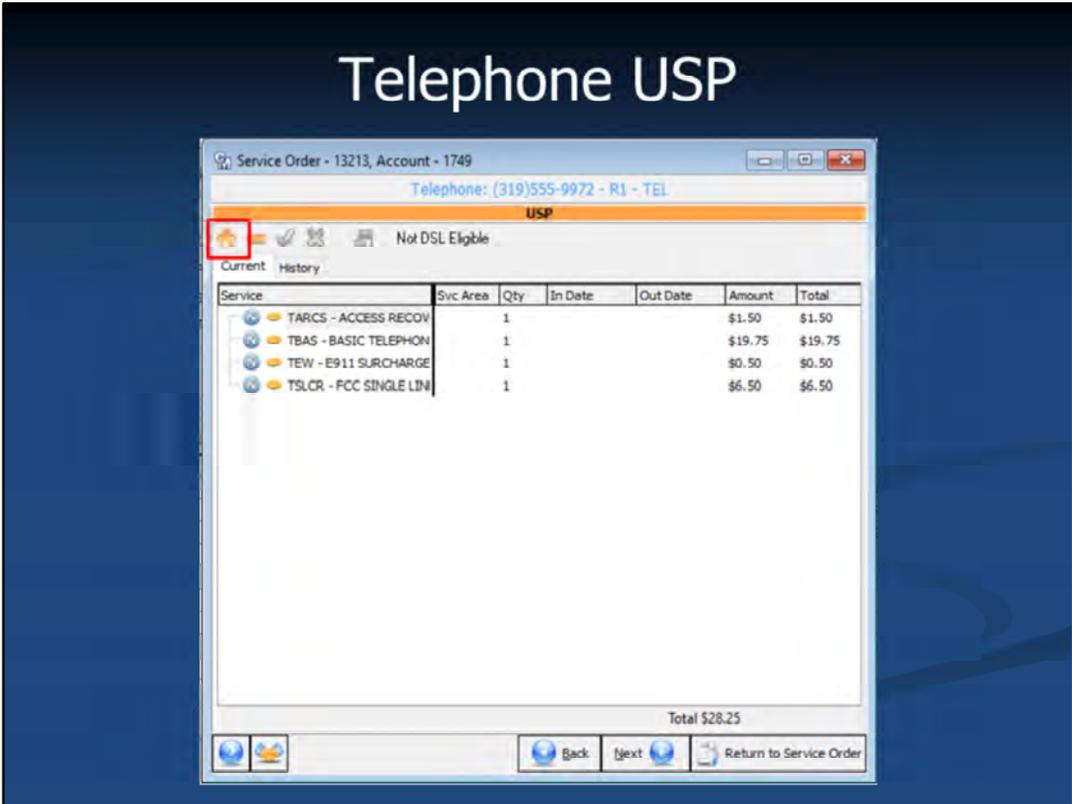
Where To Update

- Customers
- Networks
- E911
- Plant
- Directory
- Main Number

The Cascade Information screen is essentially asking you what information you want to carry over from the first network to other nodes on that network.

You want to be careful about how you handle this screen on subsequent networks. For example, if you continue to just choose Yes, you'll constantly be changing the Main Number from one network to the next.

Telephone USP



Because Telephone USPs are included in the template, all of the required USPs should already be selected. Adding additional USPs is done by clicking on the Insert icon.

USP Selector

	Code	Billing Freq	Svc Area	Description	Amount	Selected
<input type="checkbox"/>	TESS	Monthly		TELEPHONE SIMPLE SAVER	\$29.00	TFAB5
<input checked="" type="checkbox"/>	TFAB5	Monthly		TELEPHONE FABULOUS FIVE FEATUI	\$11.50	
<input type="checkbox"/>	TOPT	Monthly		TELEPHONE OPTIONS PLAN	\$32.95	
<input type="checkbox"/>	TWBAS	Monthly		WASHINGTON COUNTY BASIC PHON	\$26.84	

USP Filter: OneTime Recurring Bundles All

Bus/Res Filter: Bus Res All

Buttons:

The USPs initially displayed are based on a default setting – residential, business or all. Even with a default, you can still see all codes through the Bus/Res filter. You can filter additionally by codes flagged as One Time, and by Bundles. Click OK when all USPs have been added.

Telephone USP

Service Order - 13214, Account - 1750
Telephone: (319)555-9972 - R1 - TEL
USP
Not DSL Eligible

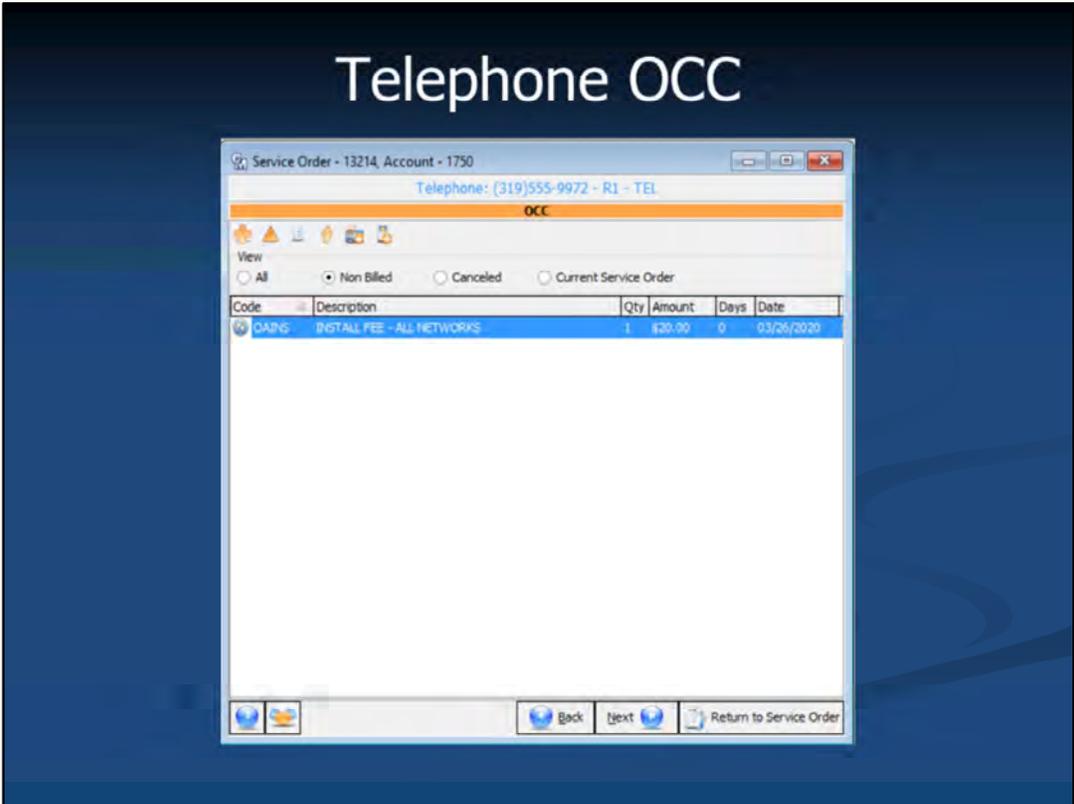
Service	Svc Area	Qty	In Date	Out Date	Amount	Total
TARCS - ACCESS RECOV		1			\$1.50	\$1.50
TBAS - BASIC TELEPHON		1			\$19.75	\$19.75
TEW - E911 SURCHARGE		1			\$0.50	\$0.50
TSLCR - FCC SINGLE LIN		1			\$6.50	\$6.50
TFABS - TELEPHONE F.A.R.		1			\$11.50	\$11.50
TCF01 - CF - INSIDE		1			\$1.13	
TCF03 - CF - TELEMA		1			\$2.02	
TCF06 - CF - VOICE I		1			\$4.07	
TCF10 - CF - CALL W		1			\$3.15	
TCF11 - CF - SELECT		1			\$1.13	

Total \$39.75

Back Next Return to Service Order

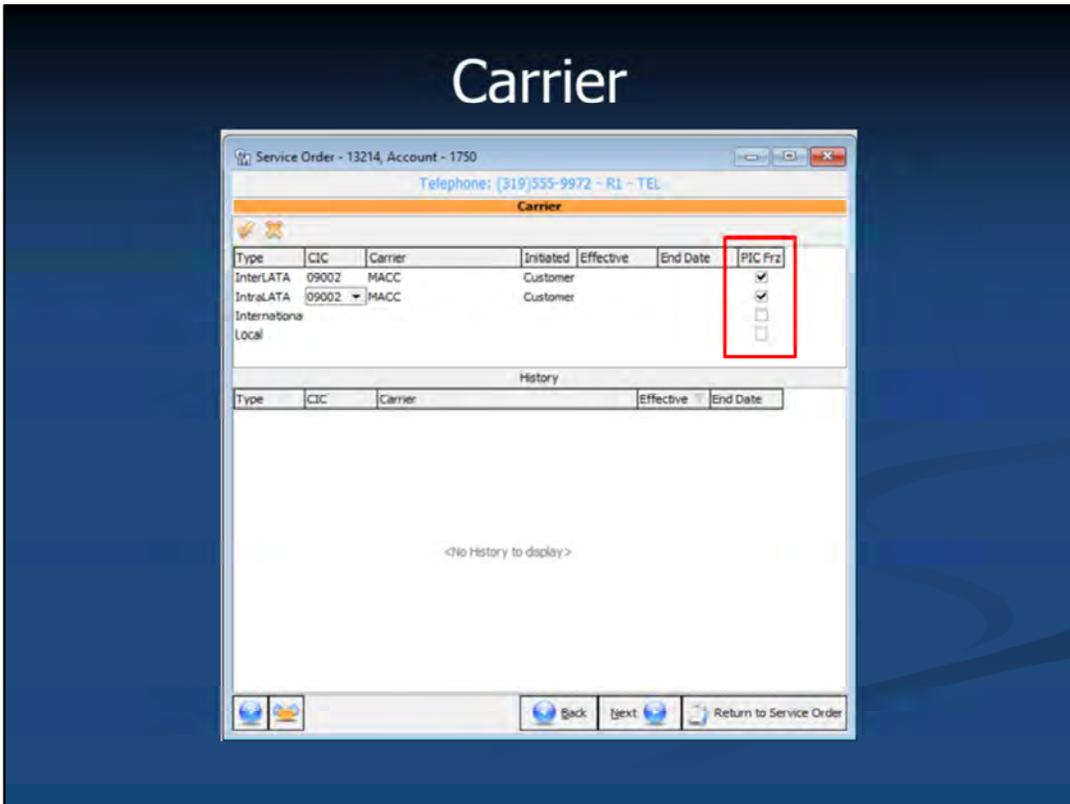
After clicking OK, all selected USPs will show in the USP display.

Telephone OCC



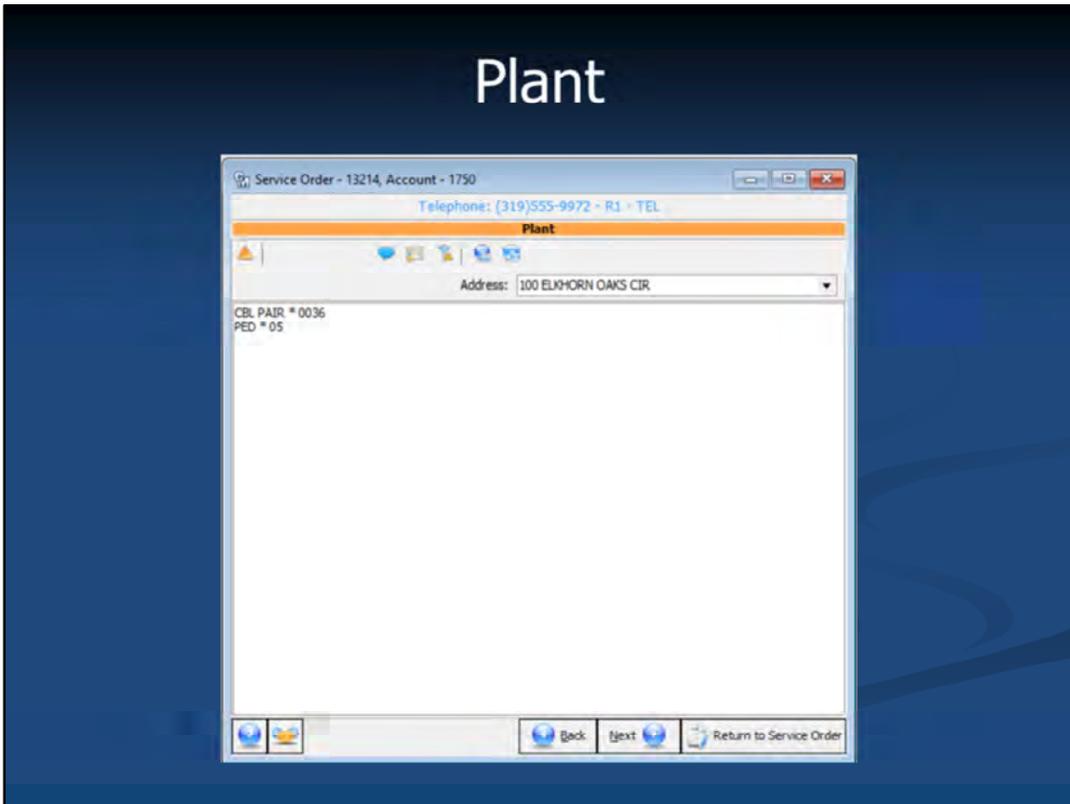
For new install orders, OCCs typically show one-time charges such as fees, onsite charges and so on. They might also be used for a 'term limit' discount and flagged as permanent rather than through USP Codes with outdates.

Carrier



The Carrier screen shows the long distance PICs the customer has chosen. The PIC Frz option is used to indicate that only the account holder is authorized to make changes, rather than the carriers themselves.

Plant



Plant is automatically added based on the address used, and the plant details previously assigned to that address. You can add, remove and update plant through the order if needed, by clicking on the Edit icon.

E911

Service Order - 13214, Account - 1750
Telephone: (319)555-9972 - R1 - TEL

E911

PSAP: SCQ

Number: 100 Suffix: PreDir: St Suf: CIR

Street: ELKHORN OAKS

Location: PostDir: Zip4: State: NE

Community: ARLINGTON ZIP: 68002

County: WASH T.A.R.: Cell ID: Sector: GPS x: GPS y: GPS z: Comment: NPA: 319

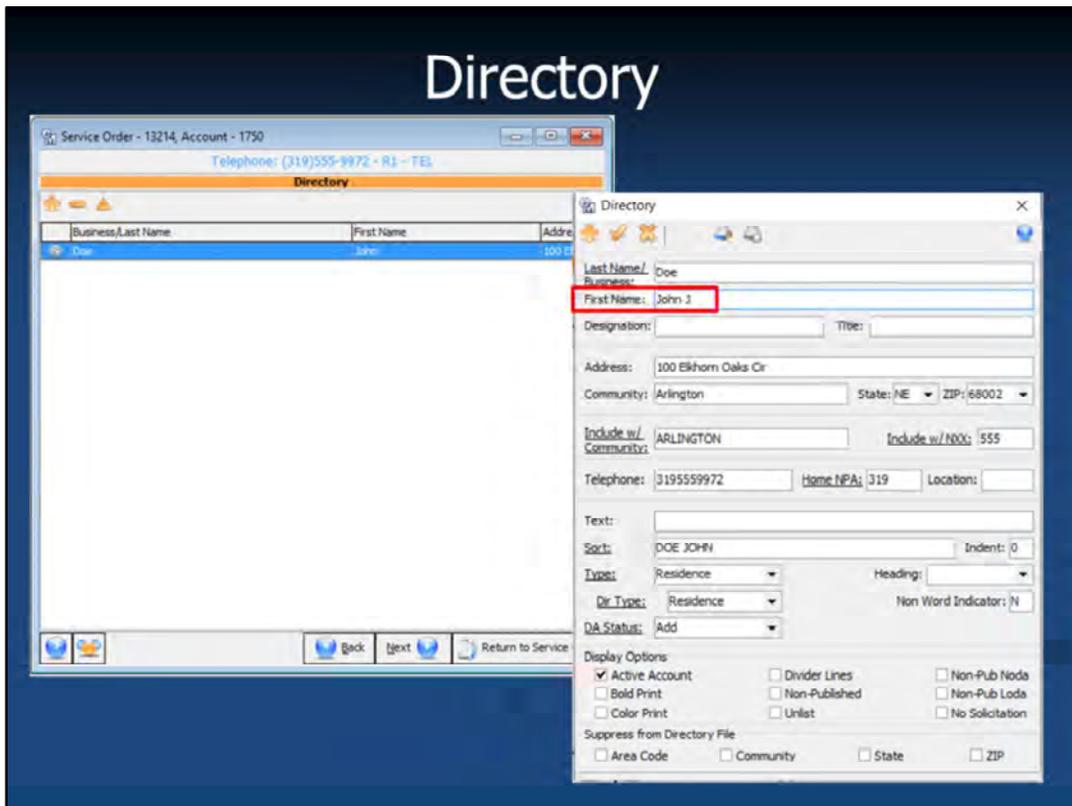
Main Number: 5559972 Phone Number: 5559972

Function: insert Class of Service: Residence

ESN: Type of Service: Not FX or Non-Pub

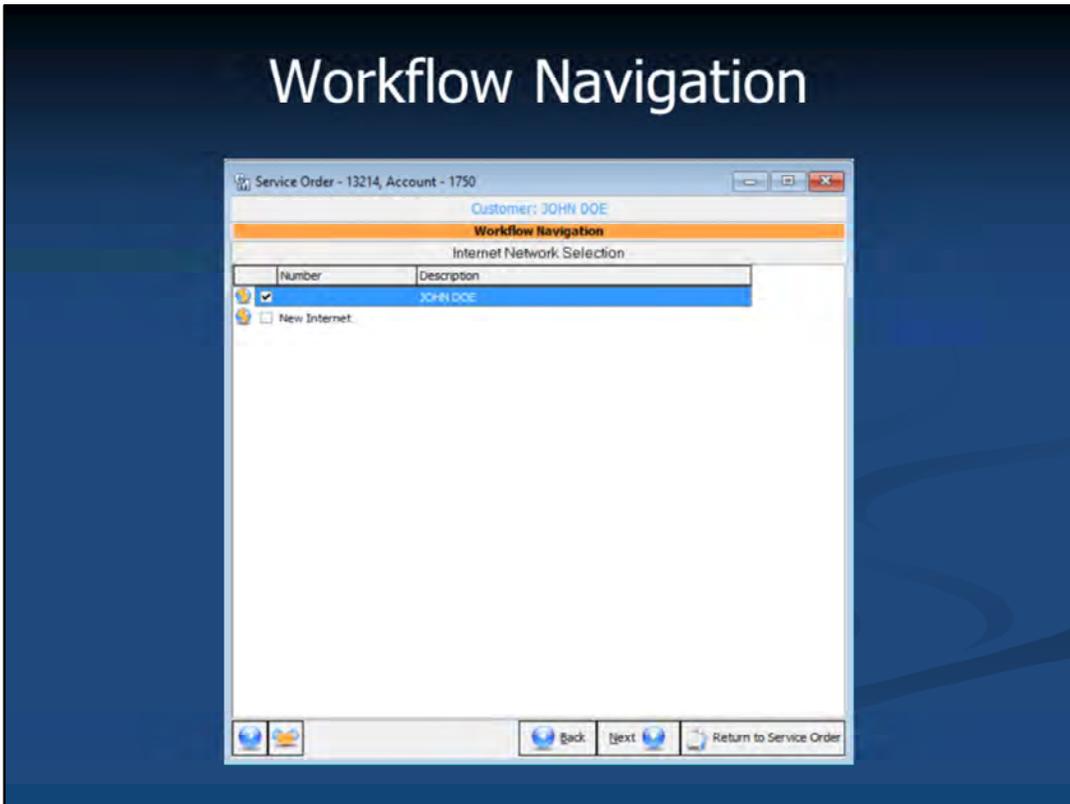
Back Next Return to Service Order

E911 information has already been added, based on the Cascade Information screen options following the creation of the Telephone network tier. If the E911 address is valid against the MSAG (Master Street Address Guide) you won't have to make any changes or click on the Post icon to save the information.



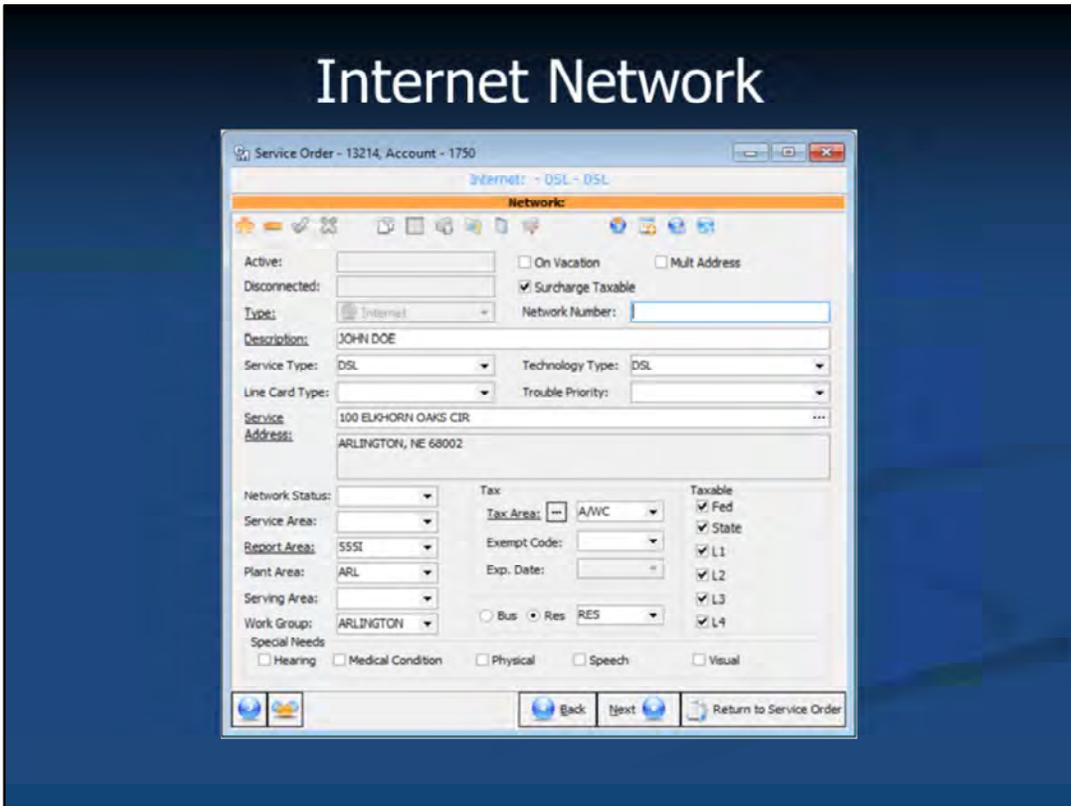
Directory listings can be created by including the option on the Cascade Information screen. On the Directory editor, Non-Published or Unlist may be flagged, based on the USP Code selected.

Workflow Navigation



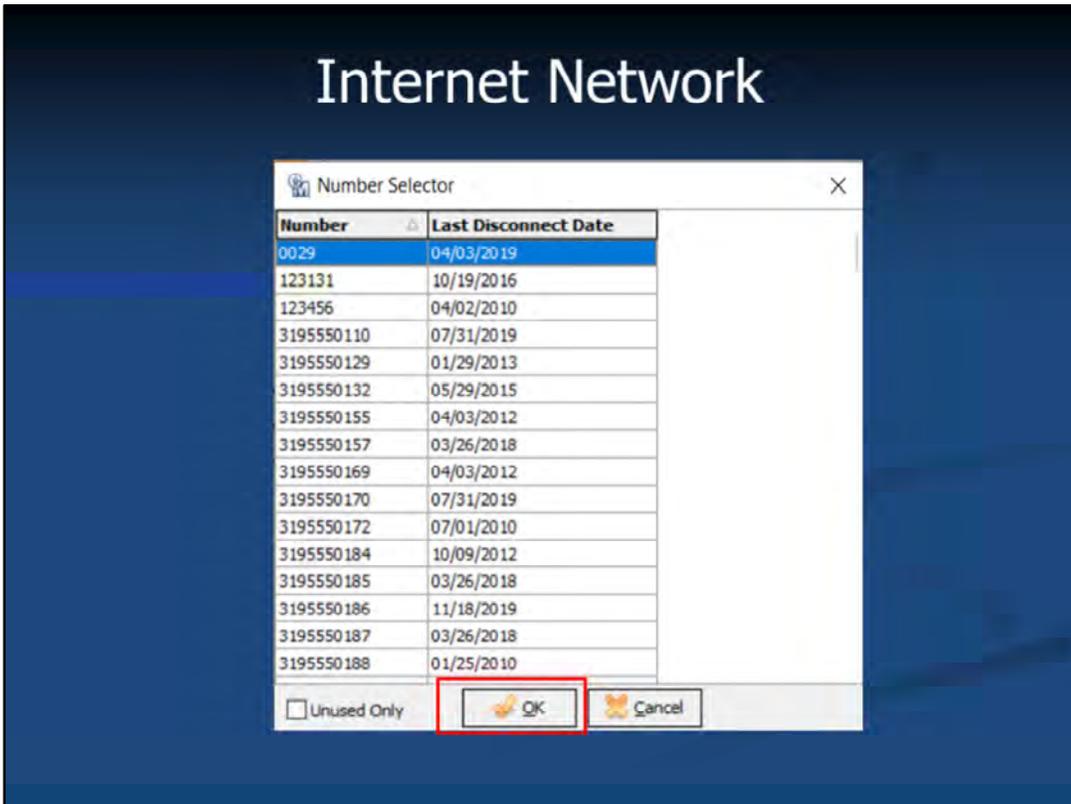
Based on the Workflow setup for this new install order, the Internet Network Selection will have the template-created network flagged already.

Internet Network



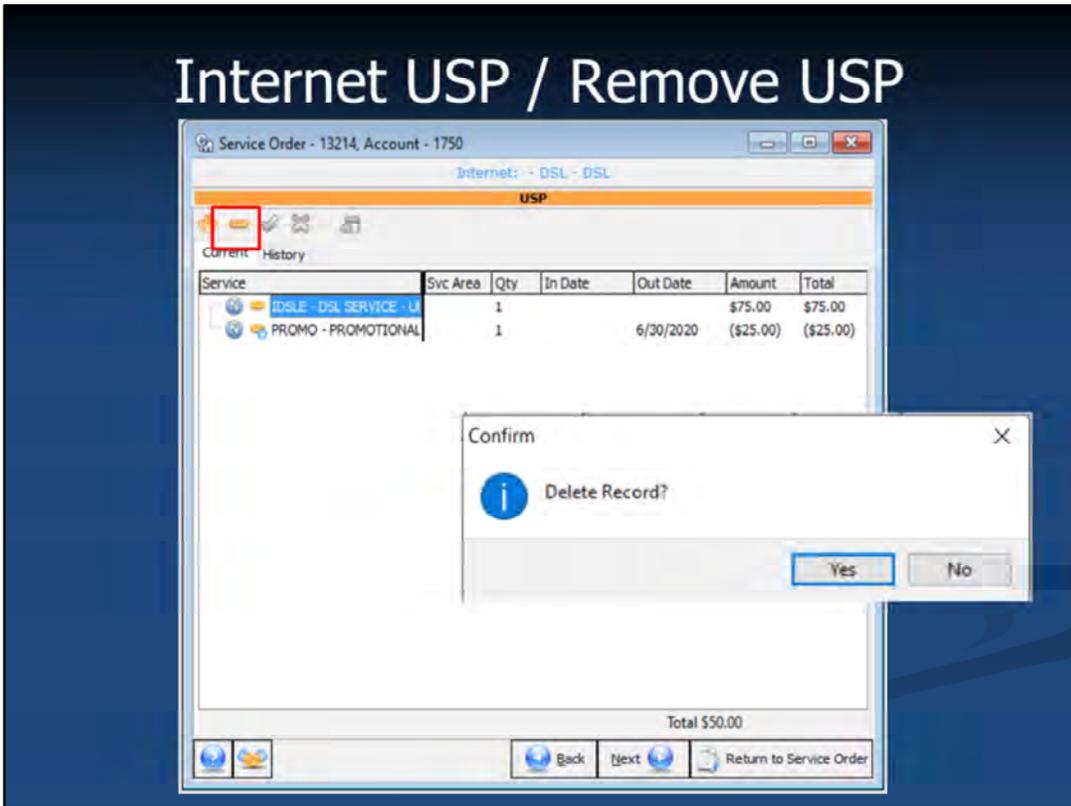
Like the Telephone network, it's always a good idea to review the tier information.

Internet Network



If you have pre-set internet network numbers, you may use the Number Selector where you can choose from available numbers. At this point, you may get the Cascade Update information screen, much like you did when you created the Telephone network. It's a good idea to deselect the Main Number checkbox before choosing OK. This keeps the main number set to Telephone – or the first network that was created.

Internet USP / Remove USP



The Internet USPs have been added based on the Template we're using.

Internet USP / Add USP

Service Order - 13214, Account - 1750

Internet: - DSL - DSL

USP

Current History

Service	Svc Area	Qty	In Date	Out Date	Amount	Total
PROMO - PROMOTIONAL		1		6/30/2020	(\$25.00)	(\$25.00)

Total (\$25.00)

Back Next Return to Service Order

On any USP screen you can add and delete USP Codes.

USP Selector

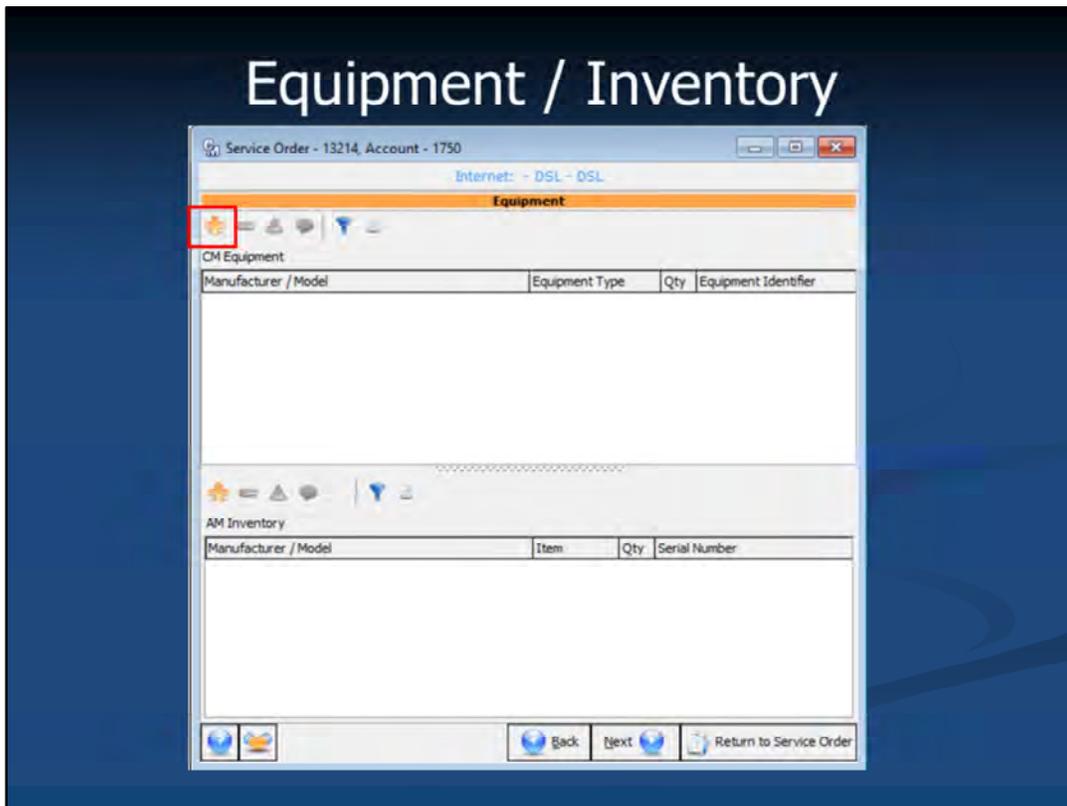
	Code	Billing Freq	Svc Area	Description	Amount	Selected
<input type="checkbox"/>	HOWL	Monthly		HOWL-O-WEEN HUMANE SOCIETY	\$0.00	IDSLF
<input type="checkbox"/>	IDSLA	Monthly		DSL SERVICE - UP TO 10 MBPS	\$35.95	
<input type="checkbox"/>	IDSLB	Monthly		DSL SERVICE - UP TO 25 MBPS	\$46.50	
<input type="checkbox"/>	IDSLD	Monthly		DSL SERVICE - UP TO 50 MBPS	\$56.50	
<input type="checkbox"/>	IDSLE	Monthly		DSL SERVICE - UP TO 75 MBPS	\$75.00	
<input checked="" type="checkbox"/>	IDSLF	Monthly		DSL SERVICE - UP TO 100 MBPS	\$99.99	
<input type="checkbox"/>	IEML	Monthly		ADDITIONAL E-MAIL	\$2.00	
<input type="checkbox"/>	IF100	Monthly		FIBER SERVICE - UP TO 100 MBPS	\$99.95	
<input type="checkbox"/>	IFB25	Monthly		FIBER SERVICE - UP TO 25 MBPS	\$69.95	
<input type="checkbox"/>	IFB50	Monthly		FIBER SERVICE - UP TO 50 MBPS	\$79.95	
<input type="checkbox"/>	IFIX	Monthly		FIXED WIRELESS	\$99.00	
<input type="checkbox"/>	ILIFE	Monthly		LIFELINE CREDIT INTERNET (\$10.00)		

USP Filter: OneTime Recurring Bundles All

Bus/Res Filter: Bus Res All

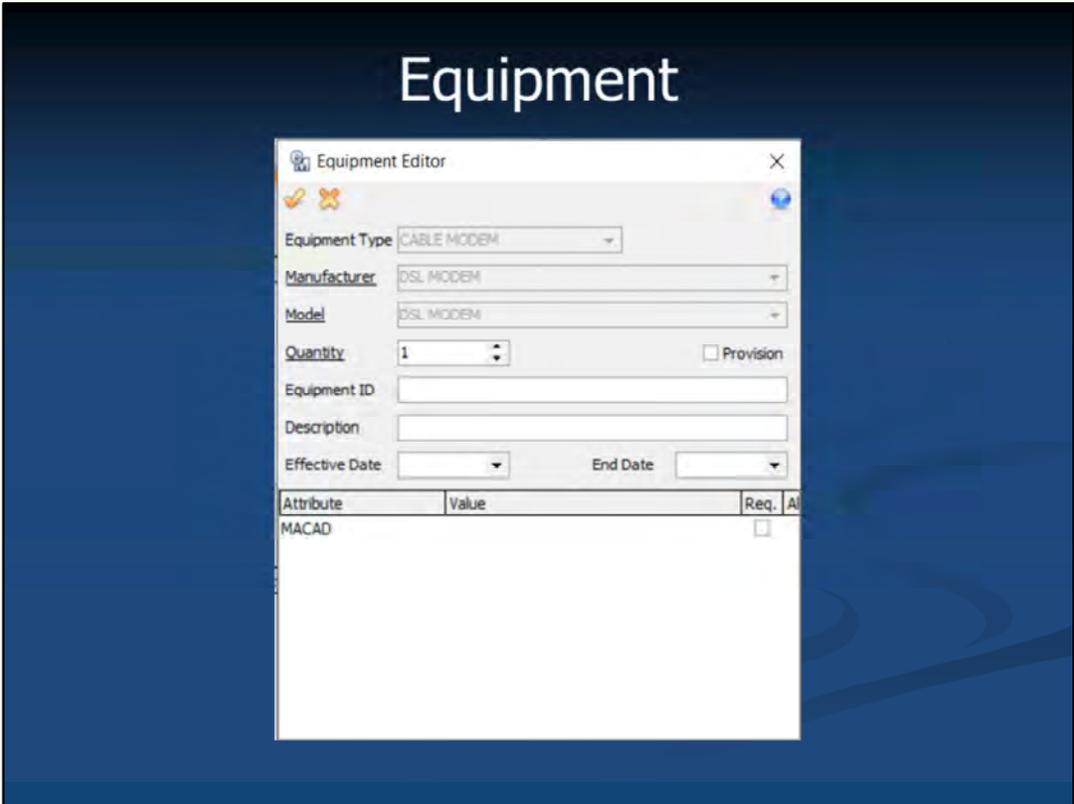
Any time you're adding a code, you'll need to both flag the code and choose OK.

Equipment / Inventory



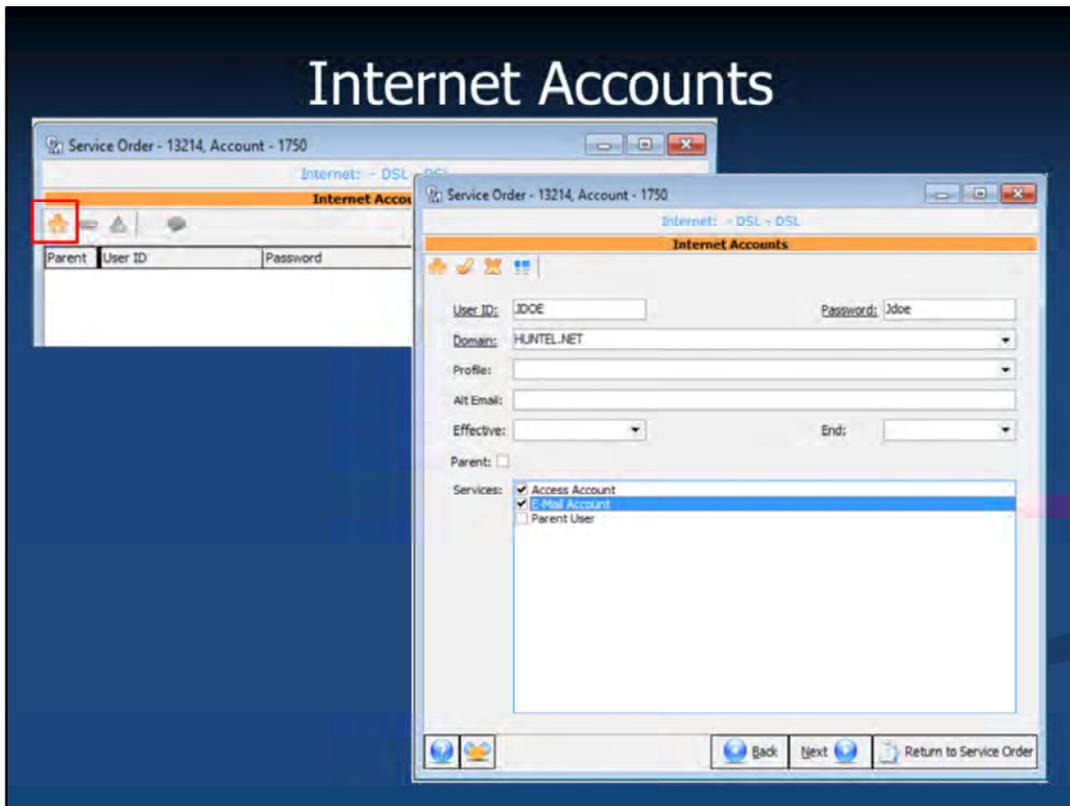
The Equipment/Inventory screen allows you to view, remove, add and edit assigned Equipment or Inventory. Equipment pulls from the Equipment Management functionality in CM. Inventory pulls from the Nii (Network Inventory Interface) through the AM/CM interface.

Equipment



Selecting Equipment requires fields that are somewhat different than those when you're using the Nii. For example, in Equipment, there is no flag for Lease or Purchase while there is in Inventory.

Internet Accounts



Internet Accounts is typically used to track customers' information when using your domain/internet services. User ID, Password and Domain are all required values. Domain may auto-populate based on a default setting.

Internet

Service Order - 13214, Account - 1750

Internet: - DSL - DSL

Internet

Internet | IPv4 | IPv6

Plan:

IP Type: IP Address:

Telephone:

Referrals

Current: Accumulated:

FCC 477 Reporting

Broadband Type: Asymmetric xDSL

Downstream: Upstream:

Computer

Type:

Operating Sys:

Modem: Modem No:

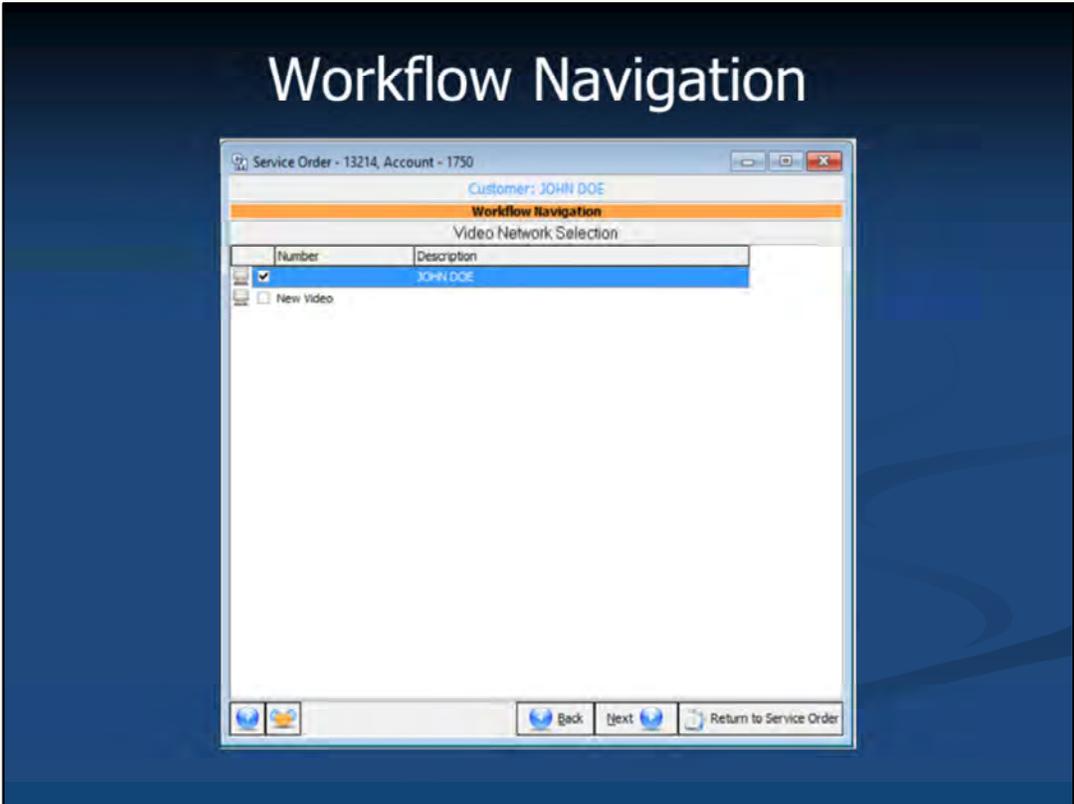
Software:

Software Date: Send Bill

[Back](#) [Next](#) [Return to Service Order](#)

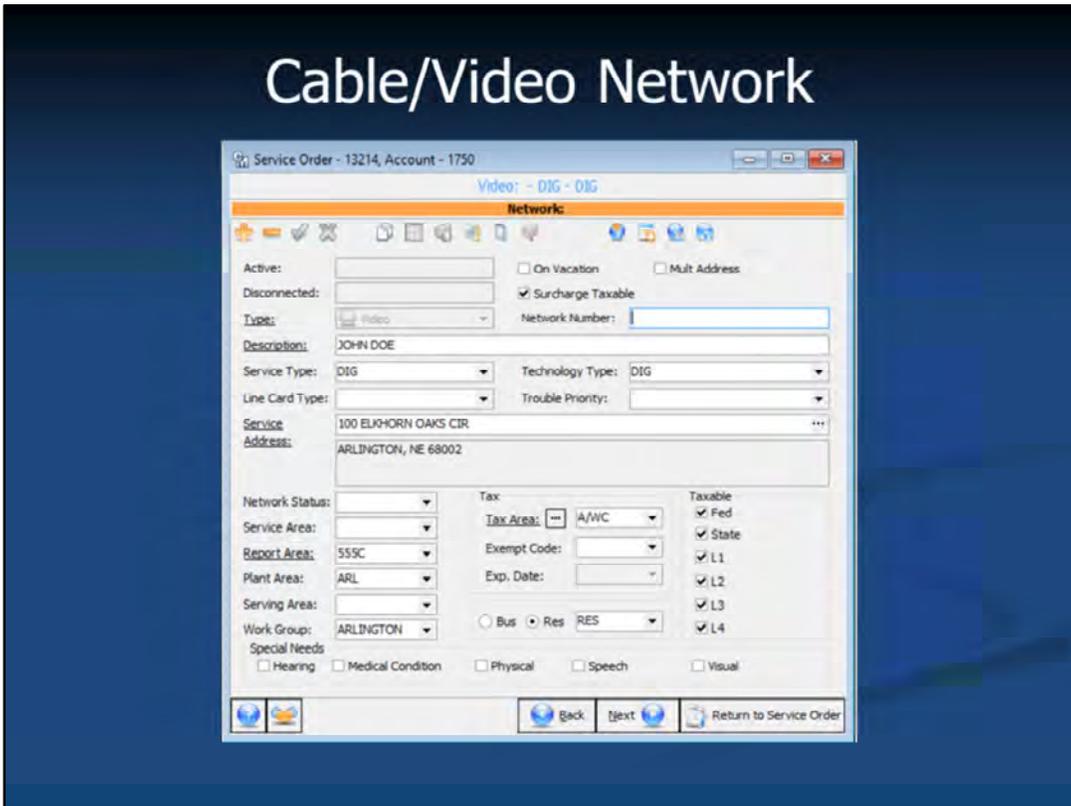
The Internet screen shows FCC 477 Reporting information. This is auto-populated based on the USP Code selected but can be changed if needed. The Heart icon is for Internet Lifeline.

Workflow Navigation



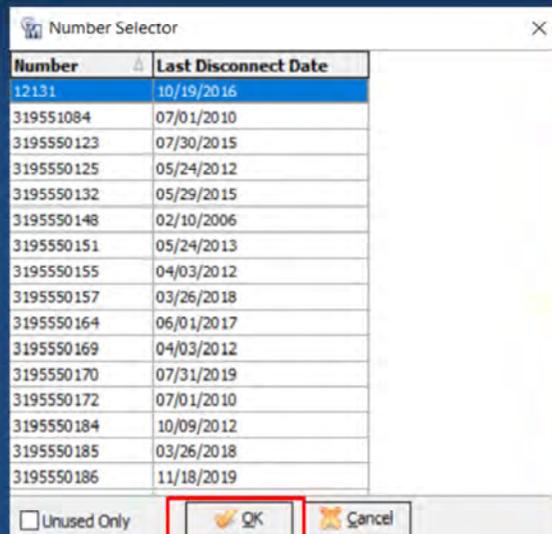
Like Telephone and Internet, you now have the opportunity to continue working on the new network created through the Template and Workflow or to flag a new Network. Most of the time, you'll choose the network already flagged.

Cable/Video Network



The Network tier screen gives you a chance to review the information and make any updates – such as a network-specific Report Area.

Cable/Video Network

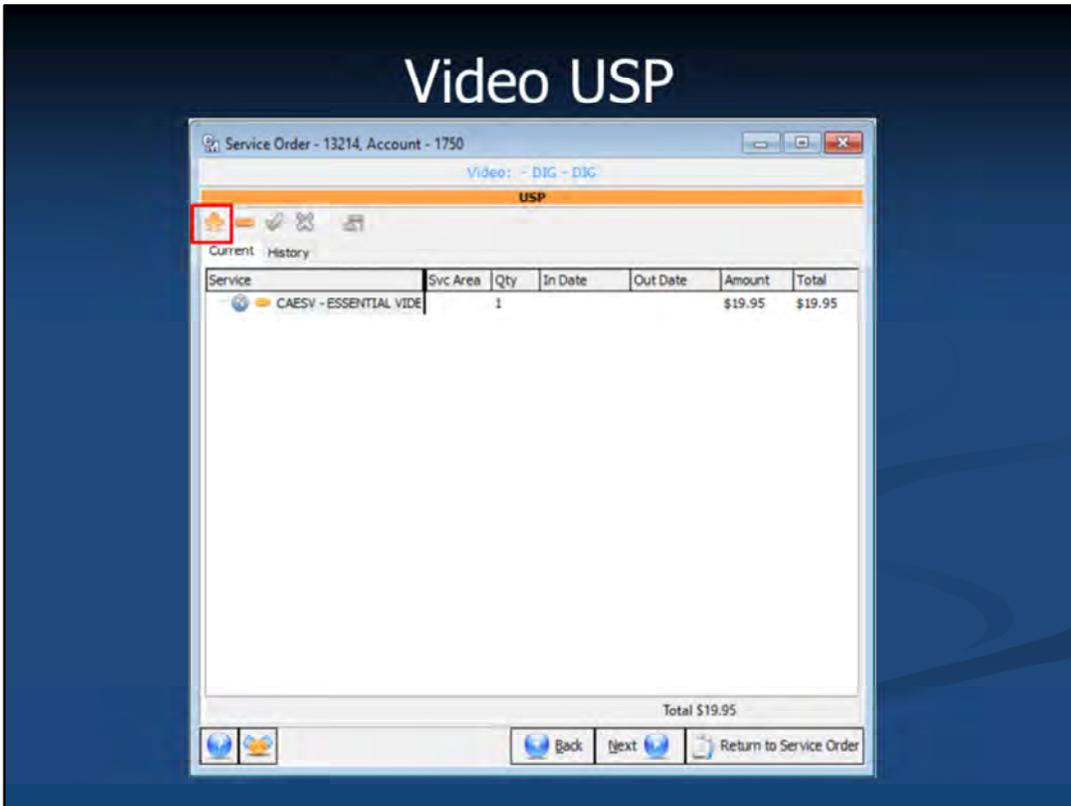


Number	Last Disconnect Date
12131	10/19/2016
319551084	07/01/2010
3195550123	07/30/2015
3195550125	05/24/2012
3195550132	05/29/2015
3195550148	02/10/2006
3195550151	05/24/2013
3195550155	04/03/2012
3195550157	03/26/2018
3195550164	06/01/2017
3195550169	04/03/2012
3195550170	07/31/2019
3195550172	07/01/2010
3195550184	10/09/2012
3195550185	03/26/2018
3195550186	11/18/2019

Unused Only

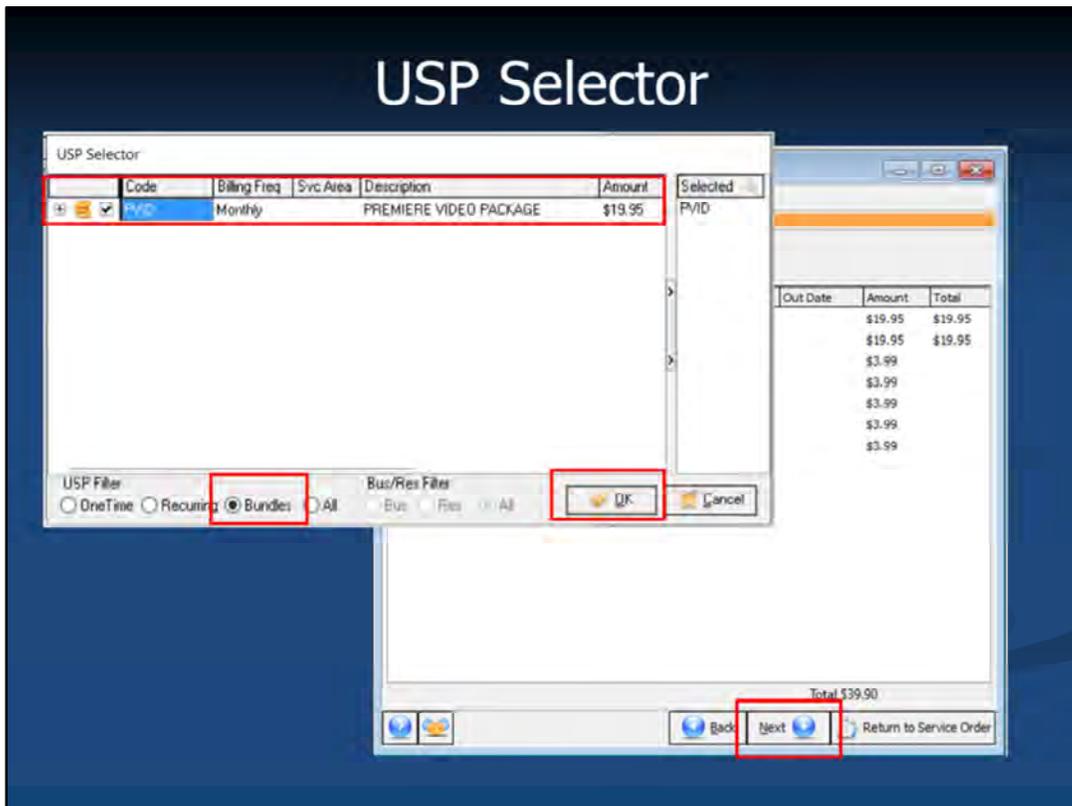
Similar to the Telephone and Internet networks, the Cascade Information screen may display after you've selected a number. It's a good idea to deselect Main Number before choosing OK. This retains the Telephone network's number as the main number.

Video USP



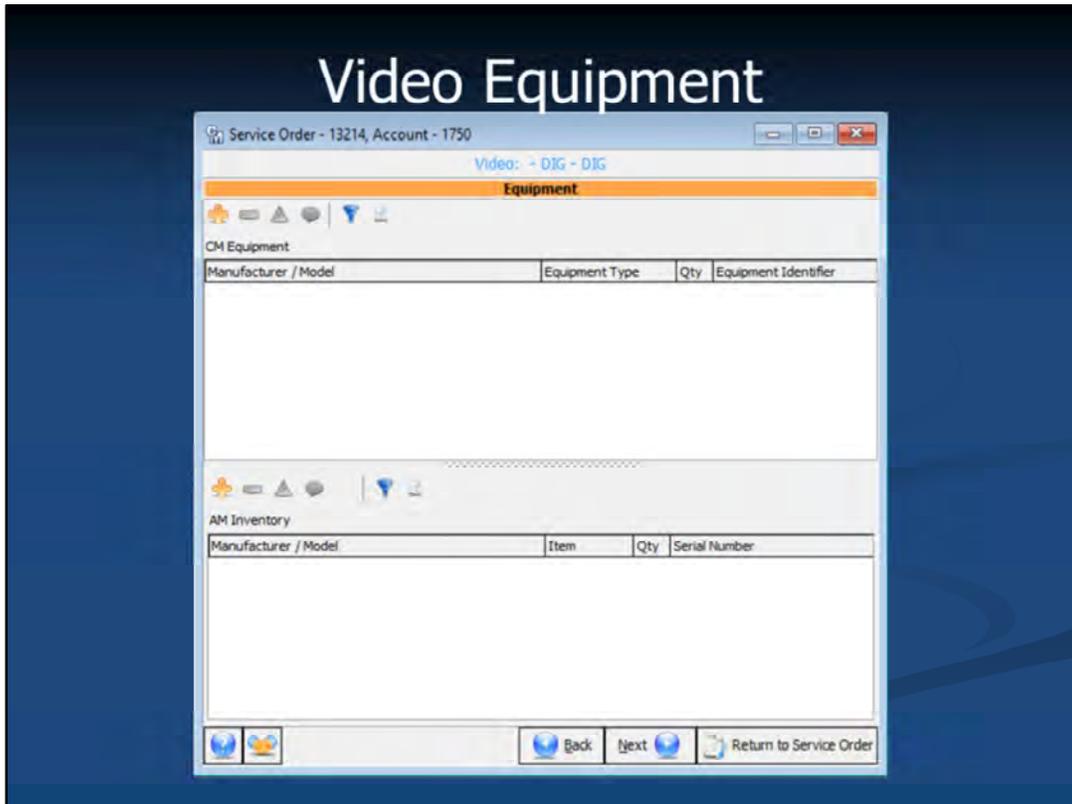
The USP screen allows you to review codes assigned through the template as well as delete existing codes and add new ones.

USP Selector



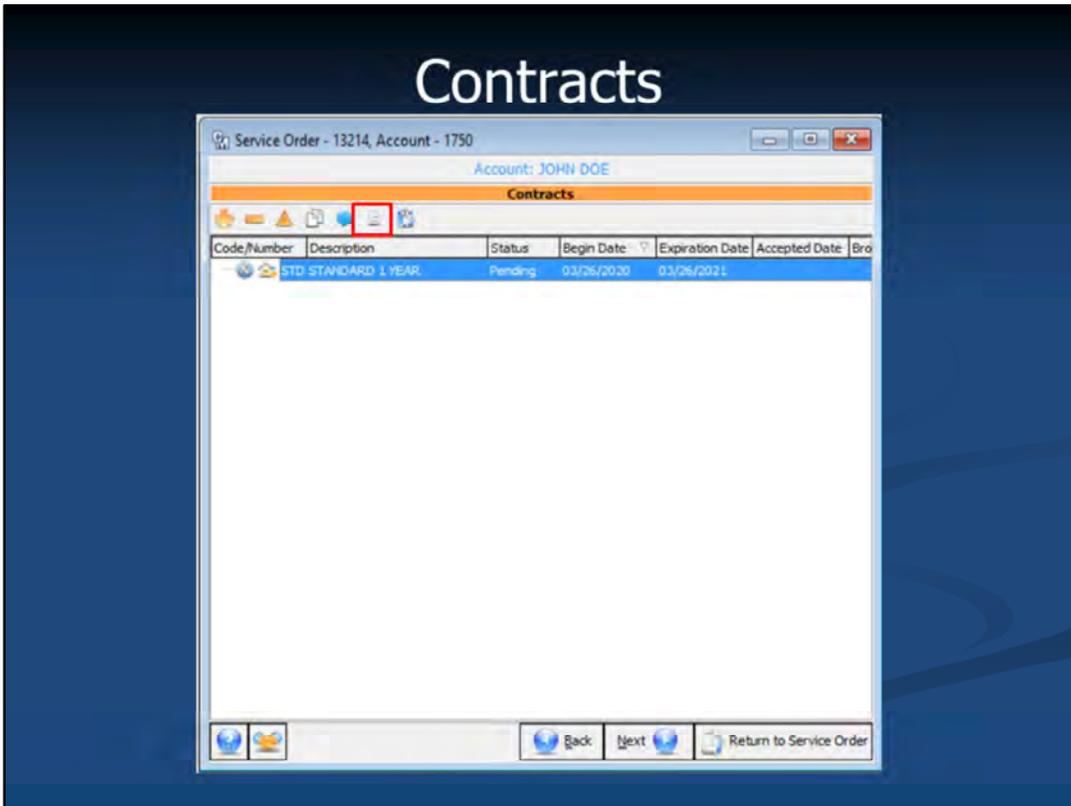
You can see all codes or use one of your filter options to shorten the list of available codes for selection.

Video Equipment



Like all networks, the Equipment screen is available for updating, deleting and/or adding either equipment or inventory. Video Equipment might be something like a set top box.

Contracts



Contracts can be included in templates or created manually.

Contracts

CSR: LLimon Page 1 of 2
Primary Agent: Date: 03/26/2020
Secondary Agent: Phone Number: 319-555-1212

Contract For:
Account Name: JOHN DOE Contract Effective Date: 3/26/2020
Account Number: 1750 Contract Expiration Date: 3/26/2021
Service Order: 13214 Contract Term Length: 12 MONTHS

Bill To: JOHN DOE
100 ELKHORN OAKS CIR
ARLINGTON, NE 68002
Contact Phone: 1234567890
Contact Email: nobody@maoznet.com

Order Total: * \$0.00

* This total does not include applicable taxes, fees, surcharges, or pre-payments.

Deposit(s) Amount: \$50.00
Pre-Payment(s) Amount:

SERVICE CONTRACT

Success Telephone Company
the provider for your telephone service.

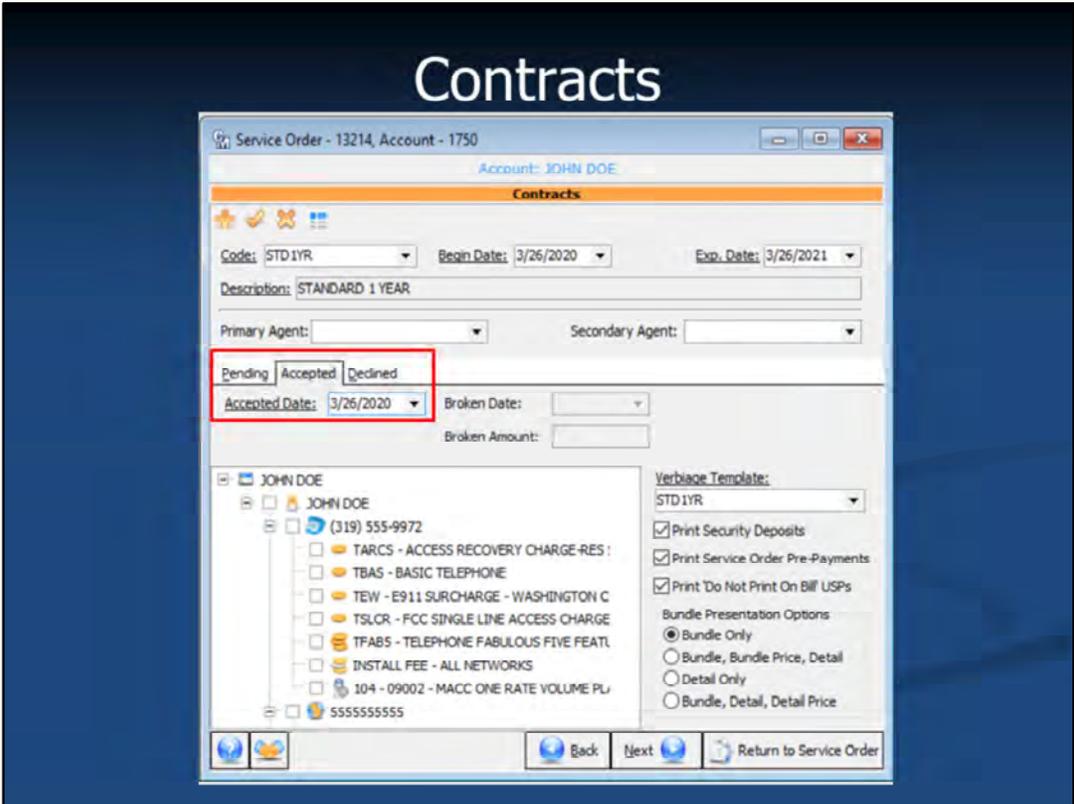
Service Order - 13214, Account - 1750 Account: JOHN DOE

Contracts

Code/Number	Description	Status	Begin Date	Expiration Date	Accepted Date	Bro
STD	STANDARD 1 YEAR	Pending	03/26/2020	03/26/2021		

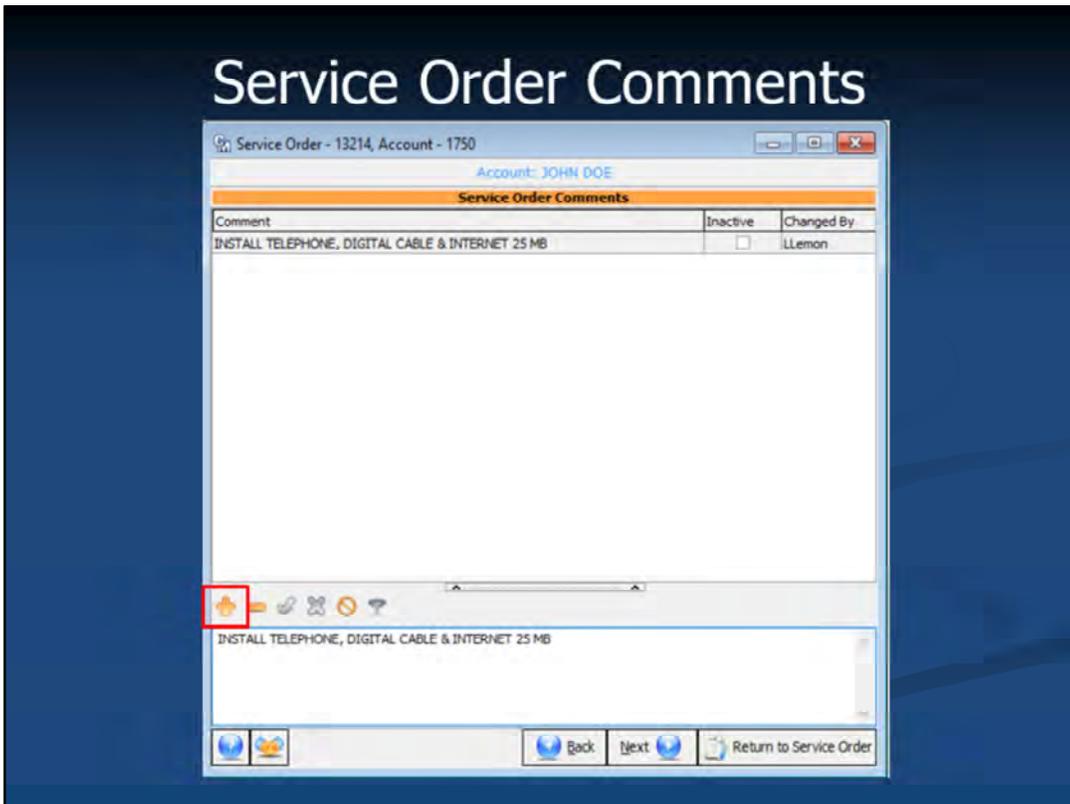
You have to either Accept or Decline an existing contract before you can complete the order.

Contracts



The Accepted tab requires a date. The Decline tab requires a date along with an option to select a reason.

Service Order Comments



Service Order Comments can be included in templates. They may also be updated, added or deleted.

Service Order Comments

Service Order - 13214, Account - 1750
Account: JOHN DOE

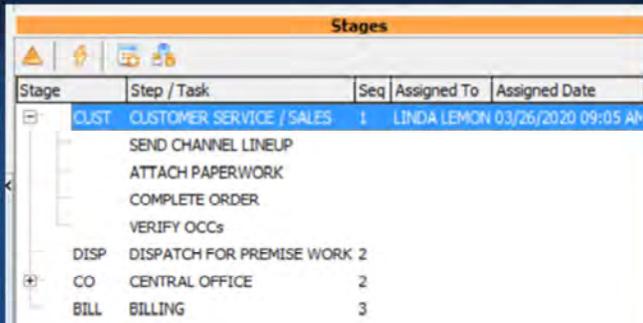
Service Order Comments		
Comment	Inactive	Changed By
INSTALL TELEPHONE, DIGITAL CABLE & INTERNET 25 MB	<input type="checkbox"/>	Lemon

Telephone with feature pack; Internet upgrade speed to 100; CATV with premium video channels

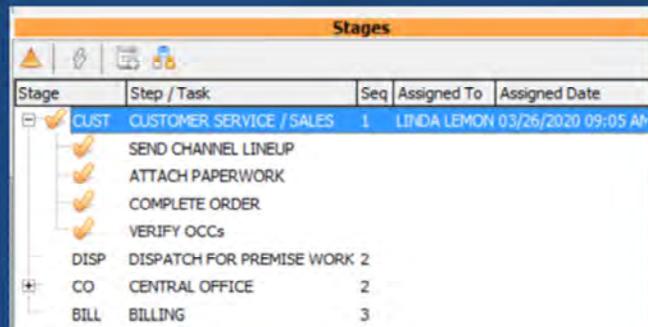
Back Next Return to Service Order

New and additional comments are entered in the lower section of the screen.

Tasks and Stages



Stage	Step / Task	Seq	Assigned To	Assigned Date
CLUST	CUSTOMER SERVICE / SALES	1	LINDA LEMON	03/26/2020 09:05 AM
	SEND CHANNEL LINEUP			
	ATTACH PAPERWORK			
	COMPLETE ORDER			
	VERIFY OCCs			
DISP	DISPATCH FOR PREMISE WORK	2		
CO	CENTRAL OFFICE	2		
BILL	BILLING	3		

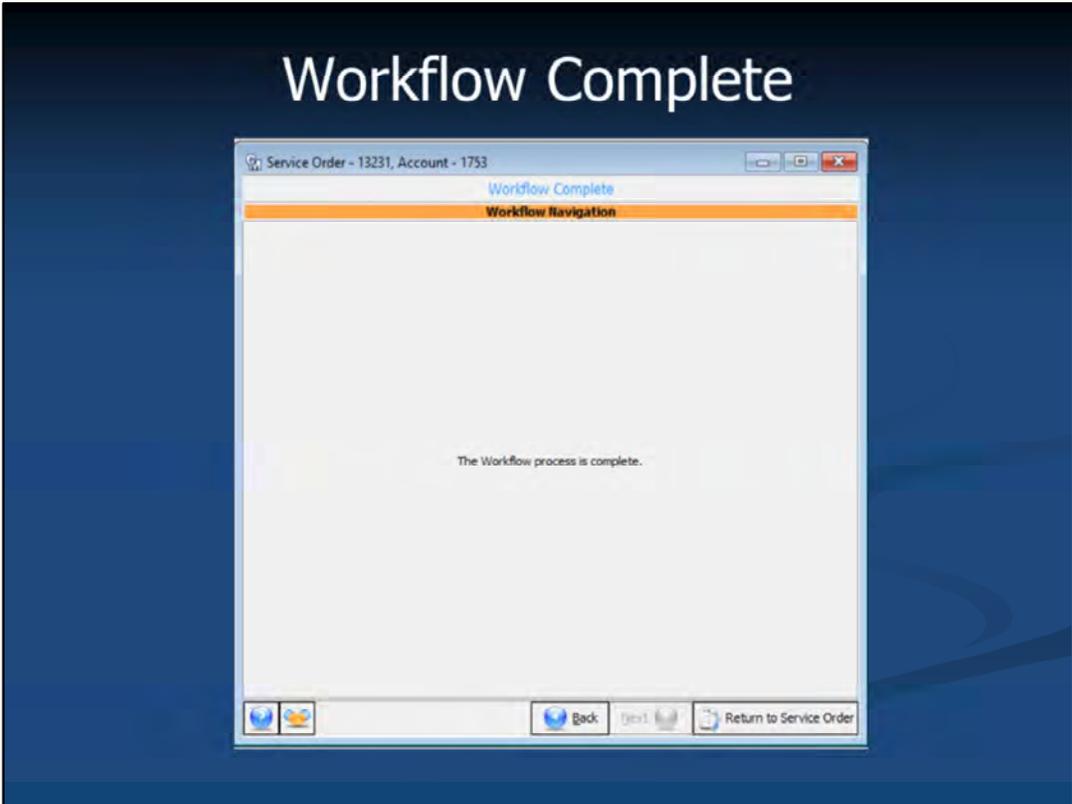


Stage	Step / Task	Seq	Assigned To	Assigned Date
CLUST	CUSTOMER SERVICE / SALES	1	LINDA LEMON	03/26/2020 09:05 AM
	SEND CHANNEL LINEUP			
	ATTACH PAPERWORK			
	COMPLETE ORDER			
	VERIFY OCCs			
DISP	DISPATCH FOR PREMISE WORK	2		
CO	CENTRAL OFFICE	2		
BILL	BILLING	3		

If you need to stop your work effort before finishing your stages, you'll choose Return to Service Order at the bottom right of the Workflow screen and then close out of the order. You can find it later through Service Order Search, Inbox and Recent Activity.

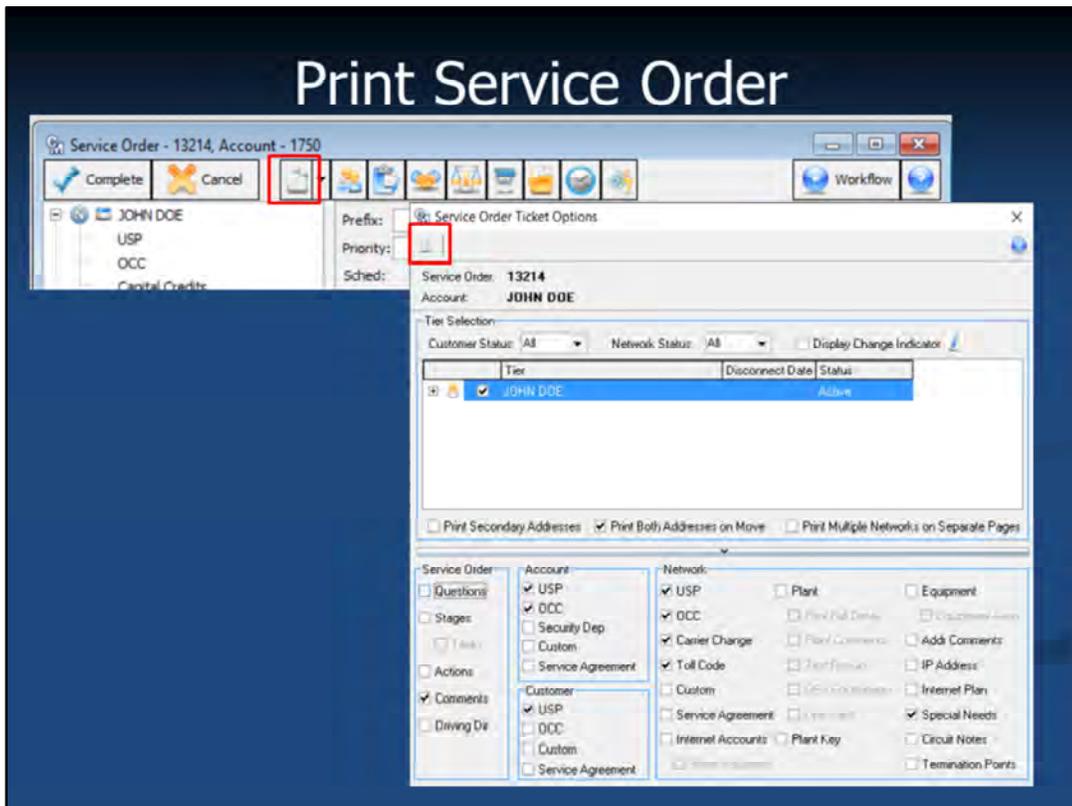
If you've finished your work effort, you'll complete your tasks and stages.

Workflow Complete



The final screen of Workflow indicates you've completed all of the included screens and you're now finished.

Print Service Order



The Service Order can be viewed and printed at any time throughout the order.

Service Order Inbox & MACC Mobile

The image shows two overlapping software windows. The background window is titled 'Inbox' and contains a table of service orders. The foreground window is titled 'My Inbox - SO' and displays detailed information for three specific orders.

Service Order	Stage	Order	Acct Num	Name
CUSTOMER SERVICE / SJ		12976	1720	B LOCKHART
CUSTOMER SERVICE / SJ		13045	771	SALLY ALBRIGHT
CUSTOMER SERVICE / SJ		13046	1660	BARRY ALLEN
CUSTOMER SERVICE / SJ		13054	1225	DREW BARRYMORE
CUSTOMER SERVICE / SJ		13066	92	KATIE IRELAND
CUSTOMER SERVICE		13224	1737	JOHN DOE

Service Order Inbox

My Inbox - SO

Order: 13224
Account: 1737 - JOHN DOE 12.6 mi
Address: 100 ELKHORN OAKS CIR ARLINGTON, NE 68002
Class: NEW
Assigned: jnecken: 3/25/2020, 3:24:00 PM
Scheduled: jnecken: 3/25/2020, 4:00:00 PM
Status: Pending

Order: 13066
Account: 92 - K 12.6 mi
Address: 899 R
Class: CHNG
Assigned: jnecken: 3/23/2020, 10:31:48 AM
Status: Pending

MACC Mobile

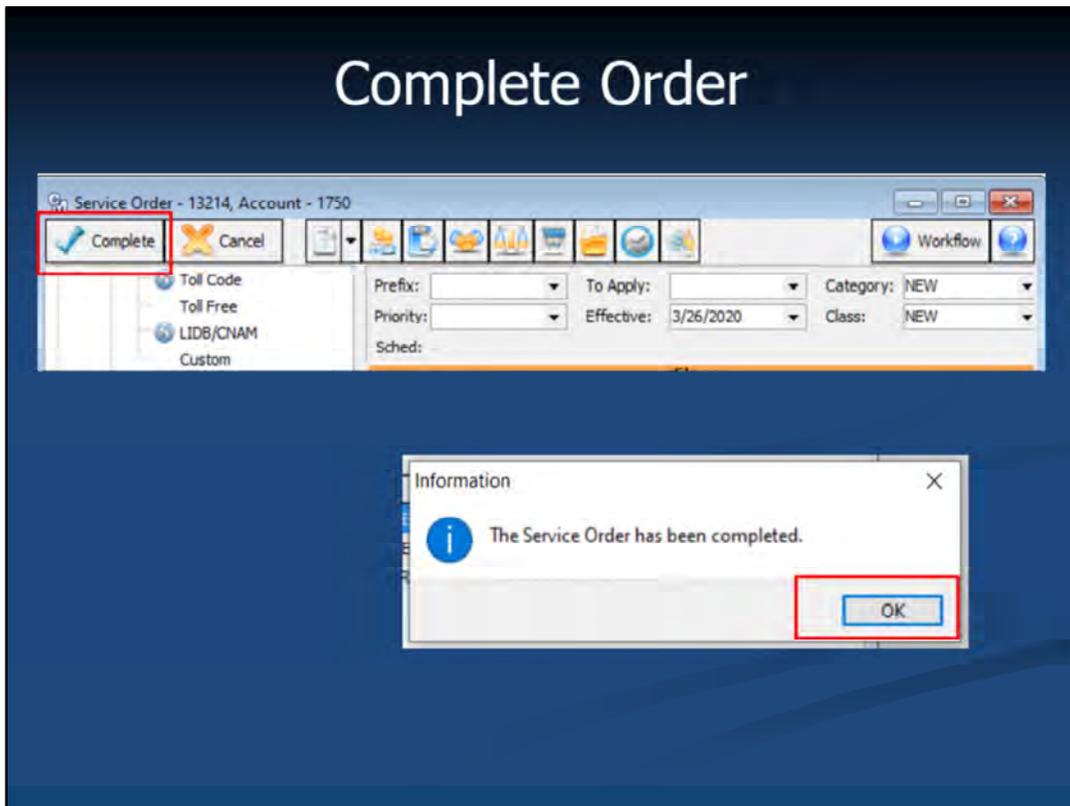
Order: 13054
Account: 1225 - DREW BARRYMORE 5.2 mi
Address: 9700 LOST VALLEY LN BLAIR, NE 68006
Class: CHNG
Assigned: jnecken: 3/23/2020, 10:31:24 AM
Status: Pending

Order: 13046

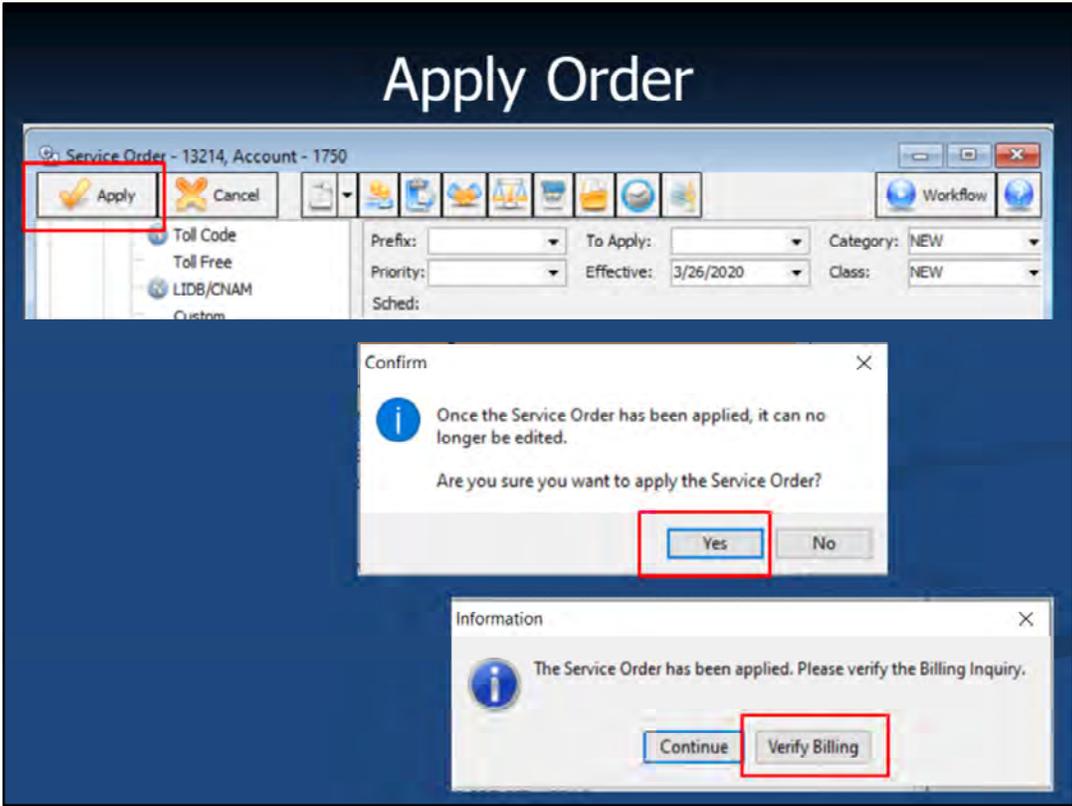
Items per page: 20 1 - 6 of 6

Besides retrieving an order through Service Order Search and Recent Activity, you can also find the order in Service Order Inbox. MACC Mobile also allows you to view and work orders. MACC Mobile is a mobile-friendly website connected to Customer Master.

Complete Order



Under normal circumstances, an order would not be completed and applied until all of the work/Stages/etc. has been done. However, for training purposes we'll be completing and applying the order. (Note: even after completing the order you can still make changes.)



Applying the order means all of the work effort is done and the order is ready to be applied to the account. Once the order has been applied, no more changes can be made.

Billing Inquiry

Account: 1790 - JOHN DOE Bill Date: 04/01/2020

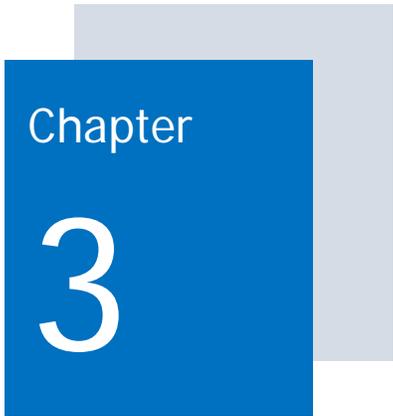
Recurring Charges | Current OCCs | Billed OCCs | Bill History

Code	Description	From	To	Bill Star	Bill Freq	Amount
Tier: Internet - 319550123						
IDSL	DSL SERVICE - UP TO 100 MBPS	03/26/2020	04/30/2020		Monthly	113.32
PRQI	PROMOTIONAL CREDIT	03/26/2020	04/30/2020		Monthly	(28.33)
						84.99
Tier: Telephone - 3195559972						
TARI	ACCESS RECOVERY CHARGE-RES SINGLE LINE	03/26/2020	04/30/2020		Monthly	1.70
TRAC	BASIC TELEPHONE	03/26/2020	04/30/2020		Monthly	22.38
TEW	911 SURCHARGE - WASHINGTON COUNTY	03/26/2020	04/30/2020		Monthly	0.52
TFBF	TELEPHONE FABULOUS FIVE FEATURES	03/26/2020	04/30/2020		Monthly	12.02
TSLC	FCC SINGLE LINE ACCESS CHARGE	03/26/2020	04/30/2020		Monthly	7.37
						45.05
Tier: Video - 319550129						
CAE	ESSENTIAL VIDEO	03/26/2020	04/30/2020		Monthly	39.80
PVID	PREMIERE VIDEO PACKAGE	03/26/2020	04/30/2020		Monthly	22.61
						62.51
						192.55

Totals: Recurring Charges: \$192.55 | Rec Chg Credits: (\$28.33) | Current OCCs: \$90.00 | Billed OCCs: \$0.00 | Bill History: \$0.00

Whenever you work an order that involves money, you want to check Billing Inquiry. It shows what's going to be billed on the Bill Date in the upper right corner – the next Bill Cycle. You can see proration on recurring charges, recurring credits and current OCCs. You have an itemized list for each tier, including a sub-total and then a final total. The amounts do not include taxes/fees/surcharges or toll.

Once an account has been through billing, this is a great screen for viewing and reporting on history.

A graphic consisting of two overlapping squares. The front square is blue and contains the text 'Chapter' and the number '3'. The back square is light gray.

Chapter

3

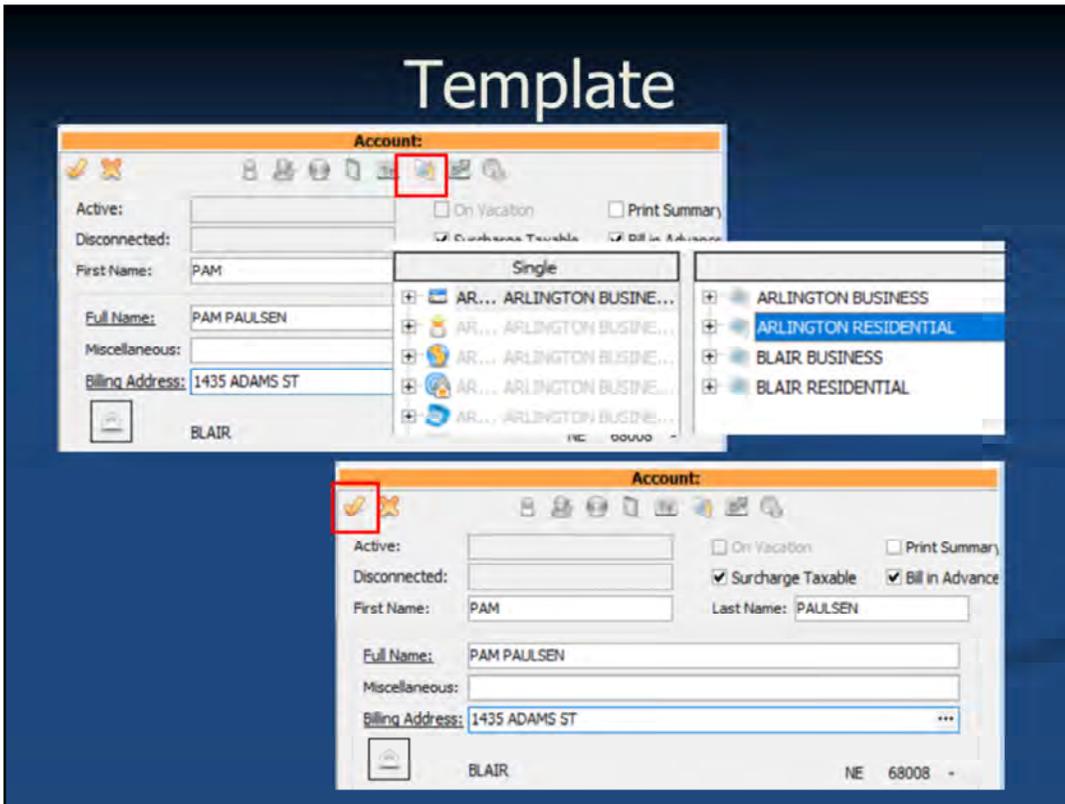
New Install – Review Classic Service Order with Templates

New Account

The screenshot shows a software interface for creating a new account. The main window is titled "Service Order" and has a "New Account" tab selected. A menu is open over the "New Account" option, showing options like "Service Order Suite", "Inquiry", "Quick Start", "Web Self Care", and "Map It". The main form contains fields for "Prefix", "Priority", "Sched.", "To Apply", "Effective", "Category", and "Class". Below these are fields for "Active", "Disconnected", "First Name", and "Last Name". The "Full Name" field contains "PAM PAULSEN". The "Billing Address" field contains "435 ADAMS ST". There are also fields for "Acct Status", "Service Area", "Report Area", "Bill Medium", "Bill Format", "Bill Language", "Agent", "Bill Cycle", "Payment Matrix", "Tax Area", "Exempt Code", "Exp. Date", and "Taxable" options.

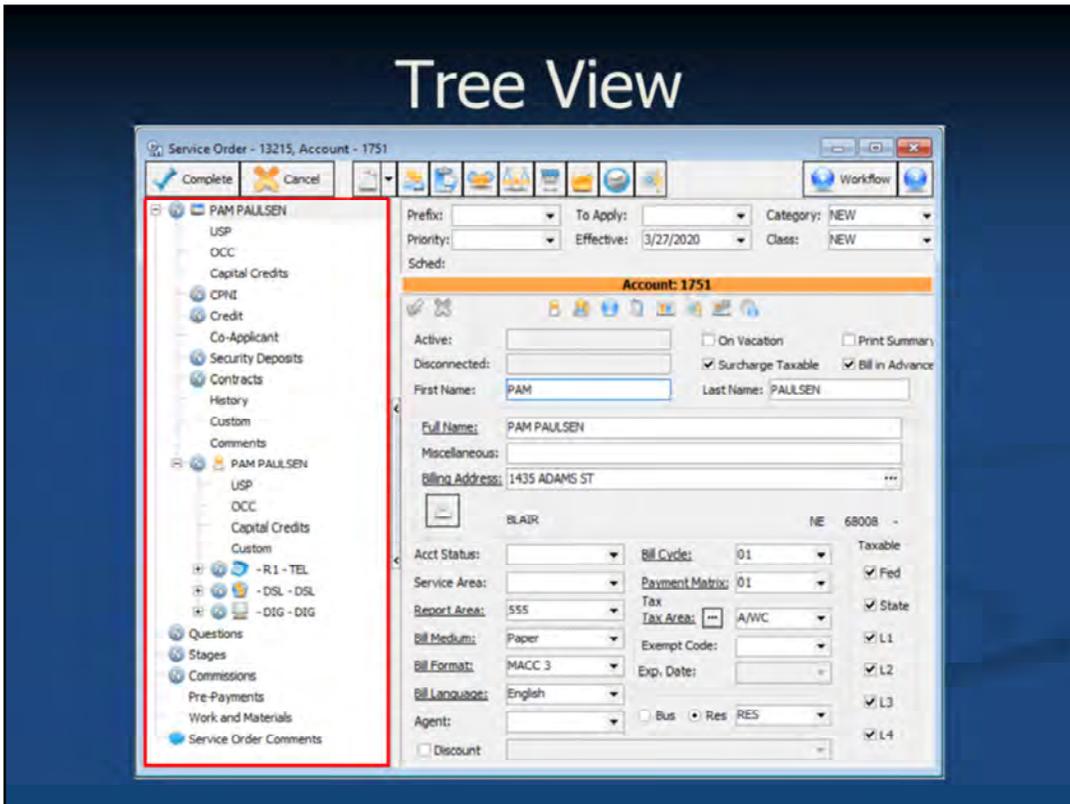
Classic Service Order is an option for all types of orders, including New Install. Rather than moving through screens included in Workflow, the Classic option allows you to move through each screen on each tier.

Template



Using Templates is a great way to pre-populate values on various screens. Using a Linked Template will create all the tiers included in the template.

Tree View



Notice all of the nodes with the Update indicator. These have been changed either through default settings (CPNI, Credit, etc.) or through the Template (Security Deposits, Contracts, etc.)

Stages

Stage	Step / Task	Seq	Assigned To	Assigned Date	Started
CUST	CUSTOMER SERVICE / SALES	1	LINDA LEMON	03/27/2020 10:15 AM	LINDA L.
DISP	DISPATCH FOR PREMISE WORK	2			
CO	CENTRAL OFFICE	2			
BILL	BILLING	3			

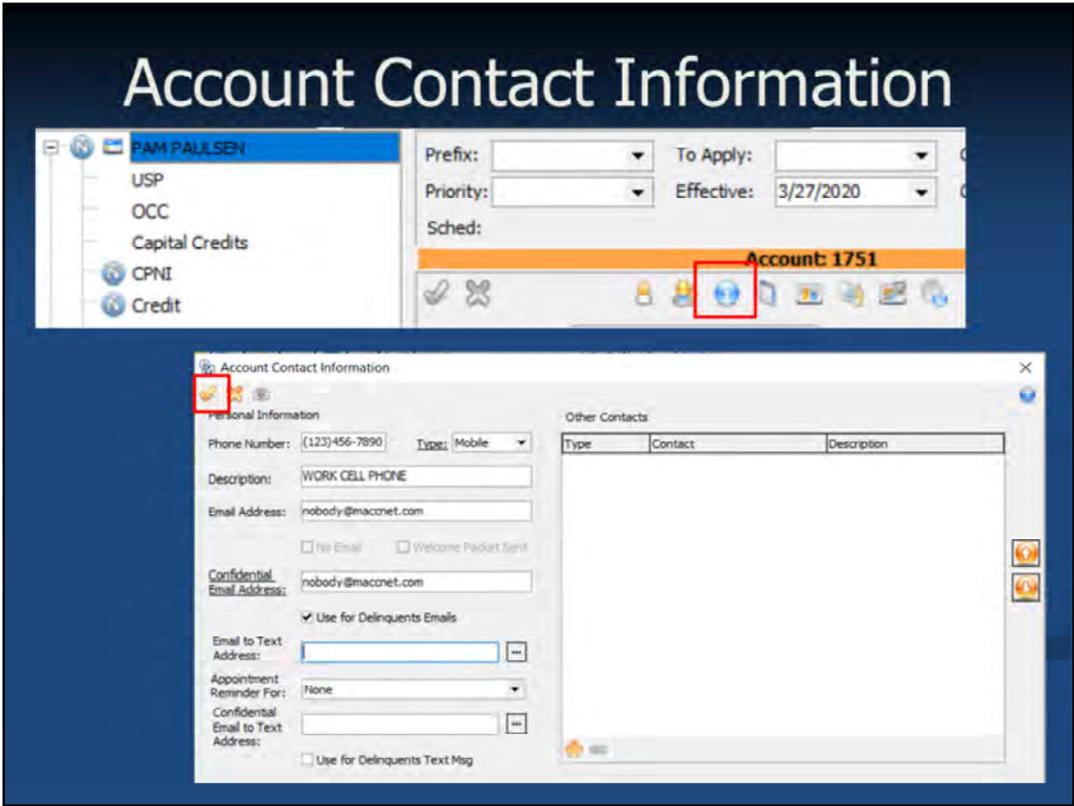
Stages route the order from one department and/or employee to the next. It's useful when using notifications (Messaging) and Service Order Inbox.

Questions

Question	Answer
HAVE YOU HAD SERVICE WITH US BEFORE	NO
HOW DID YOU HEAR ABOUT US?	DOOR HANGER

Questions are great from a marketing standpoint. Including a 'how did you hear about us' question can lead to reporting and new marketing efforts.

Account Contact Information



Account Contact information is essential and it allows for customer communication of all types.

OCC

Service Order - 13215, Account - 1751

Complete Cancel

PAM PAULSEN

USD

Capital Credits

CPNI

Credit

Co-Applicant

Security Deposits

Prefix: To Apply: Category: NEW

Priority: Effective: 3/27/2020 Class: NEW

Sched:

OCC

View

All Non Billed Canceled Current Service Order

OCC

Permanent Prior Month Round Up Cancel

Service: OAINS Description: INSTALL FEE - ALL NETWORKS

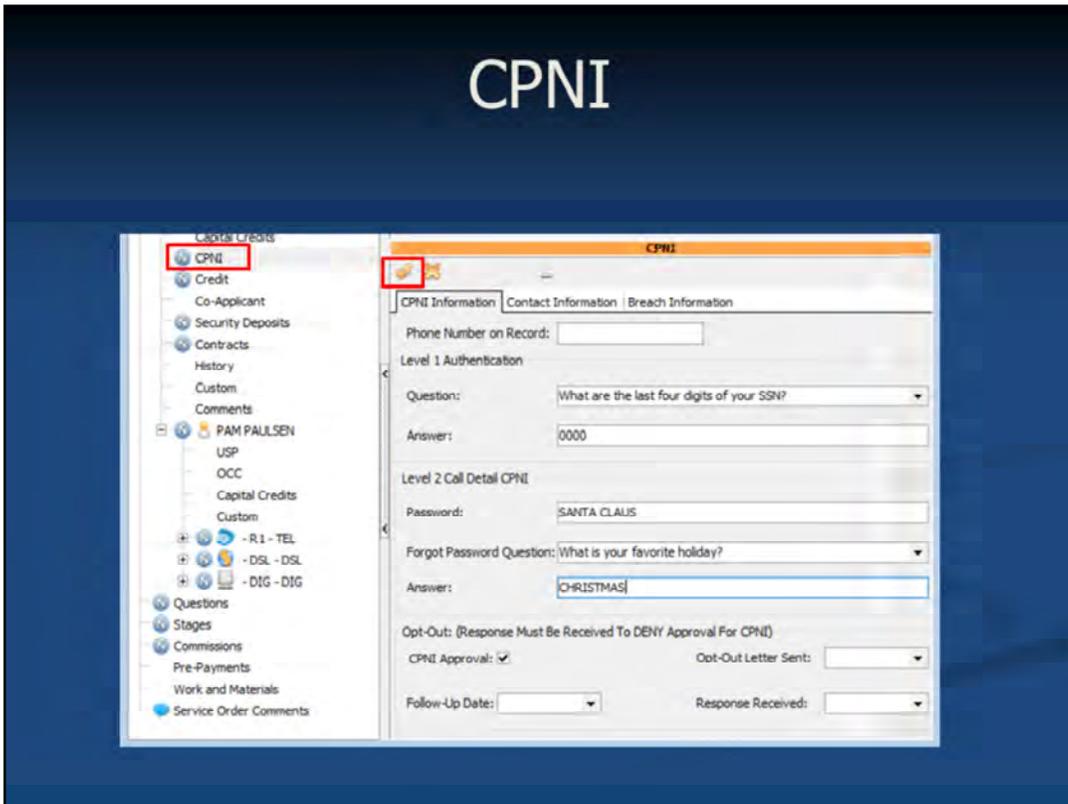
Tax Area: A/WC GL Acct: 5240.000 Last Billed:

Date: 3/27/2020 Start Bill Dt: 4/1/2020 End Bill Dt:

Amount: 30.00 Quantity: 1 Days: 0

An OCC (One-time Charge or Credit) at the Account tier is generally used to cover one-time charges for the entire order, rather than network-specific one-time charges.

CPNI



CPNI (Customer Proprietary Network Information) is two-fold. First, it houses information used to verify the customer talking to you has rights to the account. The second piece is CPNI Approval. Depending on your Opt-In or Opt-Out status, it will indicate whether or not they want to receive targeting marketing efforts.

Credit

The screenshot shows a software interface for managing credit. On the left is a navigation tree with categories like 'CPAT', 'Credit', 'Co-Applicant', 'Security Deposits', 'Contracts', 'History', 'Custom', 'Comments', and a user profile for 'PAM PAULSEN'. The main window is titled 'Credit' and contains a form. The 'Credit Class' dropdown is set to 'A' and is highlighted with a red box. The 'Credit ID' text box contains '00000000' and is also highlighted with a red box. Other fields include 'License', 'Reference 1-3', 'Prev Address', '2nd Credit ID', 'Tribal ID', 'Prev Phone', 'Date Disc', 'Friend', 'Friend Phone', 'Friend Address', 'Employer', 'Work Phone', 'Years at Job', 'DOB', 'Spouse', 'Spouse DOB', 'Spouse Emp', 'Pull Bill', 'Code', 'End Bill Date', 'No Notice', 'Expire Date', and 'In Collections'.

The Credit screen has options for lots of information, including Credit Class. Credit Class can be used in conjunction with auto-updates based on on-time payments and delinquents. This auto-behavior means you don't have to keep track of updates manually. Credit Class can also be used as a factor in your delinquent setups.

Bank Information

Credit

Credit Class: A License:

Reference 1:

Credit Rating/Bank/Credit Card Information

Credit Report

Rating: Model: Report Date:

Bank Information

Bank ABA Number: 073912459

Account Number: *****7890

Type: Checking

Effective Date: 3/27/2020

ACH Auto Pay

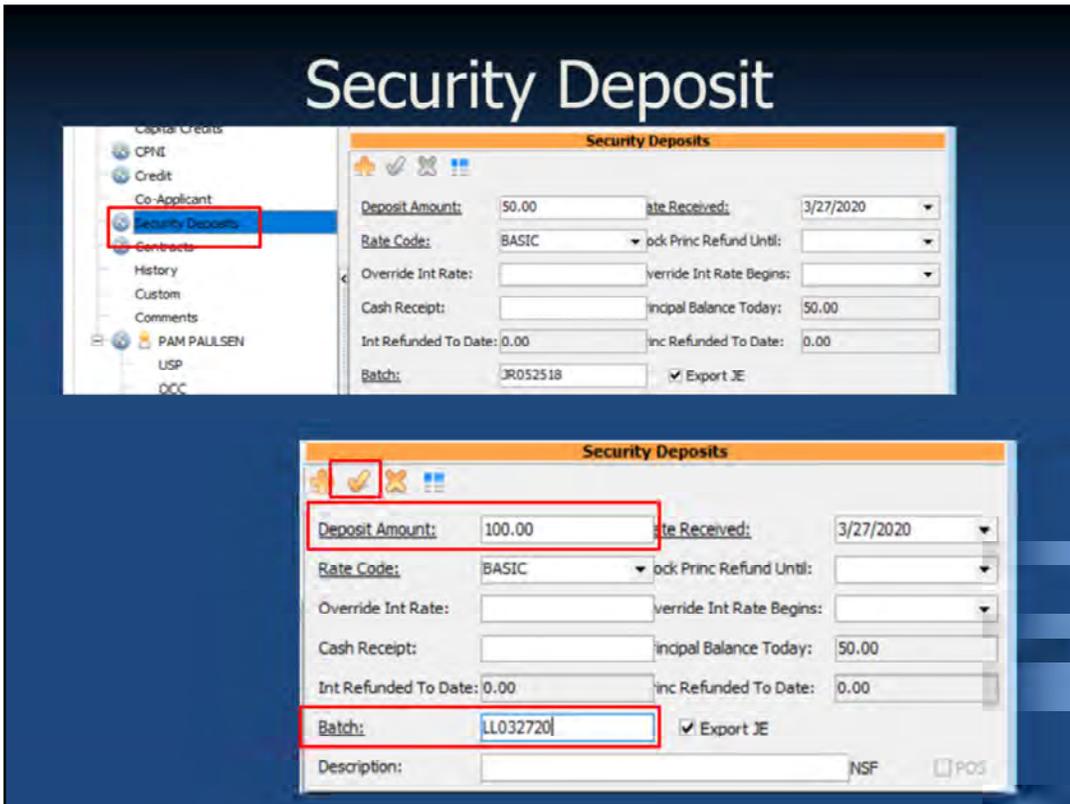
ACH Prenotified

Discount:

End Date:

Bank Information contains options for credit scores, ACH and credit cards.

Security Deposit



Security deposits can be included in Templates, if you collect them. If they're in the selected template, you'll see the update icon next to Security Deposits on the tree view.

Contract

The screenshot displays a software interface with a sidebar on the left containing menu items: Capital Credits, CPNI, Credit, Co-Applicant, Security Deposits, **Contracts**, and History. The 'Contracts' menu item is highlighted with a red box. The main area shows a table titled 'Contracts' with a toolbar above it. The table has columns for Code/Number, Description, Status, Begin Date, Expiration Date, and Access. A single row is visible with the following data: Code/Number: STD STANDARD 1 YEAR, Description: (empty), Status: Pending, Begin Date: 03/27/2020, Expiration Date: 03/27/2021, Access: (empty). The 'Description' cell in the table is also highlighted with a red box.

Below the table is a detailed contract form. The form includes the following information:

- CSR: LLeimon
- Primary Agent: (empty)
- Secondary Agent: (empty)
- Date: 03/27/2020
- Phone Number: 315-555-1212
- Contract For: (empty)
- Account Name: PAM PAULSEN
- Account Number: 1751
- Service Order: 13215
- Contract Effective Date: 3/27/2020
- Contract Expiration Date: 3/27/2021
- Contract Term Length: 12 MONTHS

Bill To: PAM PAULSEN
1435 ADAMS ST
BLAIR, NE 68008

Contact Phone: 1234567890
Contact Email: nobody@maconet.com

Order Total: * \$0.00

* This total does not include applicable taxes, fees, surcharges, or pre-payments.

Deposit(s) Amount: \$100.00
Pre-Payment(s) Amount: (empty)

SERVICE CONTRACT

Success Telephone Company would like to take this opportunity to say thank you for choosing us as the provider for your telecommunications needs.

Contracts can be included in templates or built from scratch.

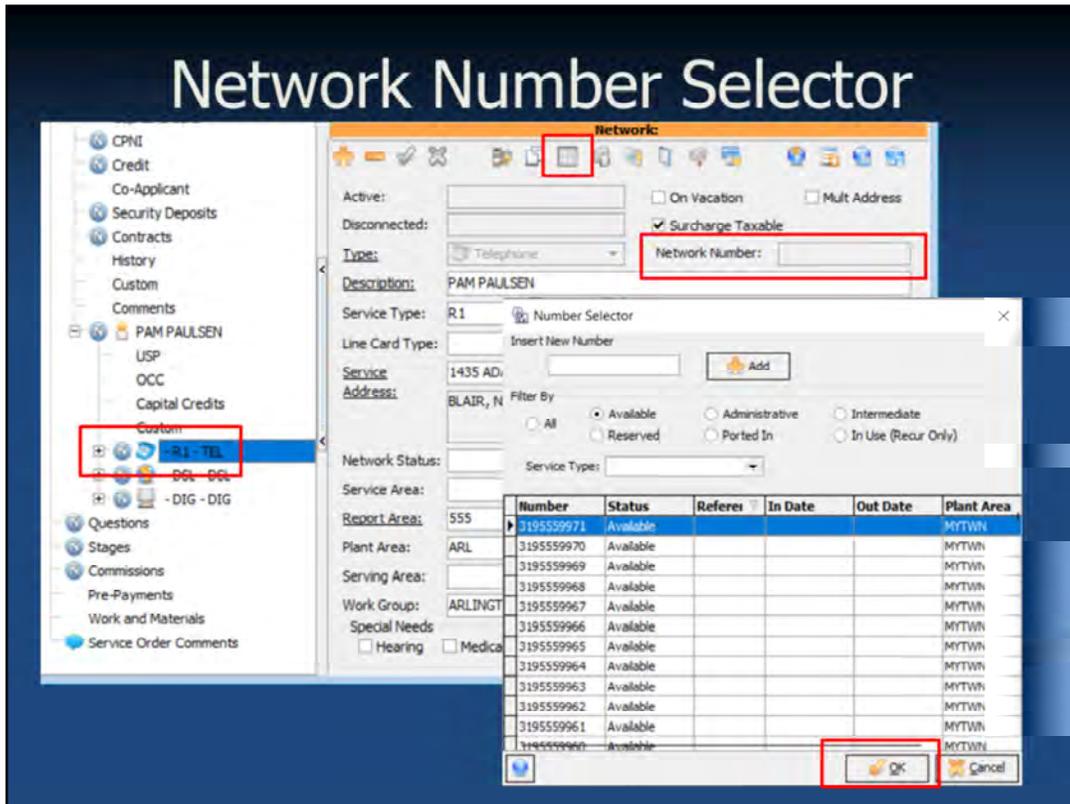
Contract

The screenshot shows a web form titled "Contracts" with the following fields and values:

- Code:** STD1YR
- Begin Date:** 3/27/2020
- Exp. Date:** 3/27/2021
- Description:** STANDARD 1 YEAR
- Primary Agent:** (empty dropdown)
- Secondary Agent:** (empty dropdown)
- Status:** Pending | Accepted | **Declined** (highlighted with a red box) | (empty dropdown)
- Declined Date:** 4/1/2020
- Declined Reason:** TERMS (highlighted with a blue box)

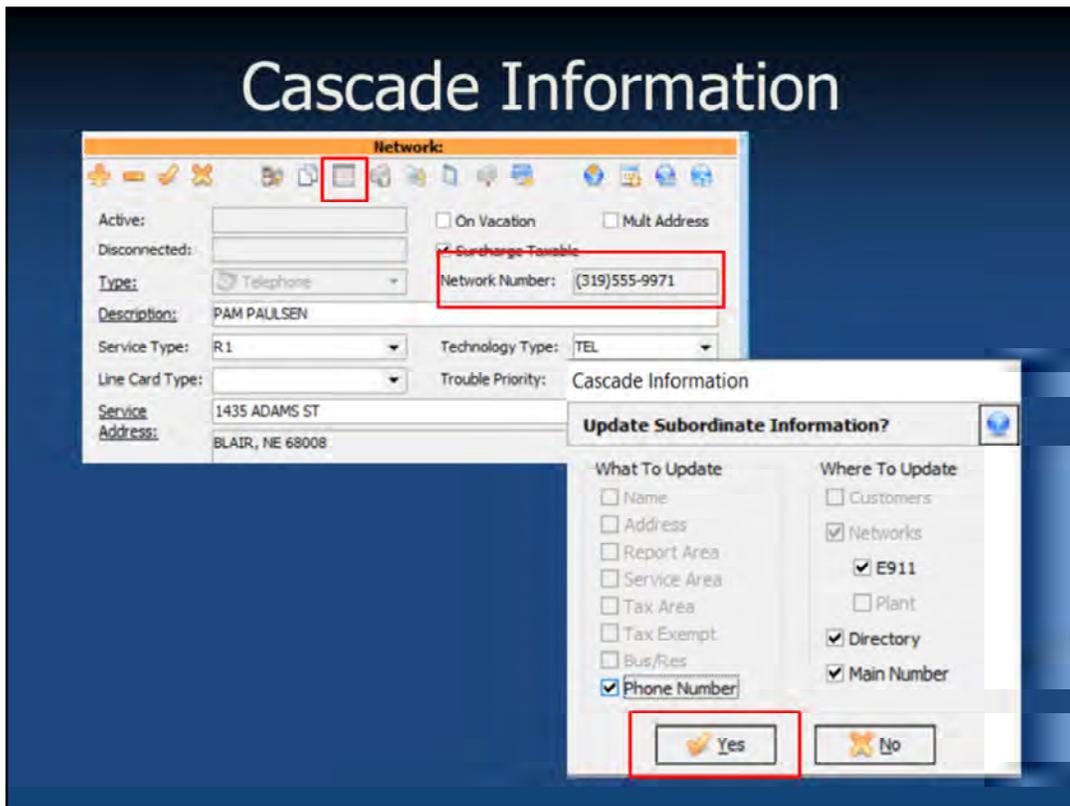
Initial contracts are in a Pending Status. They must be either Accepted or Declined in order to complete the order.

Network Number Selector



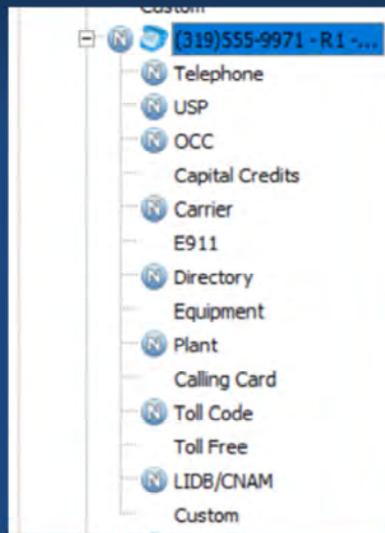
Each Network tier requires a Network Number. This can be assigned at any point in the order but must be done before you Complete the order. You'll also need to be sure there are numbers on each tier if you have an Assign-tier Bundle – a bundle that includes more than one Network type.

Cascade Information



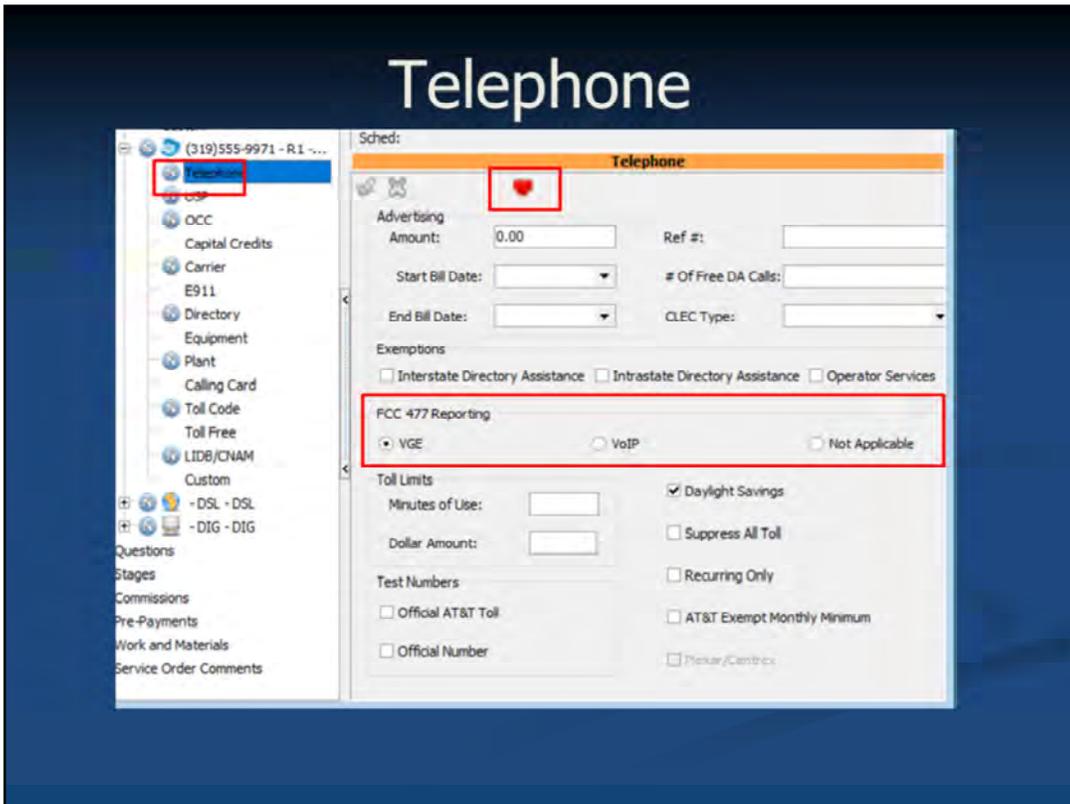
Once a network is saved, the Cascade Information window will display. On the left, it's asking what values to update and on the right it's asking 'locations'. Typically, the first network built is used for the Main Number so that option would be deselected on subsequent networks.

Cascade Information



Some of the Network nodes will be updated either through the Templates, defaults or through the Cascade information options.

Telephone



Review the Telephone screen to make sure the 477 Reporting information was added. It's populated based on the values associated with the assigned USP Code/s.

The heart icon takes you to the Lifeline screen where you can track the customer's information and access the NLAD portal.

Telephone USP

Sched: USP

Not DSL Eligible

Service	Svc Area	Qty	In Date	Out Date	Amount
TARC - ACCESS RECOV		1			\$1.50
TBAS - BASIC TELEPHON		1			\$19.75
TEW - E911 SURCHARGE		1			\$0.50

USP Selector

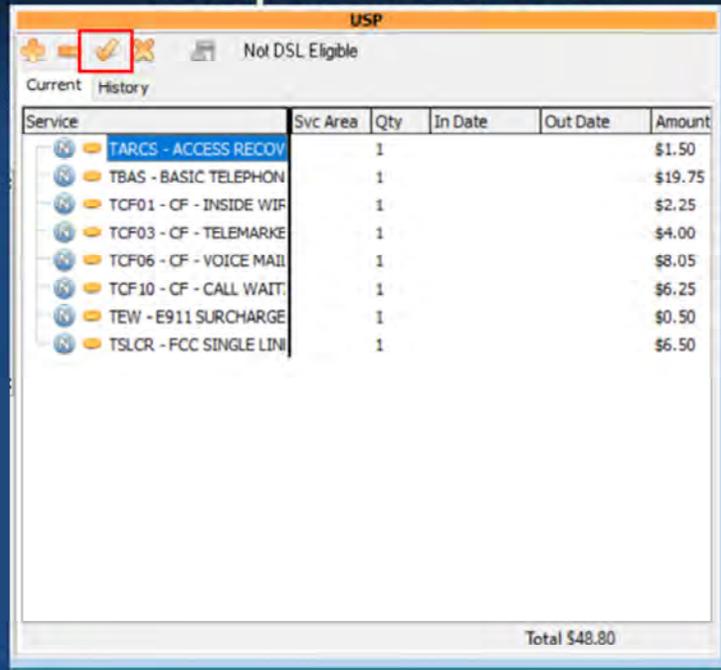
Code	Billing Freq	Svc Area	Description	Amount	Selected
<input type="checkbox"/> TCF00	Monthly		900 CALL BLOCKING	\$0.00	TCF01
<input type="checkbox"/> TCF01	Monthly		CALLING CARD ONLY	\$0.00	TCF03
<input checked="" type="checkbox"/> TCF02	Monthly		CF - INSIDE WIRE MAINTENANCE	\$2.25	TCF06
<input checked="" type="checkbox"/> TCF03	Monthly		CF - CALL FORWARDING	\$2.50	TCF10
<input checked="" type="checkbox"/> TCF04	Monthly		CF - TELEMARKETING BLOCK	\$4.00	
<input type="checkbox"/> TCF05	Monthly		CF - THREE-WAY CONFERENCE	\$6.00	
<input type="checkbox"/> TCF06	Monthly		CF - CALL TRANSFER	\$8.00	
<input checked="" type="checkbox"/> TCF07	Monthly		CF - VOICE MAIL	\$8.05	
<input type="checkbox"/> TCF08	Monthly		CF - CALLER ID-RESIDENCE	\$3.75	
<input type="checkbox"/> TCF09	Monthly		CF - CALL WAITING	\$2.95	
<input checked="" type="checkbox"/> TCF10	Monthly		CF - CALL WAITING/CALLER ID	\$6.25	
<input type="checkbox"/> TCF11	Monthly		CF - SELECTIVE CALL REJECTION	\$2.25	

USP Filter: OneTime Recuring Bundles All

Bus/Res Filter: Bus Res All

If a Template is being used, most likely the required charges will already be populated. Codes can be added, deleted and in some cases updated (changing the quantity, etc.).

Telephone USPs



The screenshot shows a software window titled "USP" with a status bar indicating "Not DSL Eligible". Below the title bar are icons for home, back, and a checked checkbox. The main area contains a table with columns for Service, Svc Area, Qty, In Date, Out Date, and Amount. The table lists several services, each with a quantity of 1 and a corresponding amount. A total amount of \$48.80 is displayed at the bottom right of the table area.

Service	Svc Area	Qty	In Date	Out Date	Amount
TARCS - ACCESS RECOV		1			\$1.50
TBAS - BASIC TELEPHON		1			\$19.75
TCF01 - CF - INSIDE WIF		1			\$2.25
TCF03 - CF - TELEMARKE		1			\$4.00
TCF06 - CF - VOICE MAIL		1			\$8.05
TCF10 - CF - CALL WAIT		1			\$6.25
TEW - E911 SURCHARGE		1			\$0.50
TSLCR - FCC SINGLE LINI		1			\$6.50

Total \$48.80

All selected telephone USPs will display on the Telephone USP screen.

Telephone OCC

(319)555-9971 - R1 ...

- Telephone
- USP
- OCC**
- Capital Credits
- Carrier
- E911
- Directory
- Equipment

OCC

Warning icon highlighted in red box.

View: All Non Billed Canceled Current Service Order

Code	Description	Qty	Amount	Days
OAINS	INSTALL FEE - ALL NETWORKS	1	\$20.00	0

OCC

Warning icon highlighted in red box.

Permanent Prior Month Round Up **Cancel**

Service: OAINS Description: INSTALL FEE - ALL NETWORKS

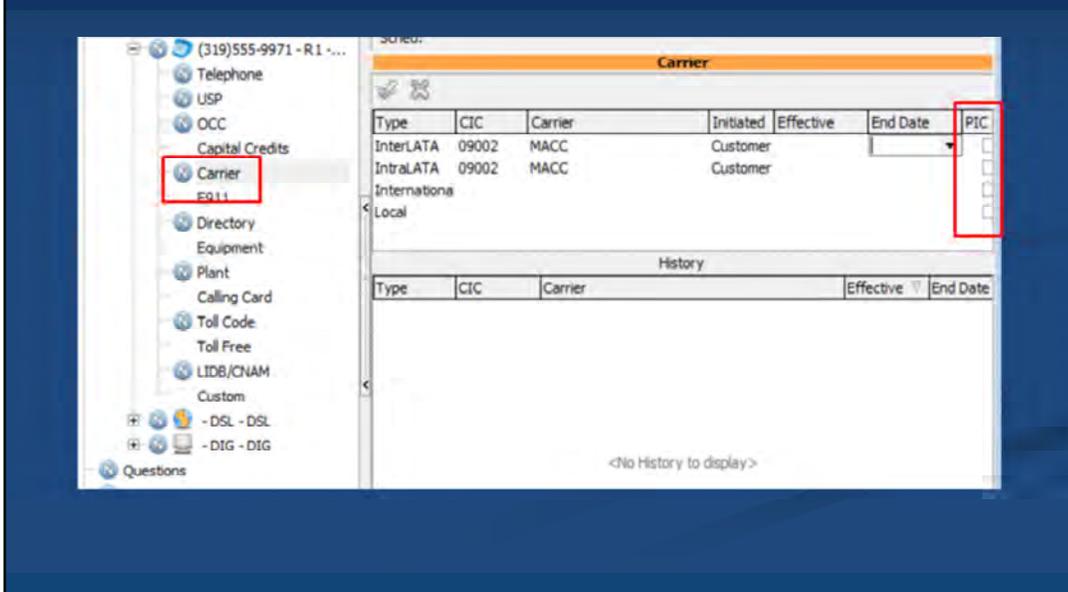
Tax Area: A/WC GL Acct: 5240.000 Last Billed:

Date: 3/27/2020 Start Bill Dt: 4/1/2020 End Bill Dt:

Amount: 20.00 Quantity: 1 Days: 0

OCCs can be included on any tier. In the template, an OCC was included on the Telephone network.

Carrier



Carrier information could be populated if it's included in a selected Template. The CICs can also be added manually as well as outdated if needed.

Note: many companies choose to have a CIC for 'no carrier selected'. In this case any carrier auto-populated would need to be outdated and the new CIC added.

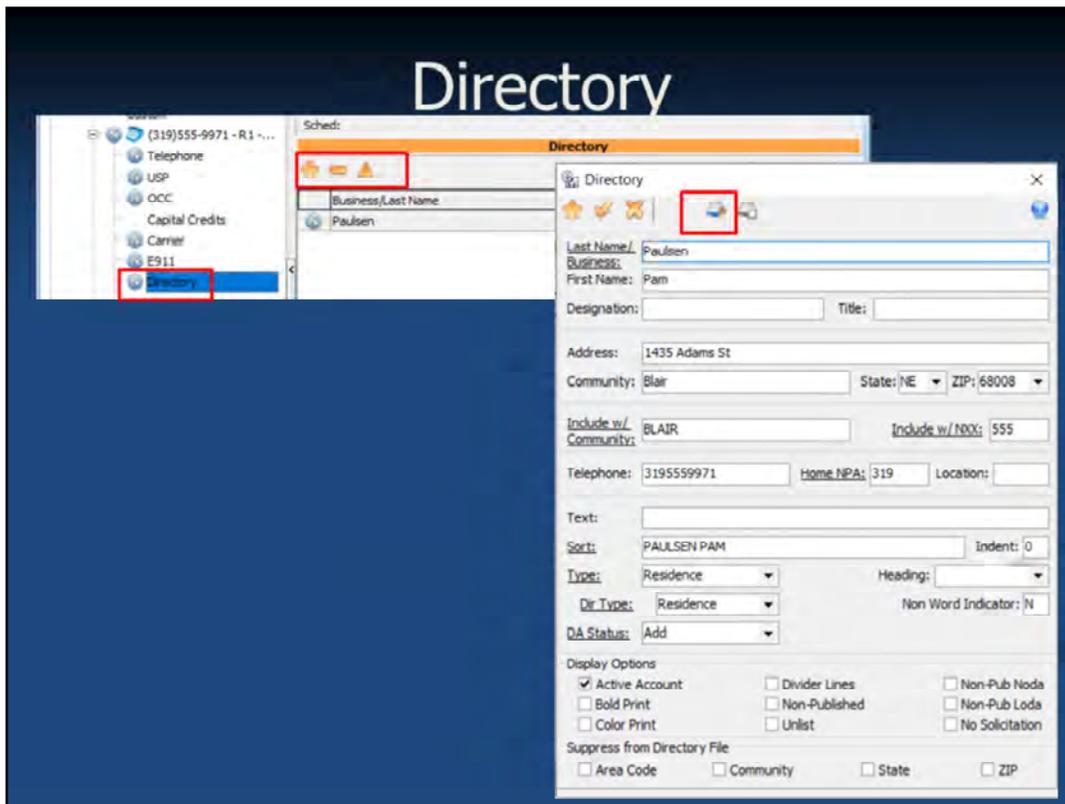
E911

The screenshot shows a software interface for configuring E911 information. The left sidebar contains a tree view with the following items: Telephone, USP, OCC, Capital Credits, Carrier (with a red box around 'E911'), Directory, Equipment, Plant, Calling Card, Toll Code, Toll Free, LIDB/CIAM, Custom, DSL - DSL, DIG - DIG, Questions, Stages, Commissions, Pre-Payments, Work and Materials, and Service Order Comments. The main window is titled 'E911' and contains the following fields:

PSAP	SWBELL		
Number	1435	Suffix:	
Street	ADAMS ST		St Suf
Location			PostDir
Community	BLAIR	Zip-4	
County	WASH	ZIP	68008
		State	NE
T.A.R.		Cell ID	
		Sector	
GPS X		GPS Y	
		GPS Z	
Comment		NPA	319
Main Number	5559971	Phone Number	5559971
Function	Insert	Class of Service	Residence
ESN		Type of Service	Not FX or Non-Pub

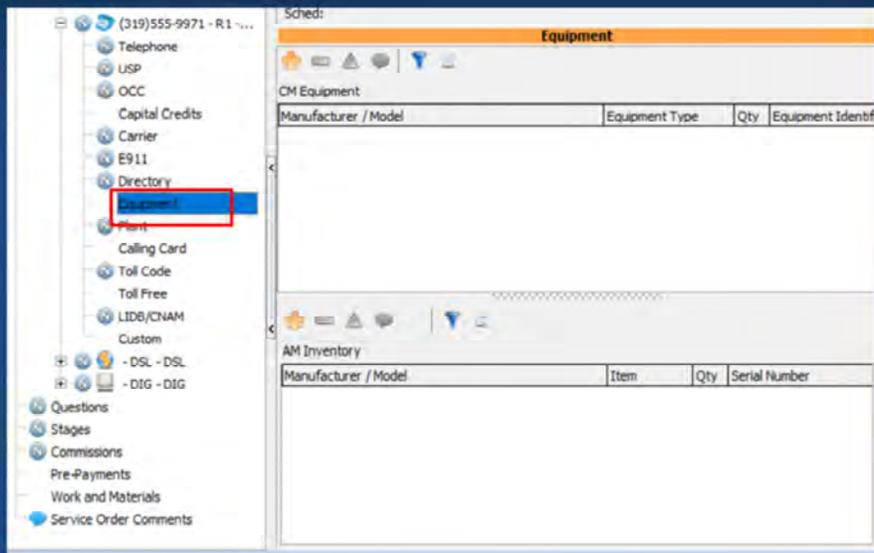
If the address you're using has been validated against the E911 MSAG (Master Street Address Guide), and you're using E911 Automation or included E911 as one of the options in the Cascade Information screen, your E911 screen will be populated. No saving of the E911 information is needed.

If the Post icon is enabled, you'll need to update and/or save the information.



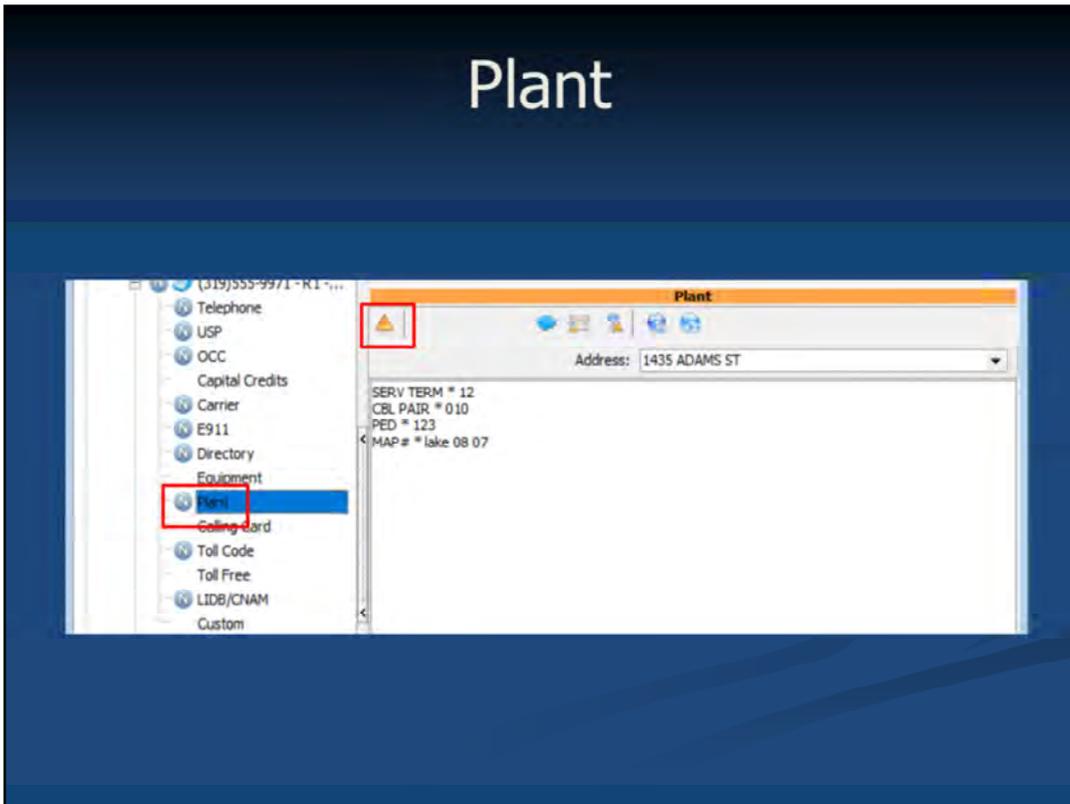
If Directory was included as one of the options from the Cascade Information screen, a main listing will already be populated. You can update the existing listing, add a separate listing (the same number but a different name) and create additional listings (numbers listed below the main number).

Equipment



Equipment Management functionality can be used to track equipment directly in Customer Master. The AM Inventory (sometimes called Nii or Network Inventory Interface) can be used to distribute equipment from the Inventory module in Accounting Master.

Plant



The Plant screen will display all plant linked to the address being used and its associated network. From here you can edit the plant and add plant comments.

Calling Card & Toll Free

Calling Card							
* Required							
Type*	Card Number*	PIN	Cards	Effective	Ordered	Canceled	Rest
Unrestricted	3195559971						

Toll Free						
* Required						
Toll Free Number*	Type	Ring Down To Number	PIN	Effective	Disconnect	Cha
(800)123-4567		(319)555-9971				

Calling Card and Toll Free are available for tracking. Required fields for each are designated by an asterisk. The Ring Down To Number for a toll free number is sometimes referred to as the bill-to number.

Toll Code

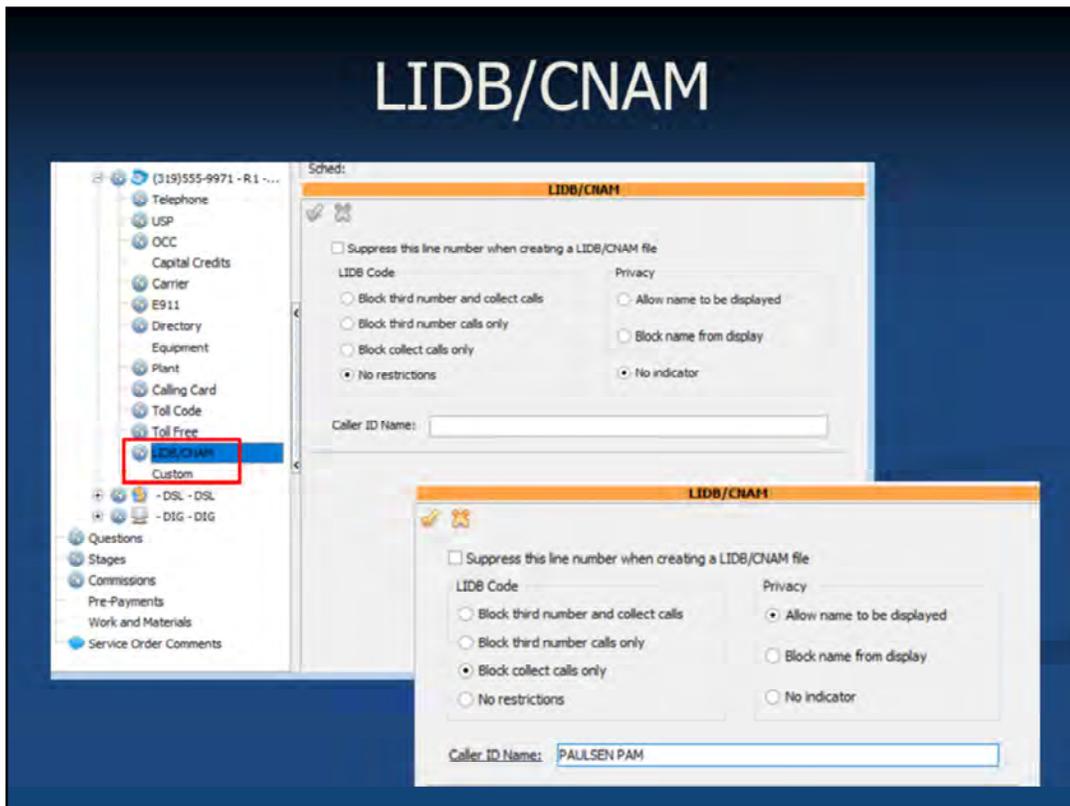
The screenshot displays two views of the Toll Code configuration interface. The top view shows a sidebar with 'Toll Code' highlighted and a main window with a table containing one entry: Toll Code 104, Carrier 09002, and Charge 0.00. The bottom view shows a detailed configuration for Toll Code 105, with a dropdown menu set to 105 and a table listing various plans.

	Toll Code	CIC	Description	Charge	Effective	Carrier Name
Effective:	104	09002	MACC ONE RATE VOLUME PLAN	\$0.00	01/1900	MACC
	105	09002	MACC BUY DOWN PLAN	\$4.95	01/1900	MACC
Ending:	106	09002	MACC BLOCK OF TIME PLAN	\$5.00	01/1900	MACC
	107	09002	MACC VOLUME DISCOUNT PLAN BY DOLLARS	\$1.00	01/1900	MACC
Quantity:	108	09002	MACC VOLUME DISCOUNT PLAN BY MINUTES	\$2.00	01/1900	MACC
	109	09002	TRUE COUNTRY	\$3.95	01/1900	MACC
	110	09002	SELECT SAVER	\$0.00	01/1900	MACC
	800	09002	MACC LD 800 SERVICE CHARGE	\$3.00	01/1900	MACC

A Toll Code is a calling plan, such as a block of time plan for a monthly rate, or a reduced per-call rate. In this example, the Toll Code was added through the Template.

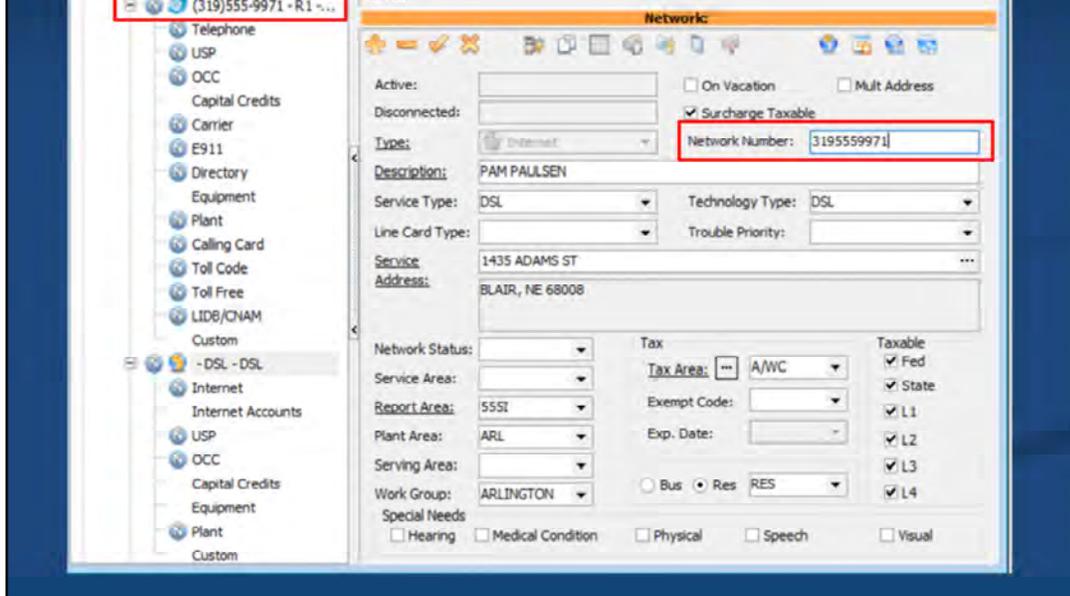
Quantity can be used to control the charges along with the toll processing. This is most often used for aggregation – when multiple networks on the same account share in a block of time.

LIDB/CNAM



LIDB/CNAM is a two-part screen. LIDB is Line Identification Database. It covers incoming call blocking. The default is No restrictions. Privacy is Caller ID – outgoing identification. The default is No Indicator. For most providers, No Indicator means the number will display but nothing else.

Internet Network Number



It's a good idea to review the next network created through the Template. Changes such as a Report Area update may be needed. The Network Number is also selected on the Network tier screen.

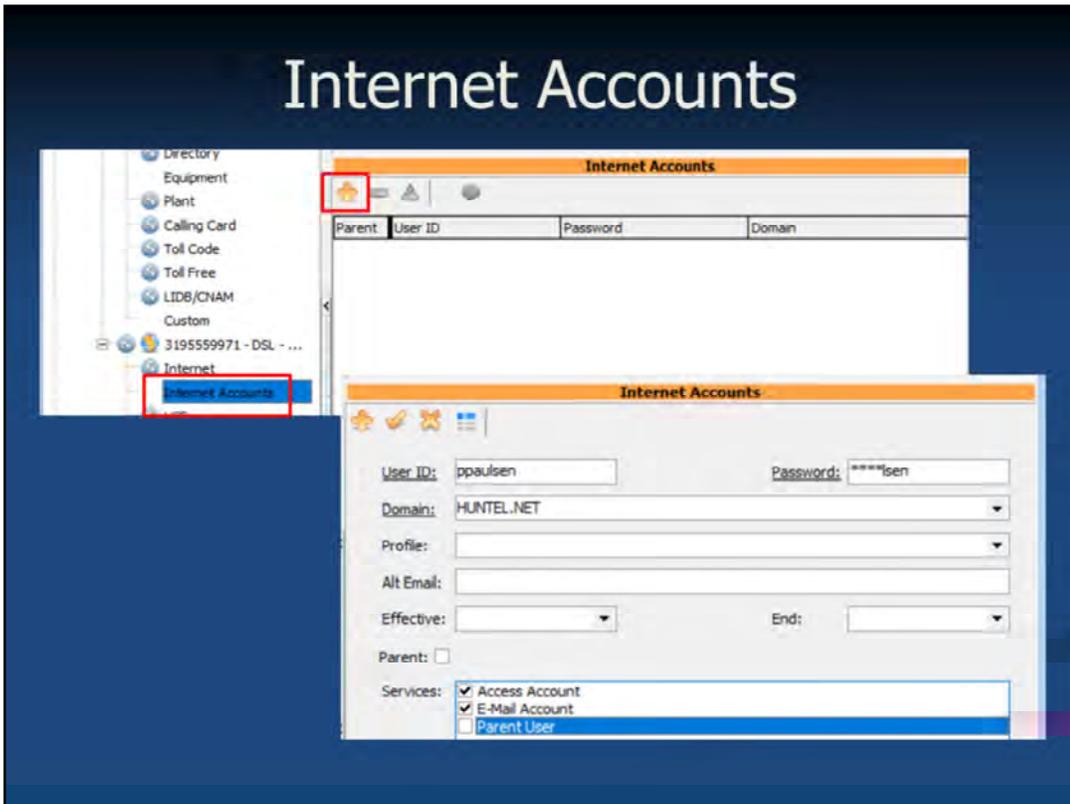
If you get the Cascade Information screen, deselect Main Number. If not, this network will become the main number, printing on the bill and used for other things such as reports and credit card processing.

Internet

The screenshot displays a software interface for configuring an Internet service. On the left, a navigation tree lists various service categories, with 'Internet' selected and highlighted in blue. A red rectangular box is drawn around the 'Internet' item in this tree. The main window, titled 'Internet', contains several configuration sections: 'Plan' (a dropdown menu), 'IP Type' (a dropdown menu) and 'IP Address' (a text input field), 'Telephone' (a text input field), 'Referrals' (two text input fields labeled 'Current' and 'Accumulated'), and 'FCC 477 Reporting' (a dropdown menu for 'Broadband Type' set to 'Asymmetric xDSL', and two text input fields for 'Downstream' set to '75' and 'Upstream' set to '20'). At the bottom, there is a 'Computer' section.

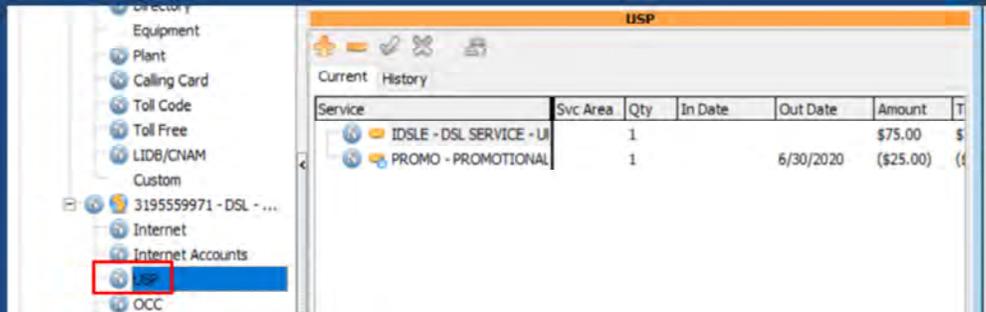
The FCC 477 Reporting values are included on the Internet screen. These should be auto-populated based on the USP code selected. You can also access lifeline for discounted Internet services.

Internet Accounts



The Internet Accounts screen houses user information, typically for those that are using your services.

Internet USP



The screenshot shows a software interface with a tree view on the left and a main window titled 'USP' on the right. The tree view includes categories like Directory, Equipment, Plant, Calling Card, Toll Code, Toll Free, LIDB/CNAM, Custom, 3195559971 - DSL - ..., Internet, Internet Accounts, and OCC. The 'USP' item under 'Internet Accounts' is highlighted in blue and has a red box around it. The main window displays a table with columns: Service, Svc Area, Qty, In Date, Out Date, Amount, and Tr. The table contains two rows of data.

Service	Svc Area	Qty	In Date	Out Date	Amount	Tr
IDSLE - DSL SERVICE - UI		1			\$75.00	\$
PROMO - PROMOTIONAL		1		6/30/2020	(\$25.00)	(

USPs may be populated if they're included in a Template. Some codes may be 'limited time' codes such as a credit for a certain service. If this is the case, the code/s should have future Out Dates.

Internet OCC

The screenshot displays two windows from a software application. The top window, titled 'OCC', shows a list of OCCs. The bottom window, also titled 'OCC', shows the details for a selected OCC.

Top Window (OCC List):

Code	Description	Qty	Amount	Days	Date
OAINS	INSTALL FEE - ALL NETWORKS	1	\$30.00	0	03/27/20

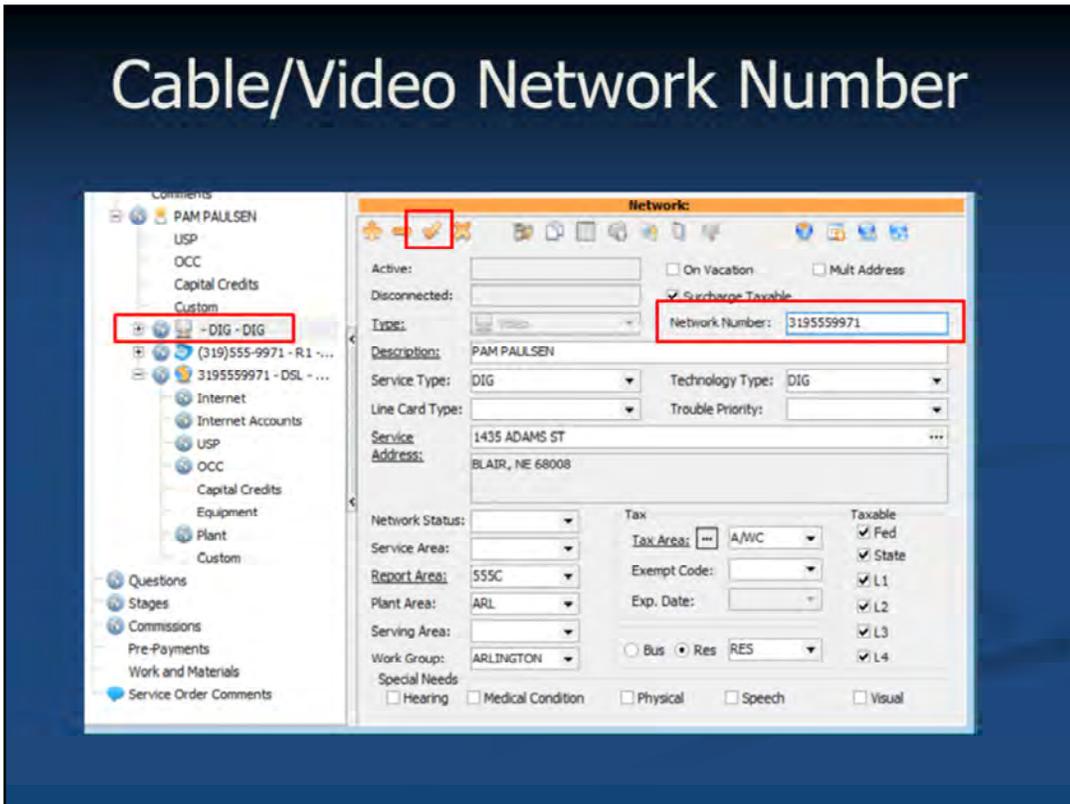
Bottom Window (OCC Details):

Permanent Prior Month Round Up Cancel

Service: OAINS Description: INSTALL FEE - ALL NETWORKS
Tax Area: A/WC GL Acct: 5200.000 Last Billed:
Date: 3/27/2020 Start Bill Dt: 4/1/2020 End Bill Dt:
Amount: 30.00 Quantity: 1 Days: 0

OCCs can be included on any tier of the account. You can add, edit and cancel OCCs.

Cable/Video Network Number



Cable/Video is another type of network. It's recommended you review the information and make any necessary updates. This is also where you add a Network Number.

Once you save the number you might get the Cascade Information screen again. If so, be sure to deselect Main Number in order to retain the Telephone number as the main number.

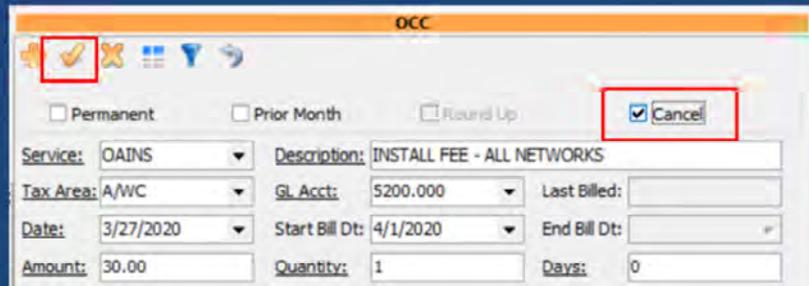
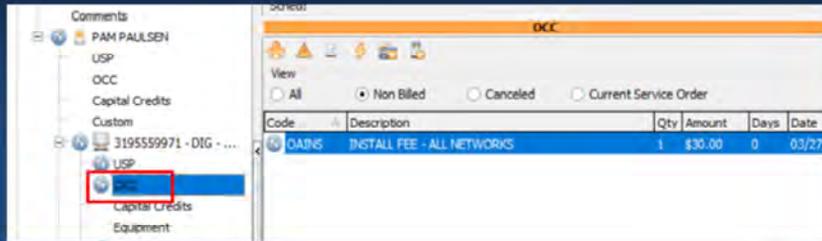
Video USP

The screenshot displays the 'Video USP' interface. On the left, a tree view shows a hierarchy: PAM PAULSEN > USP > OCC > Capital Credits > Custom > 218559971 - DIG - ... > USP. The main window shows a 'Current' tab with a table of services. Below it, a 'USP Selector' dialog is open, listing various video service codes with their billing frequencies, descriptions, and amounts. The 'Selected' column on the right of the dialog lists the chosen services: CBG10, CCSN, CESGP, and CFSN. At the bottom, there are radio buttons for 'USP Filter' (OneTime, Recurring, Bundles, All) and 'Bus/Res Filter' (Bus, Res, All), along with 'OK' and 'Cancel' buttons.

Code	Billing Freq	Svc Area	Description	Amount	Selected
<input type="checkbox"/> CAESV	Monthly		ESSENTIAL VIDEO	\$19.95	CBG10
<input type="checkbox"/> CAPRE	Monthly		PREMIER VIDEO	\$45.00	CCSN
<input checked="" type="checkbox"/> CBG10	Monthly		BIG 10 NETWORK	\$10.00	CESGP
<input checked="" type="checkbox"/> CCSN	Monthly		COLLEGE SPORTS PREMIUM	\$5.00	CFSN
<input type="checkbox"/> CDISP	Monthly		DISCOVERY PREMIUM CHANNELS	\$5.00	
<input type="checkbox"/> CDNYP	Monthly		DISNEY PREMIUM CHANNELS	\$5.00	
<input type="checkbox"/> CDSC	Monthly		DIGITAL SPORTS CHANNELS	\$25.00	
<input checked="" type="checkbox"/> CESGP	Monthly		ESPN GAME PLAN	\$5.00	
<input checked="" type="checkbox"/> CFSN	Monthly		FOX SPORTS NETWORK PREMIUM	\$5.00	
<input type="checkbox"/> CMLB5	Monthly		MLB STRIKE ZONE	\$5.00	
<input type="checkbox"/> CNBA	Monthly		NBA TV	\$5.00	
<input type="checkbox"/> CNFLN	Monthly		NFL NETWORK	\$5.00	

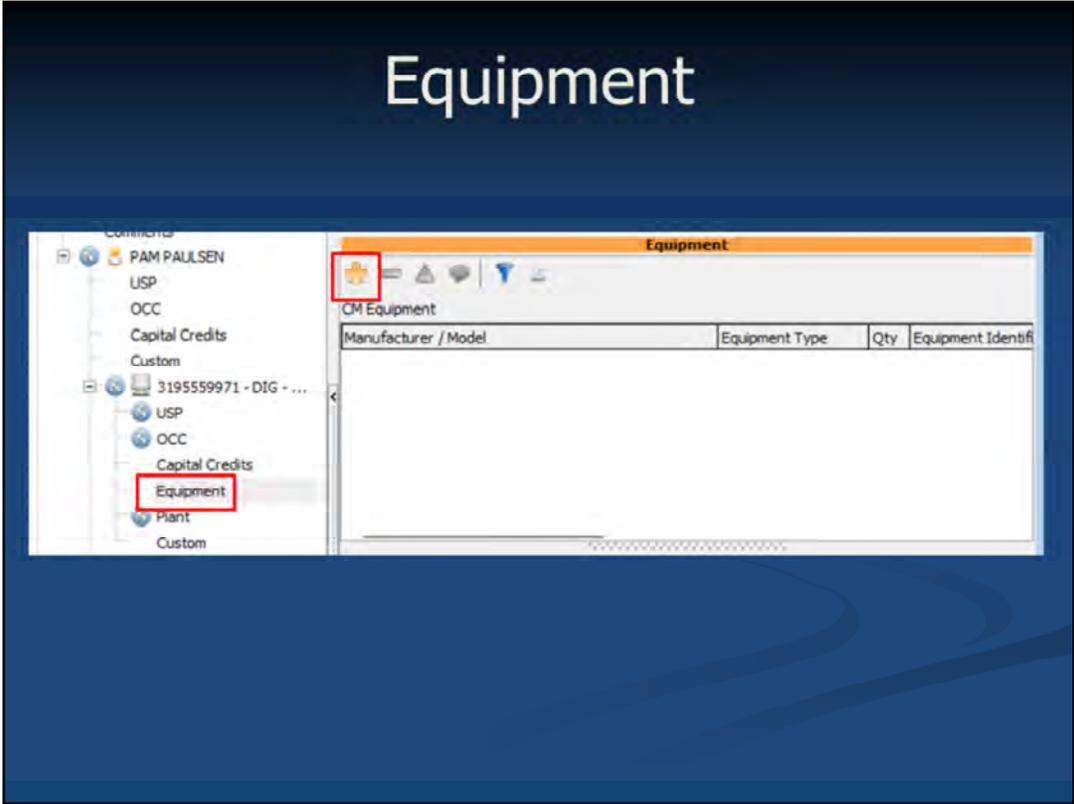
The USP screen will show any codes added through the Template, or no codes if they weren't included or a Template wasn't used.

Cable/Video OCC



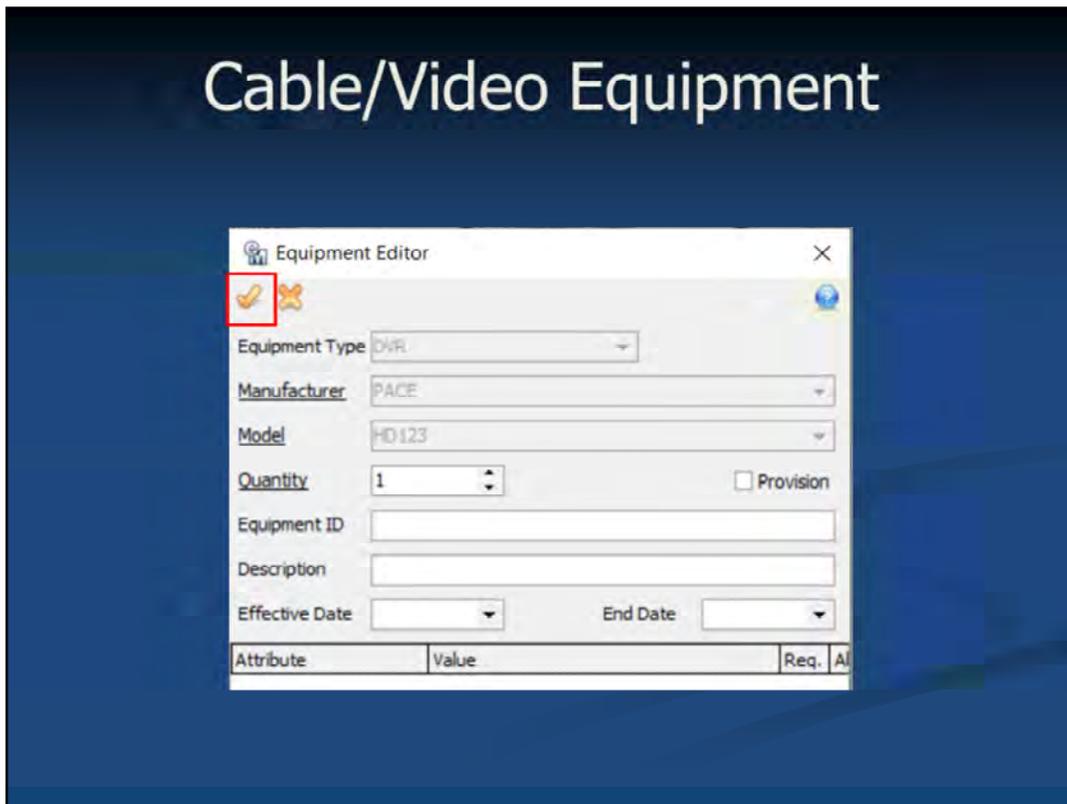
As seen previously, OCCs are available for assignment on any tier. They can be added, edited and canceled.

Equipment



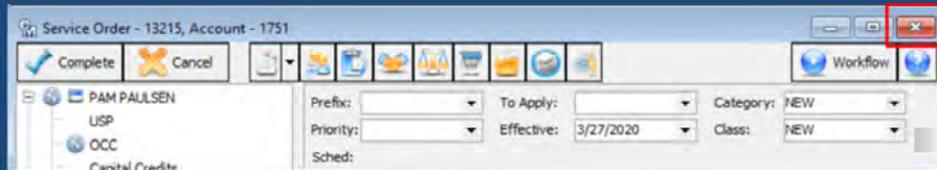
Equipment is available on all Network tiers.

Cable/Video Equipment



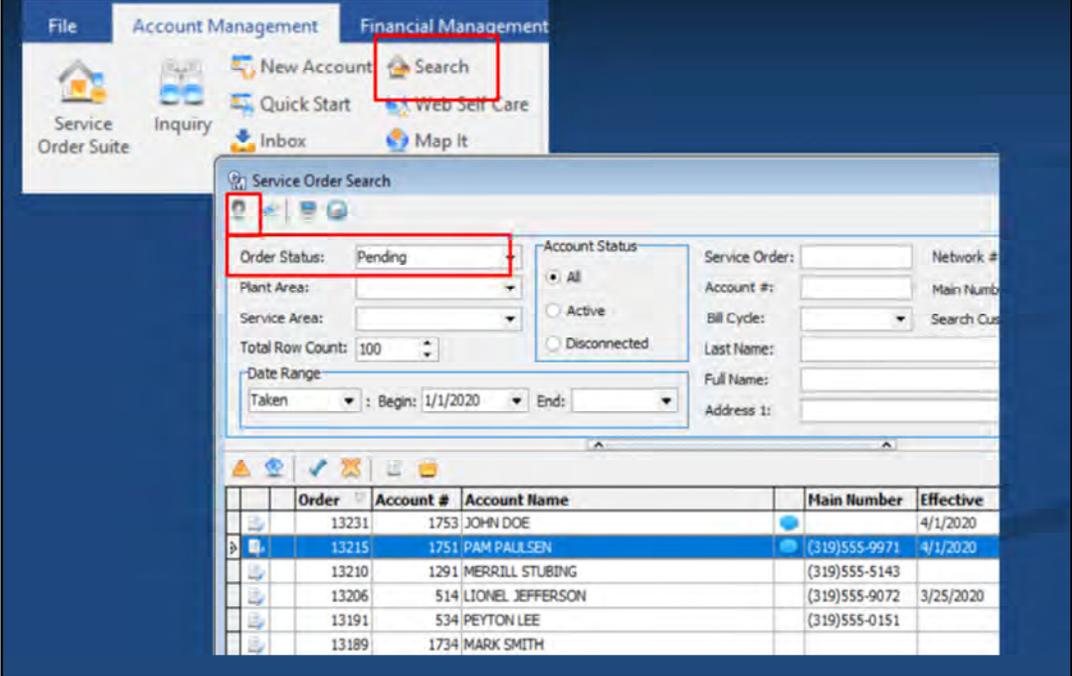
The Equipment screen will house any equipment through the Equipment Management functionality in Customer Master and inventory through the Nii (Network Inventory Interface) through Accounting Master.

Close Pending Order



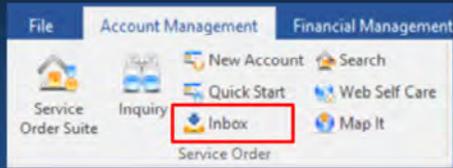
At any point along the way, you can close out of the order and continue to work it at a later time. Simply click on the X in the upper right corner of the header. This does not cancel your order, it will remain pending.

Service Order Search

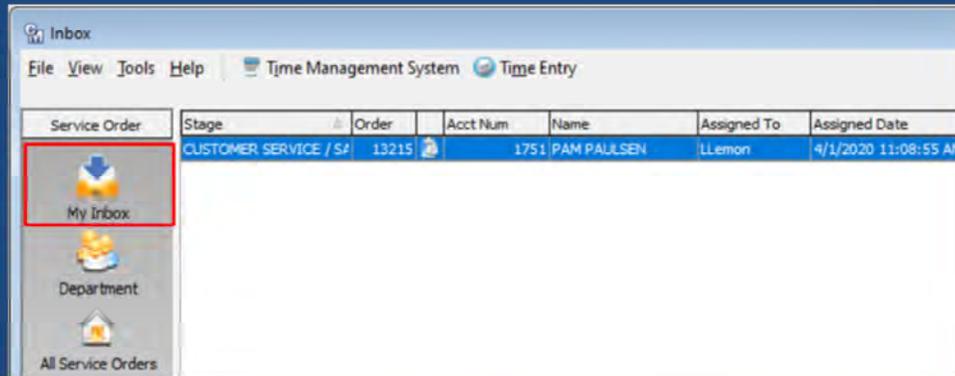


To retrieve an order, you can use Service Order Search, Inbox and Recent Activity. Use the Search icon on the Account Management tab to use Service Order Search.

Service Order Inbox



The Account Management menu includes the following items: Service Order Suite, Inquiry, New Account, Quick Start, Search, Web Self Care, and Map It. The 'Inbox' item is highlighted with a red box.



The screenshot shows the 'Inbox' window with a menu bar (File, View, Tools, Help) and a toolbar (Time Management System, Time Entry). A table displays service order data, and a sidebar on the left contains navigation options: My Inbox, Department, and All Service Orders. The 'My Inbox' option is highlighted with a red box.

Service Order	Stage	Order	Acct Num	Name	Assigned To	Assigned Date
	CUSTOMER SERVICE / SA	13215		1751 PAM PAULSEN	LLemon	4/1/2020 11:08:55 AM

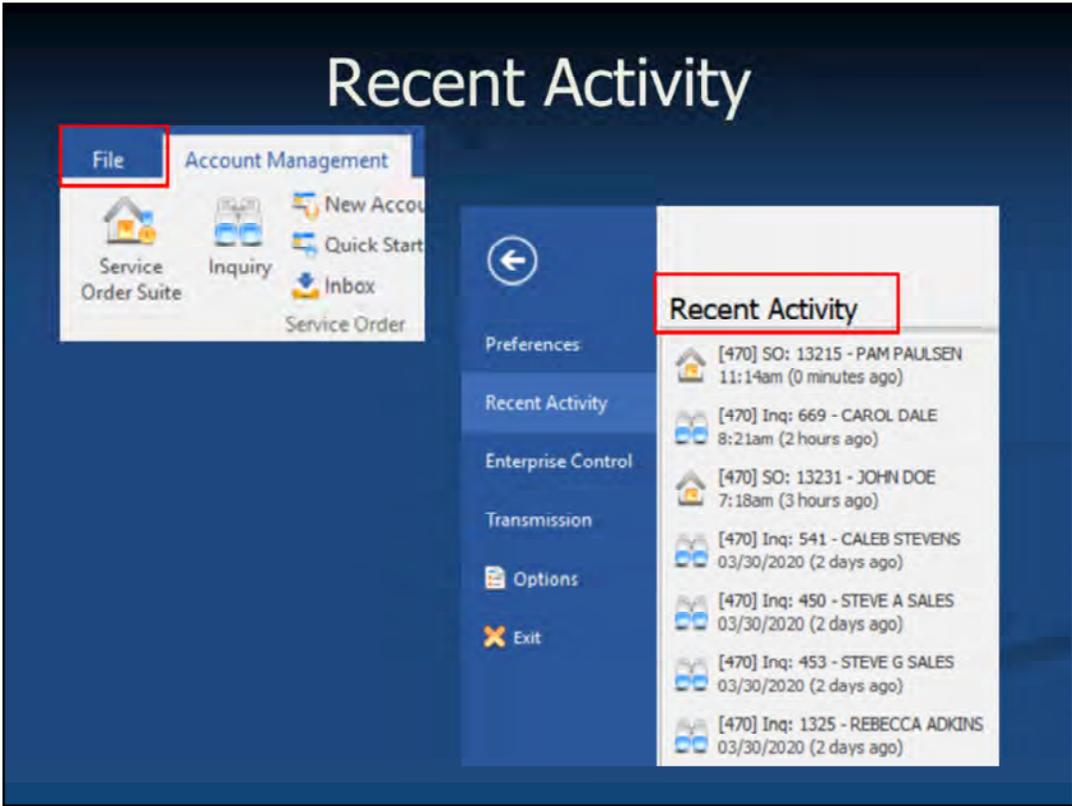
To find your order based on staging, click on Inbox on the Account Management tab. You can view by My Inbox, Department or All Service Orders.

(Note: Inbox can also be used to find Trouble Tickets and Sales Leads.)

MACC Mobile

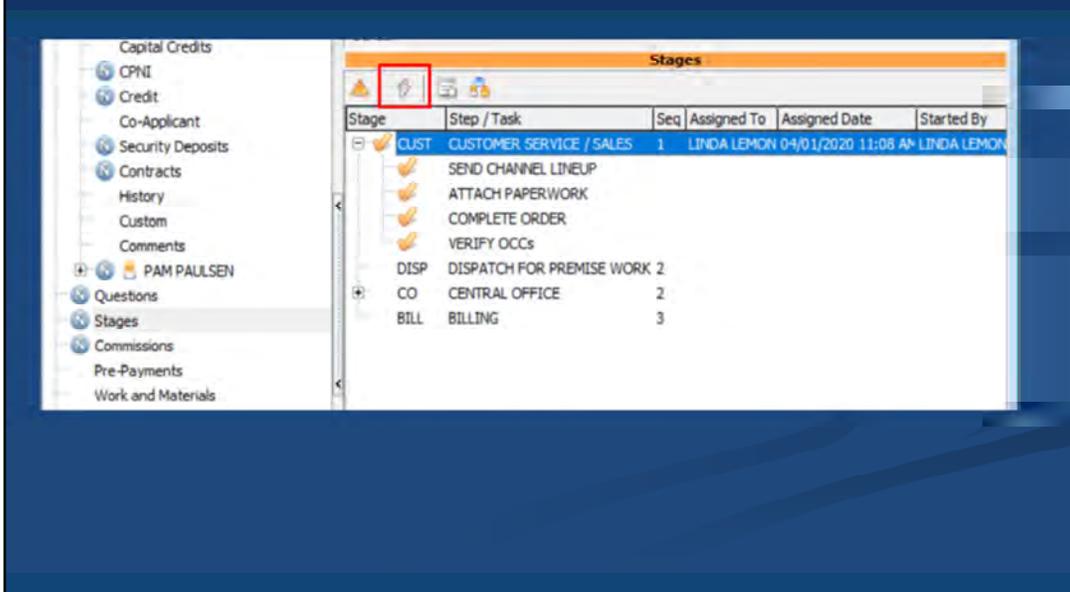


Some companies may retrieve their orders from MACC Mobile – a mobile friendly website connected to Customer Master.



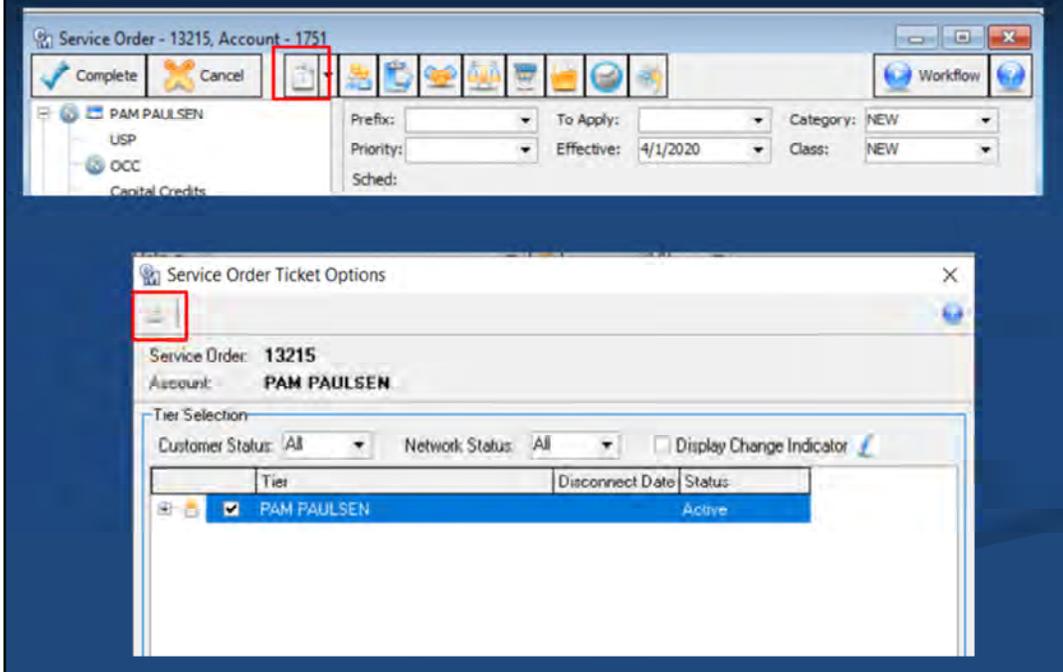
Recent Activity will display the last 50 'hits' on accounts for Inquiry, Service Order, Trouble Ticket and Sales Lead. Recent Activity can be accessed through File – Recent Activity.

Stages & Tasks



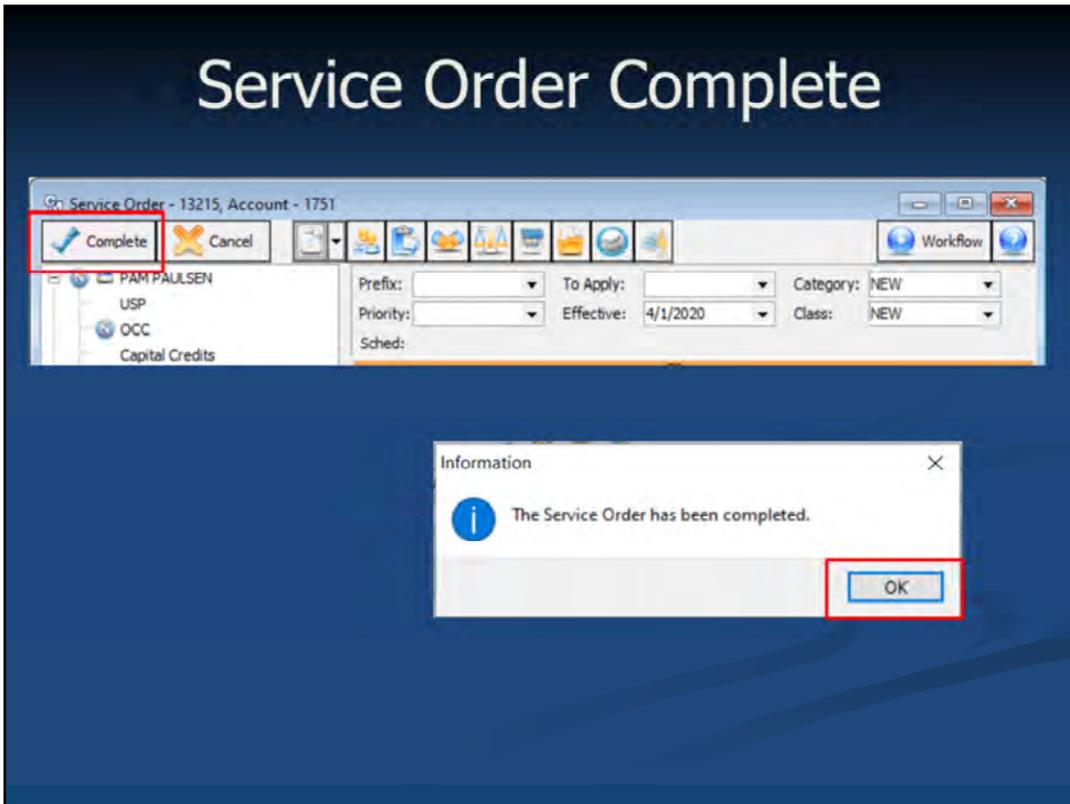
At this point, the Customer Service/Sales work effort is done and the only work effort left is to complete the assigned Stages and Tasks.

Print Service Order



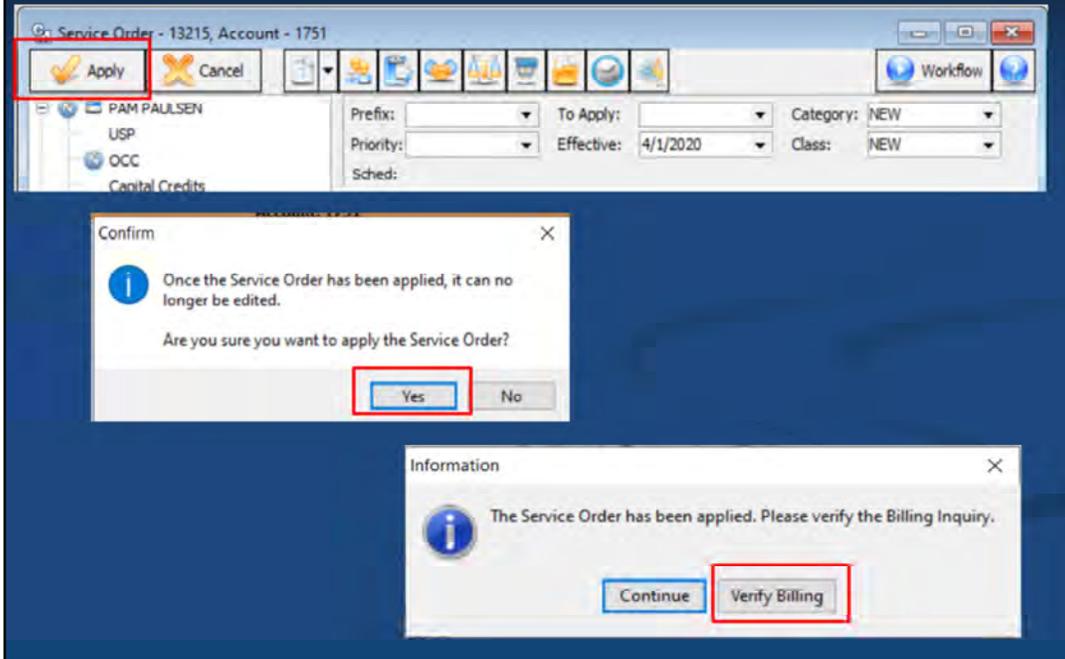
Remember that at any time in the Service Order process you can preview and print the order.

Service Order Complete



Completing an order simply changes the status from Pending. At Complete you can still make changes.

Service Order Apply



Applying the order changes the status from completed to applied. Once the order has been applied, no further changes can be made.

Billing Inquiry

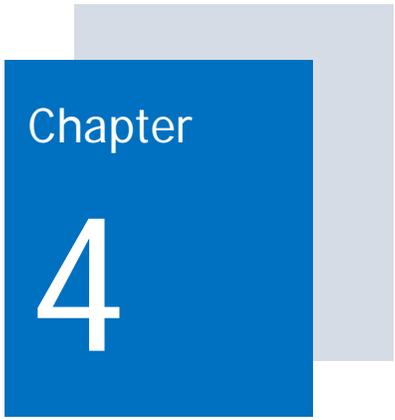
Account: 1751 - PAM PAULSEN Bill Date: 04/01/2020

Recurring Charges | Current OCCs | Billed OCCs | Bill History

Code	Description	From	To	Bill Star	Bill Freq	Amount
Tier - Internet - 3195559971						
IDSL	DSL SERVICE - UP TO 75 MBPS	04/01/2020	04/30/2020		Monthly	75.00
PRQI	PROMOTIONAL CREDIT	04/01/2020	04/30/2020		Monthly	(25.00)
						50.00
Tier - Telephone - 319555-9971						
TAR1	ACCESS RECOVERY CHARGE RES SINGLE LINE	04/01/2020	04/30/2020		Monthly	1.50
TRAI	BASIC TELEPHONE	04/01/2020	04/30/2020		Monthly	19.75
TCEI	CF - INSIDE WIRE MAINTENANCE	04/01/2020	04/30/2020		Monthly	2.25
TCEI	CF - TELEMARKETING BLOCK	04/01/2020	04/30/2020		Monthly	4.00
TCEI	CF - VOICE MAIL	04/01/2020	04/30/2020		Monthly	8.05
TCEI	CF - CALL WAITING /CALLER ID	04/01/2020	04/30/2020		Monthly	8.25
TEW	ER11 SURCHARGE - WASHINGTON COUNTY	04/01/2020	04/30/2020		Monthly	0.50
TSL1	FCC SINGLE LINE ACCESS CHARGE	04/01/2020	04/30/2020		Monthly	5.50
						48.80
Tier - Video - 3195559971						
						143.75
Totals:						
Recurring Charges:		Rec Chg Credits:	Current OCCs:	Billed OCCs:	Bill History:	
\$143.75		(\$25.00)	\$30.00	\$0.00	\$0.00	

At Billing Inquiry you can view all recurring charges, recurring credits and OCCs for the upcoming Bill Date.

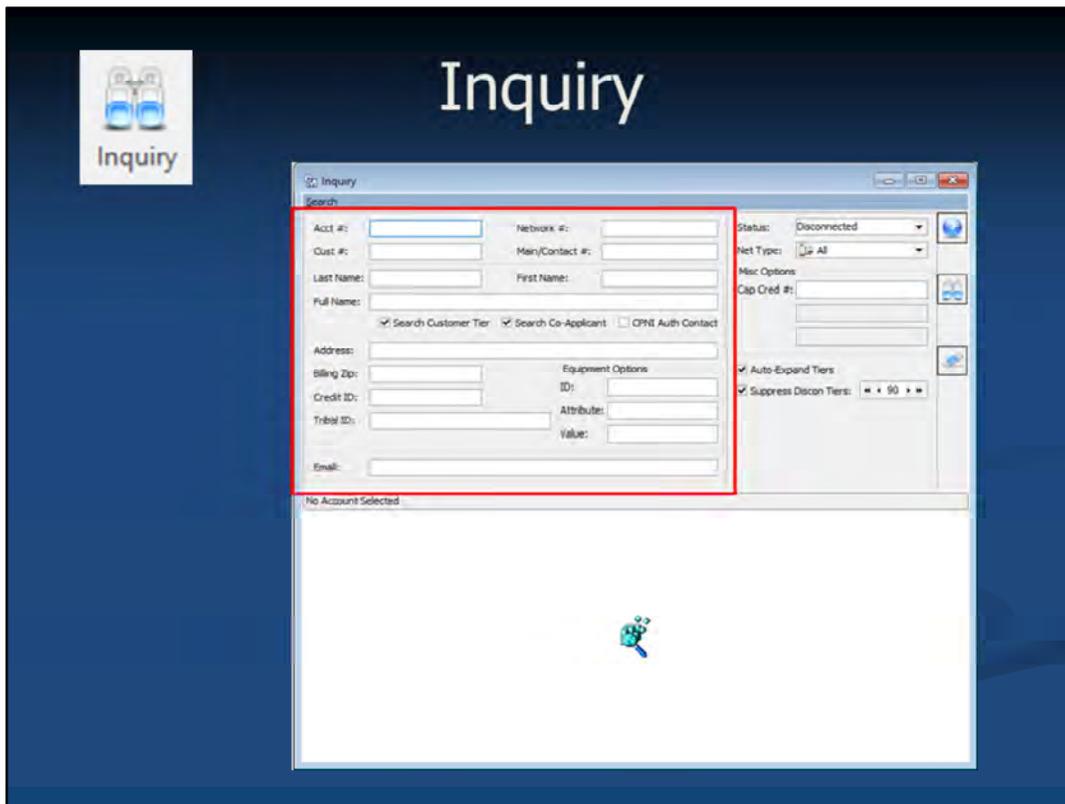
You can view historical information by changing the date in the Bill Date field.

A graphic consisting of two overlapping squares. The front square is blue and contains the text 'Chapter' and the number '4'. The back square is light gray.

Chapter

4

Account Inquiry & View



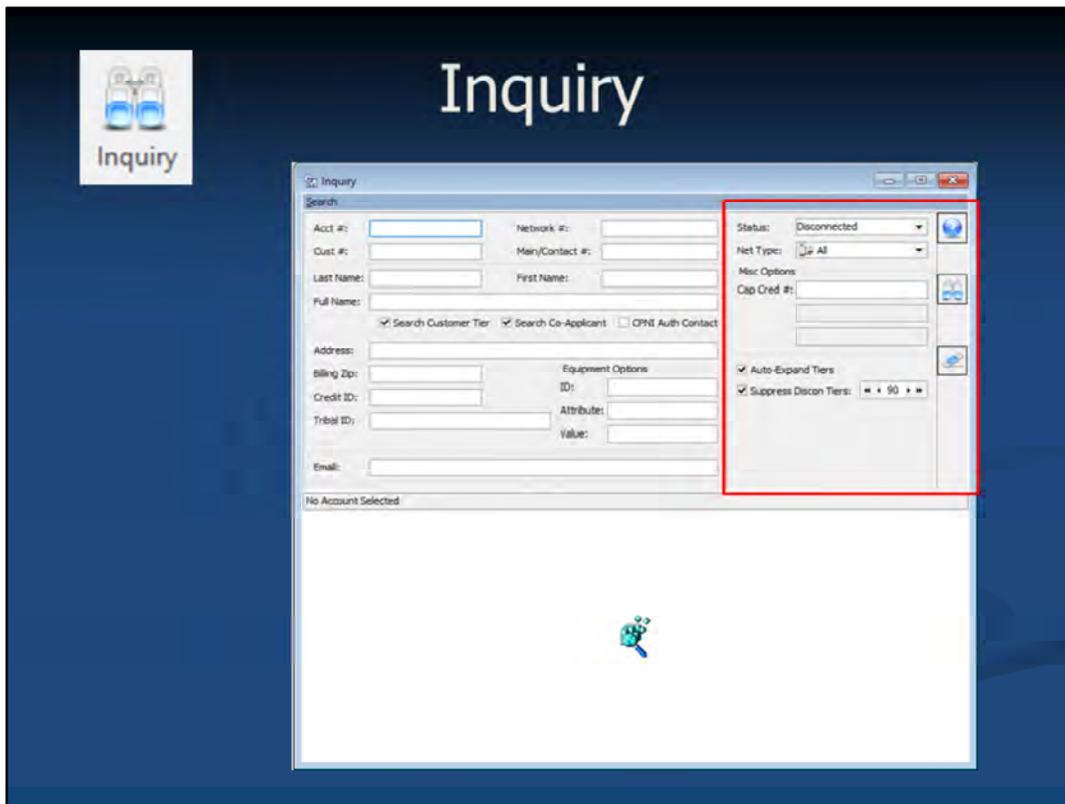
The Inquiry window, accessed from the banner in the Account Management Tab, is the starting point to view information related to an existing account. Numerous criteria is available to help you locate accounts.

Search options include the Account, Network, Customer and Main/Contact numbers. Last Name and First Name fields can be used for residential accounts. The Full Name field can be used for business accounts. It can also be used for residential accounts as long as you start your search with the first name. You can also search by Customer Tier, Co-Applicant and CPNI Authorized Contact.

Address can be used to search by an address existing on any tier of an account. Billing Zip searches for the zip code on just the Account tier. Credit ID and Tribal ID pull from the Credit ID field on the Credit screen of the Account tier.

Equipment Options pull from either Equipment Management within Customer Master or the Inventory Interface with Accounting Master (Nii). The Equipment ID can be something like a serial number. An Attribute might be something like the type of equipment (modem, set top box, etc.) and the Value could be a serial number, MAC Address and so on.

Searching by email pulls the account based on the Email address stored in the Other Information screen.



Status options include All, Active, Suspended and Disconnected. The default is All. Net Type searches can be by All or any of the networks within your database. A default can be set through Tools – Options – General.

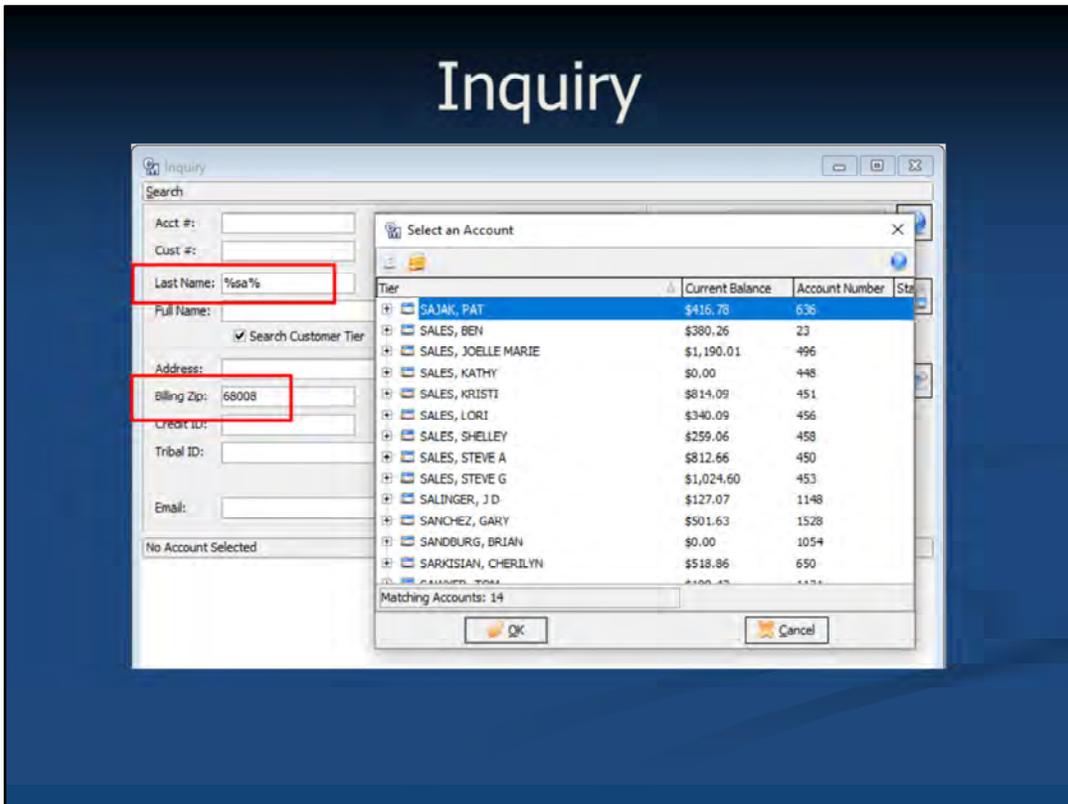
Depending on the Net Type selected, more search options are available:

- All – Capital Credit Number
- Telephone – Directory Listing Information, Toll Free number and Calling Card number
- Internet – User ID
- Special Circuit – LEC#, IXC#, Term Point

Flagging Auto-Expand Tiers will automatically display the Account, Customer and Networks, so you don't have to continually click + to get to the needed tier. Suppress Discon Tiers will hide any tiers that have been disconnected based on the number of days entered. Even with this set, you can still see all tiers if you right-click in the account tree area in View.

Once you have your search value entered, either click on the binoculars or hit your Enter key to retrieve the account. If your results don't seem accurate, or you want to start a new search, you can use the eraser button to reset.

Inquiry



You can use partial searches and wild card searches (%) or search on multiple options at one time. If multiple records are found you can view them in the Select an Account grid.

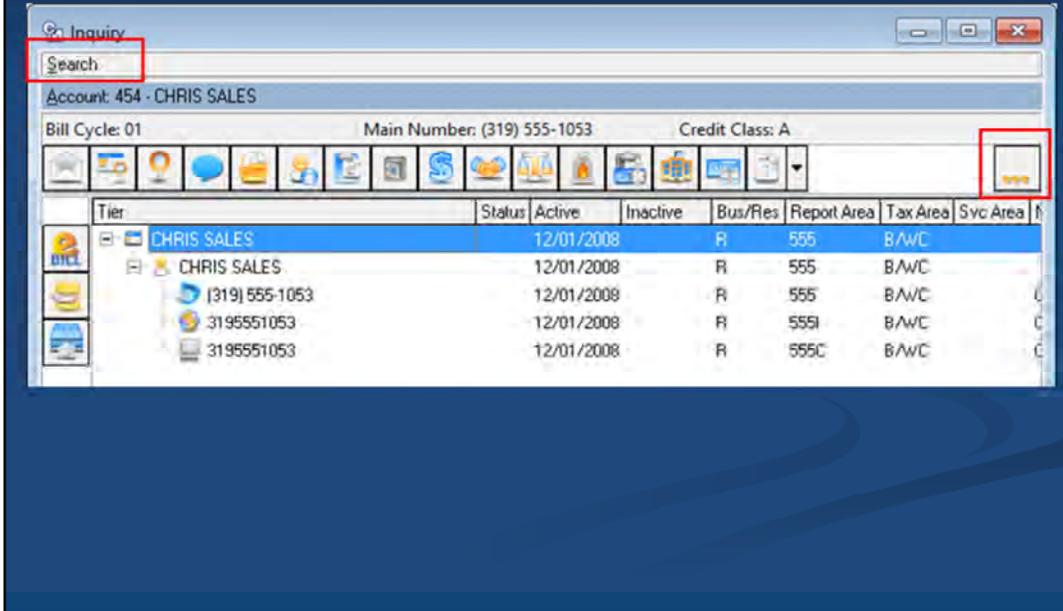
On this screen you can re-order the columns by clicking on the column header and dragging and dropping. You can also re-sort the columns by clicking on the arrow in the column header. Additionally, you can use custom search and filter options by clicking on the column header.

Account, customer and network tiers may display in different colors throughout all inquiry and view options.

- Black – active tier
- Red – disconnected tier
- Pink – suspended or vacation tier
- Blue – lifeline on telephone network tier

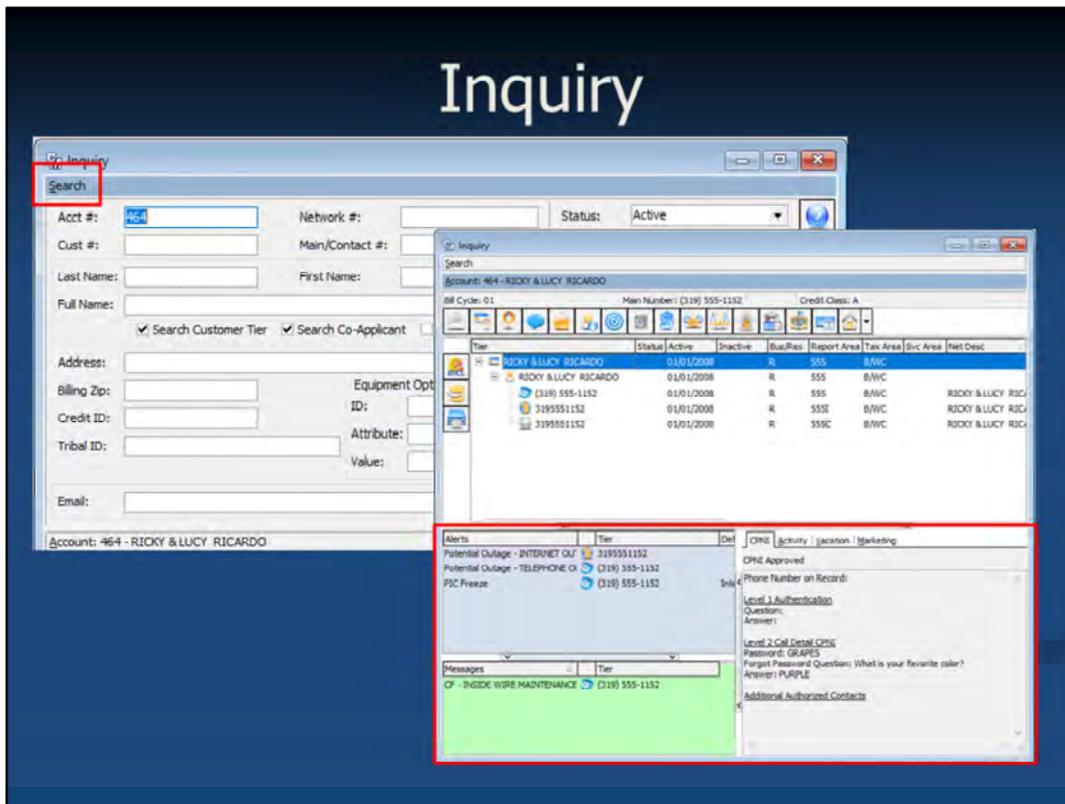
Just highlight the needed account and choose OK. If your search doesn't provide the correct results, you can choose the Cancel button in the lower right of the grid.

Inquiry



If an account from the Selected Accounts screen has been chosen in error, retrieve the Selected Accounts screen by clicking on the blue ellipsis. To begin a new search, click on the gray Search bar at the top of the Inquiry screen.

Inquiry



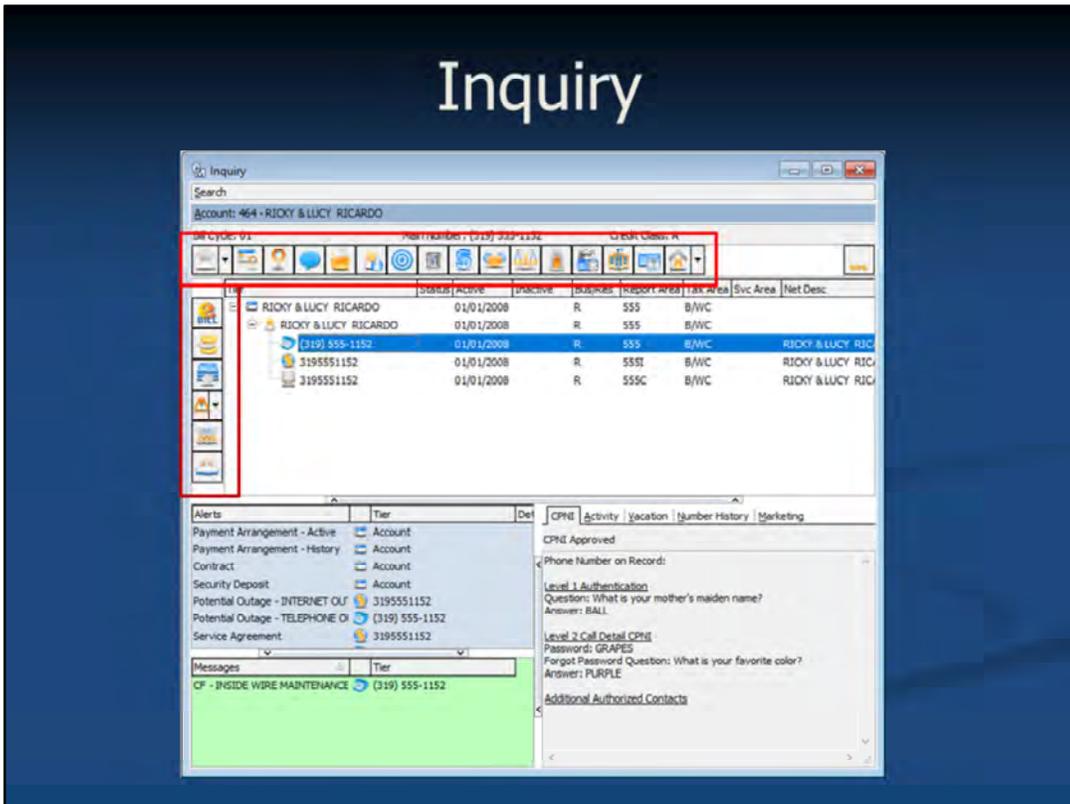
Searching by a single account brings up the Main Inquiry screen for that account. This screen displays quite a bit of information related to the account, including tiers, active and inactive dates, Report Area and Tax Area assignment, Capital Credit Member number, the Main Number, Credit Class and more. Use the scroll bar to see additional details.

- The blue section of the window displays any alerts associated with the account. Alerts are selected through Maintenance – Common – Alerts.
- Messages displayed in the green section of the window are triggered by USP codes marked Display Message through Maintenance – Common – USP Code, and assigned to the account.
- CPNI shows the CPNI authentication details for this account.
- Activity shows the disconnect/reconnect history of the account. Vacation displays vacation history if the vacation indicator is utilized.
- The Marketing tab will display a message if CPNI Approval is needed prior to offering upgrade opportunities to your customer. If you choose CPNI Approval Received, the system will display any marketing messages the customer qualifies to hear about, based on your Suggestive Marketing Criteria.

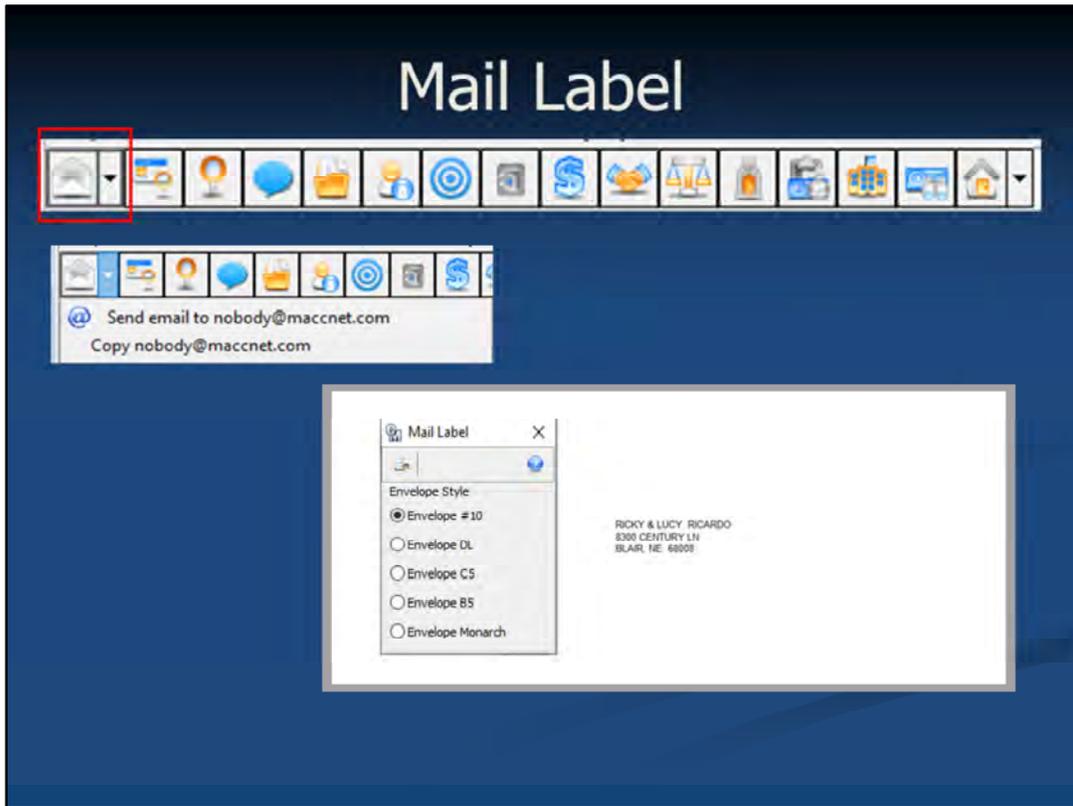
Each user has the ability to resize the various windows on the screen. Hover over the line between the windows and then drag to the desired size. This screen is user-specific and any changes will hold from one search to the next.

Another reminder - if you need to start a new search, simply click on the gray Search bar at the top of the Inquiry window.

Inquiry

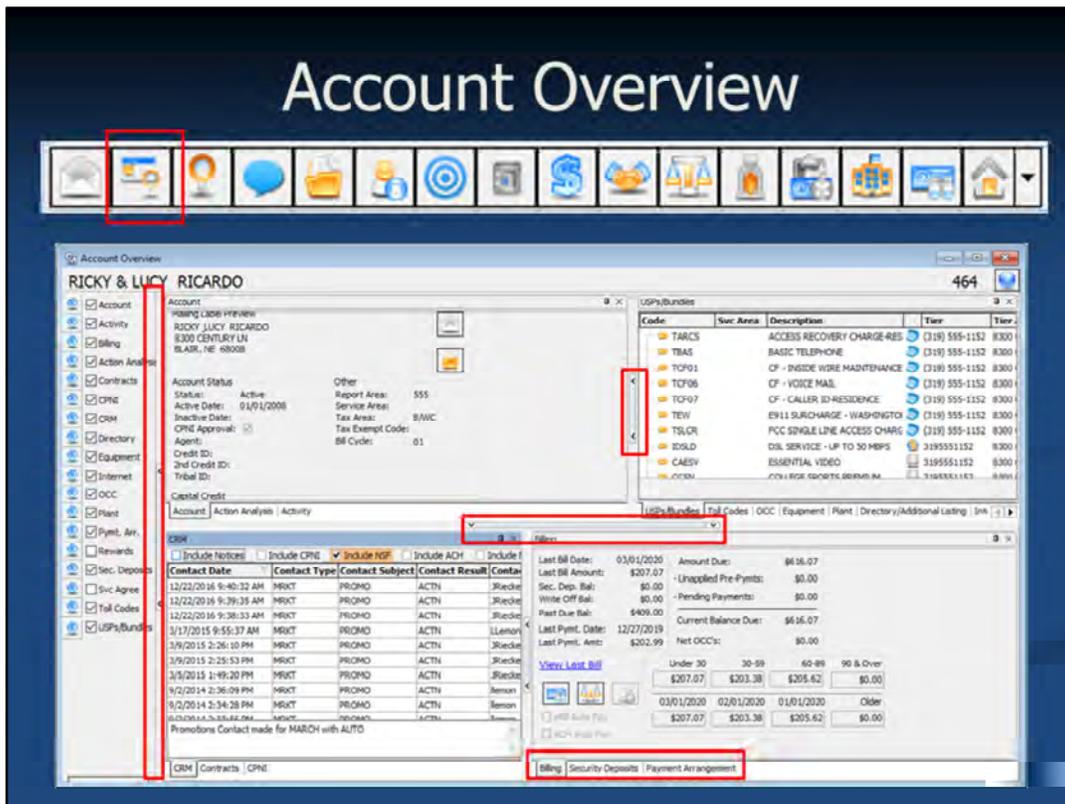


Buttons appear immediate above and to the left of your account information. We'll discuss each of these options at a high level.



An Envelope or E-Mail to the customer can be produced using the Mail Label button. It will either print an envelope in one of five different envelope styles to the billing name and address of record on the account, or if the drop-down arrow exists, it will compose an email to the customer.

Account Overview



The Inquiry Account Overview screen. This is an extremely useful screen that displays multiple details about the account in one location.

This is a customizable screen by user. On the left-hand side of the screen, there is a legend that allows you to turn the sub-screens on and off. Once you have your sub-screens selected, we recommend you minimize this legend so you have additional real estate on your screen. In addition, you can move screens to the four different panes, and resize each pane by dragging and dropping on the border of each pane.

Account Overview

The screenshot displays the 'Account Overview' window for 'RICKY & LUCY RICARDO'. The window is divided into several sections:

- Account Tab:** Shows account details including Mailing Label Preview, Account Status (Active), Active Date (8/10/2008), Inactive Date, CPNI Approval, Credit ID, 2nd Credit ID, and Tribal ID. It also includes fields for Other, Report Area (535), Service Area, Tax Area (B/WC), and Tax Exempt Code.
- Activity Tab:** Displays Sales Leads/Service Orders and Trouble Tickets. Both sections show columns for Status, Number, Class, Taken Date, Effective Date, Scheduled, Changed By, and Changed Date. Both sections currently display '<no data to display>'. There are buttons for 'Print All' and 'Print' in each section.
- CPNI Tab:** Shows authentication information including 'Phone Number on Record', 'Level 1 Authentication' (Question: Answer), 'Level 2 Call Detail CPNI' (Password: GRAPES, Forgot Password Question: What is your favorite color?, Answer: PURPLE), and 'Additional Authorized Contacts'.
- USPs/Bundles Tab:** A table listing various service codes and their details.

Code	Svc Area	Description	Tier	Tier Address	Qty
TARCS		ACCESS RECOVERY CHARGE-RES	(319) 555-1152	8300 CENTURY LN I 1	
TBAS		BASIC TELEPHONE	(319) 555-1152	8300 CENTURY LN I 1	
TCF01		CF - INSIDE WIRE MAINTENANCE	(319) 555-1152	8300 CENTURY LN I 1	
TCF06		CF - VOICE MAIL	(319) 555-1152	8300 CENTURY LN I 1	
TCF07		CF - CALLER ID-RESIDENCE	(319) 555-1152	8300 CENTURY LN I 1	
TBW		E911 SURCHARGE - WASHINGTON	(319) 555-1152	8300 CENTURY LN I 1	
TSLCR		FCC SINGLE LINE ACCESS CHARG	(319) 555-1152	8300 CENTURY LN I 1	
IDSLD			195551152	8300 CENTURY LN I 1	
CAES			195551152	8300 CENTURY LN I 1	
CCSN			195551152	8300 CENTURY LN I 1	

The Account tab displays all of the account-level information included in the main inquiry view. Additional information includes CPNI approval, an additional phone number and an email address. From here you can also generate a mail label or email as well as view documents electronically attached to the account.

USPs/Bundles will display the current USP codes and Bundle codes associated with the tiers on the account.

The Activity tab displays any open service orders or trouble tickets. From here you can open the order or ticket and print the order or ticket. If there are multiple open orders or tickets, you have the option to print all of them.

The CPNI tab displays authentication information and additional contacts.

Account Overview

The screenshot displays the 'Account Overview' window for 'RICKY & LUCY RICARDO' (account number 464). The interface is divided into several sections:

- Action Analysis:** A table listing various account events.

Contact Type	Contact Date	Contact Detail
Service Order	3/20/2020 4:26:18 PM	Number: 13222; Effective Date: 03/20/2020 12:00AM; Status:
Service Order	3/20/2020 4:24:02 PM	Number: 13221; Effective Date: 03/20/2020 12:00AM; Status:
Delinquent Notice	2/25/2020 1:18:34 PM	Last Name: 02/01/20 PPHAL
Delinquent Notice	1/29/2020 11:24:42 AM	Last Name: PPHAL - 01/2020
Service Order	1/20/2020 9:51:51 AM	Number: 13166; Effective Date: 01/20/2020 12:00AM; Status:
Delinquent Notice	12/16/2019 10:59:38 AM	
Delinquent Notice	9/9/2019 1:44:06 PM	
Delinquent Notice	9/8/2019 1:37:02 PM	
Delinquent Notice	8/7/2019 9:58:09 AM	Last Name: 07/2019 DELINQUENTS
Service Order	3/6/2019 8:28:11 AM	Number: 12673; Effective Date: 03/06/2019 12:00AM; Class:
CRM	12/22/2016 9:40:32 AM	Type: MIXT; Subject: PROMT; Result: ACTN; Result Verbiage:
CRM	12/22/2016 9:39:35 AM	Type: MIXT; Subject: PROMT; Result: ACTN; Result Verbiage:
- Toll Codes:** A table showing toll plans.

Toll Code	Number	Quantity	Charge	Carrier	Effective	Ending	Changed By
105	(319) 555-1152	1	\$4.95	09002	3/20/2020		J.Ricklen
- Contracts:** A table listing active, expired, or broken contracts.

SO Num	Code	Description	Status	Begin Date	Expiration Date	Accepted Date	Broken Date
13221	STD 1YR	STANDARD 1 YEAR	Accepted	3/20/2020	3/20/2021	3/20/2020	
- Billing:** Financial summary and bill details.

Last Bill Date:	03/01/2020	Amount Due:	\$616.07
Last Bill Amount:	\$207.07	- Unapplied Pre-Pmts:	\$0.00
Sec. Dep. Bal:	\$0.00	- Pending Payments:	\$0.00
Write Off Bal:	\$0.00	Current Balance Due:	\$616.07
Past Due Bal:	\$409.00	Net OCCs:	\$0.00
Last Pymt. Date:	12/27/2019		
Last Pymt. Amt:	\$202.99		

The Action Analysis tab shows a row for each time a Service Order, Trouble Ticket, CRM row, Payment Arrangement, Delinquent Notice, etc. has been added to an account. It gives an abbreviated summary of what was done. The Service Order or Trouble Ticket can be printed from this screen if needed.

The Toll Code tab lists all of the toll plans currently assigned to any telephone networks.

The Contracts window will display any active, expired or broken contracts associated with the account and/or network tiers.

The Billing tab displays the basic A/R information as well as last bill amounts, security deposit and write-off information. From here you can also view and print a PDF version of the previous month's bill. It also includes a shortcut to the A/R Balance screen.

Account Overview

The screenshot displays the 'Account Overview' window for 'RICKY & LUCY RICARDO' (Account ID: 464). The interface is divided into several functional areas:

- Security Deposits:** This section includes input fields for 'Deposit Amt' (\$50.00), 'Date Recvd' (01/01/2008), 'Rate Code' (BASIC), and 'Batch' (CONVERT). It also features a table with columns: Deposit Am, Date Receive, Date Refund, Rate Code, Batch, Export JE, JE Exports, and Description. A 'Security Deposits' label is overlaid on this section.
- OCC (Outstanding Charges):** This section displays a table with columns: Description, Amount, USP, Source, Status, Date, Taxes, Qty, and CI. A large 'OCC' label is overlaid on this section.
- Service Agreement:** This section shows a table with columns: Tier Num, Service Agreement, Description, Frequency, Hours, and Start Bill. A 'Service Agreement' label is overlaid on this section.
- Payment Arrangement:** This section displays a table with columns: Amount, Taken Date, Status, Pmt Arr Ends, Bill Date, Network Type, Use Categories, and Original Balance. A 'Payment Arrangement' label is overlaid on this section.

The Security Deposits tab displays information related to deposits on the account.

Selecting the OCC tab will show all non-billed OCCs and their respective tiers.

Service Agreement information can be available when a company uses that feature.

The Payment Arrangement tab lists all arrangements made on the account as well as additional instructions. Scrolling over will also show whether or not an arrangement has been flagged as broken.

Account Overview

The screenshot displays the 'Account Overview' window for 'RICKY & LUCY RICARDO' (Account ID: 464). The interface is divided into four main sections:

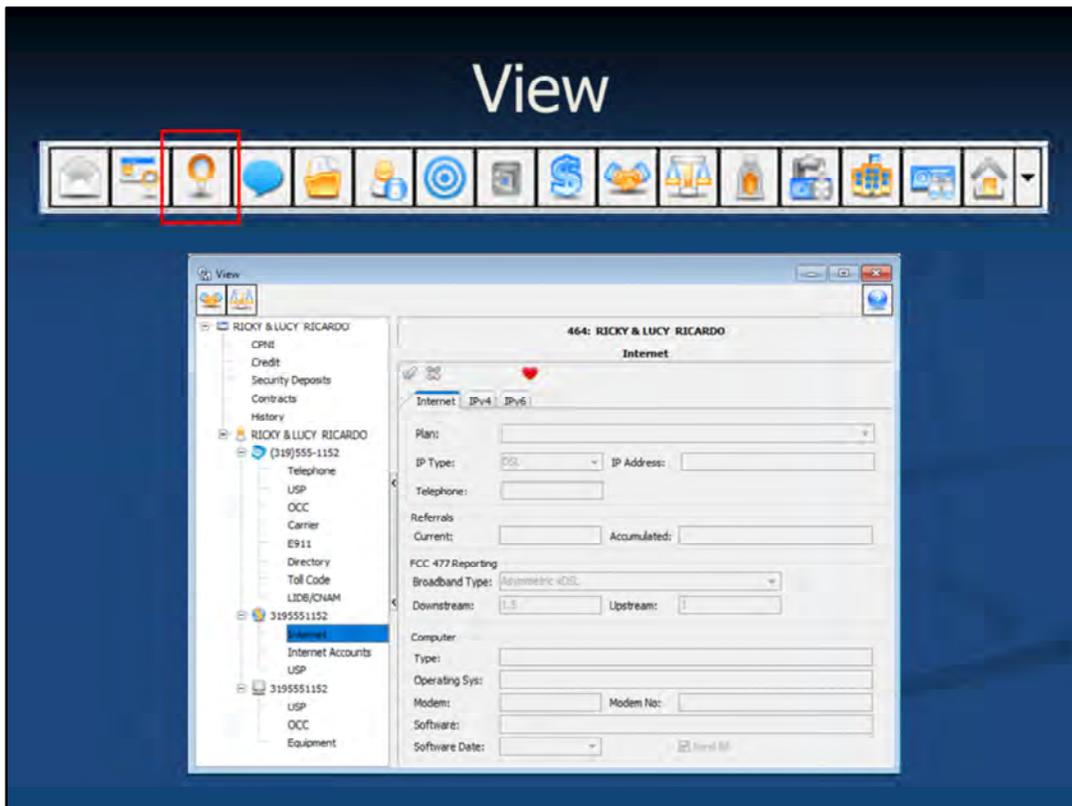
- CRM (Client Relationship Management):** A table listing contact history with columns for Contact Date, Contact Type, Contact Subject, Contact Result, Contact By, and Contact Priority. It includes filters for 'Include Notices', 'Include CPNI', 'Include NPI', 'Include ACH', and 'Include Notifications'. A note at the bottom states: 'Promotions Contact made for MARCH with ALITO'.
- Plant:** A table showing assigned plant data with columns for Network, Address, Plant Key, Plant Code, Plant Description, and Status. It lists five entries for network 319 555-1152 at 8300 CENTURY LN BLAIR, NE 68008.
- Rewards:** A table showing reward history with columns for Bill Date, Reward Type, Reward Description, Previous Carryover Points, and Current Carryover Points. It lists rewards from 03/01/2020 to 04/01/2019.
- Equipment:** A table showing equipment associated with networks, with columns for Network, Manufacturer, Model, Equipment Type, Qty, Equipment Identifier, Description, and Effect. It lists one entry for network 3195551152, manufacturer ALTELL, model 1220, and equipment type SET TOP BOX.

The CRM tab is the Client Relationship Management tab and lists all contacts created on the account. In addition to the regular contacts, you can also choose to include contacts automatically created when a late notice is generated and when a CPNI letter is generated. From this window you can also click anywhere in the grid to open the contacts screen and enter a new contact.

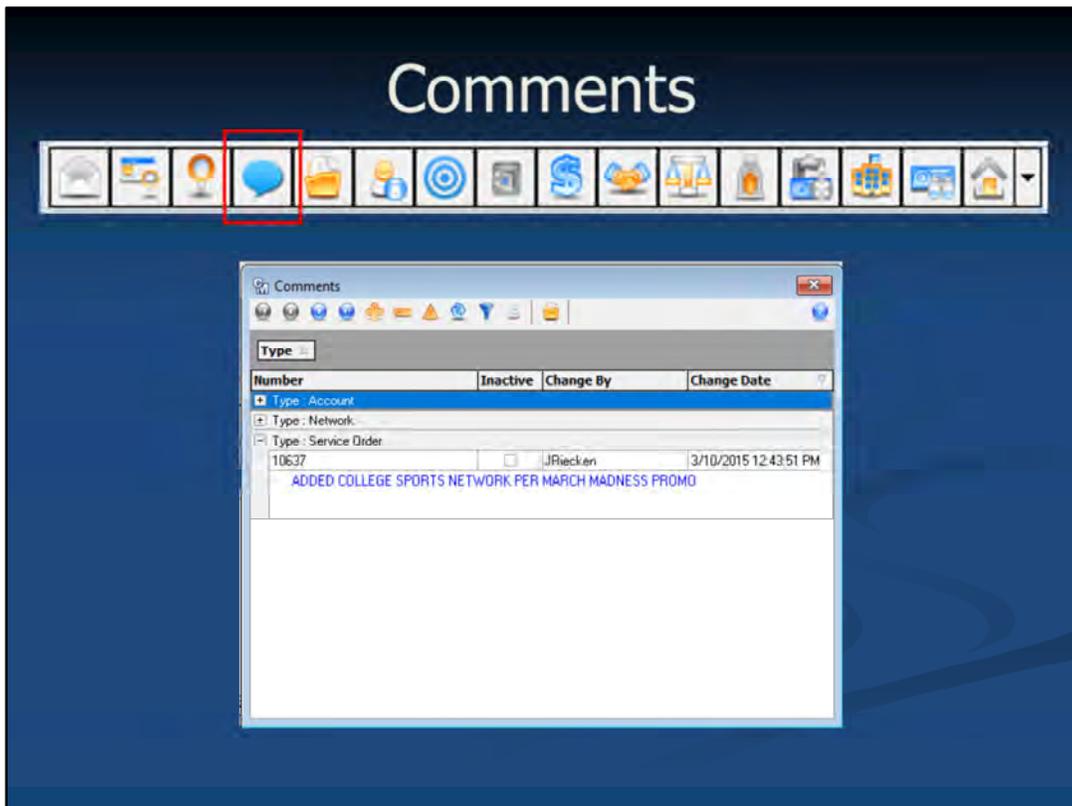
The Plant tab will display current assigned plant data at any network and address associated with the account.

Rewards can be displayed for those companies calculating Bill Rewards or PPV Rewards.

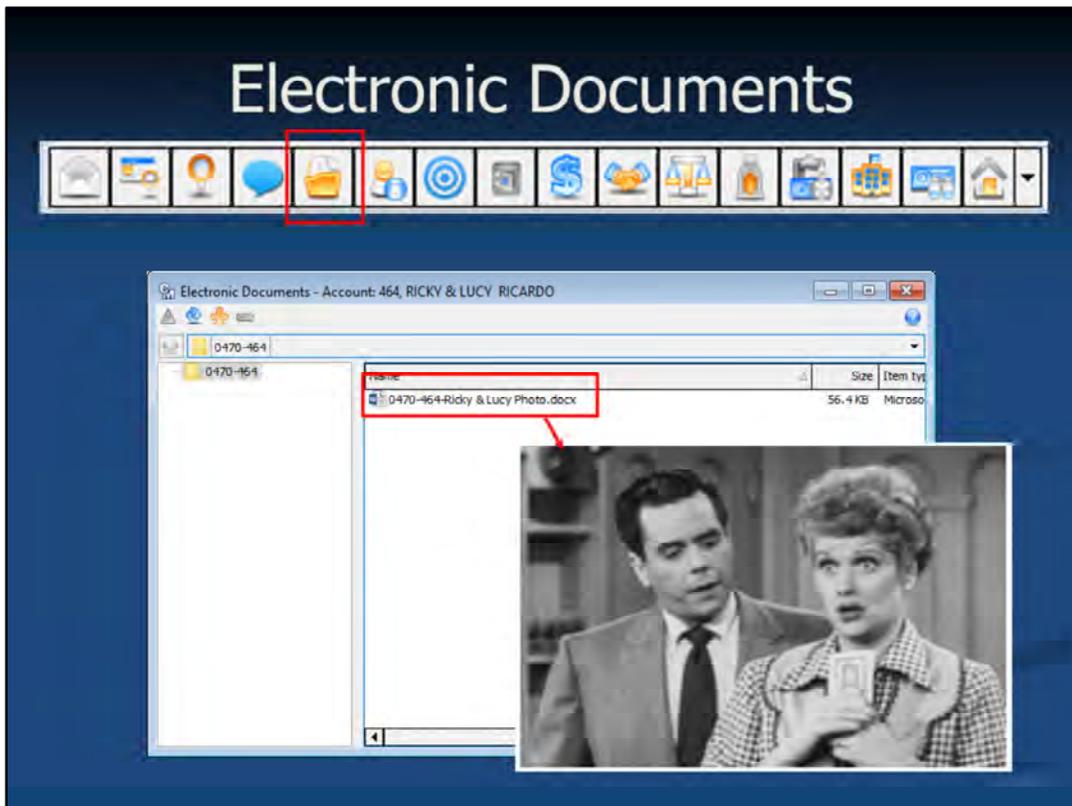
The Equipment tab displays any equipment associated with any networks on the account and includes specific equipment information such as the model, serial number and so on.



Inquiry View looks very similar to Service Order. You can easily navigate to the same screens to view details on the account in a read-only mode.

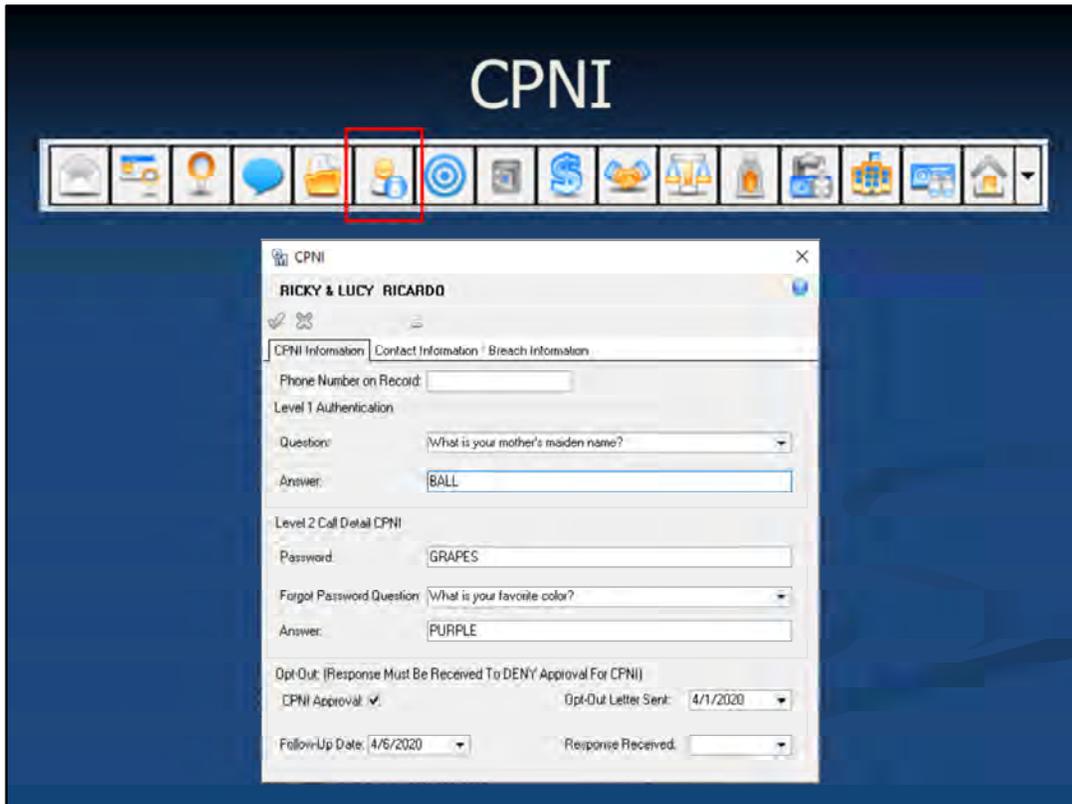


The comments bubble contains miscellaneous comments associated with the account. These may be comments converted in from a previous system



The Electronic Documents icon allows you to view all documents that have been electronically attached to the account. Besides viewing a list, you can open a selected document, attach or delete a document and view the entire electronic documents folder.

Attach any documents, scans, email messages, etc. from this screen.



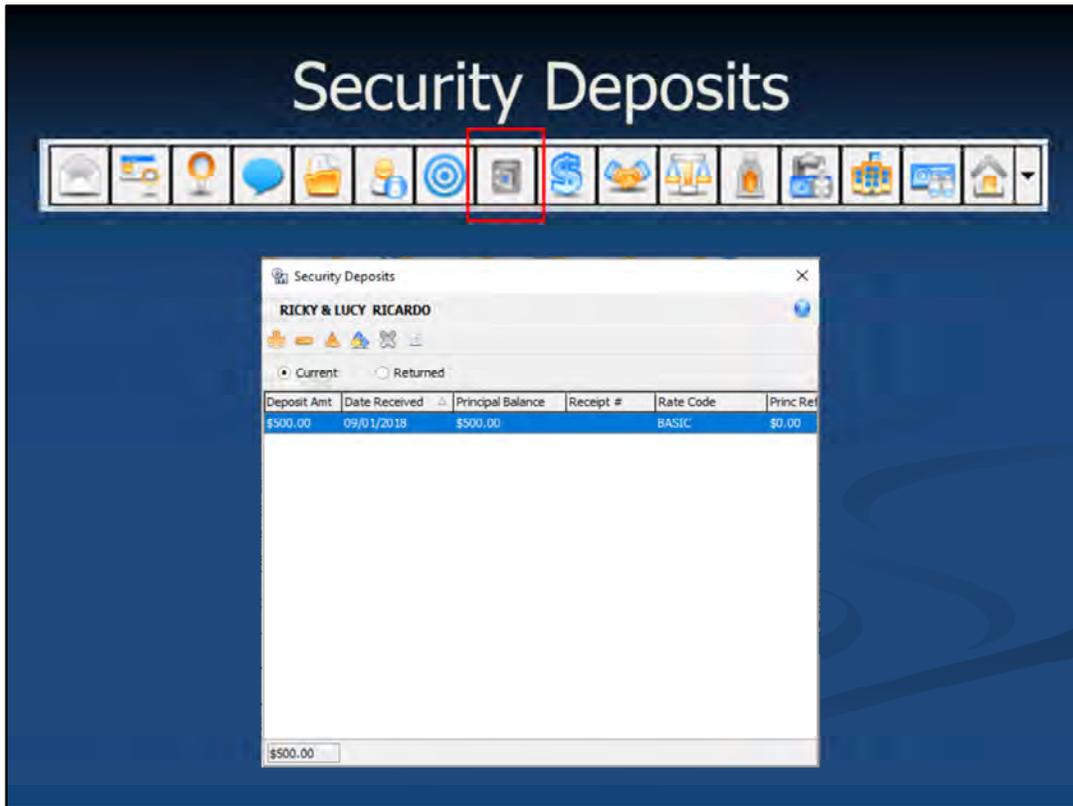
The CPNI window displays information such as Authentication and Call Detail password information as well as CPNI Approval. The Contact Information tab stores the names of additional authorized account users and Breach Information houses specifics for any break of CPNI rules.

You may edit CPNI information from this window.

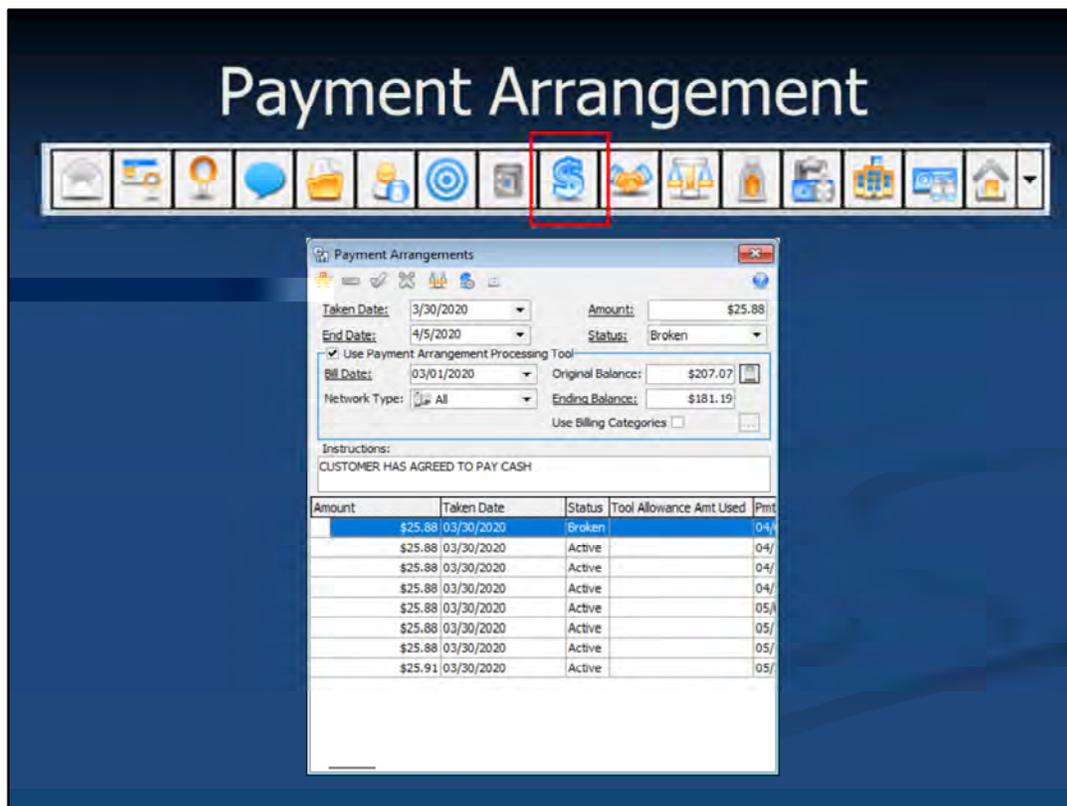
Sales Lead



Using the Sales Lead icon you can create a quote on the existing account. You can also edit, delete and print an Sales Lead. That Sales Lead may later be converted into a Service Order.



From the Security Deposit screen you can enter a new deposit, flag a deposit as NSF, refund the deposit and print a receipt. The Report icon on this screen also allows you to print the Refund Detail report for the selected account or all accounts. The History tab will show any previous deposits that have been fully refunded.

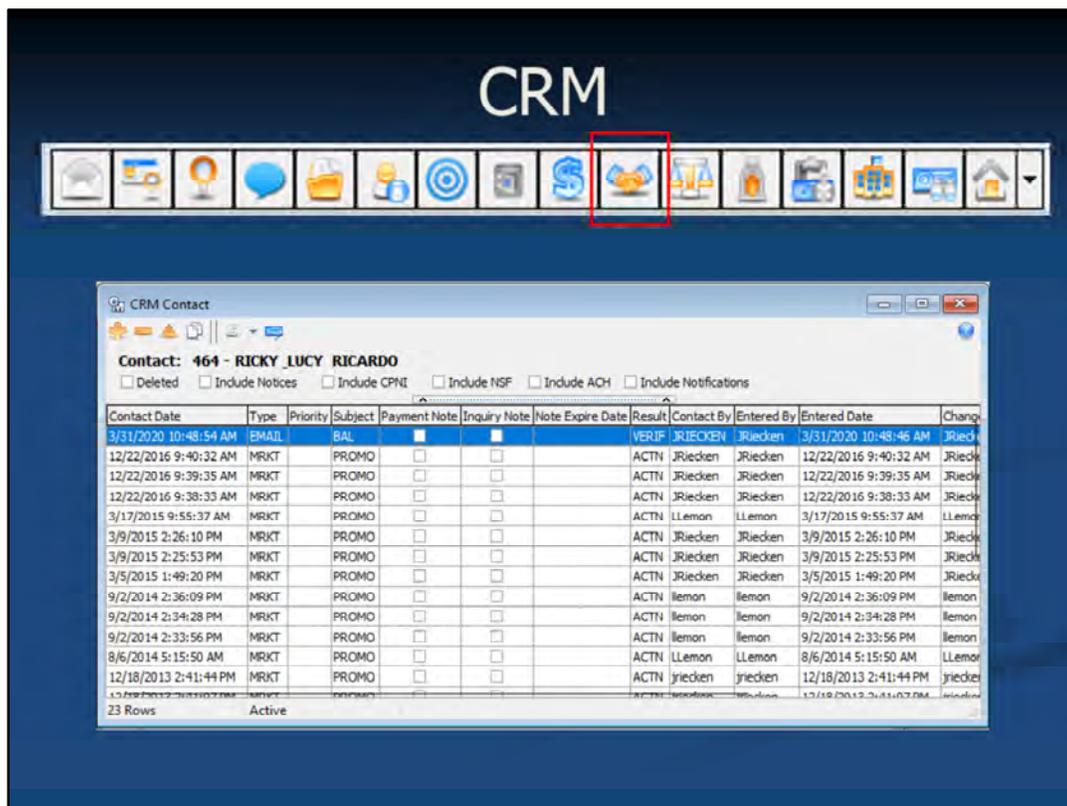


The Payment Arrangement icon allows you to create a new arrangement, delete an existing arrangement and/or flag an arrangement as broken.

The Instructions field is free-form and lets you enter any information specific to the arrangement being created.

The Payment Arrangement Processing Tool should be executed regularly to update arrangements that are due – changing them to either Broken or Completed status.

Arrangements can also be created through the Payment Entry icon. Any arrangements on accounts will display on the Account Overview.



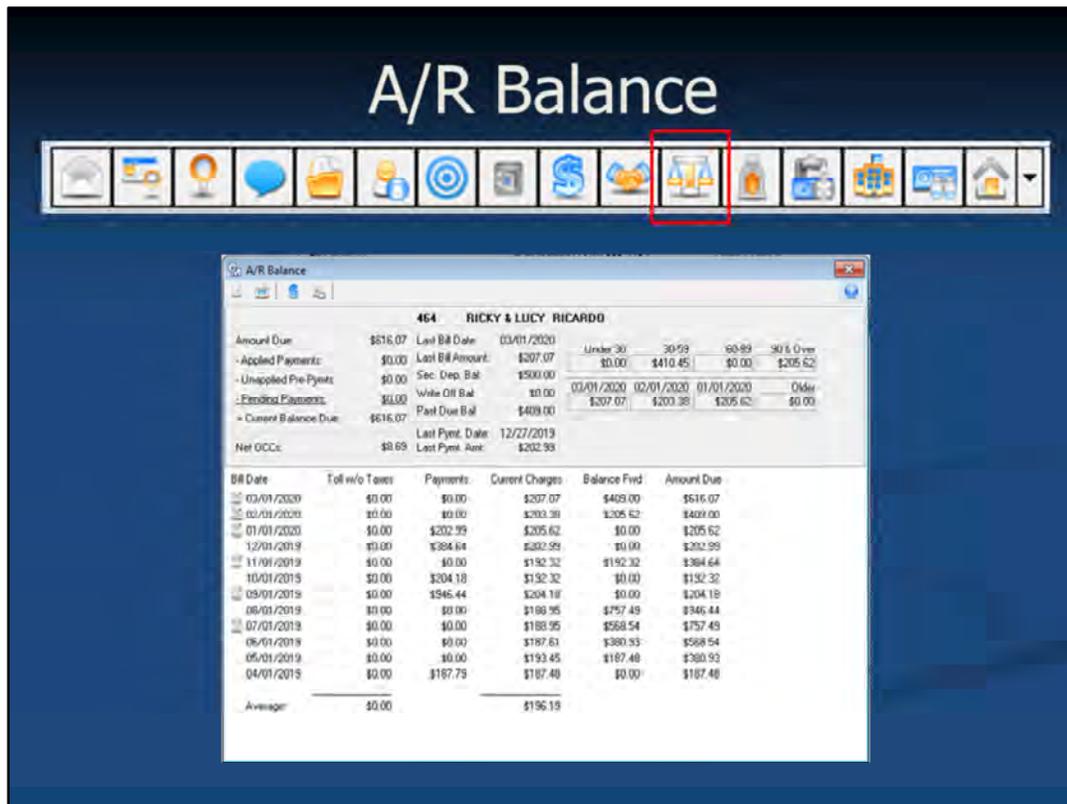
Client Relations Management is the next icon through Inquiry. The CRM tool allows you to record all customer contacts including the subject and the result. The data collected will appear in the Account Contacts report through Tools – Reports – Marketing.

You can add, delete and edit from this screen. You can determine the types of information you want to see in the History grid by selecting the various options as well as by using the advanced search and filter functionality. You can re-order the columns by clicking on a column header and dragging and dropping. You can also re-sort the columns by clicking on the arrow in the column header. In addition you can use the custom search and filter options to refine the information displayed in the grid.

From this screen you can also create a personal bill message to print on the first detail page of the account's next bill. Clicking on the Reports icon prints the Account Contact report for this account or all accounts. Both report options can be exported to a CSV file.

You can also flag individual CRM rows as an Inquiry Note. When inquiring on this account in the future, a pop-up will display the selected CRM information. This is especially useful for accounts that need special handling.

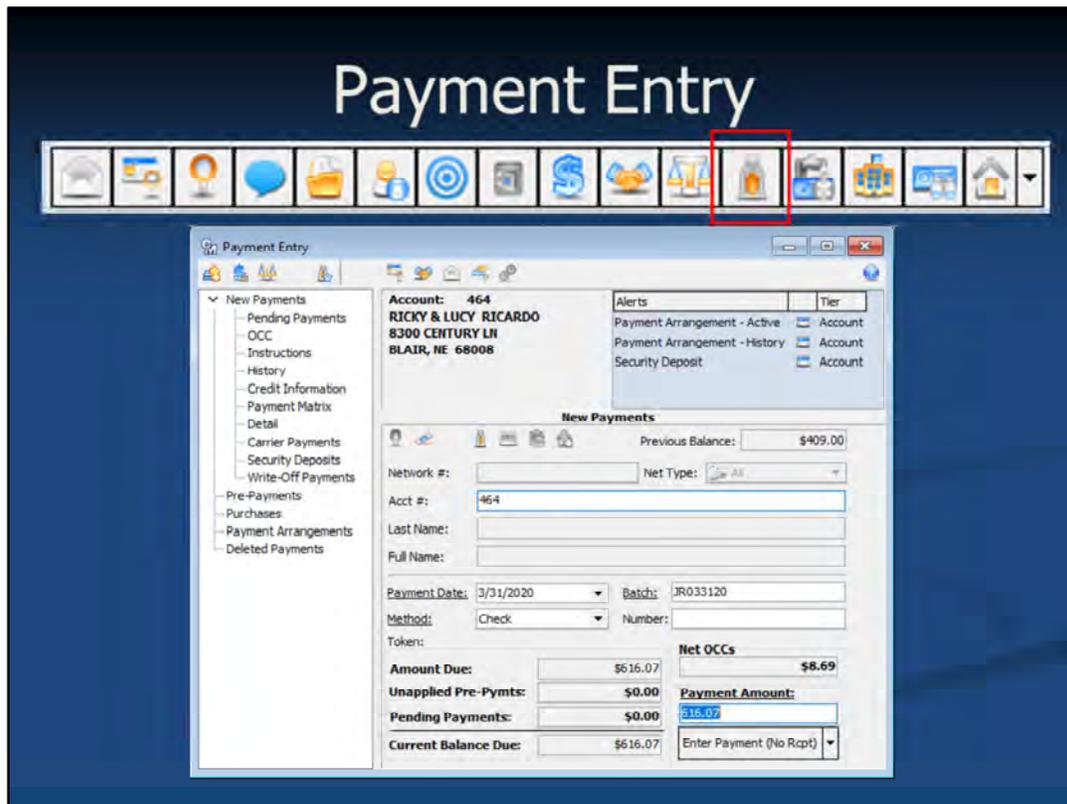
The CRM icon is also available through View for every tier on the account as well as through Account Overview, service orders and trouble tickets.



A/R Balance screen shows both current and historical receivables information for the account. The upper-left section of this screen shows current information including the Amount due, which is the amount that was last billed. Applied Payments, Unapplied Pre-Payments and Pending Payments reflect any payments posted since the last bill and Current Balance Due is the remaining balance due.

The upper right-of the screen shows both the Previous Balance, Net OCCs and aging.

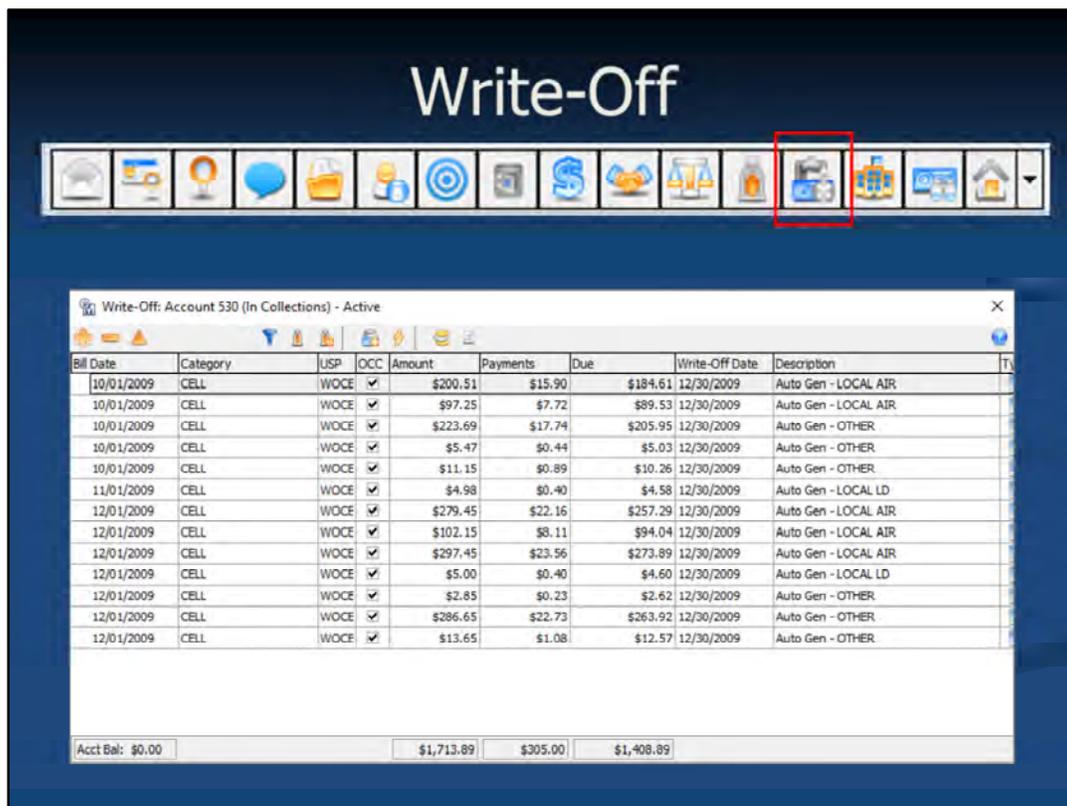
The lower half of the screen displays monthly bill history and can also include an icon indicating the account received a Late Notice for a specific month. You can highlight and double-click or click on the History icon to see detailed information for a single monthly bill. You can also run the A/R Balance History report to see bill summaries for the past 12 months.



The Payment Entry screen displays payment-related information specific to the account. The main screen shows the Current Balance due as well as any Pending Payments or Unapplied Pre-Payments. By highlighting a node on the left of the screen you can view quite a bit of additional information including Payment History.

If the account is flagged for any alerts, you will see the alerts displayed in the upper-right of the screen. Deciding which payment alerts you'd like to see displayed on accounts can be done through Maintenance – Common – Alerts.

Payment information and processing will be covered in more detail later in our training but it should be noted that this is not the screen you would typically use for payment batches.



The Write-Off icon is most typically used on disconnected accounts where the customer has failed to pay, and aging on the account has resulted in the company writing off the remaining balance. You are able to write-off portions of active accounts.

From the Write-Off window, you'll be able to see the Write-Off Categories by bill date. At the bottom of the screen, you'll see the account's active Account Balance, the Write-Off Amount, Write-Off Payments, and the current Write-Off Due amount.

From this screen, you can make Write-Off Payments, Spread Payments, create additional Write-Off Rows, and Create Write-Off OCCs. You may also run the Write-Off Report from this window. Additional detailed training is available on the Write-Off module, including how to perform Mass Write-Offs.

E-Rate

The screenshot shows a software interface with a top navigation bar containing various icons. One icon, representing a building or institution, is highlighted with a red box. Below the navigation bar is a window titled "E-Rate Networks". The window has a checkbox labeled "Show Only Active Networks Without A Current FRN". Below this is a table with the following data:

FRN	Description	Funding Year	Funding Amount	Discount	Year Beginning
+ Internet: *12345 - Active: 11/03/2011 - Inactive:					
+ Internet: 3195550152 - Active: 06/01/2005 - Inactive:					
+ Telephone: (319) 555-0112 - Active: 06/01/2005 - Inactive:					
+ Telephone: (319) 555-0152 - Active: 06/01/2005 - Inactive:					
+ Telephone: (319) 555-1162 - Active: 11/03/2011 - Inactive:					
+ Telephone: (319) 555-1350 - Active: 11/03/2011 - Inactive:					
- Telephone: (319) 555-1351 - Active: 11/03/2011 - Inactive:					
1234567890	BLAIR PUBL	FY2019	\$500.00	50.000 %	07/01/2019

The E-Rate window will show the charges, discounts, FRN information and so on for accounts eligible for the E-Rate program. If E-Rate is a consideration in your office, we strongly recommend taking the E-Rate training course.

Billing Inquiry

Account: 464 RICKY B LUCY RICARDO Bill Date: 04/01/2020

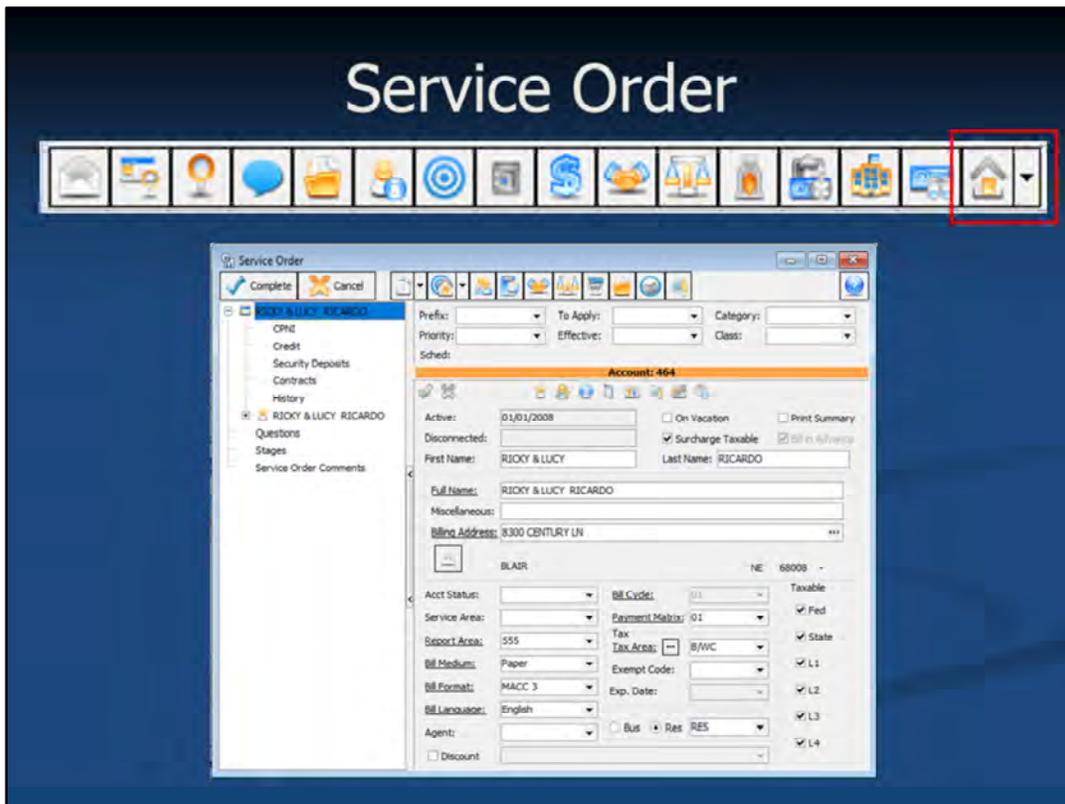
Recurring Charges | Current OCCs | Billed OCCs | Bill History

Code	Description	From	To	Bill Star	Bill Freq	Duration	Qty	Rate	Freq Rate	Type	I	SP	SF	Amount
Tier: Internet - 2195551152														
IDSL	DSL SERVICE - UP TO 50 MB	04/01/	04/30/20		Monthly		30	1.86333	0. F					56.50
														56.50
Tier: Telephone - 2195551152														
TARI	ACCESS RECOVERY CHARG	04/01/	04/30/20		Monthly		30	1.05000	0. F					1.50
TBAI	BASIC TELEPHONE	04/01/	04/30/20		Monthly		30	0.68333	0. F					19.95
TCF	CF - INSIDE WIRE MAINTENA	04/01/	04/30/20		Monthly		30	0.07500	0. F					2.25
TCF	CF - VOICE MAIL	04/01/	04/30/20		Monthly		30	0.26833	0. F					8.05
TCF	CF - CALLER ID-RESIDENCE	04/01/	04/30/20		Monthly		30	0.12500	0. F					3.75
TEW	E911 SURCHARGE - WASHIN	04/01/	04/30/20		Monthly		30	0.01667	0. F					0.50
TSLL	FCC SINGLE LINE ACCESS CH	04/01/	04/30/20		Monthly		30	0.21667	0. F					6.50
														42.30
Tier: Video - 2195551152														
CAE1	ESSENTIAL VIDEO	04/01/	04/30/20		Monthly		1	19.95000	0. F					19.95
CCS1	COLLEGE SPORTS PREMIUM	04/01/	04/30/20		Monthly		30	0.16867	0. F					5.00
CDS1	DIGITAL SPORTS CHANNELS	04/01/	04/30/20		Monthly		30	0.83333	0. F					25.00
CPH1	HBO PREMIUM CHANNELS	04/01/	04/30/20		Monthly		30	0.25000	0. F					7.50
CPS1	SHOWTIME PREMIUM CHAN	04/01/	04/30/20		Monthly		30	0.45500	0. F					13.95
														170.20
Totals: Recurring Charges: \$179.29 Rec Chg Credits: \$0.00 Current OCCs: \$7.23 Billed OCCs: \$0.00 Bill History: \$0.00														

The Billing Inquiry icon can be used to view current and historical charges on the account. Keep in mind that this screen shows only recurring and one-time charges and credits. The amounts displayed do not include any taxes, surcharges or toll and shouldn't be used to check the balance due on an account.

The Date drop-down in the upper right of the screen defaults to the next cycle date. To view past charges, select a previous date from the drop-down and detail will be displayed.

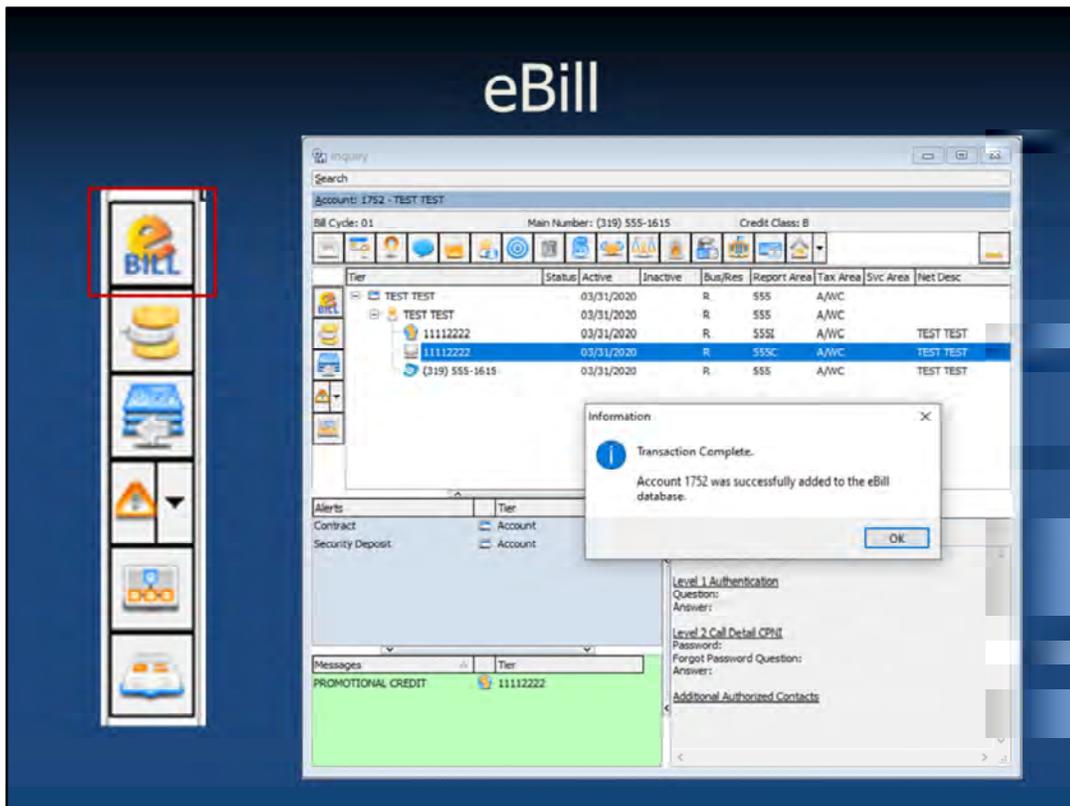
From this screen you can also view and print previous bills. Select a past date from the drop-down, click on the Print Image icon and select Print Image or View PDF of Bill. The Toll OCC Adjustments option allows you to enter OCCs for toll adjustments through print image.



The Service Order icon will open a new order on the account. If there is already an open order you'll get the option to either continue the open order or start a new one. The service order will open highlighted on whatever tier is highlighted through Inquiry.

It should be noted that if you open a new order on an account that has an existing order open, an orange N icon will appear next to those nodes impacted by the first order and no changes can be made to these during the second order.

eBill



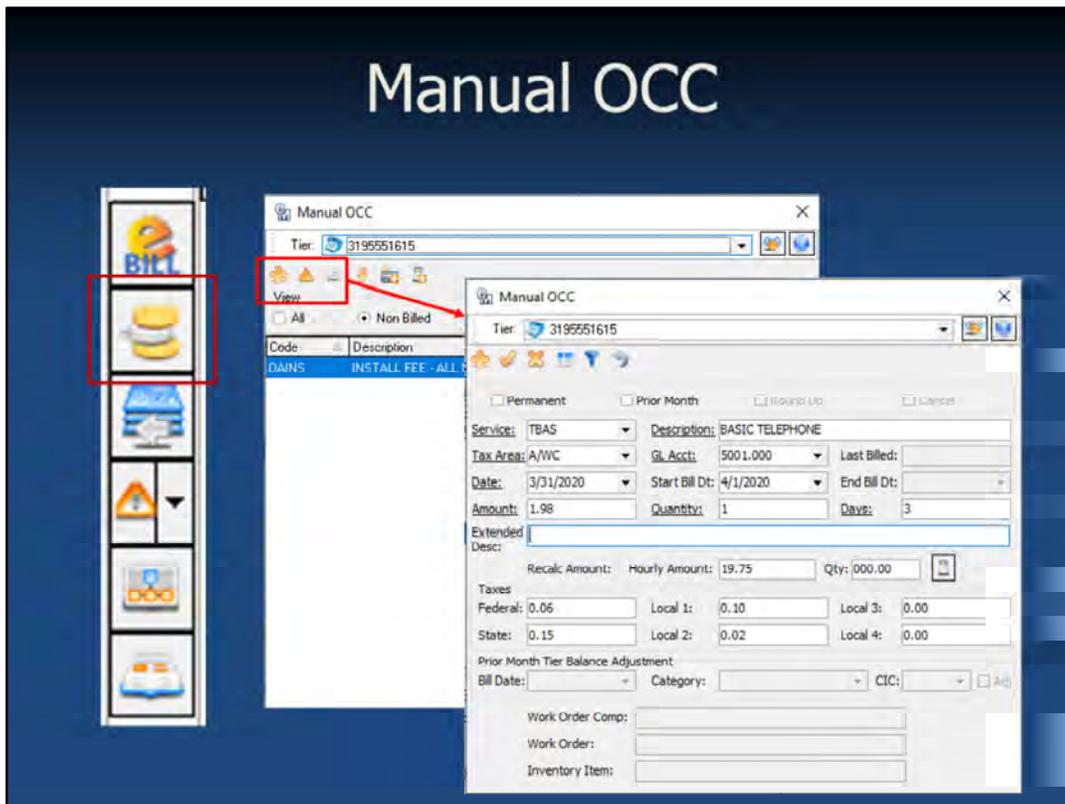
Now let's review the icons along the left-hand side of the Inquiry window. First, the eBill icon is available to allow you to send eBill or Credit Card information to CDS Global for a new account. The information would typically be sent in with the first billing, but if this customer wants to be set up for eBill or Credit Card before their first bill, you may wish to execute this option.

Once the account has been set up using the eBill button, the user may go into the account to add the credit card information accordingly.

When using the eBill button, there are a few possible results:

- 1) The transaction is complete, and you'll get a message stating that the account was successfully added to the eBill database.
- 2) If you attempt to send the information on a new account more than once, the transaction will fail with a message stating that the customer already exists in the system.
- 3) If the Main Number was not set or is non-numeric, you will receive a message indicating that the security code is invalid and the Main Number must be numeric.
- 4) If there are internet connectivity issues, you will receive a message stating that there are errors with your internet connection.

NOTE: A user must have Admin, Billing, SO 1, SO 2, or Receivables 1 security rights before they can use this functionality.



The Manual OCC icon shows all OCC history for the tier selected from the drop-down at the top of the screen. You have the option to view All OCCs, which includes previously billed OCCs, Non-Billed OCCs and Canceled OCCs. You can also select to view just Non-Billed, which is the default, or Canceled OCCs.

From this same screen you can enter a new OCC on a selected tier, edit an existing OCC or cancel an OCC. Use the Insert or Edit icons to open up the OCC Editor. You may also print the OCCs by Source or Account Non-Zero Balance reports from this screen. You may also use the Generate OCCs from a Bundle tool or the Installment OCC Calculation Tool (to spread OCCs over several months). For Jump Start, we'll just discuss adding and editing OCCs.

To add an OCC, select the appropriate Tier, and click on the Insert (+) button. At the Manual OCC editor, you'll select a Service from the drop-down. You have the option to change the fields that will be auto-populated. To change debits to credits or vice-versa, use the circled red R button. You may mark the OCC as Permanent, Prior Month, or Round Up (for charity – only available on an account-tier OCC). Use the Quantity field to adjust the quantity of your OCCs. Use the Days field to allow the system to calculate a proration based on the number of days. A Recalc Amount tool is also available to help you calculate fractions.

Keep in mind that in order for the OCC to appear on the next bill, it must be entered prior to Bill Cut.

Capital Credits

Monthly Patronage

Account #: 464 RICKY & LUCY RICARDO

Capital Credit Totals:
RICKY & LUCY RICARDO
 Rebur Chgs: **\$42.30** Messages: 0
 OCC's: Fed Taxes:
 Advertising: State Taxes:
 Purchases: Loc1 Taxes:
 Toll \$'s: Loc2 Taxes:
 Orig MOU: 0 Loc3 Taxes:
 Term MOU: 0 Loc4 Taxes:

Customer: RICKY & LUCY RICARDO
 Network: RICKY & LUCY RICARDO
 Member: 09462

Account Address:
 Address: 8300 CENTURY LN
 City: BLAIR
 State: NE Zip: 68008 Zip ++:

Activity: Active
 Active Date: 12/26/2008
 Inactive Date:
 SS EIN:

Uncollected Amt: \$0.00
 Print 1099's?
 Bankruptcy Code:
 Effective Date:
 End Date:

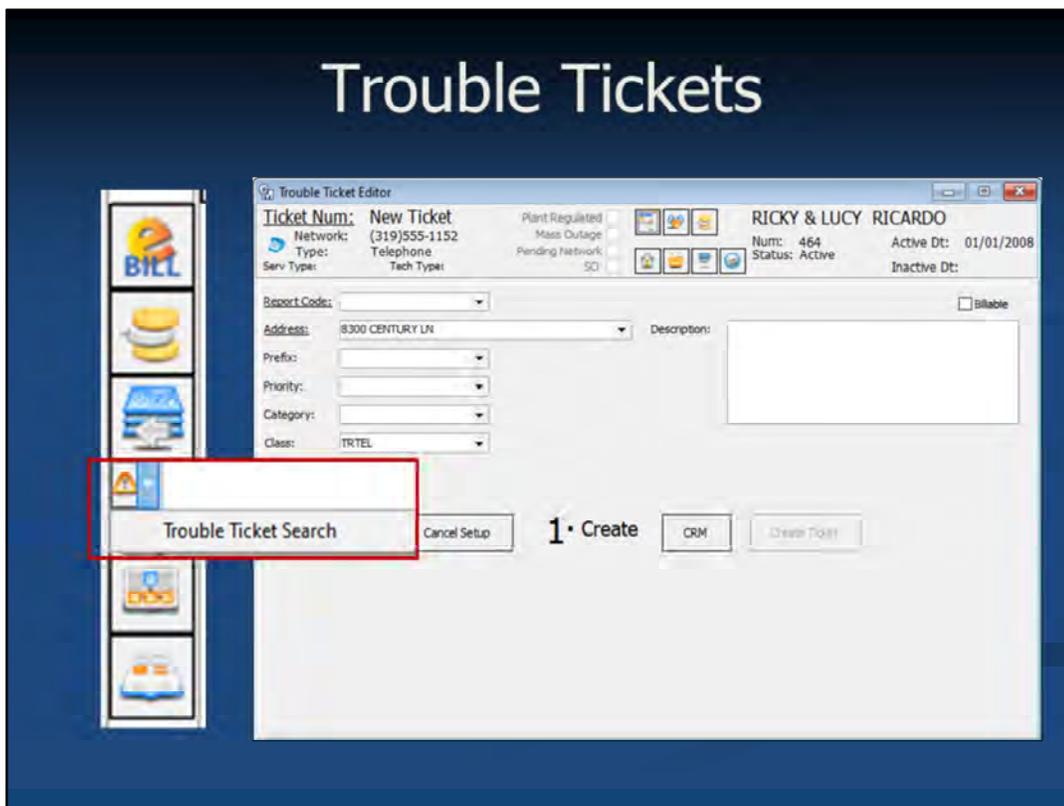
Patronage Patronage Taxes

Network Type	Network Number	Type	Amount	Cap Cred Amt	Allocated Amt	USP	Advance Disb.	Orig MOU	Te
TEL	3195551152	R	\$2.25	\$2.25		TCF01	\$0.00	0	
TEL	3195551152	R	\$8.05	\$8.05		TCF06	\$0.00	0	
TEL	3195551152	R	\$19.75	\$19.75		TBAS	\$0.00	0	
TEL	3195551152	R	\$3.75	\$3.75		TCF07	\$0.00	0	
TEL	3195551152	R	\$0.50	\$0.50		TEW	\$0.00	0	
TEL	3195551152	R	\$6.50	\$6.50		TSLCR	\$0.00	0	
TEL	3195551152	R	\$1.50	\$1.50		TARCS	\$0.00	0	

7 Rows Active

The Capital Credit icon will show monthly patronage for a selected tier. From this screen you can also click on the Report icon to print a selected bill cycle, print a fiscal year or print all bill cycles. You can also add, delete or edit patronage rows in the grid on the lower half of the screen.

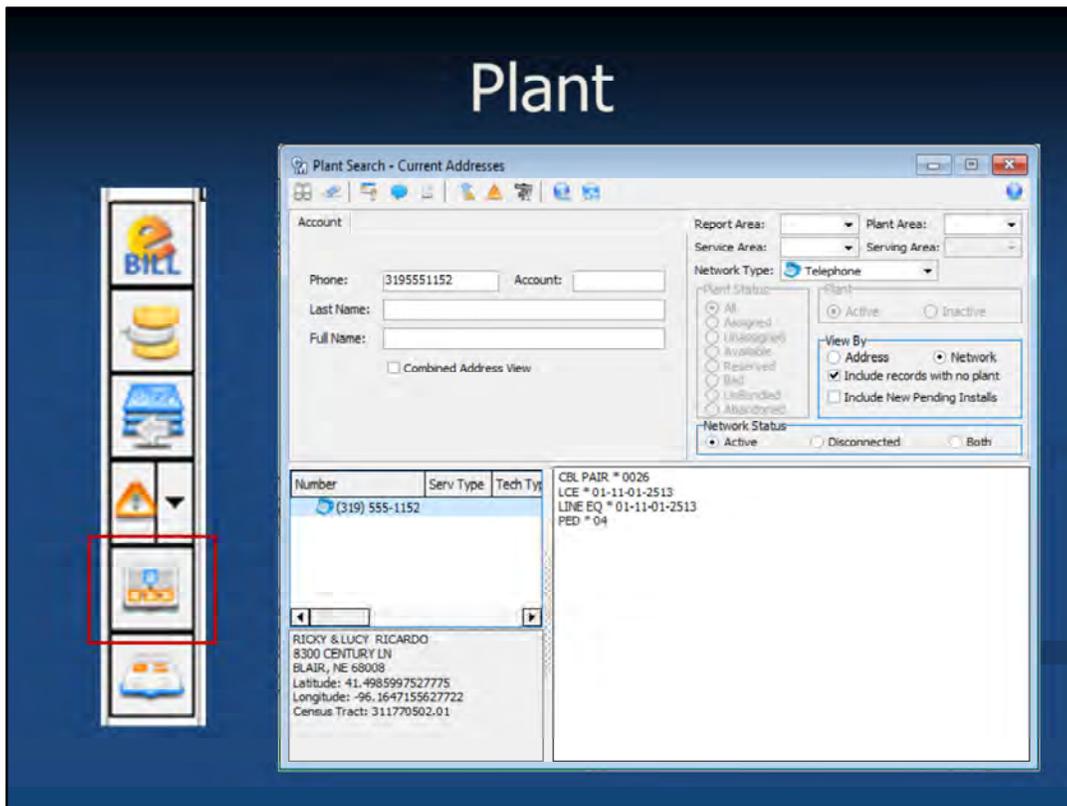
Trouble Tickets



You must be highlighted on a network tier to enable the Trouble Ticket icon. Clicking on the icon opens a ticket on the selected network. If there is already an open ticket for that network, the Trouble Selection screen will open, allowing you to either continue work on the open ticket or start a new ticket.

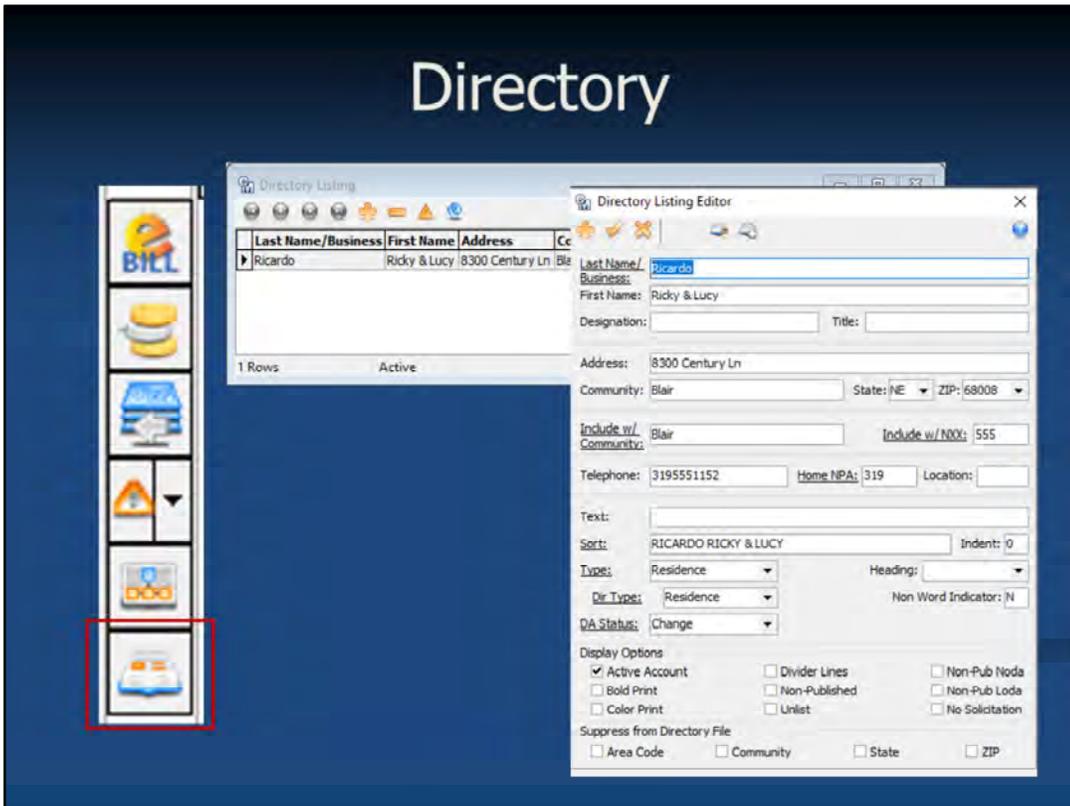
To start a new ticket, click on the Insert (+) button at the Trouble Selection window. If there is no ticket, the system will automatically open one. We'll discuss Trouble Tickets in more detail later in this session.

Plant

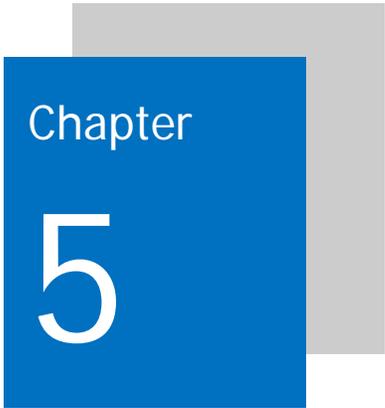


The Plant icon is another icon only enabled when you're highlighted on a network tier. Clicking on the icon opens the Plant Search screen. Here you can view all of the plant associated with the network number and address. You can add plant or network address comments, print the Plant Search report, edit Plant Key and add, delete or edit plant details. This is the same screen accessed through plant in a service order, through a trouble ticket and through the large Plant icon on the main screen of Customer Master.

Directory



The Directory icon will only be illuminated if you are highlighted on the Telephone network of the account tree. Edits and additions can be made from this screen or through a service order.

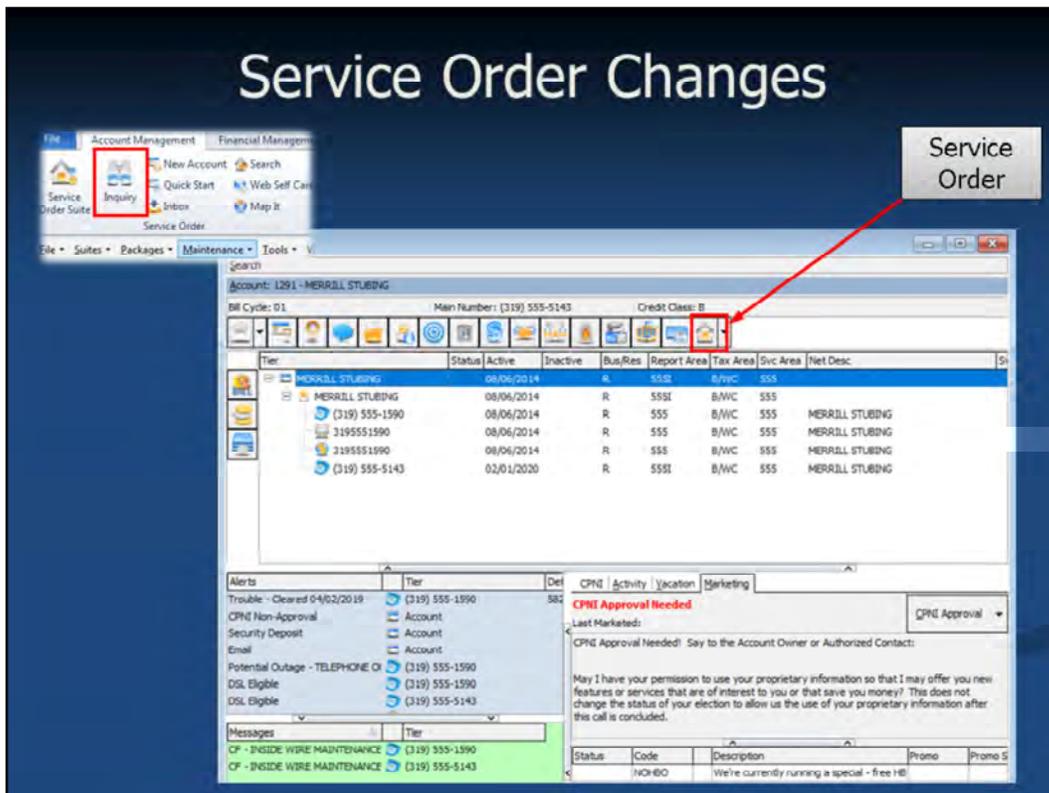
A graphic consisting of two overlapping squares. The front square is blue and contains the text 'Chapter' and the number '5'. The back square is light gray.

Chapter

5

Change Service Orders

Service Order Changes

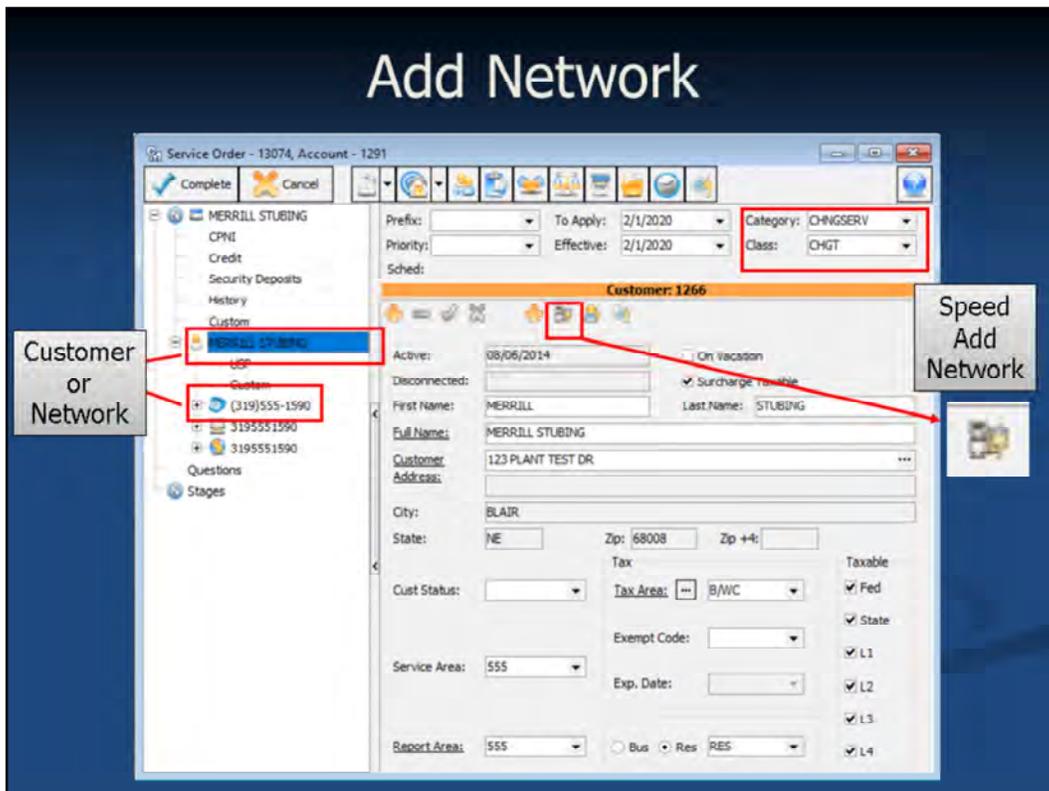


Prior to beginning any Service Order to change an existing account, you will want to use Inquiry to find the account.

To launch a Service Order on an existing account, you will use the Service Order icon displayed at the top right of the Inquiry window.

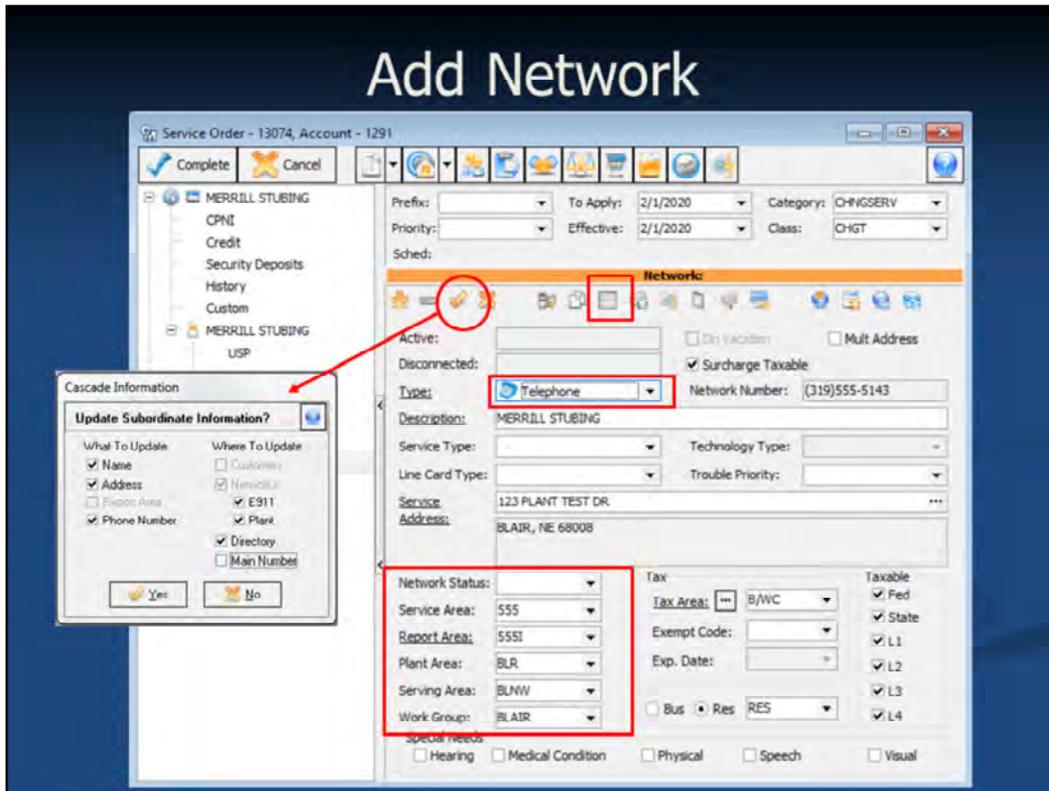
Keep in mind that Service Order Workflow may be set up to assist you with navigating through specific service order classes.

Add Network



Any Service Order should start with completing the Effective Date and Class fields. To add an additional network, you may highlight either the existing Customer Tier or an existing Network Tier in the Tree View. Once the existing network has been highlighted, you will want to choose the Speed Add Network icon.

Add Network

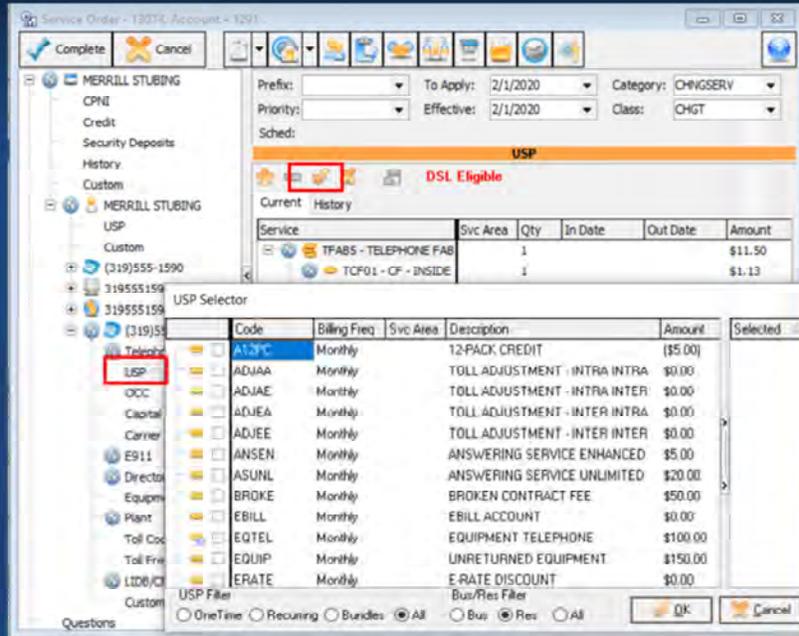


The new Network will automatically be created.

Every time a new Network is added, it's important that you verify the accuracy of the Report Area field, and change it if needed.

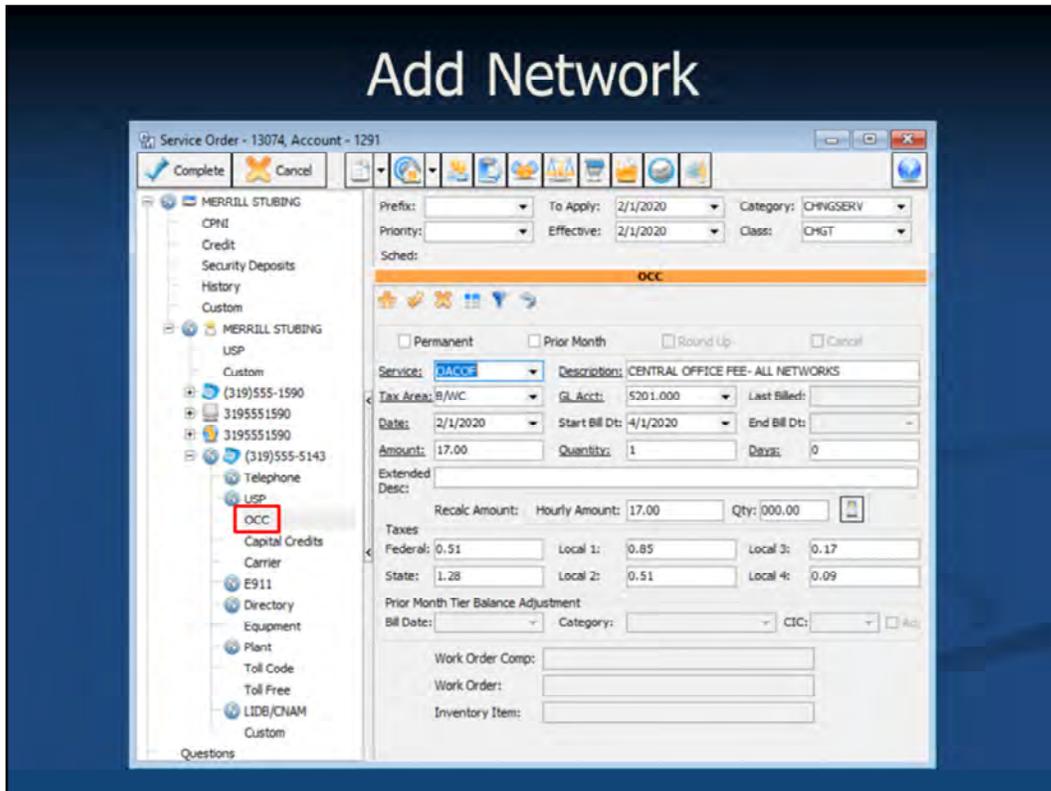
Once you post your Network screen, the Cascade Information window will appear. In most cases, the Main Number field should be deselected, because typically a secondary line is not going to be the Main Number.

Add Network



After posting the network information, the Tree View will be built for the new Network. Now, you may work your way through the Tree View – much the way you did when creating the New Install service orders.

Add Network



As with New Install Service Orders, you will want to add OCCs for any one-time charges that need to be applied to this new Network

Add Network

Service Order - 13074, Account - 1291

Prefix: To Apply: 2/1/2020 Category: CHNGSERV
Priority: Effective: 2/1/2020 Class: CHGT
Sched:

Carrier

Type	CIC	Carrier	Initiated	Effective	End Date	PIC Prz
InterLATA	09002	MACC	Customer			<input checked="" type="checkbox"/>
IntraLATA	09002	MACC	Customer			<input checked="" type="checkbox"/>

Local

History

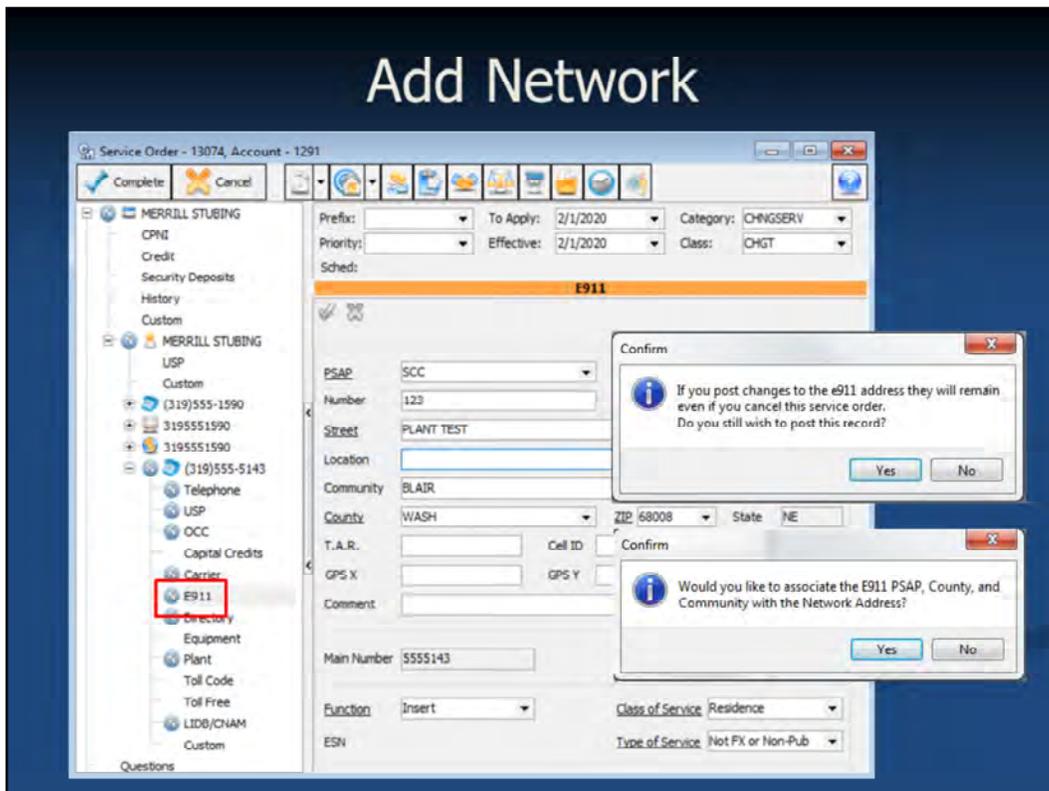
Type	CIC	Carrier	Effective	End Date
<No History to display>				

At the Carrier screen, you will need to choose an Inter and Intra LATA carrier selection.

If the PICs are different for each jurisdiction, they can be changed.

If an Effective Date is not filled in, the system will automatically use the effective date of the Service Order when the order is applied.

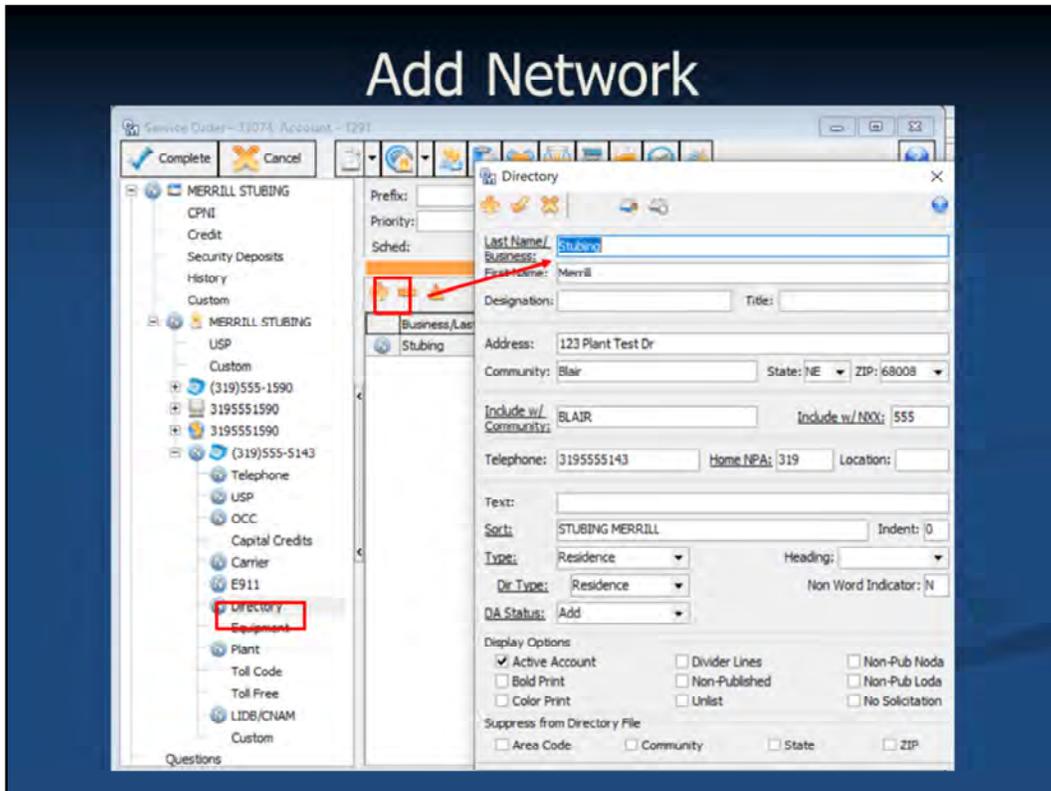
Add Network



At the E911 screen, you will need to select a PSAP and the Type of Service – Not FX or Non-Pub and Non-Pub are the most frequently used choices. After this information has been reviewed for accuracy, you may Post.

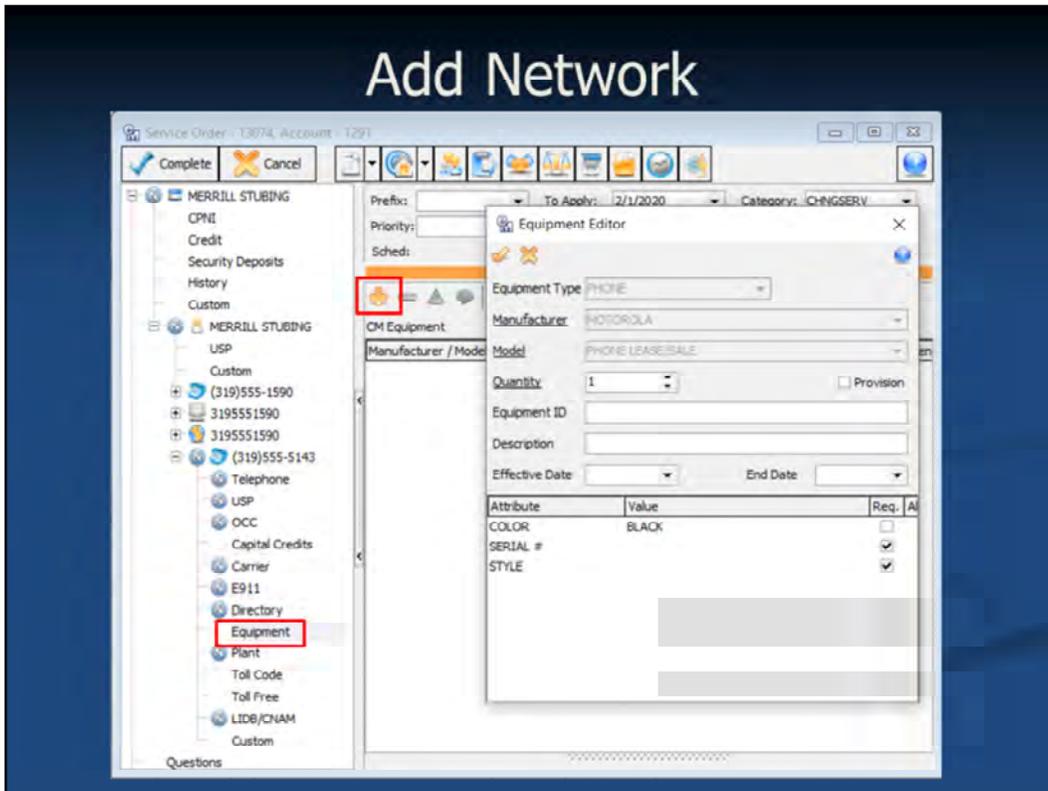
A confirmation prompt will appear to remind you that E911 changes will remain even if you cancel the service order. You may choose Yes to continue. Another confirmation prompt will appear requesting if you would like to associate the E911 PSAP, County, and Community with the Network Address. You may choose Yes to continue.

Add Network



At Directory, you have the opportunity to edit the Directory Listing. To access the listing, double-click on the element in the grid to open the Directory editor screen. After making changes, you may Post. If you make changes to the name, you'll want to make sure to also change the Sort information. A warning will appear if two listings have the same Sort information.

Add Network

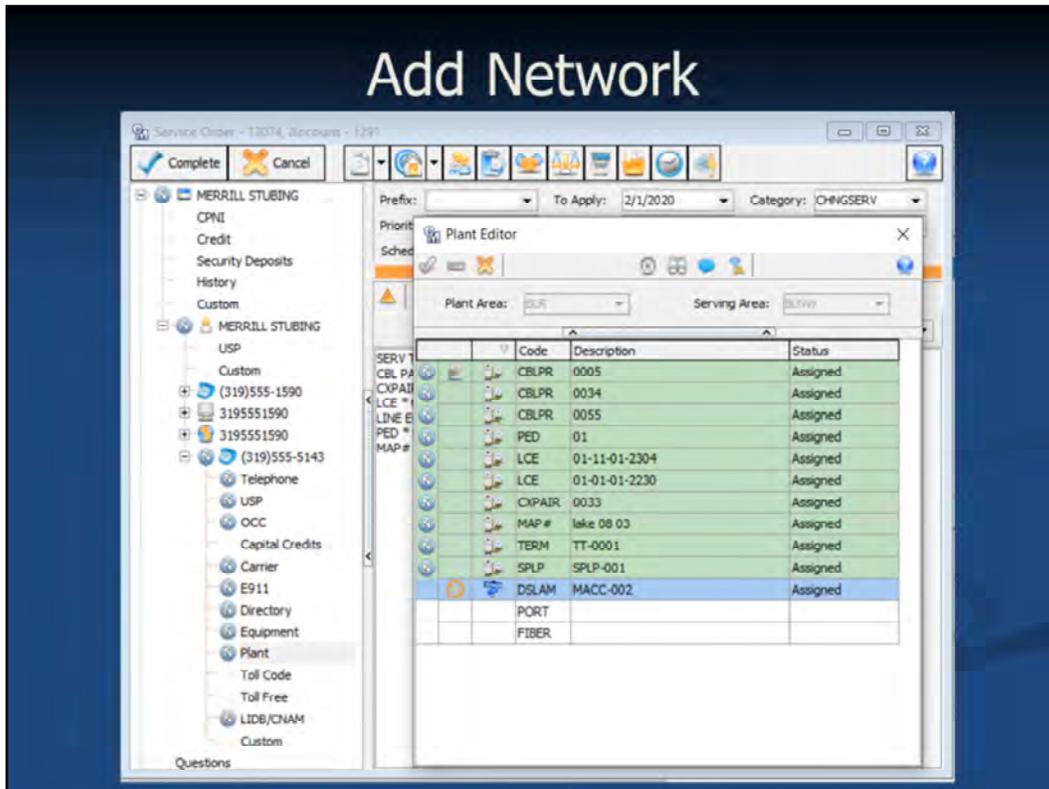


At the Equipment tier, you can optionally add sale/lease Customer Premise Equipment (CPE) that you wish to track. This may include CPE such as modems, phones, set top boxes or any other devices that reside with the network.

Separate Maintenance Tables for setting up Manufacturers, Models and Attributes are located at Maintenance-Common-Service Order.

You may also choose to issue equipment stored in Accounting Master with the optional Network Inventory Interface.

Add Network



At the Plant screen, you are able to view the Plant Details associated with the address. To make changes to the details, click on the edit button to open the SO Plant Editor screen. To see all Plant Codes, click on Exploded at the View Mode selections.

At the Description column, you may click into the field, type the % sign, and press enter to see a list of available details to add to this address. When you have finished editing the plant details at this address, you may Post.

Add Network

Service Order - 13074, Account - 1291

Complete Cancel

Prefix: To Apply: 2/1/2020 Category: CHNGSERV
Priority: Effective: 2/1/2020 Class: CHGT

Sched:

Calling Card

* Required

Type*	Card Number*	PIN	Cards	Effective	Ordered	Canceled	Re
Restricted	1234						

At Calling Card, you may add the corresponding Calling Card information to this telephone network, if applicable. When all required information has been entered, you may Post.

Add Network

The screenshot shows a software window titled "Service Order - 13074, Account - 1291". The interface includes a left-hand navigation tree with categories like "Svc Agreement", "Telephone", "Carrier", and "Toll Code". The "Toll Code" category is selected. On the right, there are input fields for "Prefix", "Priority", "Sched", "To Apply", "Effective", "Category", and "Class". Below these is a "Toll Code" section with a table. A red box highlights the "Insert (+)" icon in the toolbar above the table. The table has columns for "Toll Code", "Carrier", "Charge", "Effective", "Ending", "Qty", and "First Billed". One row is visible with the following data:

Toll Code	Carrier	Charge	Effective	Ending	Qty	First Billed
106	09002	5.00				

At Toll Code, you may add the corresponding Toll Code calling plan information to this telephone network, if applicable. To add information to this screen, you first need to click the Insert (+) icon.

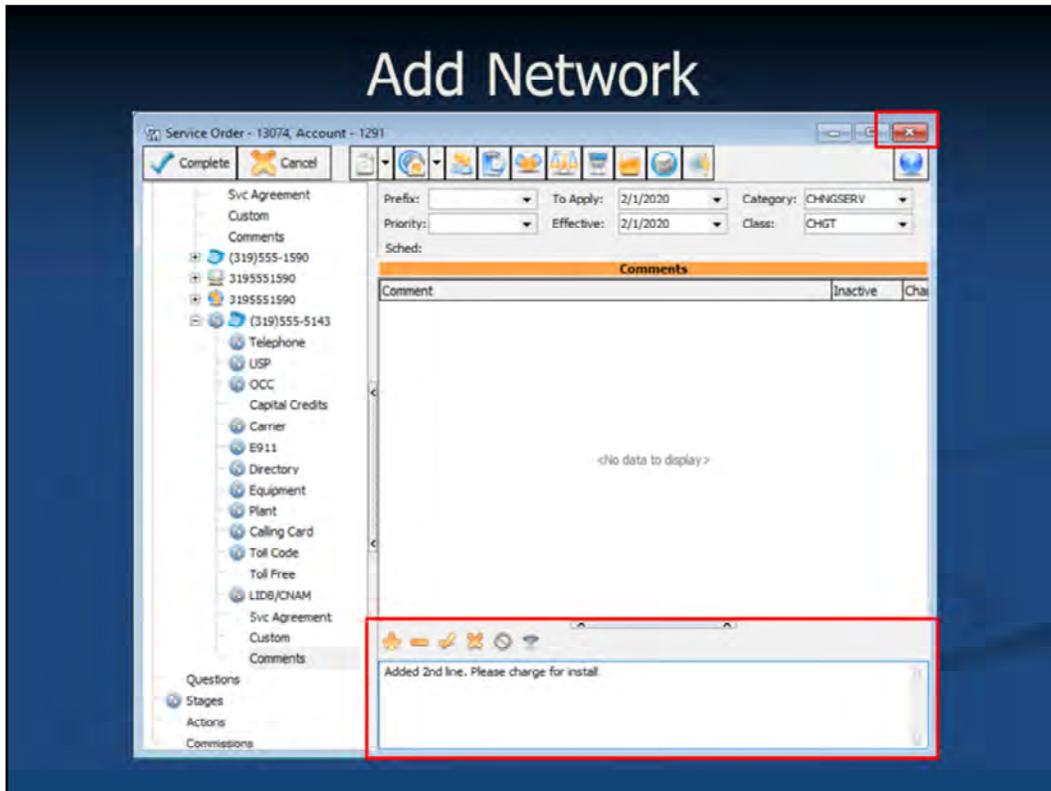
Add Network

The screenshot displays a software window titled "Service Order - 13074, Account - 1291". The interface includes a toolbar with "Complete" and "Cancel" buttons, and a sidebar with a tree view of service categories. The "LIDB/CNAM" category is selected, and a configuration dialog box is open. The dialog box has a title bar "LIDB/CNAM" and contains the following fields and options:

- Prefix: [Dropdown]
- To Apply: 2/1/2020 [Dropdown]
- Category: CHNGSERV [Dropdown]
- Priority: [Dropdown]
- Effective: 2/1/2020 [Dropdown]
- Class: CHGT [Dropdown]
- Sched: [Text]
- Suppress this line number when creating a LIDB/CNAM file
- LIDB Code**
 - Block third number and collect calls
 - Block third number calls only
 - Block collect calls only
 - No restrictions
- Privacy**
 - Allow name to be displayed
 - Block name from display
 - No indicator
- Caller ID Name: STUESING M [Text]

At LIDB/CNAM, you may add the corresponding LIDB Code and Privacy Indicator information to this telephone network. In addition, this is where you will enter the Caller ID Name information to be transmitted to Verisign. When all required information has been entered, you can Post.

Add Network



Service Order Comments may now be added at the Service Order Comments node. Add the comment to the pane at the bottom of the window. When you are finished typing your comment, choose Post to save the changes. The comment will move from the bottom pane to the Comments grid.

Service Order Search

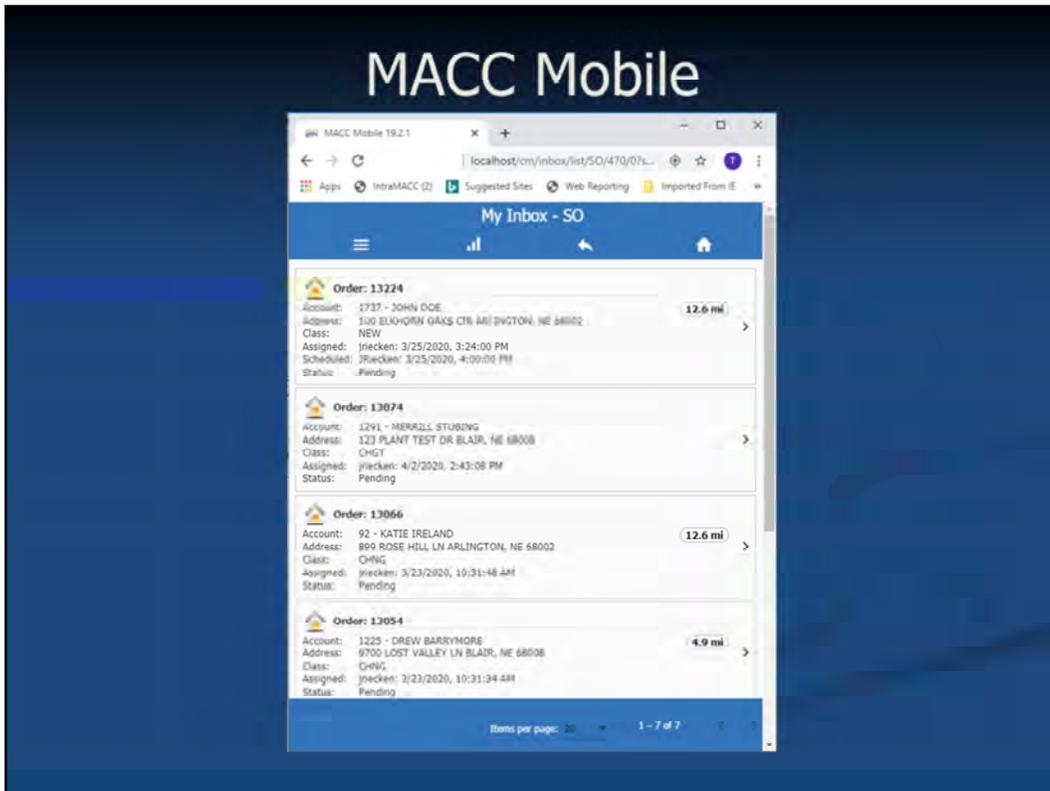
Order	Account #	Account Name	Main Number	Effective	Class	Category	Bill Cycle
13077	385	DANNY BORADUCE	(319)555-0154	2/1/2020	DNP	DISCONNP	01
13076	712	BLAIR POST OFFICE	(319)555-1310	2/1/2020	DNP	DISCONNP	01
13075	722	BITS & BYTES COMPUTERS	(319)555-1599	2/1/2020	DNP	DISCONNP	01
13074	1291	MERRILL STURDING	(319)555-5143	2/1/2020	CHNG	CHNGSERV	01
13067	960	LISA JACKSON	(319)555-1375	2/1/2020	CHNG	CHNGSERV	01
13068	963	LISA JACKSON	(319)555-1375	2/1/2020	CHNG	CHNGSERV	01
13066	92	KATIE IRELAND	(319)555-0162	2/1/2020	CHNG	CHNGSERV	01
13065	1508	ING-TECH	(319)555-9064	2/1/2020	DNP	DISCONNP	01
13064	506	LAURA INGALLS	(319)555-9064	2/1/2020	CHNG	CHNGSERV	01
13063	446	JOSIE BISSETT	3195589967	2/1/2020	DNP	DISCONNP	01

To locate the order, you will want to use the Service Order Search. At the Status filter, you can choose Pending to filter your search to only those orders. Enter any search criteria that you know and use the binoculars to perform the search.

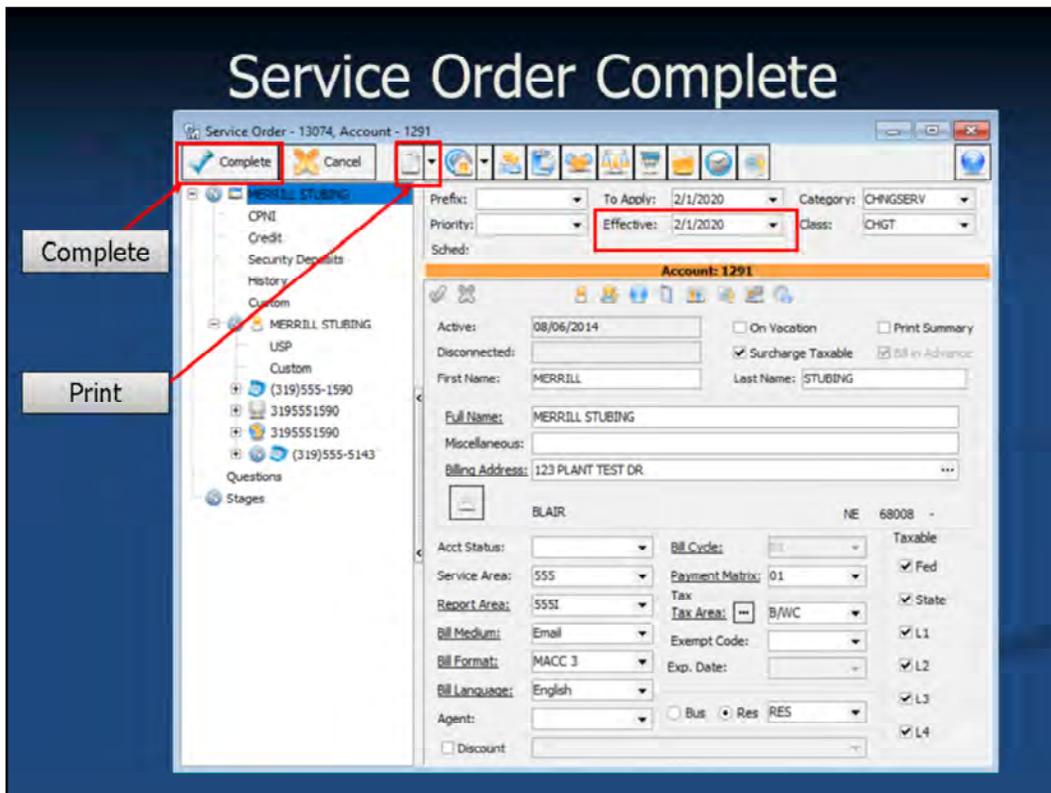
After you have found the service order, you may update it by clicking on the corresponding line in the grid.

As a reminder, you may Print the service order at this point if needed.

MACC Mobile



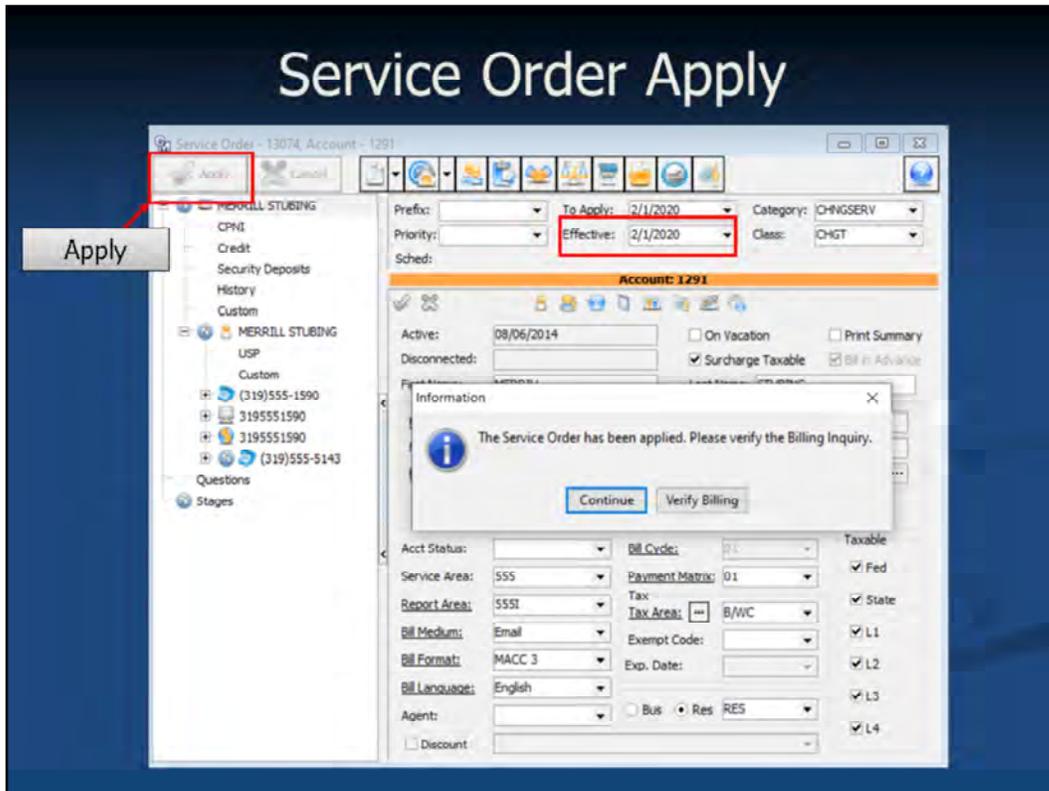
Your order may also be available by accessing MACC Mobile – allowing you to move toward and efficient, paperless environment.



Prior to Completing the service order, you may wish to make any final updates to the service order. You'll also want to confirm that the correct Effective Date has been used. When the account is ready to move to the Complete status, you may click on the Complete icon.

As a reminder, a service order may be printed at anytime during this process by choosing the Print icon.

Service Order Apply



To commit the changes associated with the Service Order to the database, you will use the Apply button. Keep in mind that you will want to verify the effective date prior to applying, as the prorations will be calculated based on the Effective Date at the time the Service Order is Applied.

After applying the order, you can use the Verify Billing to view you prorations at Billing Inquiry.

You may be wondering what the difference is between Complete and Apply. Some companies have their customer service reps or technicians complete the Service Order when the work is done, and a separate billing department will Apply the order. Security roles may be implemented that allow users to either Complete or Apply. Also, some companies' switch activation commands are sent either at Complete or Apply. Check with your company regarding your business practices regarding completing and applying orders.

Billing Inquiry

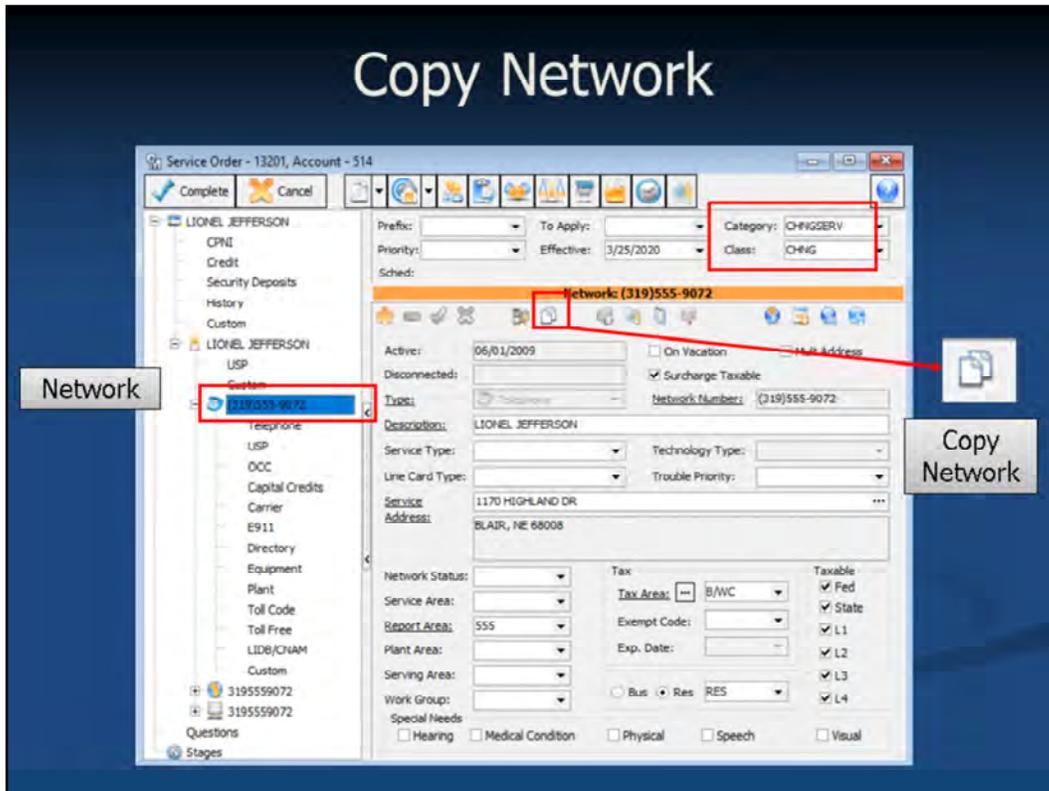
The screenshot shows a software interface with a 'Billing Inquiry' window. The window title is 'Billing Inquiry' and it displays account information for '1291 - MERRILL STUBING' with a 'Bill Date' of '04/01/2020'. Below the account info, there are tabs for 'Recurring Charges', 'Current OCCs', 'Billed OCCs', and 'Bill History'. A table of recurring charges is displayed, with a red box highlighting it. The table has columns for Code, Description, From, To, Bill Star, Bill Freq, Duration, Qty, Rate, Freq, and Amount. Below the table, there are sections for 'Tier - Telephone - (319)555-5143' and 'Tier - Video - (319)555-1500'. At the bottom, there is a 'Totals' section with fields for 'Recurring Charges', 'Rec Chg Credit', 'Current OCCs', 'Billed OCCs', and 'Bill History'.

Code	Description	From	To	Bill Star	Bill Freq	Duration	Qty	Rate	Freq	Amount
105	MACC BUY DOWN PLAN	04/01/	04/30/20		Monthly	30	1	0.00000		0.00
TCFC	CF - CALLER ID-RESIDENCE	04/01/	04/30/20		Monthly	30	1	0.12500		3.75
TCFC	CF - CALL WAITING	04/01/	04/30/20		Monthly	30	1	0.09833		2.95
TEW	E911 SURCHARGE - WASHIN	04/01/	04/30/20		Monthly	30	1	0.01667		0.50
TRLY	STATE RELAY SURCHARGE	04/01/	04/30/20		Monthly	30	1	0.00300		0.09
TSLS	FCC SINGLE LINE ACCESS C	04/01/	04/30/20		Monthly	30	1	0.21667		6.50
										13.79
Tier - Telephone - (319)555-5143										
TRAF	TELEPHONE FABULOUS FRI	02/01/	04/30/20		Monthly	30	1	0.38333		14.50
										34.50
Tier - Video - (319)555-1500										
										278.23
Totals:		Recurring Charges:	Rec Chg Credit:	Current OCCs:	Billed OCCs:	Bill History:				
		\$278.23	\$0.00	\$17.00	\$0.00	\$0.00				

To view the billing details associated with the change that was just made, you can also use Inquiry to find the account and select Billing Inquiry.

This screen will display exactly how the account will be prorated for the new services on the next bill.

Copy Network

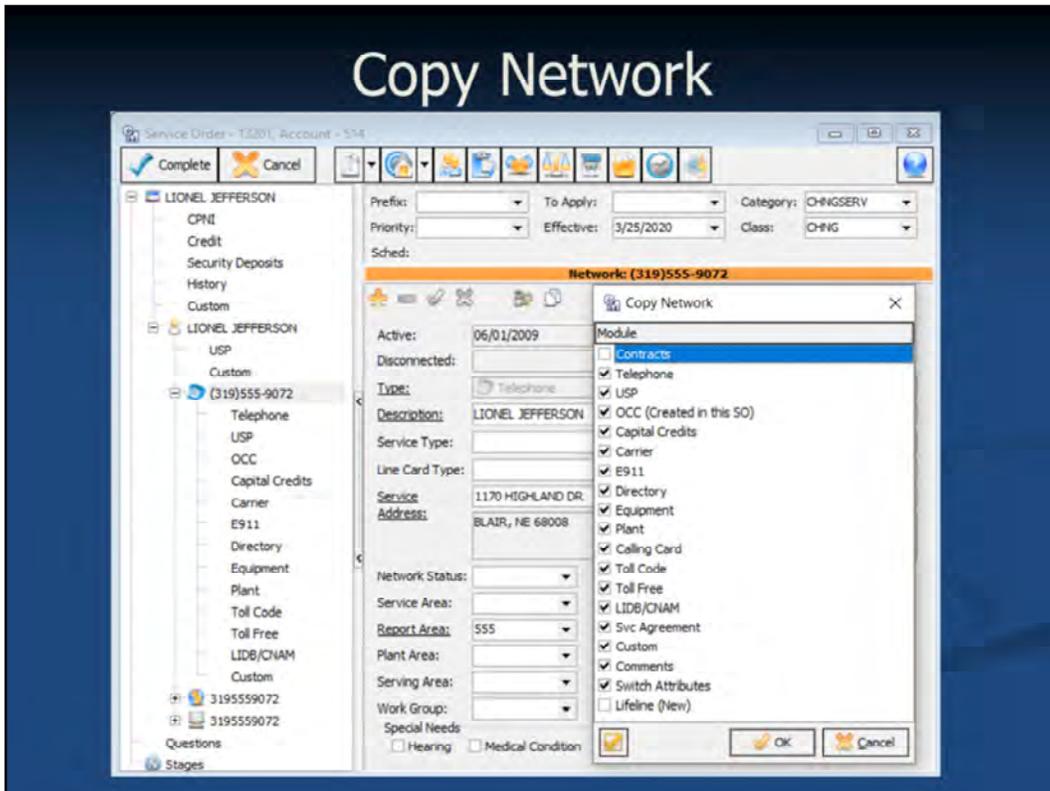


There is another option to add a new network. Begin with completing the Effective Date and Class fields, this should be a common practice.

To add an additional network, you may highlight the existing Network Tier in the Tree View. Once the existing network has been highlighted, you will want to choose the Copy Network icon.

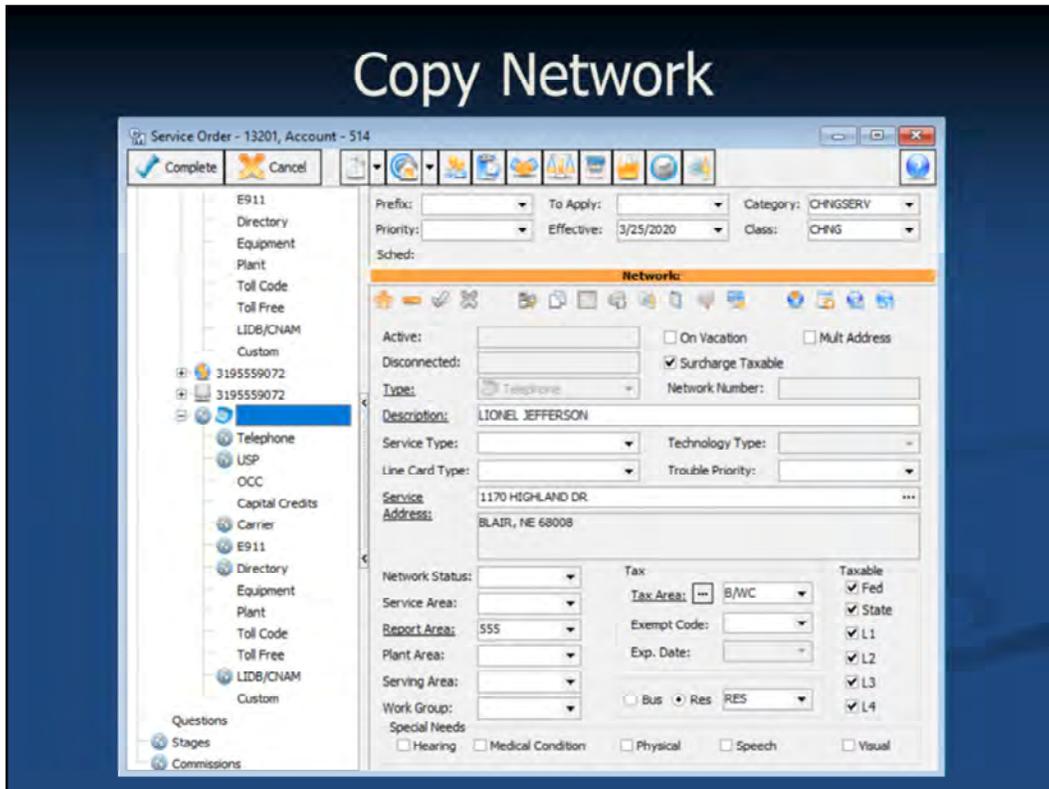
You can also use this function when changing an existing telephone network number. You'll want to disconnect the original and use the copy to build a new network and select a new number.

Copy Network



A second window will appear where you may select which elements you want to copy. Click OK to continue.

Copy Network



Once you click OK, the copies will be completed. You may want to copy all elements and then go back and edit details as needed. There are a few business rules regarding what is and is not copied. We encourage you to read through the business rules to get a better idea of how the process functions.

USP Node (Includes: USP, Bundles, Cell Rate Plans, Variable Rate USP) Rules:

- Overlapping Dates: This will prevent the process from copying down the service to the designation networks.
- Service Area: Services have to match the networks' service area or be blank to be copied.
- Assign Tier elements should not copy.
- Selective Bundle must be the same variant in order for the tool to mass update it.

OCC Node

- No prior month adjustment OCCs or work order invoice OCCs.
- Only OCCs generated in selected service order can be copied down.
- OCCs with the same USP Code but different Bill Start Dates are considered unique.
- The designated networks' tax area is used to calculate OCC taxes. OCC taxes will be copied from the source network when the OCCs' amount is 0. In all other cases, taxes are calculated for each individual network.

Carrier Node

- Overlapping dates will prevent the process from copying the carrier to the designated networks.

Toll Code Node (Includes: Toll Codes, Toll Code Values, Associated USP to Toll Code)

- Overlapping dates will prevent the process from copying the toll code to the designated networks.
- Toll Code Aggregation is ignored when copying to the designated network, and will need manual update.

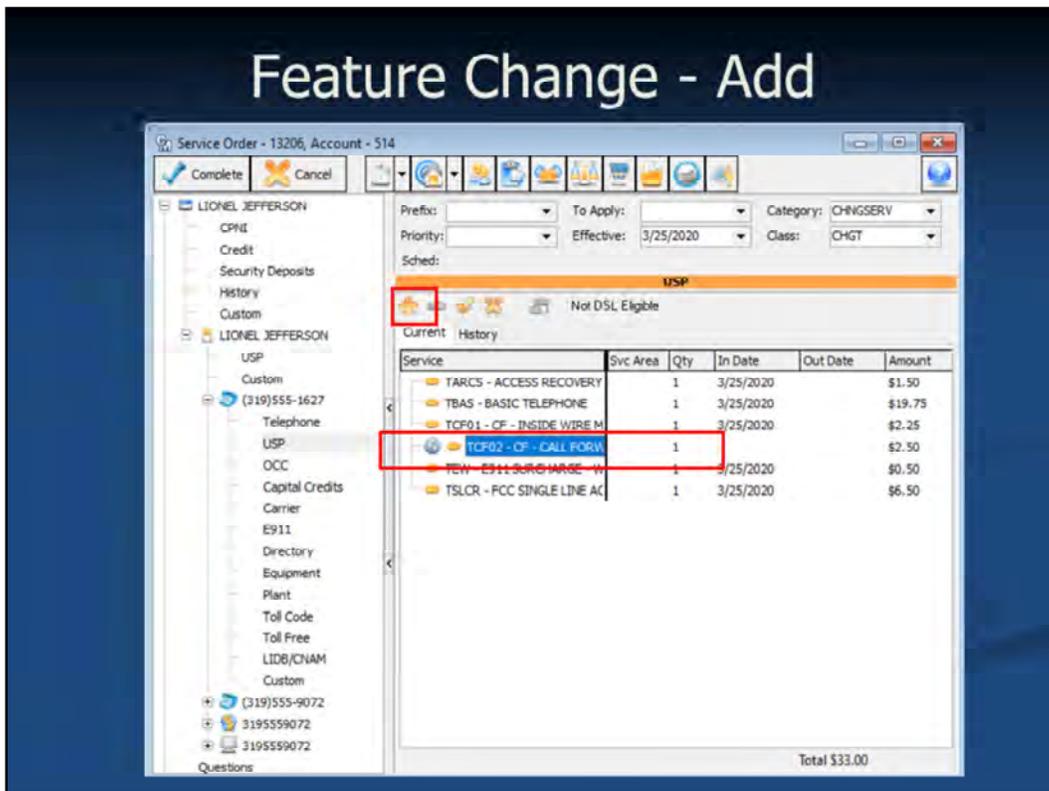
Billing Inquiry

The screenshot shows a software interface with a 'Billing Inquiry' window. The window title is 'Billing Inquiry' and it displays account information for '514 - LIONEL JEFFERSON' with a 'Bill Date' of '04/01/2020'. Below this, there are tabs for 'Recurring Charges', 'Current OCCs', 'Billed OCCs', and 'Bill History'. The main content is a table of charges with columns: Code, Description, From, To, Bill Star, Bill Freq, Duration, Qty, Rate, and Amount. A red box highlights the 'Inquiry' button in the top-left menu and the main table of charges.

Code	Description	From	To	Bill Star	Bill Freq	Duration	Qty	Rate	Fre	Amount
Tier: Internet - 319559072										
INDS	DSL SERVICE - UP TO 50 MB	04/01/	04/30/20		Monthly	30	1	1.88333		56.50
Tier: Telephone - 3195551627										
IARL	ACCESS RECOVERY CHARGE	03/25/	04/30/20		Monthly	25	1	0.05000		1.75
TRAS	BASIC TELEPHONE	03/25/	04/30/20		Monthly	25	1	0.69833		21.04
TCFL	CF - INSIDE WIRE MAINTEN	03/25/	04/30/20		Monthly	25	1	0.07500		2.63
TEW	E911 SURCHARGE - WASHIN	03/25/	04/30/20		Monthly	25	1	0.01667		0.58
ISLC	FCC SINGLE LINE ACCESS C	03/25/	04/30/20		Monthly	25	1	0.21667		7.50
Tier: Telephone - 3195559072										
Tier: Video - 2196369072										
										175.08
Totals: Recurring Charges: \$175.08, Rec Chg Credits: \$0.00, Current OCCs: \$0.00, Billed OCCs: \$0.00, Bill History: \$0.00										

When you're ready, Complete and Apply the order. You'll be prompted to view Billing Inquiry. This screen will display exactly how the account will be prorated for the new services on the next bill.

Feature Change - Add



Two types of feature changes commonly occur when end-users add or remove services. The first type of change is to add a service to an existing network. During class, we will add and remove a USP code from the account and primary telephone number that was installed earlier in the session.

Launch the Service Order window and select CHNG from the Class dropdown. As always, you will want to select an Effective Date.

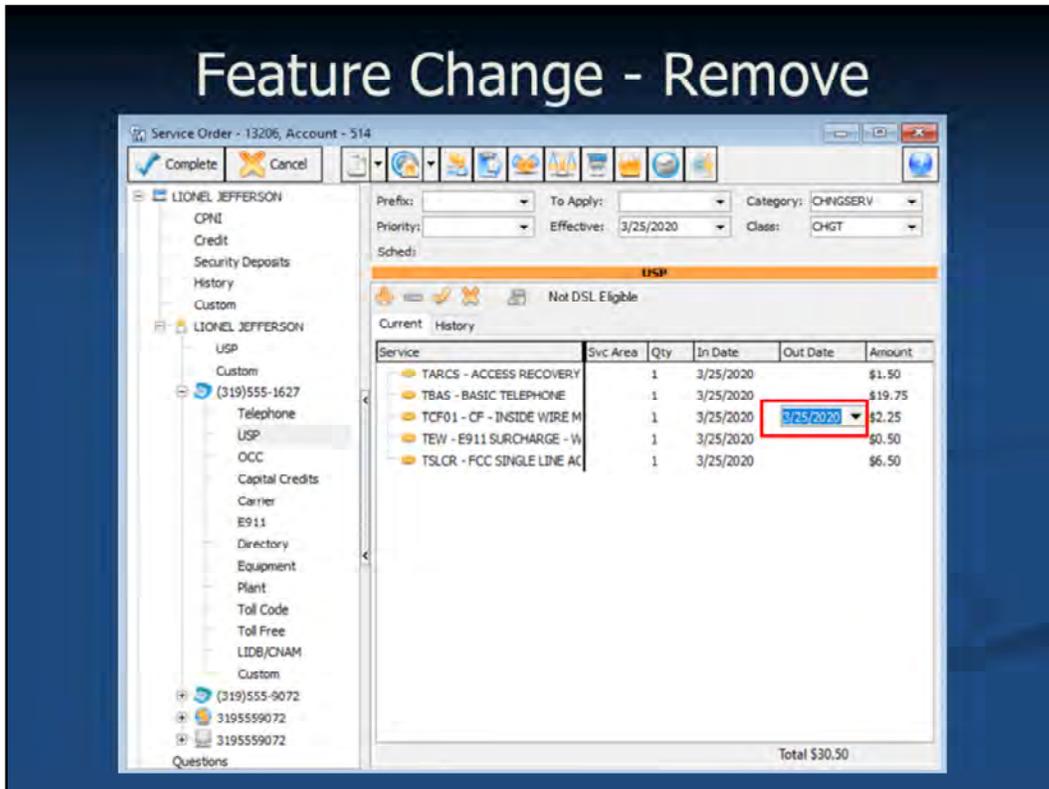
Highlight USP beneath the Network tier on which features are being added or removed to switch to the USP pane. If adding Feature(s), click the Insert (+) icon to add a new USP Code/Feature. This will open the USP Selector window.

Once the USP is found, select the code by checking the box to the left of the USP code. Continue adding USPs if needed. When finished, click OK. The USP pane will display the USPs selected.

Click the Post icon to save. An N will appear next to USP in the Service Order tree, indicating that it is new.

You can add Service Order Comments, which are located at the bottom of the Service Order tree view.

Feature Change - Remove



Another type of feature change that we will review is to remove service from an existing network.

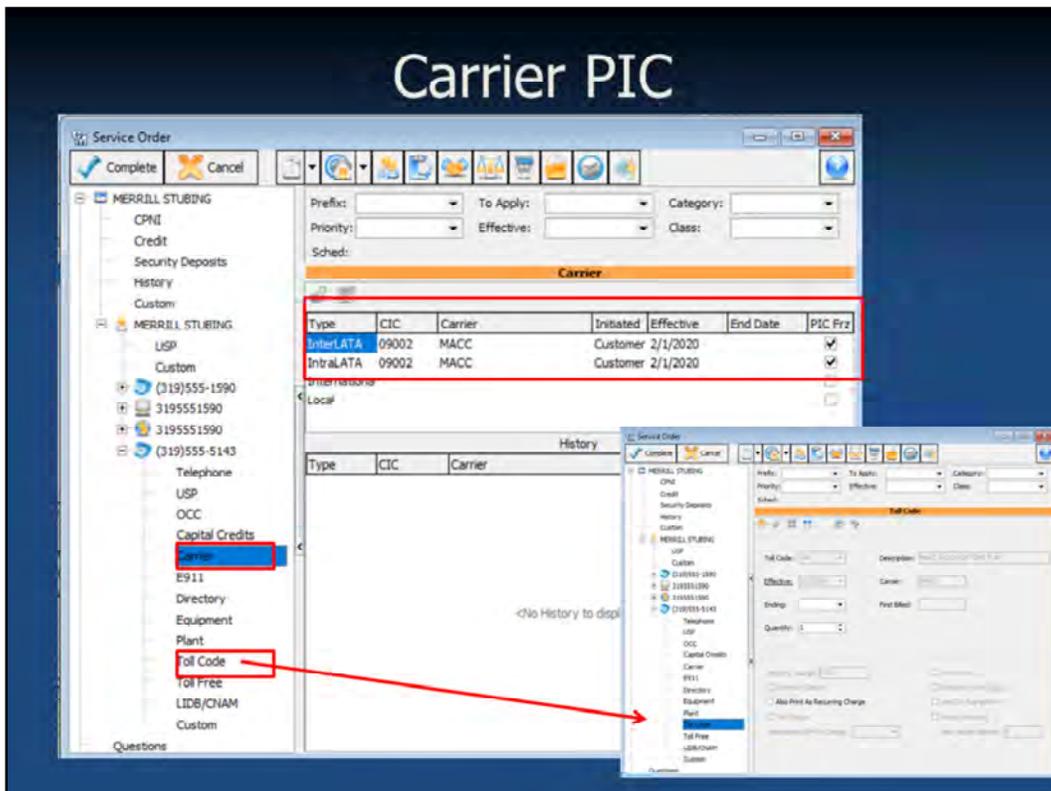
Highlight USP beneath the Network tier on which features are being removed to switch to the USP pane.

Highlight the USP Code to remove. Click into the corresponding Out Date column and place an Out Date on the USP code that you are removing. Once the USP is updated, click the Post icon to save. An N will appear next to USP in the Service Order tree, indicating that it is new.

Continue with Service Order Comments, which is located at the bottom of the Service Order tree view.

Next, we will review a PIC Change in a new Service Order.

Carrier PIC

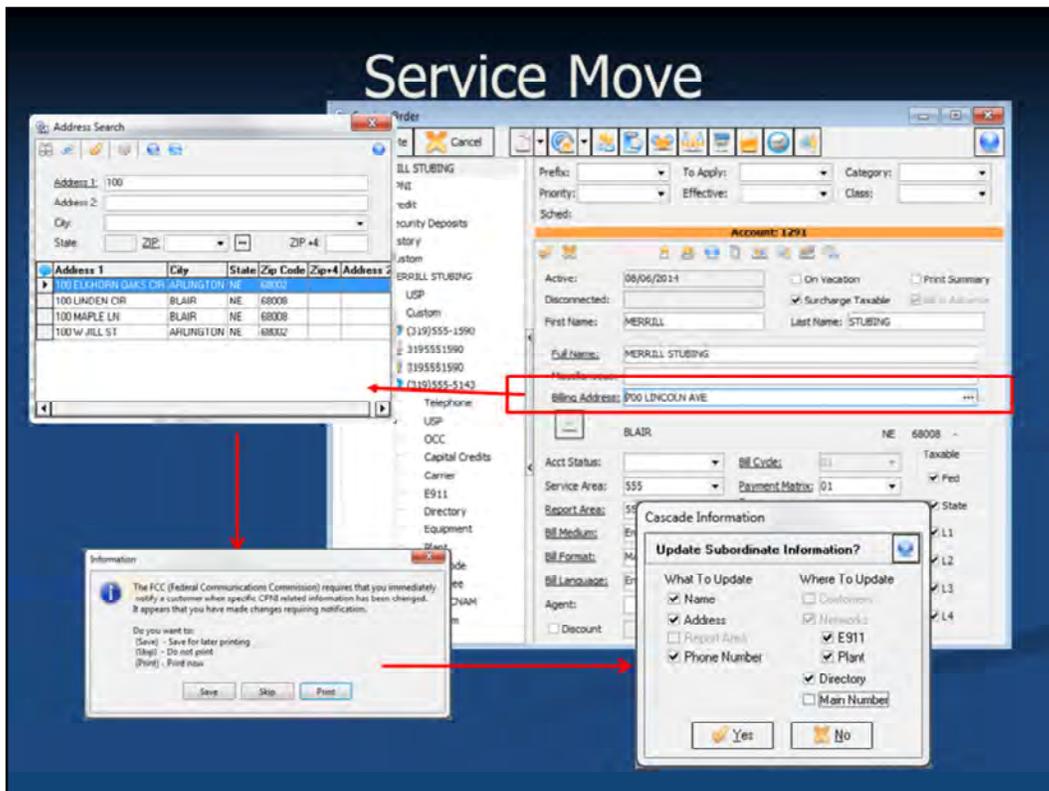


PIC Changes are another common service order.

By selecting the appropriate Change Initiated information, you will ensure that the correct TCSIs are used for carrier reporting. The CIC and Carrier will populate in the Carrier form below.

Note – once the order has been Applied, the old Carrier selections will appear in the History section of the Carrier pane.

Keep in mind that it's possible that two additional screens may need to be updated on a PIC change. The Toll Code window may need to be updated with a new calling plan, or an existing plan may need to be outdated. If you charge your customer for PIC changes, you will need to enter the appropriate USP code.



Another service order type is to perform a service move.

If the Address is not found, based on your company policies you may need to enter the address and click the Post icon to save.

After posting, there are possible confirmation prompts that will appear if the Capital Credits module is in use (that message is not shown here, but asks if you want to update Capital Credit information). Also, an optional window to generate a CPNI letter will appear.

The Cascade Information dialog box will appear. At this point, you may indicate which items of Subordinate Information should be updated. If this is a true physical move, all items should be left selected, and choose Yes to continue.

Service Move

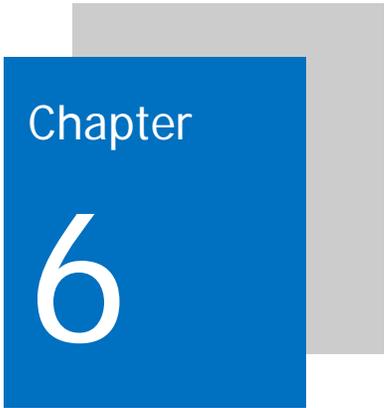
The screenshot shows a software interface for a Service Order. The title bar reads "Service Order - 13210, Account - 1291". On the left is a tree view with nodes for "MERRILL STUBING", "CPNI", "Credit", "Security Deposits", "History", "Custom", "USP", "OCC", "Capital Credits", "Carrier", "E911", "Directory", "Equipment", "Plant", "Toll Code", "Toll Free", "LIDB/CNAM", and "Custom". The "E911" node is selected. The main area displays the "E911" information form. A red box highlights the following fields: "Number" (700), "Street" (LINCOLN), "Community" (BLAIR), and "Country" (WASH). Other visible fields include "Suffix", "PreDir", "St Suf" (AVE), "PostDir", "Zip4", "State" (NE), "T.A.R.", "Cell ID", "Sector", "GPS X", "GPS Y", "GPS Z", "Comment", "NPA" (319), "Main Number" (5555143), "Phone Number" (5555143), "Function" (Change), "Class of Service" (Residence), and "Type of Service" (Not FX or Non-Pub).

You will notice that all of the nodes in the tree view will be updated automatically – if they are impacted by a move.

Because of the critical nature of E911, we recommend that you review the E911 information each time a true move occurs. Simply go to the E911 node to review the information for accuracy. Make any changes necessary, and then Post. You will receive the E911 changes confirmation prompt.

As a result of choosing to Update Subordinate Information, you will notice that items in the tree view are automatically updated – such as Directory. The directory listing will have the new address associated with it.

If you were to have a Billing Address Only change, you would NOT want to Update Subordinate Information.

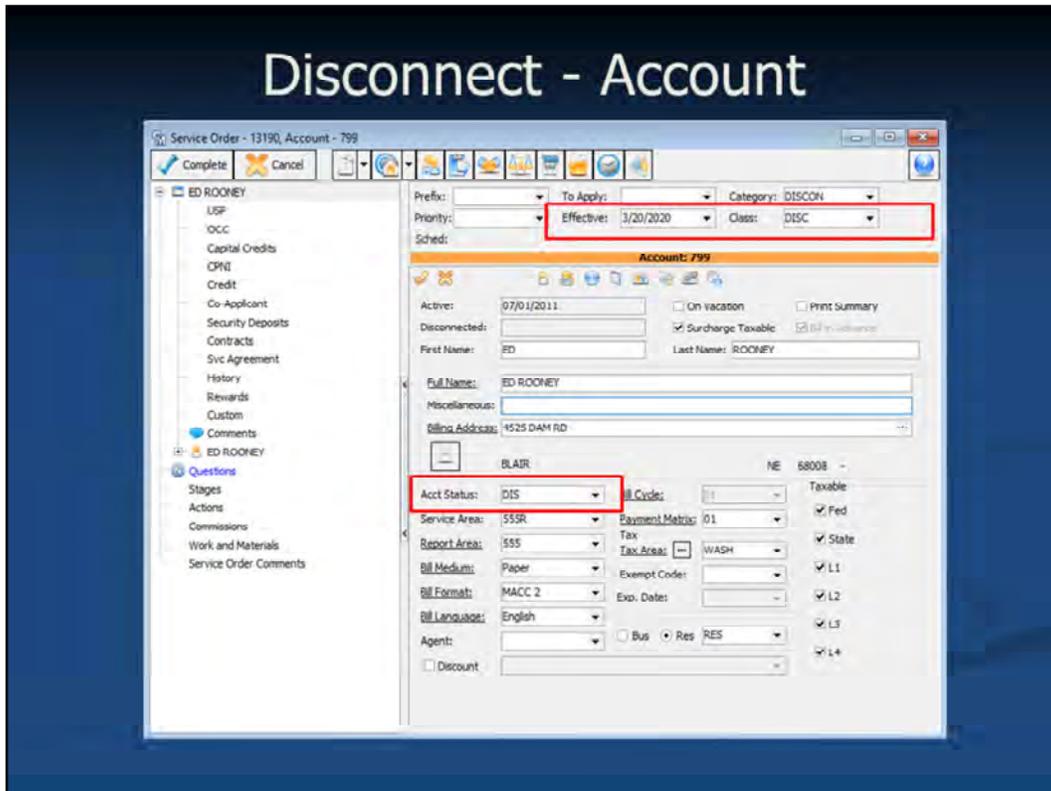
A graphic consisting of a blue square with the word "Chapter" and the number "6" inside, and a gray square behind it.

Chapter

6

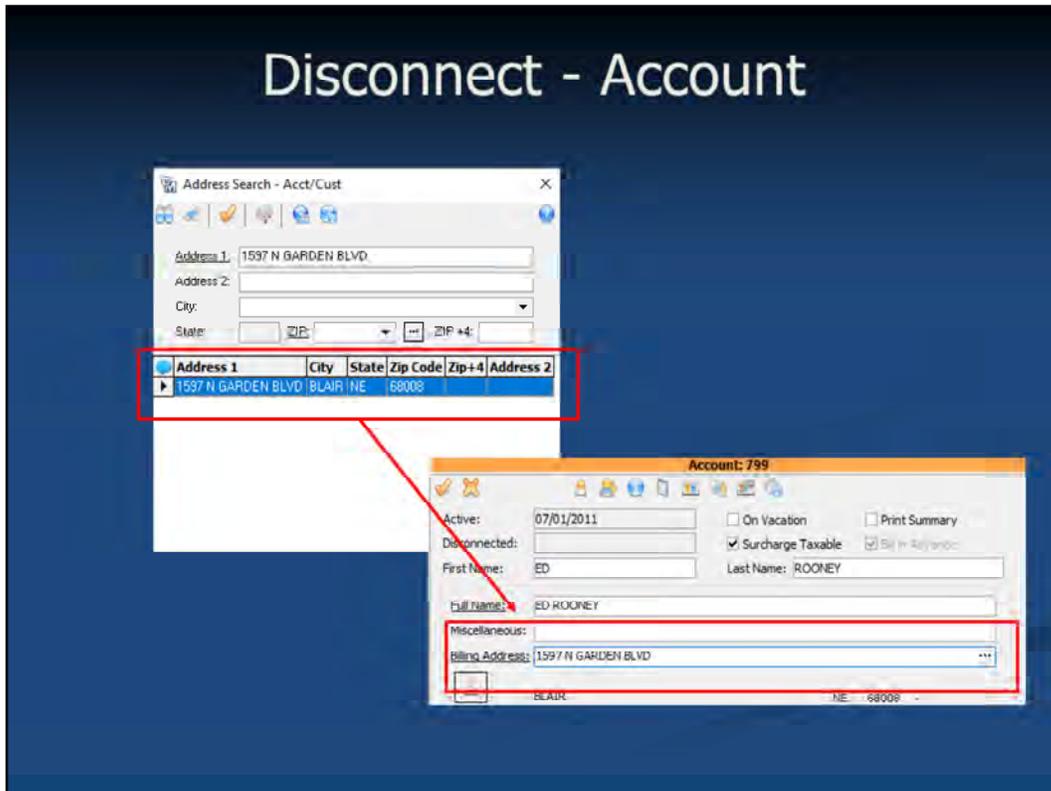
Disconnect/Reconnect Orders

Disconnect - Account



Disconnections can be performed at any tier in the tree view. Keep in mind that wherever the disconnection occurs, tiers subordinate to that tier will also be disconnected. For Jump Start, we will begin with a complete disconnect of an account.

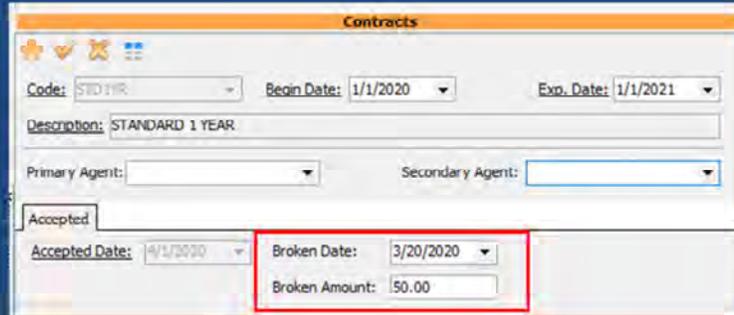
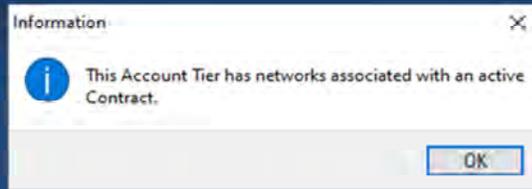
Disconnect - Account



If a final billing address is other than the current Account tier address, click on the ellipsis to open the Address Search screen and perform a partial search. If the address doesn't exist, add it to the database, post the new address and double-click on it to move it into the service order.

If the zip code doesn't exist you can click on the ellipsis in that field to be taken to the Zip Code table. Add it, save it and then select it from the drop-down in the Address Search screen.

Disconnect - Account



Contracts

Code: STD1R Begin Date: 1/1/2020 Exp. Date: 1/1/2021

Description: STANDARD 1 YEAR

Primary Agent: Secondary Agent:

Accepted

Accepted Date: 4/1/2020 Broken Date: 3/20/2020

Broken Amount: 50.00

If the account is under contract, you might receive a warning. We recommend breaking the contract and charging a broken contract fee.

Refund a Security Deposit

Service Order - 13192, Account - 799

Complete Cancel

ED ROONEY
USP
OCC
Capital Credits
CPNI
Credit
Co-Applicant
Security Deposits
Contracts
Svc Agreement
History

Prefix: To Apply: Category: DISCON
Priority: Effective: 3/20/2020 Class: DISC
Sched:

Deposit Amt	Date Rec
\$100.00	12/14/2015

Security Deposits

Current

Security Deposit Refunds

Current Deposit Information

Deposit Amounts: 100.00
Deposit Date: 12/14/2015
Deposit Balance Today: 100.00
Interest To 03/20/2020: 20.73
OCC Amount: 120.73

Refund Options

All Interest and Deposit
 All Interest Only
 All Interest Plus Part of Deposit

USP Code for Refund: OSEC Refund Interest From Date: 12/14/2015
USP Code for Interest: OINT Refund / Interest To Date: 3/20/2020

OCC/Check Options

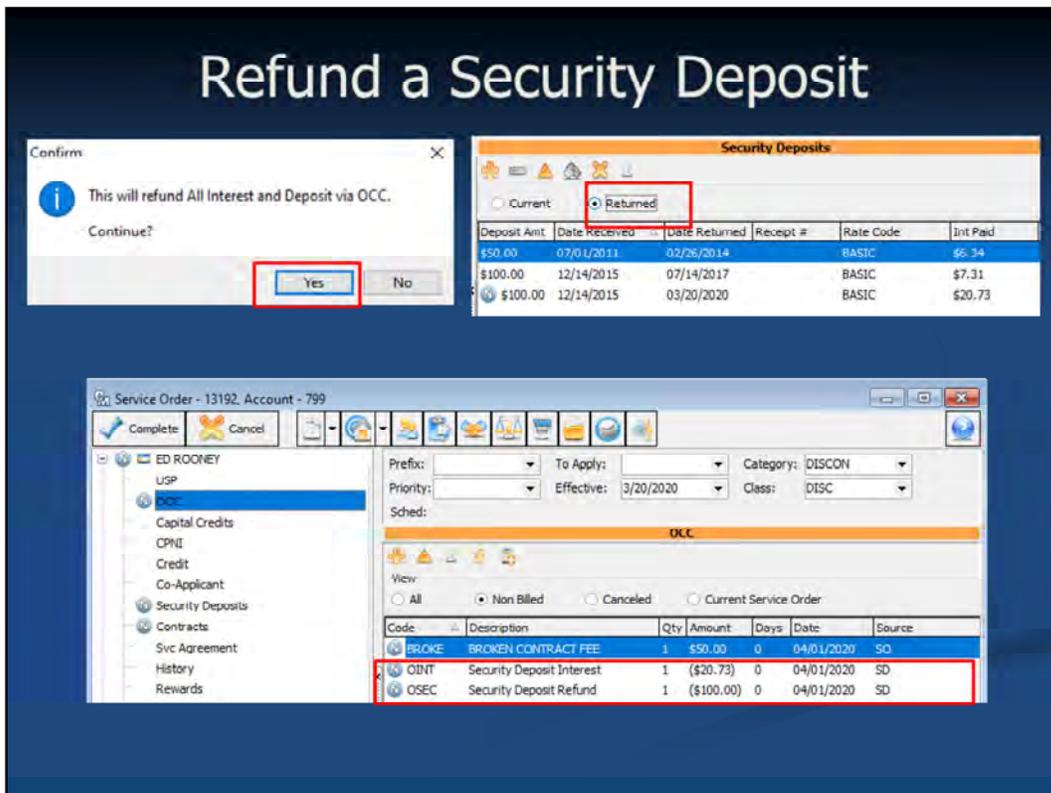
OCC Manual Check Auto-Check
Title: ED ROONEY Check Number:

Refund Description: SECURITY DEPOSIT REFUND
Check Stub Comment:

Post Refund Cancel

Many times, upon disconnection, a Security Deposit will need to be refunded.

Refund a Security Deposit



Back at the Security Deposit window at Service Order, you must now click on the Returned option to see your refunded deposit.

The OCC screen will show two OCCs on the Account tier, one for the Interest returned and one for the Principal returned.

Reconnect - Account

Account: 799-ED-ROONEY Bill Date: 04/01/2020

Recurring Charge | Current OCCs | Billed OCCs | Bill History

Code	Description	From	To	Bill Start	Bill Free	Duration	Qty	Rate	Amount
Tel - Internet - 7199551290									
DSL	DSL SERVICE -UP TO 20 MB	03/20/2020	03/21/2020			Monthly	11	1,550.00	(17.05)
Tel - Telephone - 0199551290									
TARI	ACCESS RECOVERY CHARGE	03/20/2020	03/21/2020			Monthly	11	0.05000	(0.55)
TBAJ	BASIC TELEPHONE	03/20/2020	03/21/2020			Monthly	11	0.68800	(7.24)
TEW	E911 SURCHARGE - WASHIN	03/20/2020	03/21/2020			Monthly	11	0.01667	(0.18)
TBLV	STATE RELAY SURCHARGE	03/20/2020	03/21/2020			Monthly	11	0.00000	(0.00)
TSLL	FCC SINGLE LINE ACCESS CH	03/20/2020	03/21/2020			Monthly	11	0.21667	(2.38)
Tel - Video - 7199551290									
CAE1	ELITE VIDEO	03/20/2020	03/21/2020			Monthly	11	1,090.00	(12.00)
QDS1	DIGITAL SPORTS CHANNEL	03/20/2020	03/21/2020			Monthly	11	0.03000	(0.17)
									(148.59)

Totals: Recurring Charges: (\$48.63) Prev Orig Credits: (\$48.63) Current OCCs: (\$70.73) Billed OCCs: \$0.00 Bill History: \$0.00

Account: 799-ED-ROONEY Bill Date: 04/01/2020

Recurring Charge | Current OCCs | Billed OCCs | Bill History

Description	USP	Source	Status	Date	Taxes	Qty	CIC	GL Account	Perm	Amount
Tel - Account - ED-ROONEY										
Security Deposit Interest	OINT	SD	A	04/01/2020	0.00	1		4010.200	N	(20.73)
Security Deposit Refund	OSEC	SD	A	04/01/2020	0.00	1		4010.200	N	(100.00)
BROKEN CONTRACT FEE	BROKE	SD	A	04/01/2020	0.00	1		5200.000	N	50.00
										(70.73)

Once the order has been applied, the Billing Inquiry screen will show proration, either partial charges or partial credits depending on the disconnect date. The Current OCCs tab will show any Security Deposit refunds and/or Broken Contract fees.

Refer to the instructions on the Jump Start Exercises worksheet to Complete and Apply the order, and verify billing.

Reconnect - Account

Account: 799 ED ROONEY
Bill Cycle: 01 Main Number: (319) 555 1292 Credit Class: C

Tier	Status	Active	Inactive	Bus/Res	Report Area	Tax Area	Svc Area	Net Desc
ED ROONEY	DIS	07/01/2011	03/20/2020	R	555	WASH	55SR	
ED ROONEY	DIS	07/01/2011	03/20/2020	R	555	WASH	55SR	ED ROONEY
(319) 555 1292	DIS	07/01/2011	03/20/2020	R	555	WASH	55SR	ED ROONEY
3195551292	DIS	07/01/2011	03/20/2020	R	555C	WASH	55SR	ED ROONEY

All tiers on the account will display in red with a Status of Disconnect and an Inactive date. You'll also be able to see the status of each tier in the Alerts section if this option has been selected in the Alerts table.

Reconnect - Account

Service Order - 13193, Account - 799

Complete Cancel

ED ROONEY

Prefix: To Apply: Category: RECON

Priority: Effective: 4/1/2020 Class: REC

Sched:

Account: 799

Active: 07/01/2011 On Vacation Print Summary

Disconnected: 03/20/2020 Surcharge Taxable Bill in Advance

First Name: ED Last Name: ROONEY

Full Name: ED ROONEY

Miscellaneous:

Billing Address: 4525 DAM RD

BLANK NE 68008

Acct Status: Bill Cycle: 01 Taxable

Service Area: 55SR Payment Matrix: 01

Report Area: 555 Tax Tax Area: WASH Fed

Bill Medium: Paper Exempt Code: L1

Bill Format: MACC 2 Exp. Date: L2

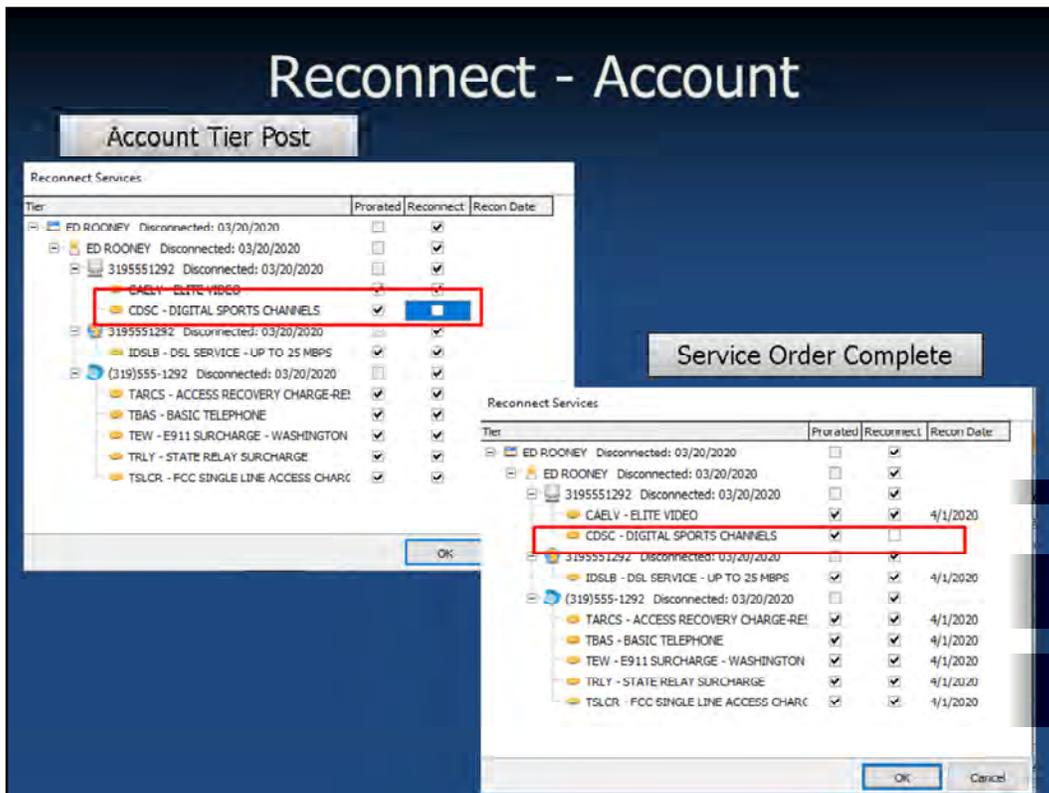
Bill Language: English Bus + Res: RES L3

Agent: Discount: L4

We will now reconnect the entire account. You will begin by retrieving the account through Inquiry and launching a Service Order. Enter an Effective Date and Class. Then, wipe out the Acct Status field and save the update.

Note: you'll want to confirm the status to be used for reconnections. In our training database, blank = active.

If the Billing Address needs to be updated, click on the ellipsis and perform a partial search. If the address isn't found, add it to the table.

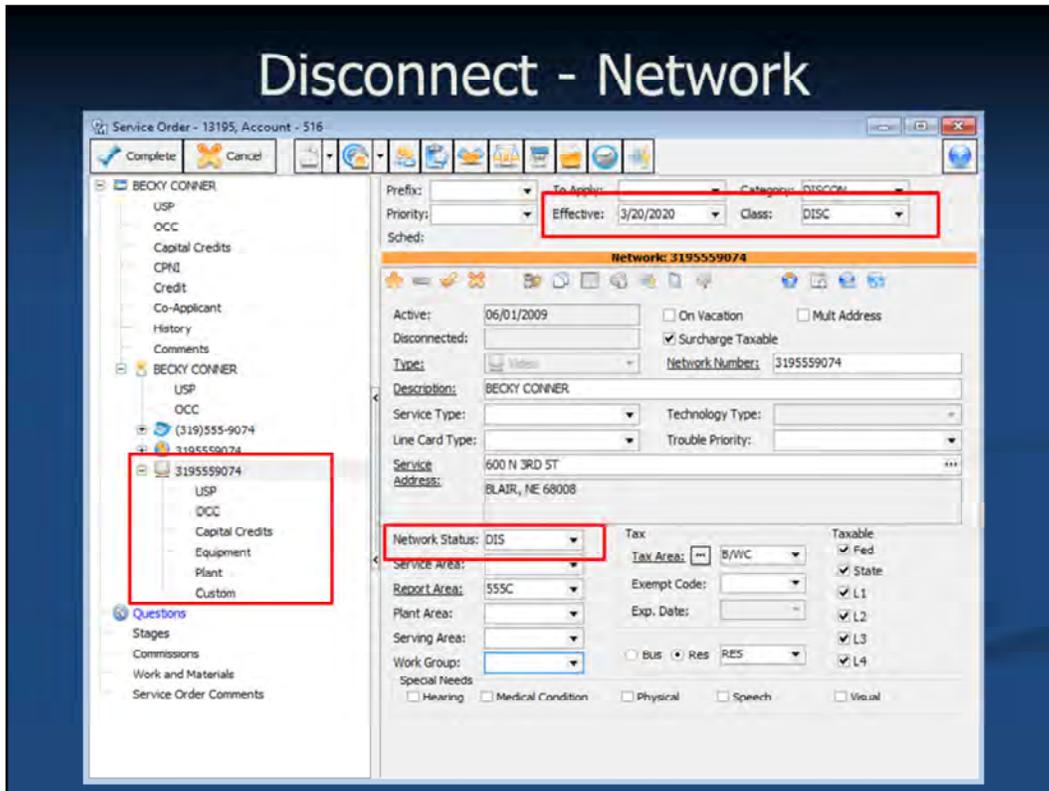


When the Account tier updates are posted, the initial Reconnect Services window displays. This shows all services the customer had at the time of disconnect and all are flagged by default to reconnect. At this point, you can deselect any services the customer no longer wants.

The window will display again at Service Order Complete. The Recon Date will be the Effective Date of the order. Any services initially deselected will not have reconnect dates. Changes can still be made at this point, which would then retrigger the Reconnect Services when the order is completed a second time.

Note: additional services can be added in a reconnect order, including both network-specific and assign tier bundles.

Disconnect - Network

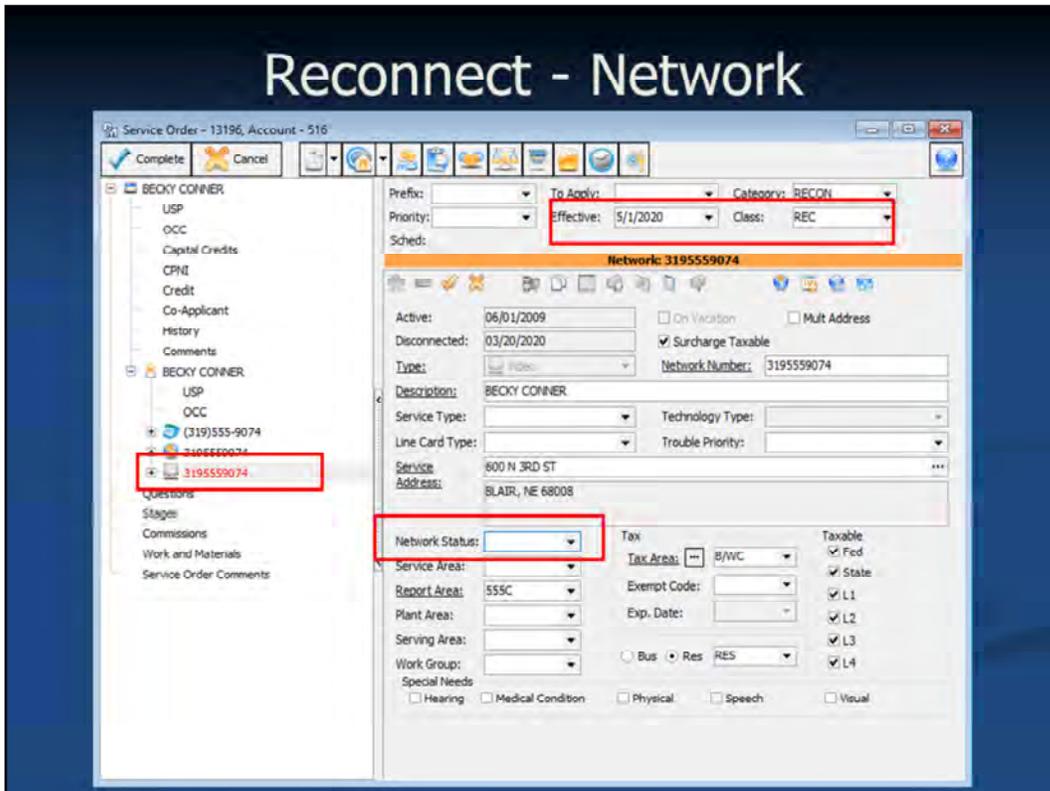


Another type of disconnect can be done at the Network tier. This makes it very simple to discontinue all services for one specific telephone line, internet, or cable TV service.

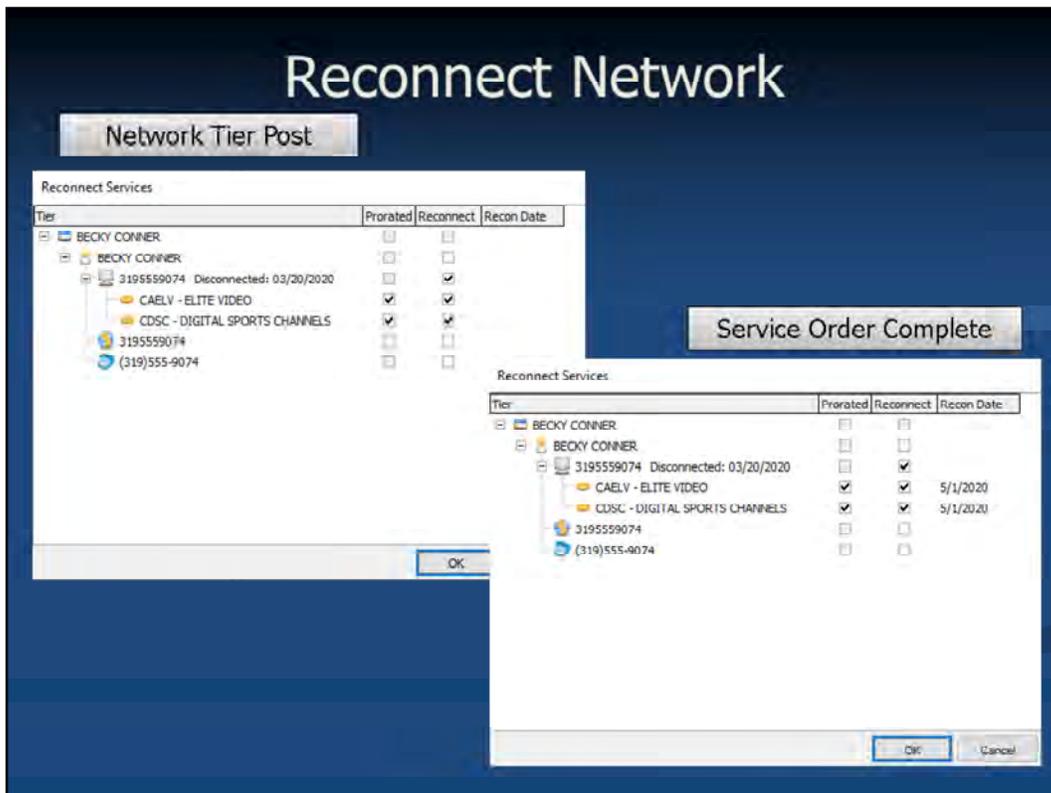
All individual USP codes associated with the network will discontinue billing as of the Effective Date on the Service Order. The network will now appear in red when viewing through the Billing Inquiry.

Based on your company policies, a network's disconnect might impact either a contract or a bundle. You might need to break the contract or remove an assign tier bundle from the account. You might also need to change the network designated as the Main Number on the account.

Reconnect - Network



Similarly, disconnected networks can easily be reinstated by reconnecting at the network tier.



When you post the Network tier updates, the Reconnect Services screen will display, with all services flagged for reconnect by default. You can deselect any that aren't needing reconnection. A customer can add additional services during the same reconnect order.

The Reconnect Services window will display again at Service Order Complete, showing the services and dates of reconnect.

Adding/Removing Vacation

The screenshot displays a software interface for managing an account. The main window is titled "Account: 476" and shows the following details:

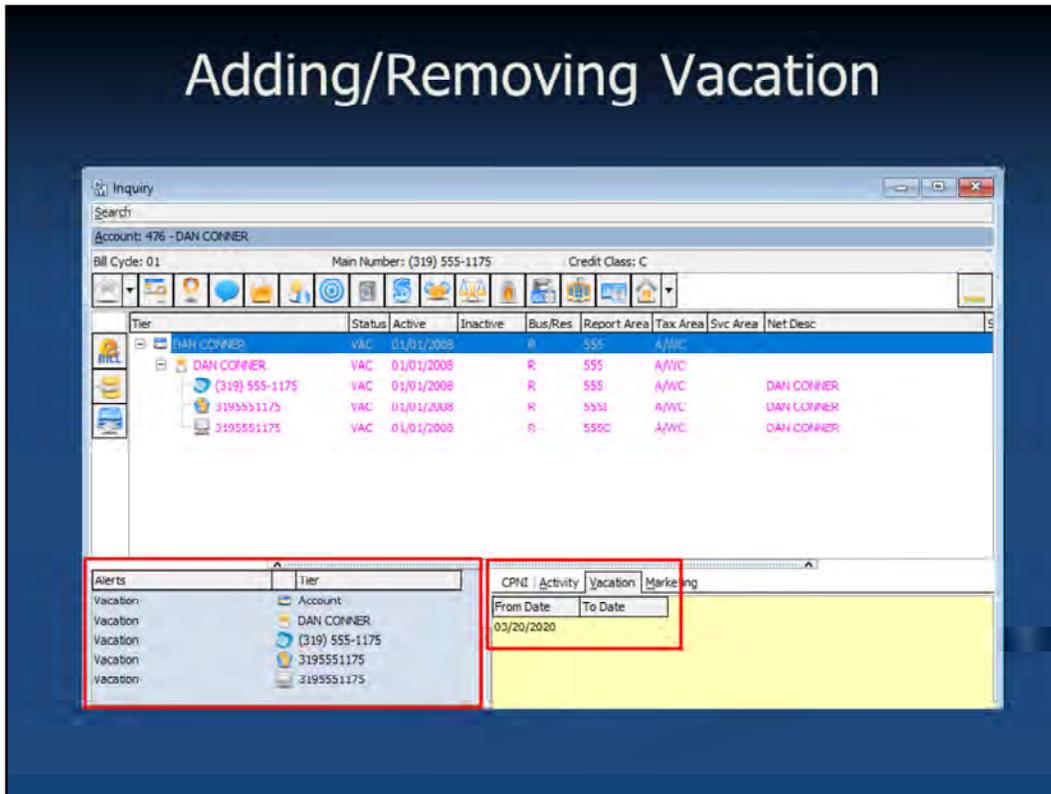
- Effective:** 3/20/2020 (highlighted in red)
- Class:** CHNG (highlighted in red)
- On Vacation:** (highlighted in red)
- Acct Status:** VAC (highlighted in red)

Other visible fields include: Prefix, Priority, To Apply, Category, Sched, Active (01/01/2008), Disconnected, First Name (DAN), Last Name (CONNER), Full Name (DAN CONNER), Billing Address (400 N 3RD ST), ARLINGTON, NE 68002, Bill Cycle (01), Payment Matrix (01), Tax (A/W/C), Exempt Code, and various tax checkboxes (Fed, State, L1, L2, L3, L4).

Accounts can easily be placed on Vacation or removed from Vacation. Vacation discount percentages are arranged at the Discount Setup, and are individual by company, by USP code.

Note: some companies may choose to handle vacation discounting by using different account statuses. If this is the case for your company, then you will handle this functionality as a disconnect/reconnect rather than using the Vacation indicator, selecting the appropriate tier status.

Adding/Removing Vacation



Using the Vacation indicator triggers the Vacation information in the Alert section of Inquiry, along with the From/To Dates on the Vacation tab. Using a Tier Status for Vacation, with a billing action of Suspend triggers the display in pink. Either option can be used, as can both. Each option feeds into its own set of reports.

Vacation Discounting

Account: 476 - DAN CONNER Bill Date: 04/01/2020

Recurring Charges: Current OCCs | Billed OCCs | Bill History

Code	Description	From	To	Bill Stat	Bill Freq	Duration	Qty.	Rate	Amount
Tier - Internet - 3195551175									
IDSL	DSL SERVICE - UP TO 25 MB	03/20/2020	04/30/2020		Monthly	40	1	1.55000	(31.00)
IDSL	DSL SERVICE - UP TO 25 MB	04/01/2020	04/30/2020		Monthly	30	1	1.55000	46.50
									15.50
Tier - Telephone - 3195551175									
TAR	ACCESS RECOVERY CHARGE	04/01/2020	04/30/2020		Monthly	30	1	0.05000	1.50
TBAS	BASIC TELEPHONE	03/20/2020	04/30/2020		Monthly	40	1	0.65933	(26.33)
TBAS	BASIC TELEPHONE	04/01/2020	04/30/2020		Monthly	30	1	0.65933	19.75
TELECOM	EMERGENCY WASHIN	04/01/2020	04/30/2020		Monthly	30	1	0.01667	0.50
TSLE	FCC SINGLE LINE ACCESS D	04/01/2020	04/30/2020		Monthly	30	1	0.21667	6.50
									1.92
Tier - Video - 3195551175									
CAEL	ELITE VIDEO	03/20/2020	04/30/2020		Monthly	40	1	1.09833	(35.15)
CAEL	ELITE VIDEO	04/01/2020	04/30/2020		Monthly	30	1	1.09833	32.95
CDSI	DIGITAL SPORTS CHANNELS	04/01/2020	04/30/2020		Monthly	30	1	0.93333	(25.00)
									22.80
Totals: Recurring Charges: \$40.22 Rec. Cng. Credits: (\$32.49) Current OCCs: \$0.00 Billed OCCs: \$0.00 Bill History: \$0.00									

At Billing Inquiry you'll see the regular charge and the Vacation credit with the credit displaying in blue. The regular charge and the vacation credit will display on the bill as well.

Later, you can perform the same steps to remove the Vacation discount indicator and/or Tier Status on the account.

Chapter

7

Receivables, Payment Entry & Manual OCCs

Receivables - Basics

Main FCC 477			
USP Code:	TBAS	Service Area:	
Description:	BASIC TELEPHONE		
Billing Amount:	\$19.75	Bill Frequency:	Monthly
Effective Date:	8/1/2011	Inactive Date:	
GL Account:	5001.000	Network Type:	Telephone
Service Options			
<input checked="" type="checkbox"/> Prated			
<input type="checkbox"/> One Time Charge	<input checked="" type="checkbox"/> Print on Bill		
<input type="checkbox"/> Display Message	<input type="checkbox"/> Print if Zero		
<input type="checkbox"/> Lifeline	<input type="checkbox"/> Discountable		
<input type="checkbox"/> Non Published	<input checked="" type="checkbox"/> Calling Feature		
<input type="checkbox"/> Unlisted	<input checked="" type="checkbox"/> Provisioning		
<input type="checkbox"/> Print in Fee Section	<input type="checkbox"/> Work Order		
	<input type="checkbox"/> Advance Disburse		
Billing Categories			
<input checked="" type="checkbox"/> Basic Service			
<input type="checkbox"/> Equip/Inv			
<input type="checkbox"/> Toll Related			
<input checked="" type="checkbox"/> Regulated			
<input type="checkbox"/> E911			
<input type="checkbox"/> FCC			

Let's start with the basics. All USP Codes have Billing Categories. These pull from the categories linked to your Network categories. Billing Categories are also a part of your Payment Matrix. The matrix determines how payments are applied – either through age first followed by priority or by priority first, followed by age. Basically, your categories talk to your matrix, which talks to your USPs. The USPs talk to your balances and payments are applied accordingly.

A/R Balance

23 BEN SALES

Amount Due: \$380.26 Last Bill Date: 03/01/2020

Applied Payments: \$0.00 Last Bill Amount: \$127.45

Unapplied Pre-Pymts: \$0.00 Sec. Dep. Bal: \$0.00

Pending Payments: \$0.00 Write Off Bal: \$0.00

Current Balance Due: \$380.26 Past Due Bal: \$252.81

Net OCC: \$0.00 Last Pymt. Date: 12/27/2019

Last Pymt. Amt: \$205.46

	Under 30	30-59	60-89	90 & Over
	\$0.00	\$127.45	\$125.13	\$127.68

	03/01/2020	02/01/2020	01/01/2020	Older
	\$127.45	\$125.13	\$127.68	\$0.00

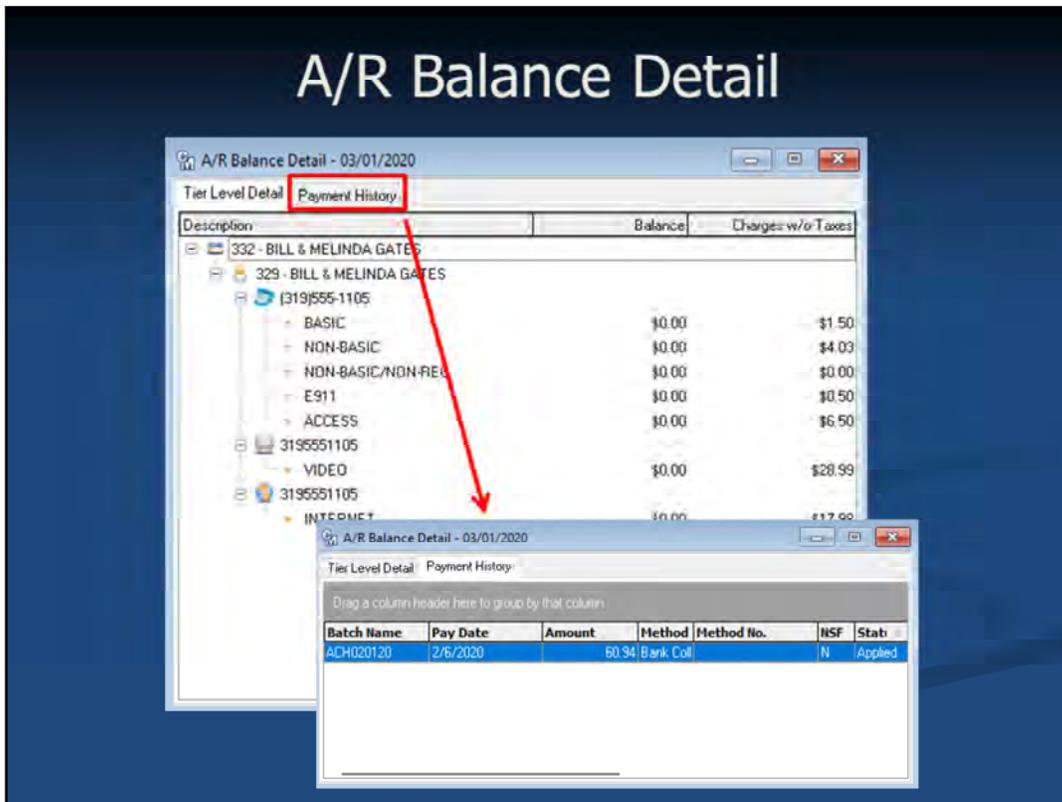
Bill Date	Totl w/o Taxes	Payments	Current Charges	Balance Fwd	Amount Due
03/01/2020	\$0.00	\$0.00	\$127.45	\$252.81	\$380.26
02/01/2020	\$0.00	\$0.00	\$125.13	\$127.68	\$252.81
01/01/2020	\$0.00	\$205.46	\$127.68	\$0.00	\$127.68
12/01/2019	\$0.00	\$184.64	\$205.46	\$0.00	\$205.46
11/01/2019	\$0.00	\$0.00	\$92.32	\$92.32	\$184.64
10/01/2019	\$0.00	\$115.45	\$92.32	\$0.00	\$92.32
09/01/2019	\$0.00	\$2,736.24	\$115.45	\$0.00	\$115.45
08/01/2019	\$0.00	\$0.00	\$90.58	\$2,645.66	\$2,736.24
07/01/2019	\$0.00	\$0.00	\$90.58	\$2,555.08	\$2,645.66
06/01/2019	\$0.00	\$0.00	\$90.65	\$2,464.43	\$2,555.08
05/01/2019	\$0.00	\$0.00	\$110.38	\$2,354.05	\$2,464.43
Average:	\$0.00		\$115.27		

The A/R Balance screen shows both current and historical billing and payment information. It can be accessed through the A/R Balance icon on Inquiry as well as through payment entry.

- Amount Due - Amount that was last billed
- Applied Payments, Unapplied Pre-Pymts and Pending Payments – Reflects Payment(s) posted since the last bill
- Current Balance Due – Amount of the remaining Balance Due from the Customer
- Previous Balance - any unpaid amount that was brought forward from a previous billing cycle
- Net OCCs - net amount of all OCCs which have been entered for the next billing cycle

There are two rows for aging balances. The first row represents the aging balances and is refreshed every 30 days based on billing cycle. The second row represents the aging balances by Bill Date.

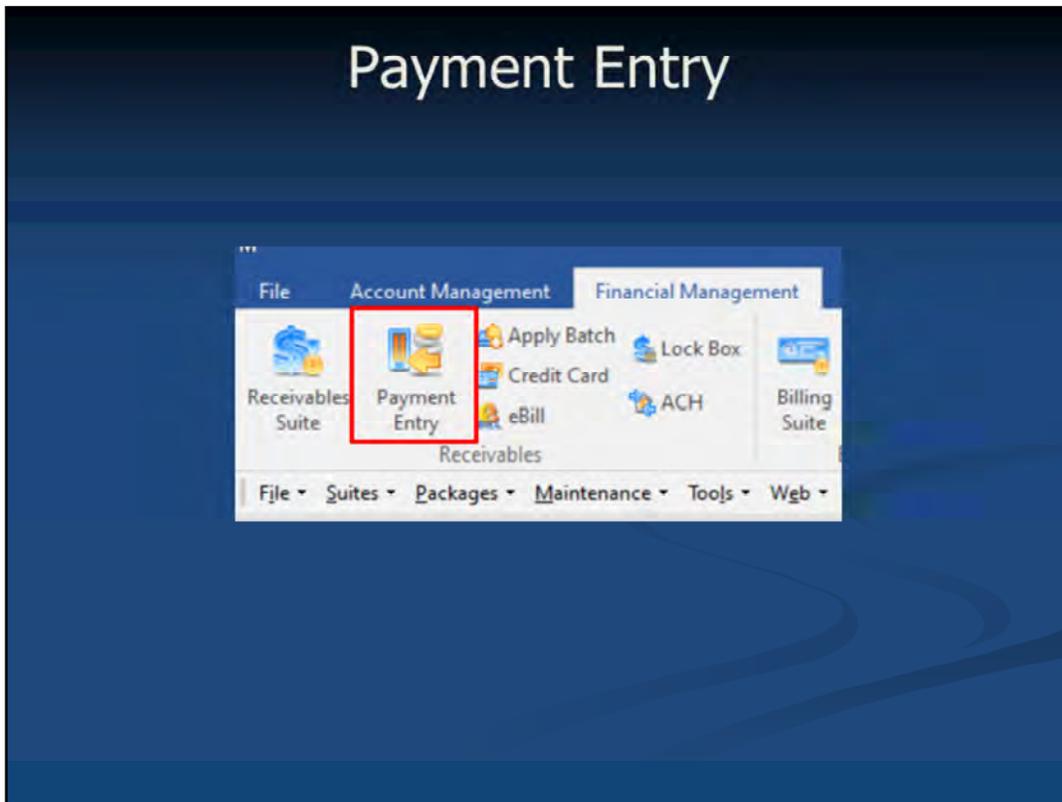
A/R Balance Detail



To research a specific billing month, select the month under the Bill Date column. Click on the History Book icon or double click on the month to open the A/R Balance Detail window for the selected month. The A/R Balance Detail window will default to the Tier Level Detail tab and this detailed information will show the outstanding balance for each billing category for the selected billing month.

Select the Payment History tab to review Payment information for the specific billing month. The Payment History tab includes the Batch Name in which the payment was included, Pay Date associated with the payment and Amount of the Payment. You can also see the Method which was assigned to the Payment. (Cash, Check, Credit Card, etc.) and Method No., if applicable. NSF is N unless the specific payment has been flagged as NSF. Status is Applied unless the specific payment is still in a pending batch of payments and Billed Date will match the Billing Month being viewed. ACH Date is only populated if the Customer has utilized Automatic Bank Collect for their payment.

Payment Entry



Payments may be processed by selecting the Payment Entry icon from the Financial Management ribbon located at the top of the Customer Master window. This is the best way to post batches of payments.

Payment Entry

Account: 23 - BEN SALES
Main Number: (319) 555-9223
Credit Class: C

Tier	Status	Active	Inactive	Bus/Res	Report Area	Tax Area	Svc Area	Net Desc	Svc Type	Tech Type	Cap Cred #
BEN SALES				R	555	WASH					1237876
BEN SALES				R	555	A/WC	555				1237876
11111				R	555C	A/WC	555	BEN SALES			1237876
(319) 555-1026				R	555	A/WC	555	BEN SALES	R1		1237876
BEN L SALES				R	555	A/WC	555				1237876
(319) 555-1125				R	555	A/WC	555	BEN SALES	R1		1237876
3197550136				R	555C	A/WC	555				1237876

Alerts

Alerts	Tier
CPNI Non-Approval	Account
Write-Off - History	Account
Potential Outage - TELEPHONE OI	(319) 555-1026
Potential Outage - TELEPHONE OI	(319) 555-1125

Messages

Messages	Tier
----------	------

CPNI Activity | Vacation | Marketing

CPNI Not Approved

Phone Number on Record:

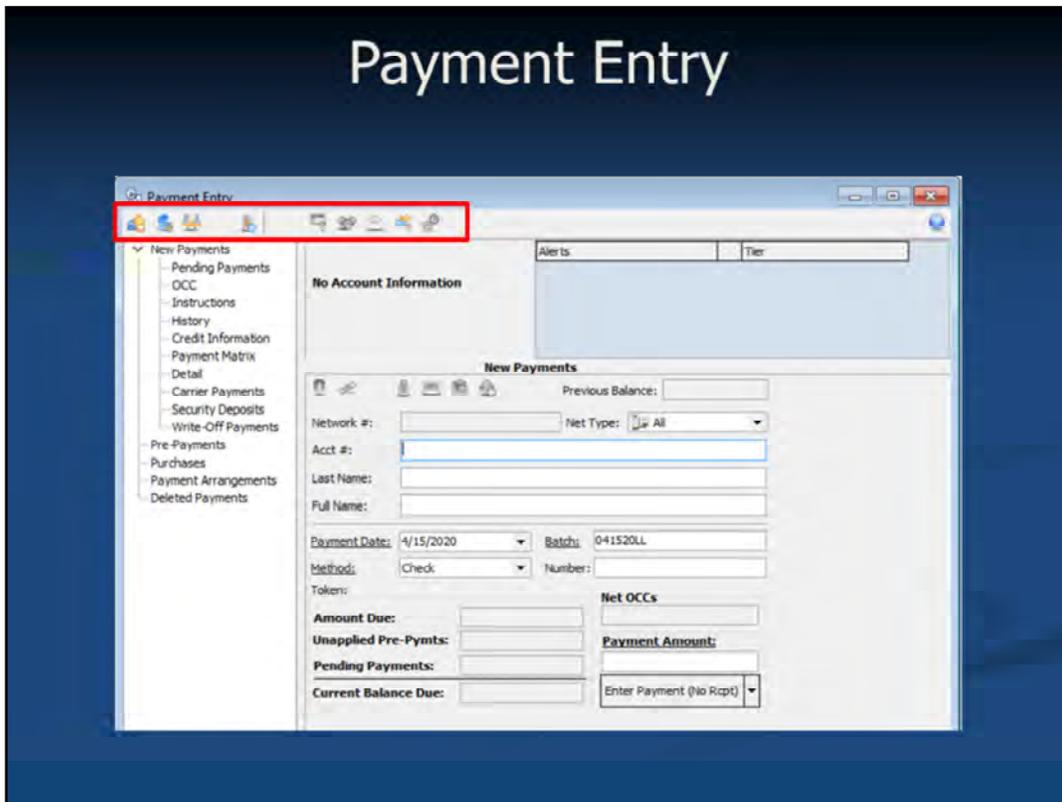
Level 1 Authentication
Question:
Answer:

Level 2 Call Detail CPNI
Password:
Forgot Password Question:
Answer:

Additional Authorized Contacts

You can also enter payments through the Payment Entry icon at Inquiry. This is used more for research than for payment entry.

Payment Entry



At the top of the Payment Entry screen, the following icons are available:

- Batch Apply – Provides access to the Batch functions and applying payment batches
- Lockbox – Process the lockbox payment file into a payment batch
- A/R Balance – Displays current and historical information for the selected Account
- Special Pay – Allows you to apply payments to specific charges
- Account Overview – Allows you to access the Account Overview window
- CRM – Provides access to the Account Contact information for selected account, allowing you to view and/or enter contact information
- Print Mail Label – Allows you to print an envelope from the payment entry screen
- Show My Pending Payments Running Total – Allows you to Pull up a Grid with your Running Total for Pending payments you have entered, similar to a register tape
- Reconnect Eligible Accounts – An option to automatically reconnect accounts disconnected for non-pay, based on specified parameters

12 Month History

A/R Balance

332 BILL & MELINDA GATES

Amount Due: \$60.94 Last Bill Date: 03/01/2020
 - Applied Payments: \$60.94 Last Bill Amount: \$60.94
 - Unapplied Pre-Pymts: \$0.00 Sec. Dep. Bal: \$0.00
 - Pending Payments: \$0.00 Write Off Bal: \$0.00
 + Current Balance Due: \$0.00 Past Due Bal: \$0.00
 Net DCC: \$0.00 Last Pymt. Date: 03/06/2020
 Last Pymt. Amt: \$60.94

	Under 30	30-89	90-89	90 & Over
	\$0.00	\$0.00	\$0.00	\$0.00

	03/01/2020	02/01/2020	01/01/2020	Older
	\$0.00	\$0.00	\$0.00	\$0.00

Bill Date	Toll w/o Taxes	Payments	Current Charges	Balance Fwd	Amount Due
03/01/2020	\$0.00	\$60.94	\$60.94	\$0.00	\$60.94
02/01/2020	\$0.00	\$60.85	\$60.94	\$0.00	\$60.94
01/01/2020	\$0.00	\$60.85	\$60.85	\$0.00	\$60.85
12/01/2019	\$0.00	\$121.70	\$60.85	\$0.00	\$60.85
11/01/2019	\$0.00	\$0.00	\$60.85	\$60.85	\$121.70
10/01/2019	\$0.00	\$60.85	\$60.85	\$0.00	\$60.85
09/01/2019	\$0.00	\$60.53	\$60.85	\$0.00	\$60.85
08/01/2019	\$0.00	\$60.53	\$60.53	\$0.00	\$60.53
07/01/2019	\$0.00	\$60.53	\$60.53	\$0.00	\$60.53
06/01/2019	\$0.00	\$60.53	\$60.53	\$0.00	\$60.53
05/01/2019	\$0.00	\$60.53	\$60.53	\$0.00	\$60.53
Average:	\$0.00		\$60.79		

To quickly view the past 12 months of history, click on the Printer icon in the A/R Balance window.

Account Number 332
Name BILL & MELINDA GATES
24159 TURKEY RIDGE LN
ARLINGTON, NE 68002

Active Date 08/01/2006
Inactive Date

Arrangement: N Bank Collect: Y NSF: N Collection: N Lifeline: N Lock Box: N

Summary

Amount Due:	60.94	Security Deposits:	100.00
- Applied Payments:	60.94	Security Deposit Balance:	0.00
- Unapplied Pre-Pymts:	0.00	Recurring Charges:	140.90
- Pending Payments:	0.00	Previous Balance:	0.00
Current Balance Due:	0.00	Net OCCs:	0.00

A/R Balance Detail

Delinquent Notice Sent	Bill Date	Toll w/o Taxes	Payments	Current Charges	Balance Forward	Amount Due
	03/01/2020	0.00	60.94	60.94		60.94
	02/01/2020	0.00	60.85	60.94		60.94
	01/01/2020	0.00	60.85	60.85		60.85
	12/01/2019	0.00	121.70	60.85		60.85
	11/01/2019	0.00		60.85	60.85	121.70
	10/01/2019	0.00	60.85	60.85		60.85
	09/01/2019	0.00	60.63	60.85		60.85
	08/01/2019	0.00	60.63	60.63		60.63
	07/01/2019	0.00	60.63	60.63		60.63
	06/01/2019	0.00	60.63	60.63		60.63
	05/01/2019	0.00	60.63	60.63		60.63
Average Toll:		0.00	Average Charges:	60.79		

Payment History - 12 months

Batch Name	Pay Date	Amount Method	Method Num	Status	NSF Stmt Date	ACH Date	Pay Class	Entered By
ACH030120	03/06/2020	60.94 Bank Collect		Applied	N		Full Pay	LLemon
ACH020120	02/06/2020	60.94 Bank Collect		Applied	N	03/01/2020	02/06/2020 Full Pay	LLemon

This is an example of the A/R Balance Activity Report. It includes a Summary section which shows the current date's information. You can also see the balance detail and payment history.

Payment Entry

Account: 456
LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

Alerts: Payment Arrangement - History
Tier: Account

New Payments

Previous Balance: \$225.88

Network #: Net Type:

Acct #: 456

Last Name:

Full Name:

Payment Date: 4/7/2020 **Batch:** 040720MJ

Method: Check **Number:**

Token:

Amount Due: \$340.09 **Net OCCs:** \$0.00

Unapplied Pre-Pymts: \$0.00 **Payment Amount:** \$340.09

Pending Payments: \$0.00 **Enter Payment (No Rcpt):**

Current Balance Due: \$340.09

Before starting your batch, be sure to verify the Payment Date for accuracy, and change the Batch name to an appropriate naming convention. A typical batch name is the date followed by the user's initials. There is an option to set up a template which will auto-populate the Batch field accordingly.

Note: a Batch name is required before you can enter a payment.

Payment Entry

0470 - 555 *** DETACH AND RETURN THIS PORTION WITH YOUR PAYMENT ***

SUCCESS TELEPHONE COMPANY - M
111 ADMIRAL DR STE 2
BLAIR NE 68008

DAN & ROSEANNE CONNER
400 N 3RD ST
ARLINGTON NE 68002

Success
Telecom

FOR CHANGE OF ADDRESS: Please check here
and complete form on reverse. Thank you.

Account Number: 000000476
Bill Date: April 01, 2017
Due Date: 10TH OF MONTH
Phone Number: 319-555-1175

Remit To:
SUCCESS TELEPHONE COMPANY - R
111 ADMIRAL DR STE 2
BLAIR NE 68008-2522



04700000000476000000309134

Balance Due Includes Past
Due Amount - Please Remit: \$309.13

Amount
Enclosed: \$

The return section of the end-user's bill will look similar to the one seen here. You will find it easiest to post the payment using the Account Number printed in the upper-right corner of the payment stub. The Payment Amount (if your customer chooses to write it in) should be listed in the lower-right corner of the payment stub.

If the payment stub is not returned, there are several other ways to search for the account at payment entry.

Payment Entry

The screenshot shows the 'Payment Entry' application window. On the left is a navigation tree under 'New Payments' with items like Pending Payments, OCC, Instructions, History, Credit Information, Payment Matrix, Detail, Carrier Payments, Security Deposits, Write-Off Payments, Pre-Payments, Purchases, Payment Arrangements, and Deleted Payments. The main area is titled 'New Payments' and contains a 'Previous Balance' field, a 'Net Type' dropdown menu (highlighted with a red box and showing a list of services including 'All'), and various input fields for 'Network #', 'Acct #', 'Last Name', 'Full Name', 'Payment Date' (4/10/2020), 'Batch' (04102), 'Method' (Credit Card), and 'Number'. At the bottom, there are fields for 'Amount Due', 'Unapplied Pre-Pymts', 'Pending Payments', 'Current Balance Due', and 'Payment Amount'.

After setting your Batch name select the applicable Network Type, or All. If you are posting by Account number, you can leave the default to All.

Payment Entry

Account: 456
LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

Alerts: Tier
Payment Arrangement - History Account

Previous Balance: \$225.88

Network #: Net Type:

Acct #: 456

Last Name:

Full Name:

Method: Credit Card Number:

Tokens:

Amount Due: \$340.09

Unapplied Pre-Pymts: \$0.00

Pending Payments: \$0.00

Current Balance Due: \$340.09

Net OCCs: \$0.00

Payment Amount: \$340.09

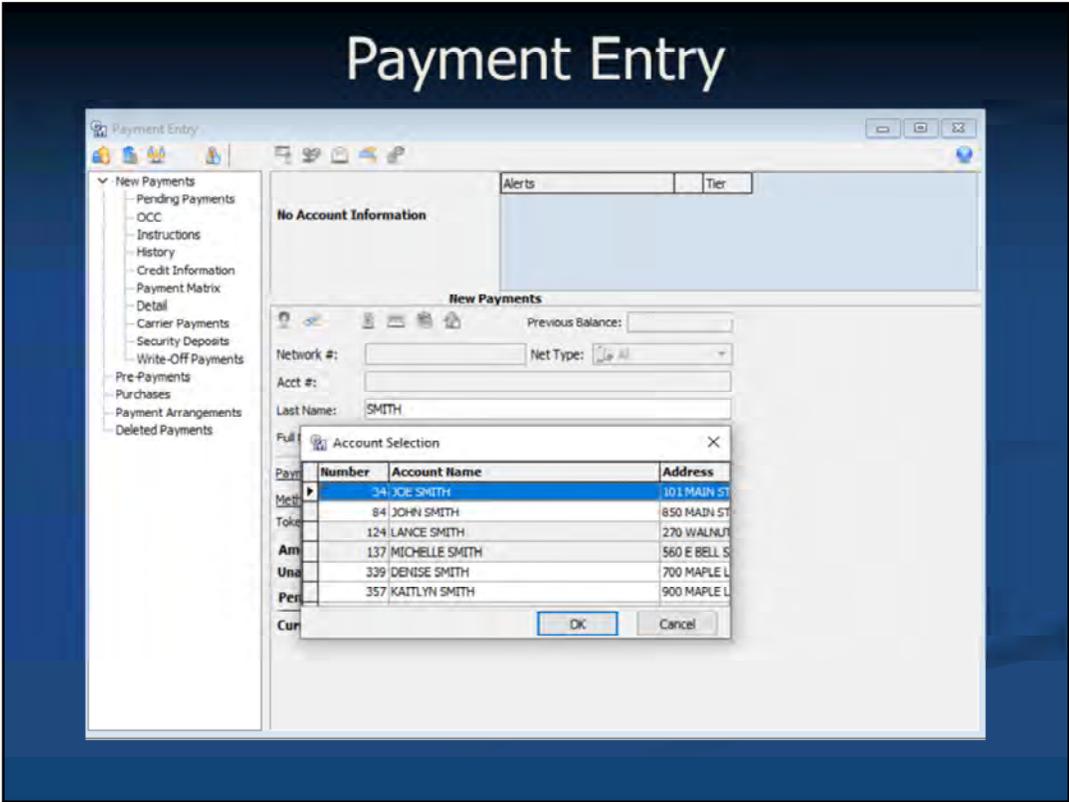
Enter Payment (No Rcpt)

If you do not know the account number, you can type in the Last Name, Full Name, or the Phone # (if you are on the Telephone network) of the account to which you would like to make the payment.

For business accounts, without the account number available, you will need to search using the Full Name field.

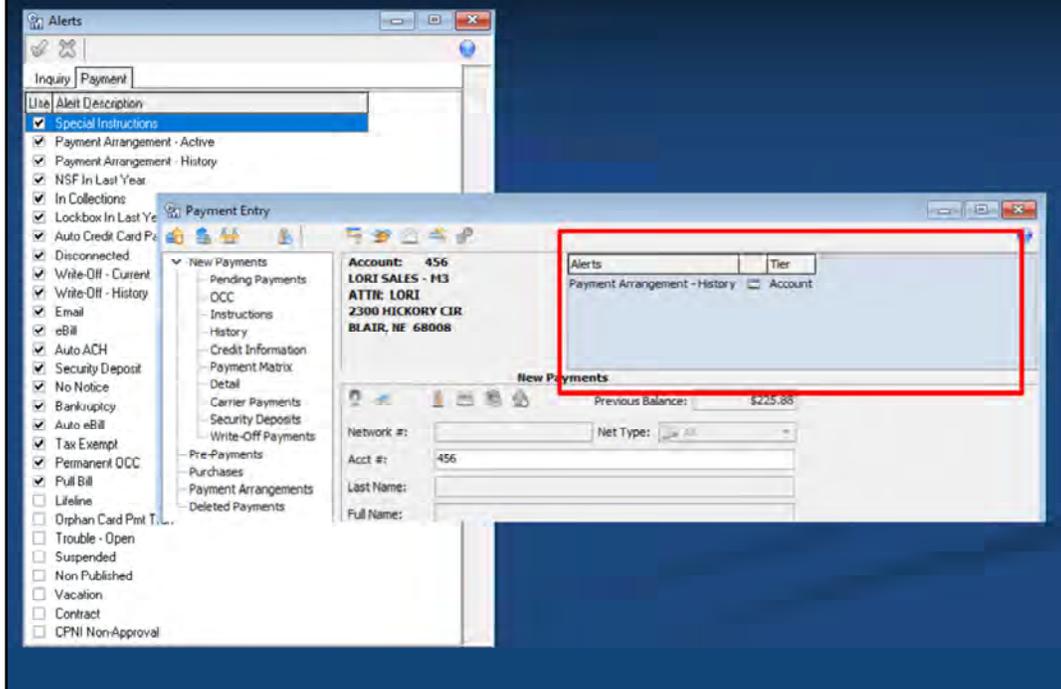
Use of a payment scanner is also an option.

Payment Entry



If you have more than one account with the same last name, an Account Selection dialogue box will appear and you can select the correct account.

Payment Entry



When an account has been retrieved, you will need to remember to review the Payment Alerts. The Payment Alerts notification flags are located under Maintenance – Common – Alerts. This allows you to select the Payment Alerts based on your companies needs or preferences. The selected Payment Alerts will be displayed through Payment Entry if applicable to the chosen account.

Payment Entry

The screenshot displays the 'Payment Entry' window. At the top, the account information is shown: Account: 456, LORI SALES - M3, ATTN: LORI, 2300 HICKORY CIR, BLAIR, NE 68008. The 'New Payments' section is active, showing a 'Previous Balance' of \$225.88. The 'Method' dropdown menu is open, listing various payment options: Check (highlighted), Cash, Credit Card, Money Order, Lockbox Check, Lockbox Cash, Bank Collect, Other, Sys Credit Pmt, ePay, and Third Party. A red box highlights the 'Method' dropdown, and a red arrow points to the 'Check' option.

Amount Due:	\$340.09
Unapplied Pre-Pymts:	\$0.00
Pending Payments:	\$0.00
Current Balance Due:	\$340.09

Net OCCs:	\$0.00
Payment Amount:	340.09

Select the Method of payment. The options are seen here.

The system will automatically continue to post to the most recently used method, so it may be easiest to post all checks together, then all cash, etc. Reporting will allow you to balance by method, if you need to.

Payment Entry

New Payments

Previous Balance: \$113.28

Network #: Net Type:

Acct #:

Last Name:

Full Name:

Payment Date: Batch:

Method: Number:

Token:

Net OCCs:

Amount Due:	\$172.01
Unapplied Pre-Pymts:	\$0.00
Pending Payments:	\$0.00
Current Balance Due:	\$172.01

Payment Amount:

Amount Due:	\$172.01
Unapplied Pre-Pymts:	\$0.00
Pending Payments:	\$172.01
Current Balance Due:	\$0.00

Once you have an account, check the payment amount. If it's a full payment, all you have to do is click on the Enter Payment button. You can choose to print a receipt at that point as well.

Once you hit Enter Payment, you'll see the amount in the Pending Payments field. The Current Balance Due amount will be decreased accordingly.

Additionally, once Enter Payment is selected, your cursor will go back to the field you used to search on the previous account.

Payment Entry

The screenshot shows the 'New Payments' window with the following fields and values:

- Previous Balance: \$976.88
- Net Type: All
- Last Name: Lemon
- Payment Date: 4/15/2020
- Batch: 041520LL
- Method: Check
- Amount Due: \$1,642.41
- Unapplied Pre-Pymts: \$0.00
- Pending Payments: \$0.00
- Current Balance Due: \$1,642.41
- Net OCCs: \$29.57
- Payment Amount: 500.00
- Enter Payment (No Rcpt) dropdown menu

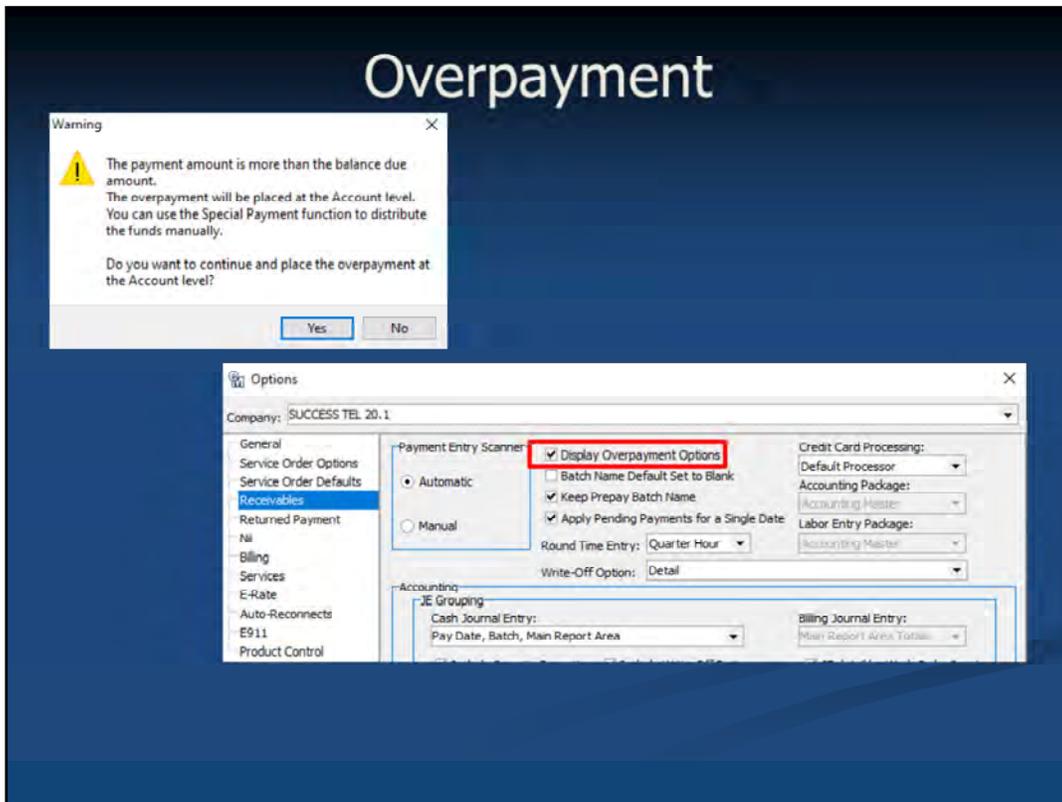
A red box highlights the 'Amount Due', 'Unapplied Pre-Pymts', 'Pending Payments', 'Current Balance Due', 'Net OCCs', and 'Payment Amount' fields.

Field	Value
Amount Due:	\$1,642.41
Unapplied Pre-Pymts:	\$0.00
Pending Payments:	\$0.00
Current Balance Due:	\$1,642.41
Net OCCs:	\$29.57
Payment Amount:	500.00

Field	Value
Amount Due:	\$1,642.41
Unapplied Pre-Pymts:	\$0.00
Pending Payments:	\$500.00
Current Balance Due:	\$1,142.41

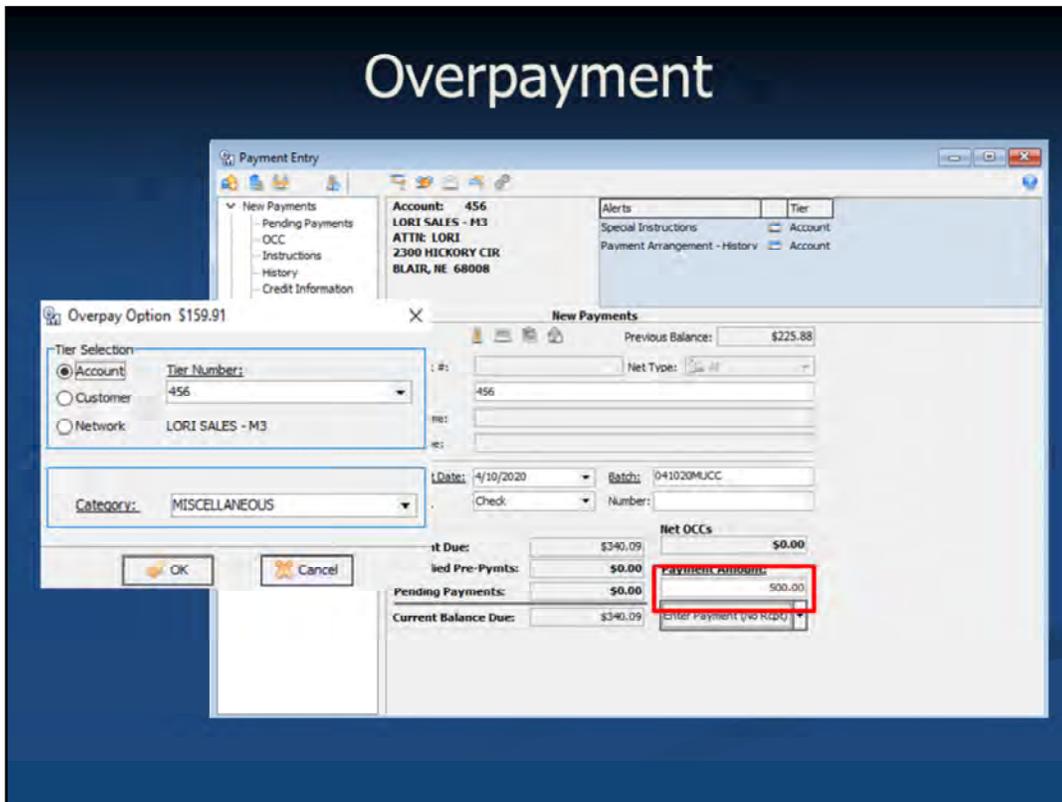
To make a Partial Payment, enter the Account information. When the account is retrieved, simply type over the pre-set full payment amount with the partial payment amount. Then select Enter Payment, or simply press the Enter key.

The Amount due will still show the full balance, but the Current Balance Due will show what's left after the payment's been entered. The new Payment Amount will populate with the remaining balance (Current Balance Due).



If the customer's payment exceeds the balance due, the Warning prompt seen here will be triggered. There is the Overpay Option which allows the Overpayment to be placed at the selected Tier level and Category or you can use the Special Payment function to distribute the funds manually.

Overpayment



When an overpayment is entered on an account, you will receive the Overpay Option window. The payment will automatically default to the Account tier and the Miscellaneous category, however you can select a different Tier and Category to apply the overpayment to. After making the selection in the Overpay Option click OK. After OK has been selected, the Pending Payments field will reflect the Payment that was just posted and the Current Balance Due field will be updated to a credit amount.

Special Payments

The screenshot shows a 'Special Payment' window with the following fields:

- Payment Date: 4/1/2020
- Batch: 040120MU
- Method: Check
- Number: (empty)
- Token: (empty)
- Total Payment: 300.00

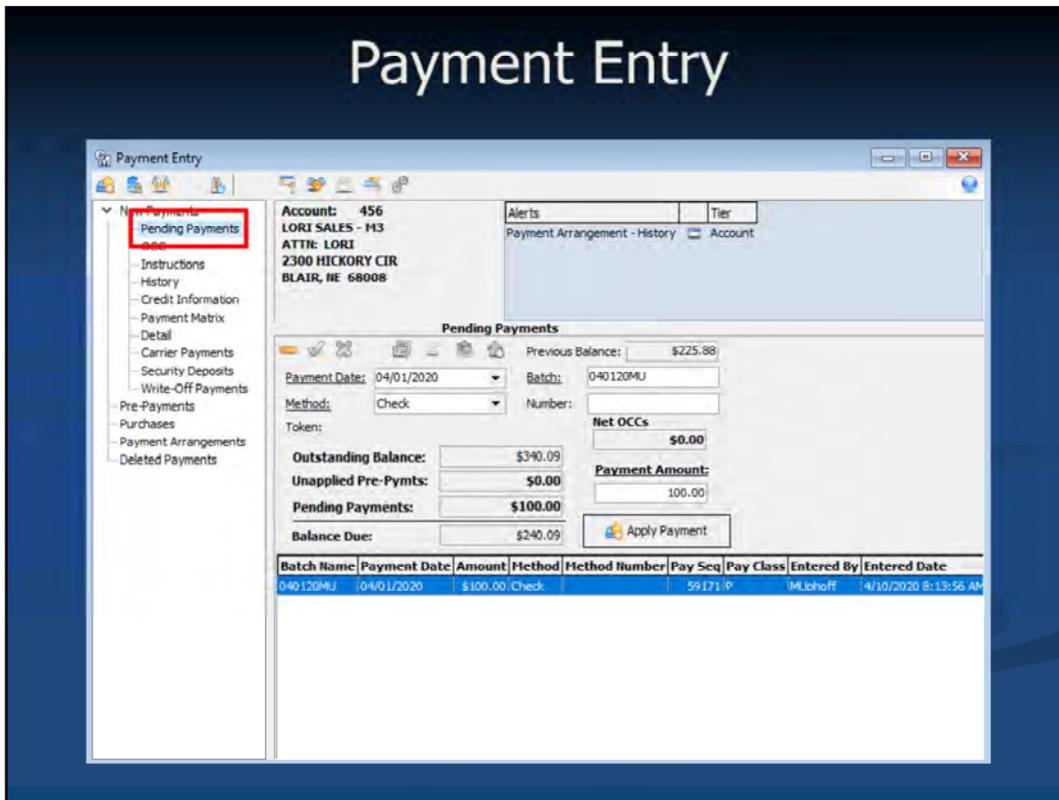
The table below shows the breakdown of charges:

Description	Outstanding Bal	Pending Pymts	Payment Amt.
03/01/2020	\$114.21	\$0.00	
LORI SALES			
(319) 555-1060			
BASIC	\$3.33	\$0.00	\$5.00
NON-BASIC	\$4.83	\$0.00	\$6.00
TOLL	\$6.10	\$0.00	
09002 - MACC	\$6.10	\$0.00	\$8.00
NON-BASIC/NON-REG	\$50.00	\$0.00	\$61.00
E911	\$0.62	\$0.00	\$3.00
ACCESS	\$6.50	\$0.00	\$10.00
3195551060			
VIDEO	\$29.91	\$0.00	\$100.00
(319) 555-0118			
Sub Total:			\$300.00

A Customer may indicate they would like their payment applied to some specific charges (Internet, Basic Telephone Service, Toll, etc.). The payment can be entered as a Special Payment. Enter amounts for each category.

The Total Payment amount and the Sub Total from the amounts entered much match.

Payment Entry



There are additional screens associated with Payment entry to provide you with more detail regarding receivables. Just click on the node in the tree view to view these details.

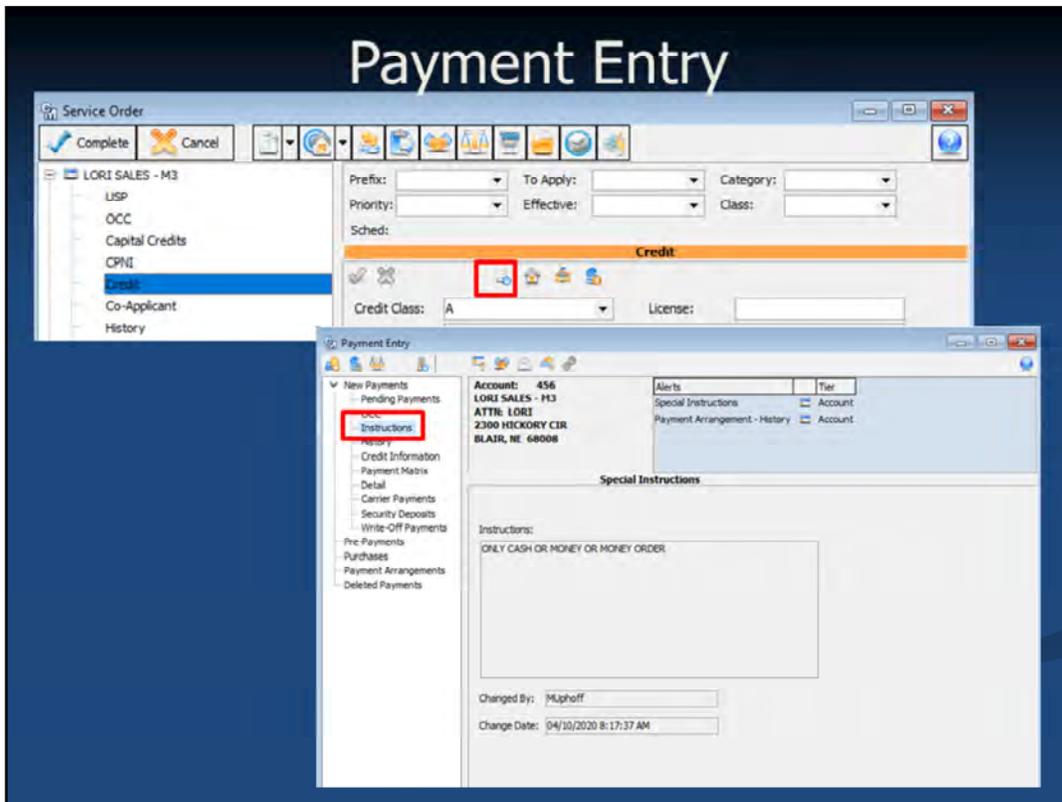
Information on any pending payments will appear when this option is selected. Pending payments are those which have been entered but not applied through the batch process. To print a receipt for a pending payment, click the report icon. To edit a Pending Payment, make the change/s in the available field/s. To cancel a Pending Payment, click on the Delete icon.

Payment Entry

The screenshot shows the 'Payment Entry' window. On the left is a navigation tree with 'OCC' highlighted. The main area displays account information for 'Account: 456' and 'LORI SALES - M3'. Below this is a section titled 'Account OCCs' with a form for 'Description: LATE PENALTY' and fields for 'OCC Date', 'Amount', 'Quantity', 'Tax Amount', 'Last Billed', 'Status', and 'Start Bill Date'. At the bottom is a table listing various OCCs with their respective dates, amounts, tax amounts, services, last billed dates, statuses, quantities, descriptions, and sources.

OCC Date	Amount	Tax Amount	Service	Last Billed	Status	Quantity	Description	Sourc
03/03/2020	\$5.00	\$1.01	OLATE		Canceled	1	LATE PENALTY	DL
03/01/2020	\$0.45	\$0.00	NEUSF	03/01/2020	Applied	1	MACC - NEBRASKA UNIVERSAL SERVICE FUND	SY
03/01/2020	\$0.45	\$0.00	NEUSF	03/01/2020	Applied	1	MACC - NEBRASKA UNIVERSAL SERVICE FUND	SY
03/01/2020	\$1.38	\$0.00	FUSF	03/01/2020	Applied	1	MACC - FEDERAL UNIVERSAL SERVICE FUND	SY
03/01/2020	\$1.38	\$0.00	FUSF	03/01/2020	Applied	1	MACC - FEDERAL UNIVERSAL SERVICE FUND	SY
02/25/2020	\$2.00	\$0.40	OLATE	03/01/2020	Applied	1	LATE PENALTY	DL
02/25/2020	\$2.00	\$0.40	OLATE		Canceled	1	LATE PENALTY	DL
02/24/2020	\$2.00	\$0.40	OLATE		Canceled	1	LATE PENALTY	DL
02/01/2020	\$0.45	\$0.00	NEUSF	02/01/2020	Applied	1	MACC - NEBRASKA UNIVERSAL SERVICE FUND	SY
02/01/2020	\$0.45	\$0.00	NEUSF	02/01/2020	Applied	1	MACC - NEBRASKA UNIVERSAL SERVICE FUND	SY
02/01/2020	\$1.38	\$0.00	FUSF	02/01/2020	Applied	1	MACC - FEDERAL UNIVERSAL SERVICE FUND	SY

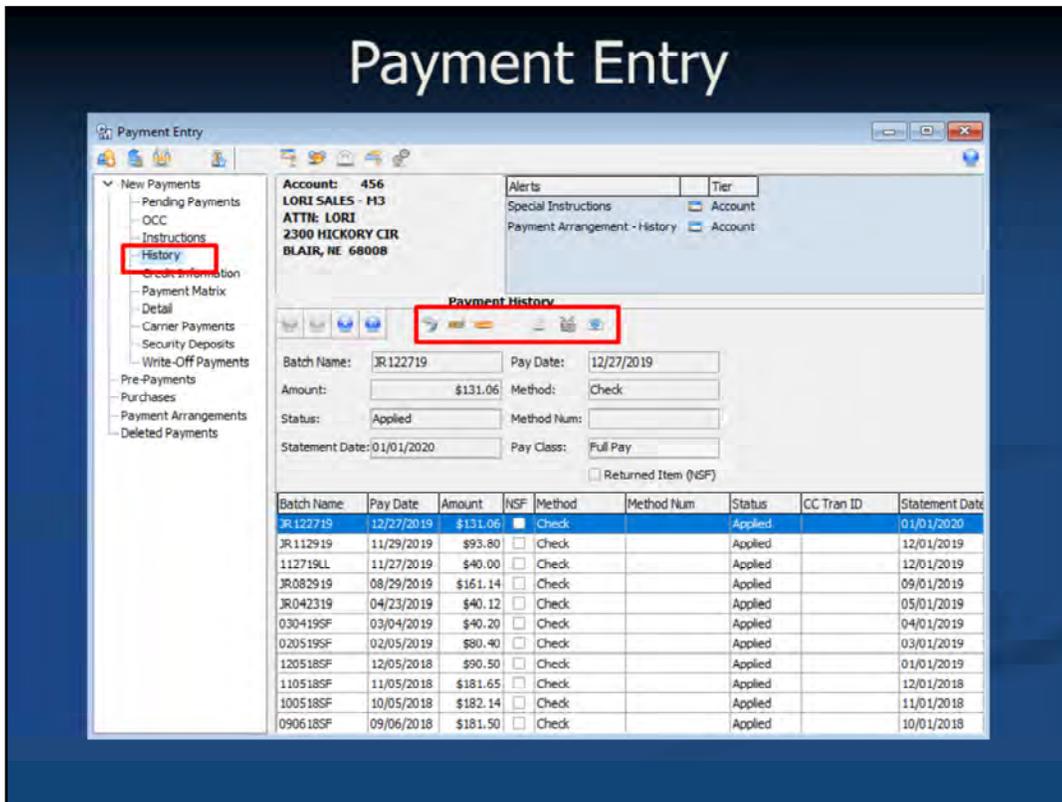
The OCC screen displays OCCs that have been applied to the account. Click on the OCC in the grid to see additional details.



Special Instructions for the account selected can be viewed here.

Instructions are put on the account via Service Order at the account tier, on the credit screen. Instructions will result in an alert on the Payment Entry screen if selected through the Alerts maintenance table.

Payment Entry



From the Payment History screen, you'll see all applied payments. Here, you can Reverse a payment as long as it has not been through billing, flag a payment as NSF, or Delete a reversed payment. You will also have the ability to print a payment receipt. The Point of Sale icon allows you to enter a payment through the Accounting Master cash drawer. You will need to be interfaced with Accounting Master to process POS payments. The Send Payment Notification Email icon allows you to email a receipt of the payment.

Payment History also allows you to view additional details regarding payments by moving the scroll bar to the right. Additional details include Entered By/Date, Applied By/Date, CDS Global credit card information and Accounting Master POS Payments. The windows also allow you to utilize the filter and sort capabilities. This can be very helpful when troubleshooting payment history.

NSF payments will be discussed later in this chapter.

Payment Entry

The screenshot displays the 'Payment Entry' application window. On the left is a navigation tree with 'Credit Information' highlighted. The main area shows account details for 'LORI SALES - M3' and a 'Credit Information' section with fields for Bank, eBill, and Credit Card information.

Account: 456
LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

Alerts | **Tier**
Special Instructions | Account
Payment Arrangement - History | Account

Credit Information

In Collections

Bank Information ACH Auto Pay

Bank ABA Number:

Account Number:

Effective Date: Ending Date:

eBill Information eBill Auto Pay

Effective Date: Ending Date:

Credit Card Information

Effective Date: Automated Credit Card Payment on Bill

Ending Date:

Card Type:

Token:

Last Four: Exp. Date:

Card Holder:

Manufacturer:

The Credit Information displays ACH and/or credit card information saved to this account and is view only. Information may be added via Service Order at the Credit – Bank Information screen. Note: For security purposes only the last 4 digits of the credit card number are displayed.

Payment Entry

The screenshot shows the 'Payment Entry' window. On the left is a navigation tree with 'Payment Matrix' highlighted. The main area displays account information for 'LORI SALES - M3' and a 'Payment Matrix' table. The table has columns for Priority, Age, Category, Category Desc, Spec Handle, Received w/in Days, Include in Spec Hndl, and Chz.

Account: 456
 LORI SALES - M3
 ATTN: LORI
 2300 HICKORY CIR
 BLAIR, NE 68008

Alerts: Tier
 Special Instructions: Account
 Payment Arrangement - History: Account

Payment Matrix

Priority Age: AP Priority: 1
 Use Special Handling: Received Within: Days
 Category: BASIC
 Include in partial payment special handling:

Priority	Age	Category	Category Desc	Spec Handle	Received w/in Days	Include in Spec Hndl	Chz
AP	1	1	BASIC	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	SFPr
AP	1	2	NON-BASIC	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	1	5	BASIC/NON-REG	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	1	7	E911	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	1	8	ACCESS	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	2	6	NON-BASIC/NON-REG	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	2	13	CIC OVERRIDE BASIC	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	3	3	TOLL	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	3	9	TOLL USP BASIC	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	3	10	TOLL USP BAS/NONREG	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	3	11	TOLL USP NON-BASIC	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	3	12	TOLL USP NBAS/NONREG	<input type="checkbox"/>		<input type="checkbox"/>	SFPr
AP	3	14	CIC OVERRIDE NON-BAS	<input type="checkbox"/>		<input type="checkbox"/>	SFPr

The Payment Matrix screen is view only.

Payment Entry

The screenshot shows the 'Payment Entry' window. On the left is a navigation tree with 'Detail' highlighted. The main area displays account information for 'LORI SALES - M3' and a 'Payment Detail' section with input fields for Category, Amount, Balance Date, Batch Name, and Pay Class. Below this is a table of payment entries.

Category	Balance Date	Amount	Batch Name	Applied Date	Applied By	Pay Seq	HSF	Status
BASIC	01/01/2020	\$3.33	040120MU			59171		Pending
BASIC	01/01/2020	\$3.42	040120MU			59171		Pending
NON-BASIC	01/01/2020	\$4.79	040120MU			59171		Pending
TOLL	01/01/2020	\$6.08	040120MU			59171		Pending
NON-BASIC/NON-REG	01/01/2020	\$50.00	040120MU			59171		Pending
E911	01/01/2020	\$0.61	040120MU			59171		Pending
E911	01/01/2020	\$0.59	040120MU			59171		Pending
ACCESS	01/01/2020	\$6.50	040120MU			59171		Pending
ACCESS	01/01/2020	\$6.50	040120MU			59171		Pending
VIDEO	01/01/2020	\$16.84	040120MU			59171		Pending
MISCELLANEOUS	01/01/2020	\$1.34	040120MU			59171		Pending
BASIC	12/01/2019	\$3.70	JR122719	12/27/2019 3:50:52 PM	JRiecken	58736		Applied

The Detail screen will show the charges broken down into specific categories, such as basic and non-basic. It is for information only. The Detail window allows you to utilize the filter and sort capabilities. This can be very helpful when troubleshooting payment details.

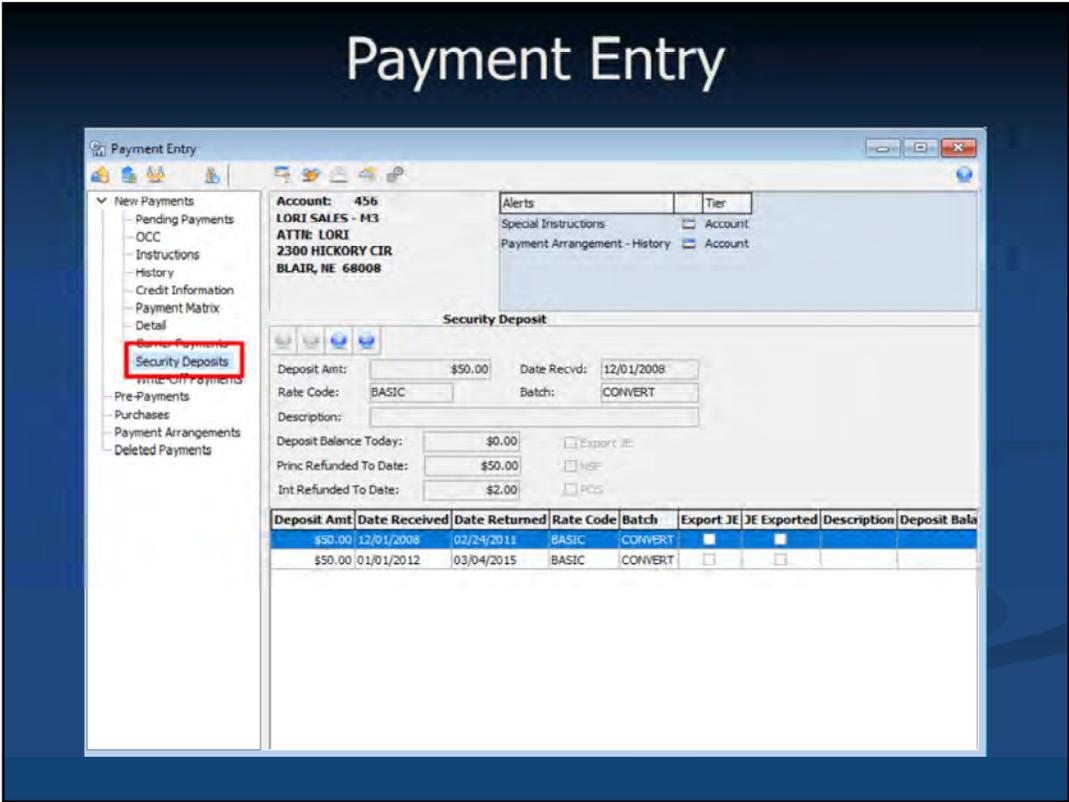
Payment Entry

The screenshot displays the 'Payment Entry' application window. On the left is a navigation tree with 'Carrier Payments' highlighted. The main area shows account information for 'LORI SALES - M3' and a table of 'Carrier Payments' for the 'TOLL' category. The table includes columns for Category, CIC, Pay Seq, Amount, Balance Date, Date Paid, Carrier Name, Batch Name, NSF, Status, and Prepay Batc.

Category	CIC	Pay Seq	Amount	Balance Date	Date Paid	Carrier Name	Batch Name	NSF	Status	Prepay Batc
TOLL	09002	59171	\$5.08	01/01/2020	04/01/2020	MACC	040120RJ	<input checked="" type="checkbox"/>	Pending	
TOLL	09002	58736	\$0.64	12/01/2019	12/27/2019	MACC	JR122719	<input type="checkbox"/>	Applied	
TOLL	09002	55114	\$0.29	12/01/2018	12/05/2018	MACC	120518SF	<input type="checkbox"/>	Applied	
TOLL	09002	53884	\$0.49	10/01/2018	10/05/2018	MACC	100518SF	<input type="checkbox"/>	Applied	
TOLL	09002	51518	\$0.56	06/01/2018	06/05/2018	MACC	060518SF	<input type="checkbox"/>	Applied	
TOLL	09002	49710	\$1.10	03/01/2018	03/05/2018	MACC	030518SF	<input type="checkbox"/>	Applied	
TOLL	09002	49116	\$0.88	02/01/2018	02/05/2018	MACC	020518SF	<input type="checkbox"/>	Applied	
TOLL	09002	47986	\$0.26	12/01/2017	12/05/2017	MACC	120517SF	<input type="checkbox"/>	Applied	
TOLL	09002	44990	\$0.14	07/01/2017	07/07/2017	MACC	070717SF	<input type="checkbox"/>	Applied	
TOLL	09002	37269	\$0.44	07/01/2016	07/07/2016	MACC	070716SF	<input type="checkbox"/>	Applied	
TOLL	09002	36635	\$0.63	05/01/2016	05/06/2016	MACC	050616SF	<input type="checkbox"/>	Applied	
TOLL	09002	36171	\$0.93	04/01/2016	05/02/2016	MACC	JR050216	<input type="checkbox"/>	Applied	
TOLL	09002	34911	\$0.59	02/01/2016	02/04/2016	MACC	020416SF	<input type="checkbox"/>	Applied	
TOLL	09002	34213	\$0.29	01/01/2016	01/05/2016	MACC	010516SF	<input type="checkbox"/>	Applied	

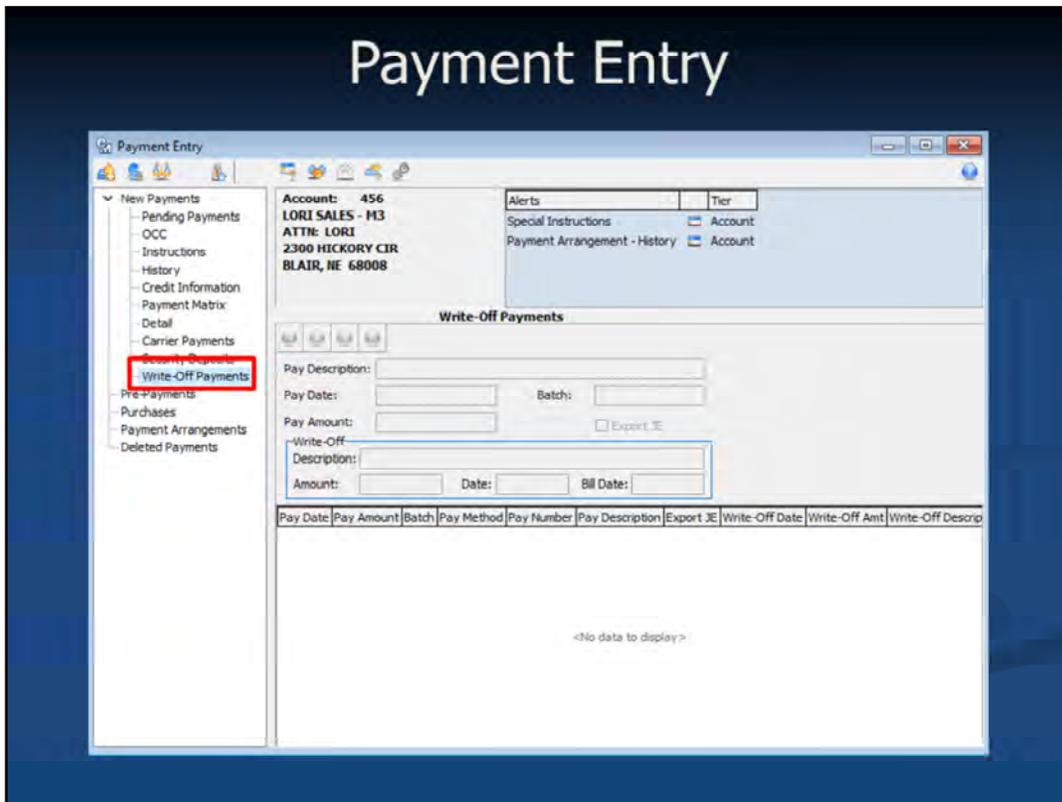
The Carrier screen shows all of the payment portions applied toward toll. You can also see the associated CIC Code, Amount, Balance and Date Paid.

Payment Entry



Security Deposit information includes the Rate Code, Deposit Amount, Date Received, and Description. It is informational only.

Payment Entry



All payments applied to Write-Off balances can be seen on the Write-Off Payments screen. This is view only. Actual Write-Off payments are made on the Write-Off screen of the account.

Note: when you retrieve an account in Payment Entry that has a write-off balance, you'll get a warning prompt indicating so and allowing for direct access to the Write-Off screen.

Payment Entry

The screenshot displays the 'Payment Entry' application window. On the left is a navigation tree with 'Pre-Payments' highlighted. The main area shows account details for 'LORI SALES - M3' and a 'Pre-Payments' form. The form includes fields for Amount, Category, Pay Date (4/10/2020), Batch (040120MU), Method (Credit Card), and a checked 'Matrix' checkbox. Below the form is a table with columns: Batch Name, Amount, Pay Date, Category, CIC, Cancel Date, and Description. The table is currently empty, showing '<No data to display>'. Red boxes highlight the 'Pre-Payments' menu item and the 'Matrix' checkbox.

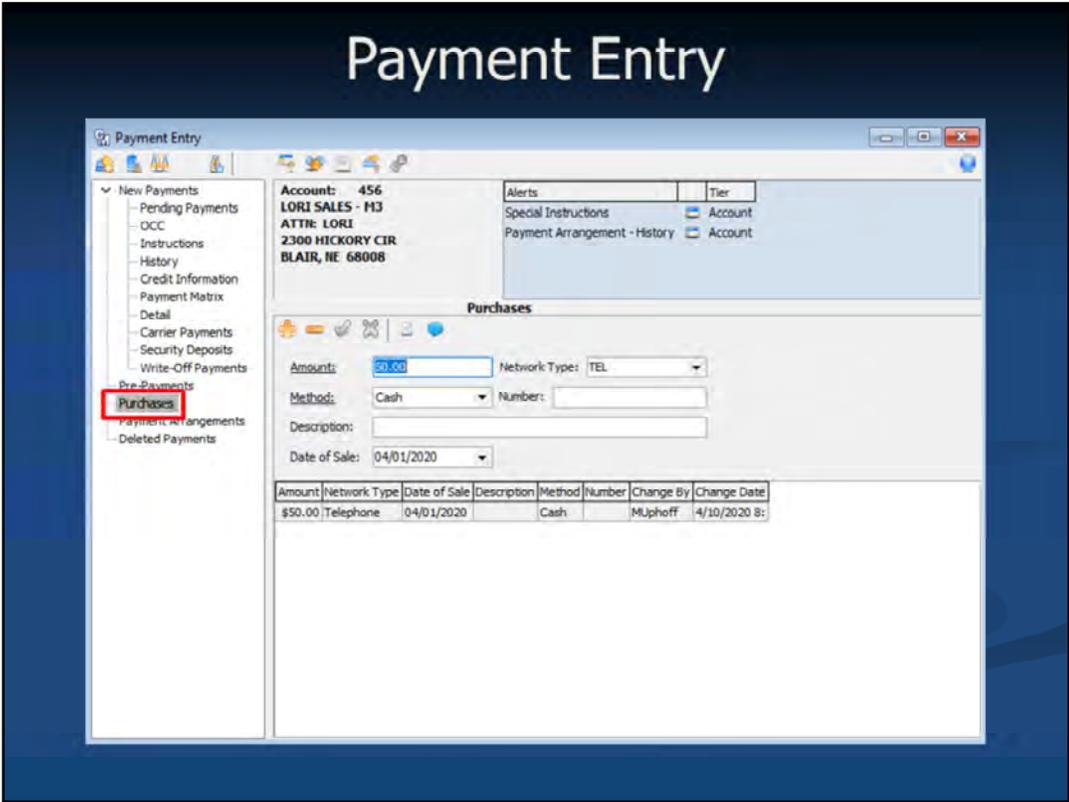
Pre-Payments can be entered at this screen. Pre-payments are made to accounts that do not yet have a balance, such as a new install. Amount, Category, Pay Date, Batch and Method are required fields.

Pre-payment entry is also available through a New Install service order without having to apply the order. This allows the user to accept Pre-Payments during the service order process without having to complete two service orders and enter the Pre-Payment through Payment Entry. The Pre-Payments screen looks exactly like it does through the Payment Entry. Simply enter the appropriate information and post to save the changes. The Pre-Payment will reflect on the customer's bill as payment received.

The Matrix checkbox, when selected, will direct the Pre-Payment to the Payment Matrix in the event there are no charges to pay at the selected Category. If there are charges at the selected category, the full amount of the Pre-Payment will be directed to the selected category. If the Matrix box is not checked, the Pre-Payment will remain unapplied until charges occur at the selected category.

The Matrix indicator is flagged by default.

Payment Entry



Purchases can be tracked at the Purchases screen. This is generally used for small equipment like cell phones, jacks, or other accessories.

Note: This is for informational purposes only and will not affect your A/R balance, the customer's bill, or payment reports. This information does not currently interface with Accounting Master.

Payment Entry

Account: 456
LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

Alerts: Tier
Special Instructions: Account
Payment Arrangement - History: Account

Payment Arrangements

Taken Date: 11/27/2019 Amount: \$46.58
End Date: 11/27/2019 Status: Completed
Bill Date: 09/01/2019 Original Balance: \$46.58
Network Type: All Ending Balance: \$0.00
Use Billing Categories:

Instructions:

Amount	Taken Date	Status	Pmt Arr Ends	Bill Date	Net Use Categor	Original
\$50.00	10/07/2011	Broken	10/07/2011	10/01/2011	<input type="checkbox"/>	
\$50.00	10/27/2011	Completed	10/27/2011	10/01/2011	<input type="checkbox"/>	
\$46.58	11/27/2019	Completed	11/27/2019	09/01/2019	<input type="checkbox"/>	

Payment Arrangements can be viewed and made from this screen. Payment arrangements will result in an alert on the Inquiry screen as well as on the Payment Entry screen if selected in the Alerts maintenance table.

This will allow you to track when the arrangement was Taken, the Arrangement Amount (how much is expected to be paid), and the Pmt Arr Ends date (when the amount is due). When a new arrangement is entered, the Status will default to Active.

If you choose to use the automated functionality, select the Use Payment Arrangement Processing Tool (it may be flagged by default based on Tools – Options). Here, you'll need to indicate a Bill Date which is the Bill Date (from the past) that's scheduled to be paid. Only those Bill Dates that are unpaid will appear in the dropdown. You may also select a Network Type to be paid – which is optional. The Original Balance of the bill may be auto-populated by clicking on the calculator icon. Finally, you'll need to enter an Ending Balance – which is the goal balance to be achieved in order to satisfy the arrangement.

Additionally, you can tie the arrangement to specific Billing Categories, if you so choose.

A Payment Arrangement Agreement may be printed from this screen – which will detail each payment that's scheduled to be paid, as well as customizable verbiage.

Payment Entry

The screenshot displays the 'Payment Entry' window. On the left is a navigation tree with 'Deleted Payments' highlighted in red. The main area shows account information for 'LORI SALES - M3' and a table of deleted payments.

Account: 456
LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

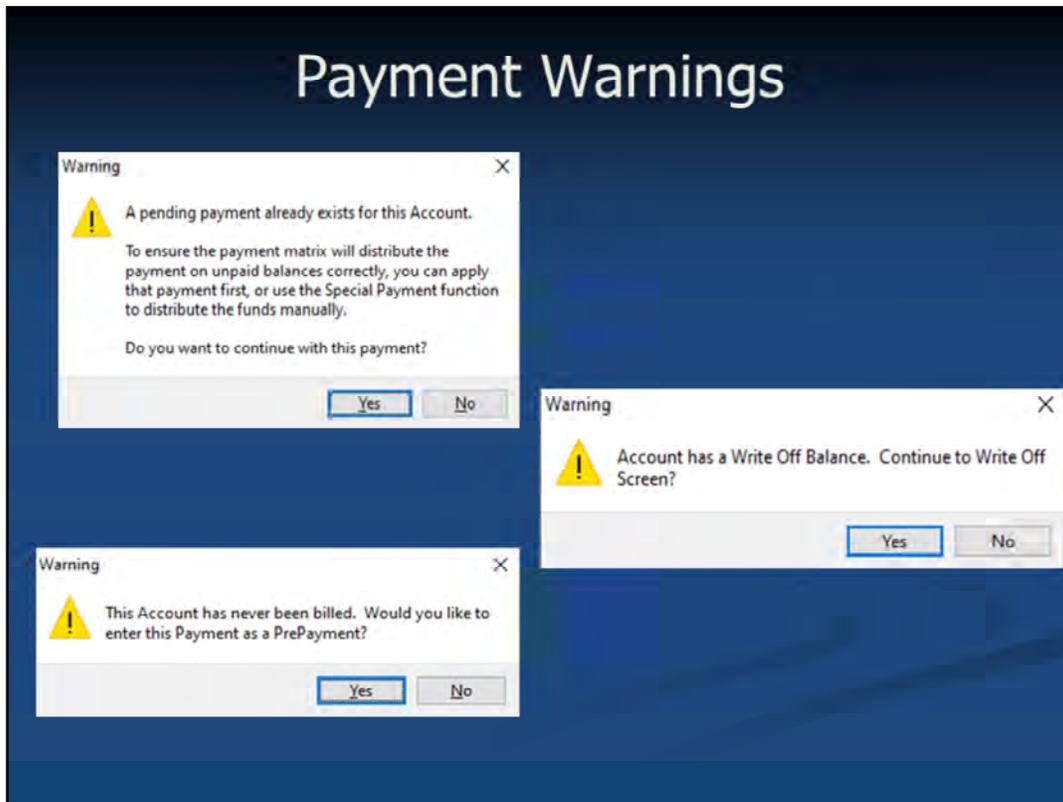
Alerts
Payment Arrangement - History Account

Deleted Payments

Batch Name	Pay Date	Amount	NSF	Method	Method Number	Status	Entered By
mwhite	2/12/2014	243.63	<input type="checkbox"/>	Check		Rev	mwhite
mwhite	2/12/2014	243.63	<input type="checkbox"/>	Check		Pend	mwhite
TCarlson	1/15/2016	112.57	<input type="checkbox"/>	Credit Card	VS 1111 03/2016	Pend	TCarlson
TCarlson	1/15/2016	50.00	<input type="checkbox"/>	Credit Card	VS 1111 04/2016	Pend	TCarlson
TCarlson	1/15/2016	112.57	<input type="checkbox"/>	Credit Card	VS 1111 04/2016	Pend	TCarlson

Deleted Payments will display any payments that were either deleted while in a Pending status, or reverse once the payment was applied. You can also see deleted payments for Write-Offs and Security Deposit Returns (not deposit refunds).

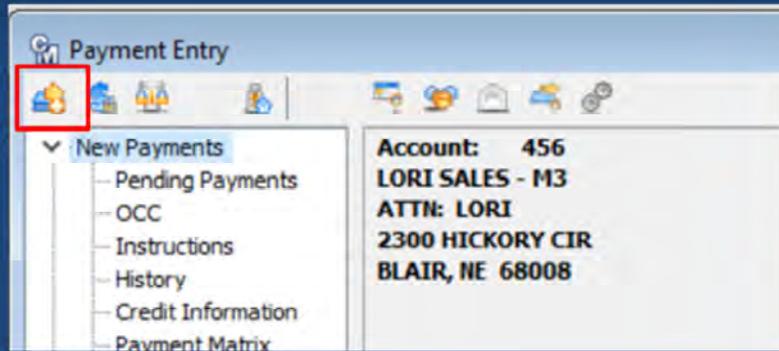
Payment Warnings



Payment warnings may appear based on potential issues with the selected account:

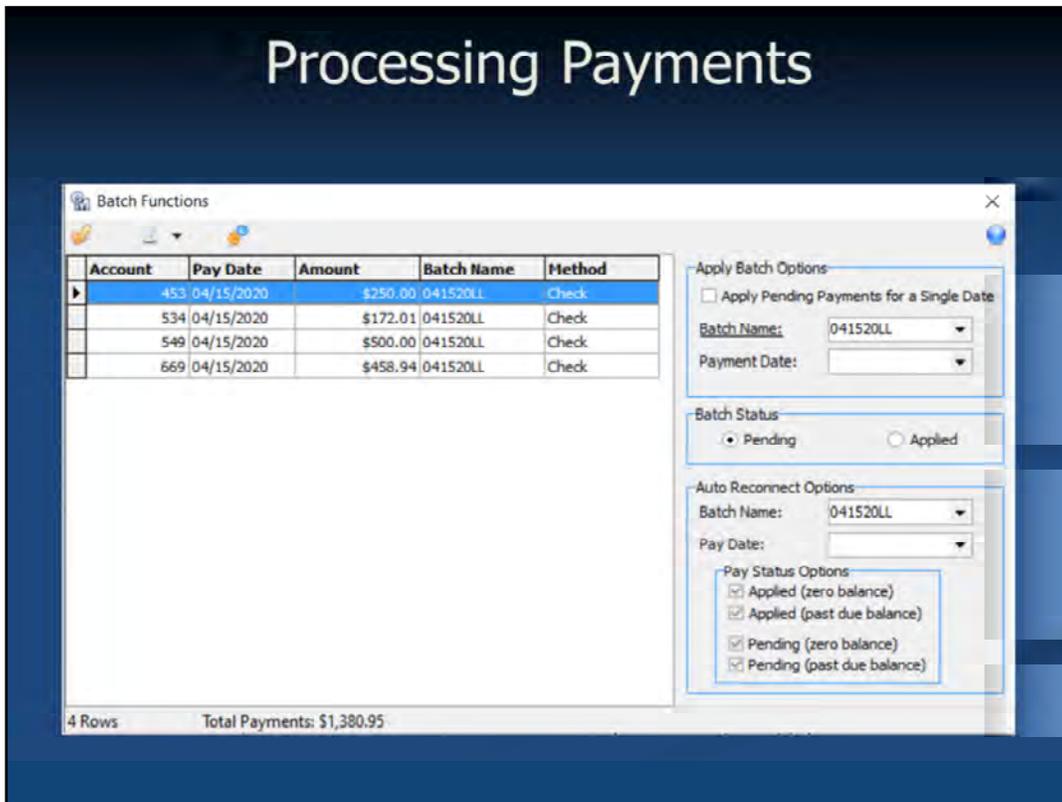
- Pending Payment already exists, with the opportunity to apply that payment and enter another
- Write-Off balance, with the opportunity to continue to the Write-Off screen and enter the payment against the write-off balance
- Pre-Payment option for an account that has yet to be billed

Processing Payments



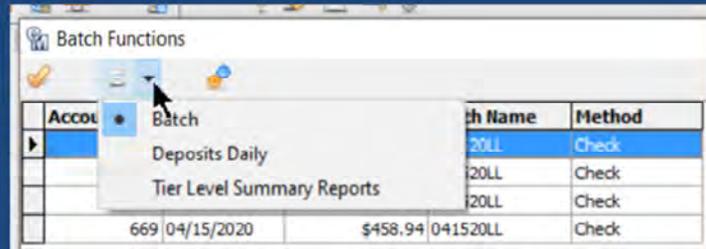
Reviewing and applying the batch can be done through the Batch Review/Apply icon.

Processing Payments



Depending on which Batch Name you select in the drop-down, you can view the total of pending payments in that batch.

Processing Payments



Account	Batch	Batch Name	Method
	Deposits Daily	20LL	Check
	Tier Level Summary Reports	20LL	Check
669	04/15/2020	\$458.94 041520LL	Check

There are several reports available from the Batch Functions screen, including the Batch report. It's a good idea to run this report before actually applying the batch.

Processing Payments

The screenshot shows the 'Batch Report Options' window with the following settings:

- Payment Date Range:** Show All Dates, Begin: [dropdown], End: [dropdown]
- Payment Method:** Cash, Check, Credit Card, Bank Collect, Lock Box, Money Order, Other, System Credit Payment, Third Party, Group Totals
- Sort By:** Order Payments Entered, Payment Date, Payment Amount
- Batch Status Options:** Pending, Applied, Non-Sufficient Funds, Reversed
- POS Payments:** Exclude, Include, Print only POS Payments
- Print Options:** Print Payment Detail Report, Include Pre-Payments, Include Write-Off Payments, Include Security Deposits, All Bill Cycles [dropdown]

Batch	Payment	Prepay	Write Off	Security Deposit
<input type="checkbox"/> 040820MUCC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 040920CC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> 041020MJ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

At the Batch Report Options screen, you can select your applicable print options and then select which batch or batches you want to print.

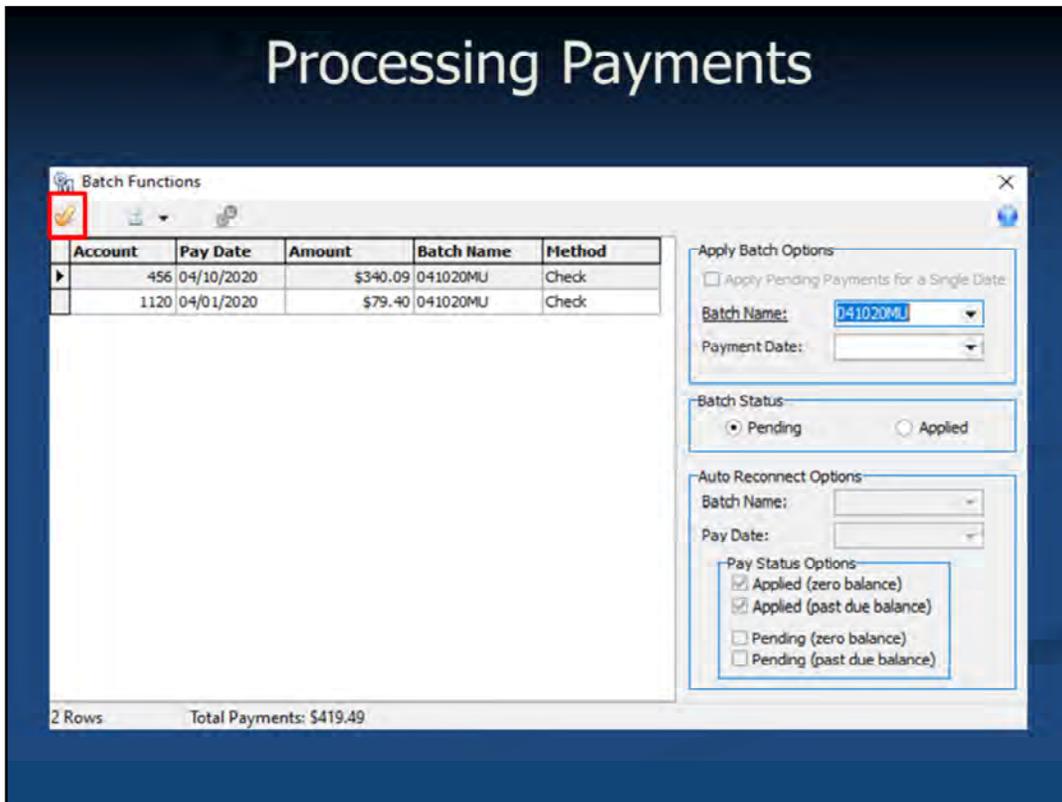
Processing Payments

Account Name	Acct.No	Payment Method	Payment Method Number	Transaction ID	Pay Date	Pay Amount
All Rpt Areas CO # : 470 OCN # : 470a						
Batch Report - Pending All Dates, Sorted by Order Payments Entered, Exclude POS SUCCESS TEL 20.1						
Page 1 of 1 04/10/2020 9:42:11 AM MUphoff						
All Payment Methods Are Included Included. Pre-Payment Deposits						
Batch Name: 041020MU						
SALES, LORI	456	Check			04/10/2020	340.09
PEVENSIE, PETER	1120	Check			04/01/2020	79.40
Batch Payment Count:		2		Batch Total:		419.49
Subtotal Payment Count:		2		Subtotal of Regular Payment Batches:		419.49
Batch Name: 041020MU						
Pre-Payments						
RASSMUSSEN, ROBBIN	1620	Check			04/10/2020	50.00
Batch Pre-Payment Count:		1		Batch Total:		50.00
Subtotal Pre-Payment Count:		1		Subtotal of Pre-Payment Batches:		50.00
Grand Total Payment Count:		2		Grand Total of Payments:		419.49
Grand Total Pre-Payment Count:		1		Grand Total of Pre-Payments:		50.00
Grand Total Count:		3		Report Grand Total:		469.49

If, when you're reviewing the report, you find that corrections need to be made, you will want to return to the Payment Entry screen, find the Account that needs to be corrected, and go to the Pending Payments node to edit the payment. The report may be printed as many times as necessary until the batch is accurate.

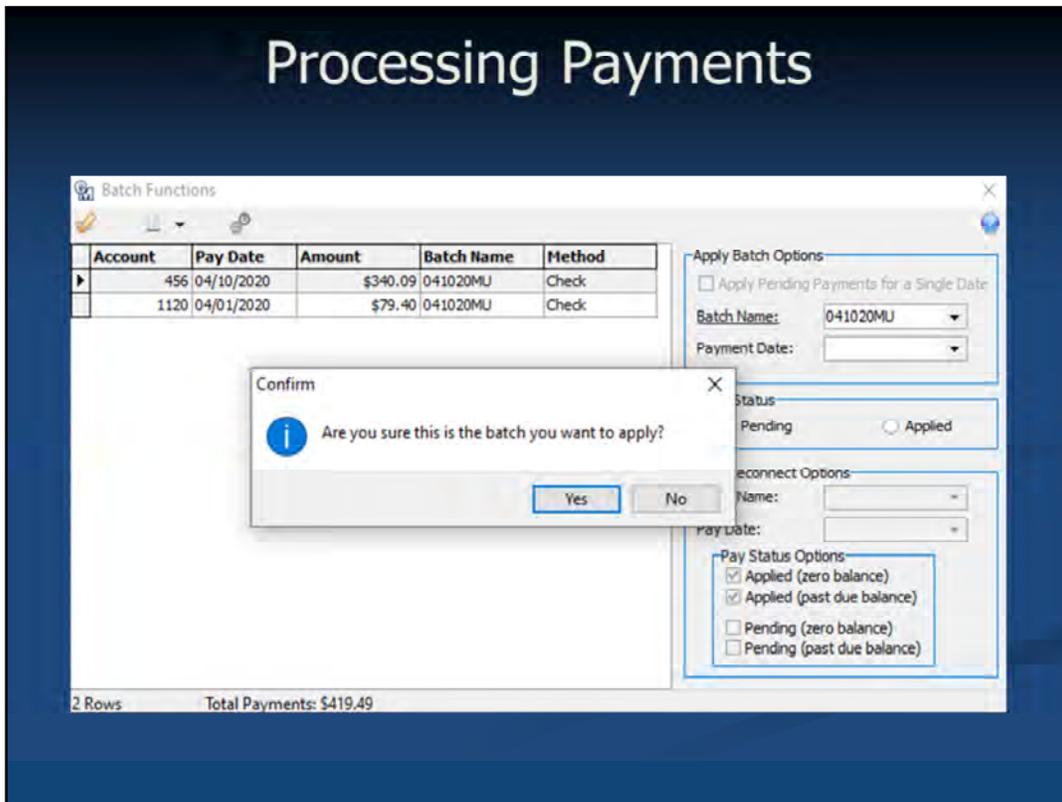
Notice that regular payments are listed first, followed by pre-payments. A grand total of both appears at the end of the report.

Processing Payments



Once you've finished reviewing, you can apply the batch by clicking on the Post icon. Make sure your batch is the one displaying in the Batch Name drop-down.

Processing Payments



The Confirm prompt seen here will display. Choose Yes to apply the batch.

Processing Payments

The screenshot shows the 'Batch Functions' window with the following data:

Account	Pay Date	Amount	Batch name	Method
456	04/10/2020	\$340.09	041020MU	Check
1120	04/01/2020	\$79.40	041020MU	Check

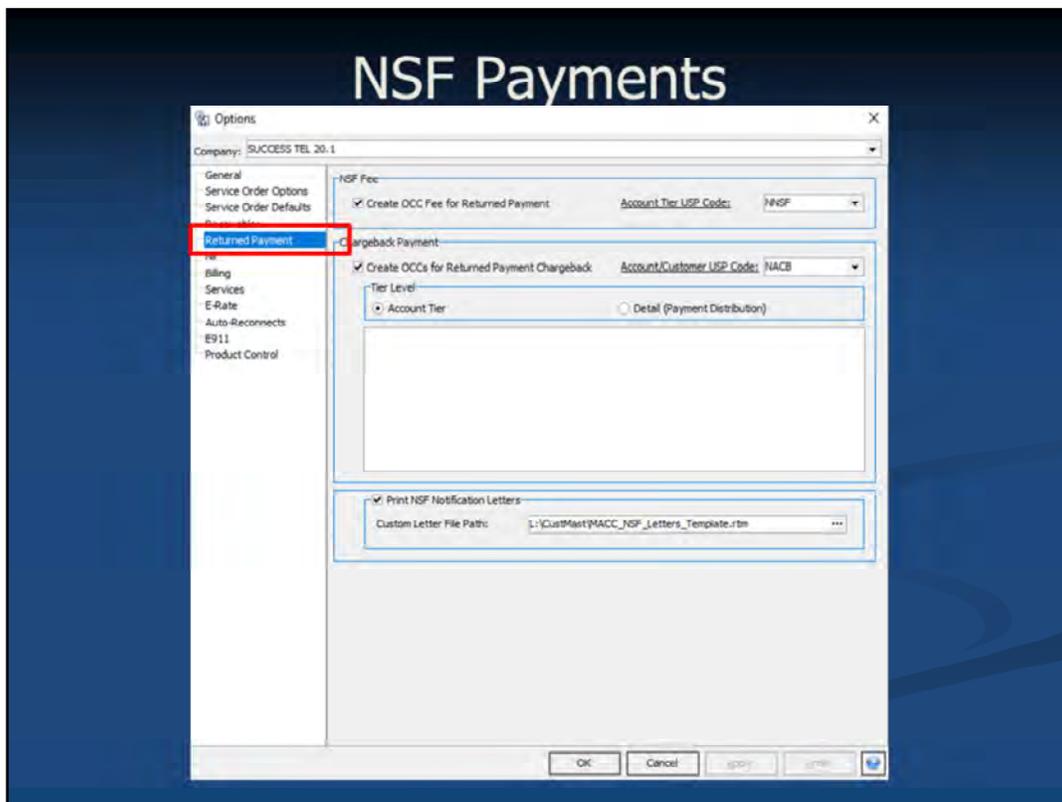
Summary: 2 Rows, Total Payments: \$419.49

Configuration options on the right:

- Apply Batch Options:**
 - Apply Pending Payments for a Single Date
 - Batch Name: 041020MU
 - Payment Date: [dropdown]
- Batch Status:**
 - Pending
 - Applied
- Auto Reconnect Options:**
 - Batch Name: 041020MU
 - Pay Date: [dropdown]
- Pay Status Options:**
 - Applied (zero balance)
 - Applied (past due balance)
 - Pending (zero balance)
 - Pending (past due balance)

Once the batch is applied it will now show up in the Applied Batches list. You also have access to the Batch, Deposits Daily and Tier Level Summary reports.

At this point, you can also auto-reconnect any accounts that have been disconnected for non-pay and meet the established parameters. You can also use this function on pending batches as well as when individual payments are being made.



The Returned Payment functionality, found through Tools – Options – Returned Payment, is used for the automation of NSF Payments. The NSF Fee for the Returned Payment will need a USP code, which will place the OCC at the Account Tier.

For the Returned Payment amount, you can choose to place the returned payment amount on the Account Tier or on the Network Tiers (Detail) from which the charges were generated. If the Tier Level of Detail is selected, you may need additional USP codes.

You can also generate a notification letter. The letter is an option that's triggered once the payment has been flagged as NSF and is custom-designed.

NSF Payments

Account: 456
LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

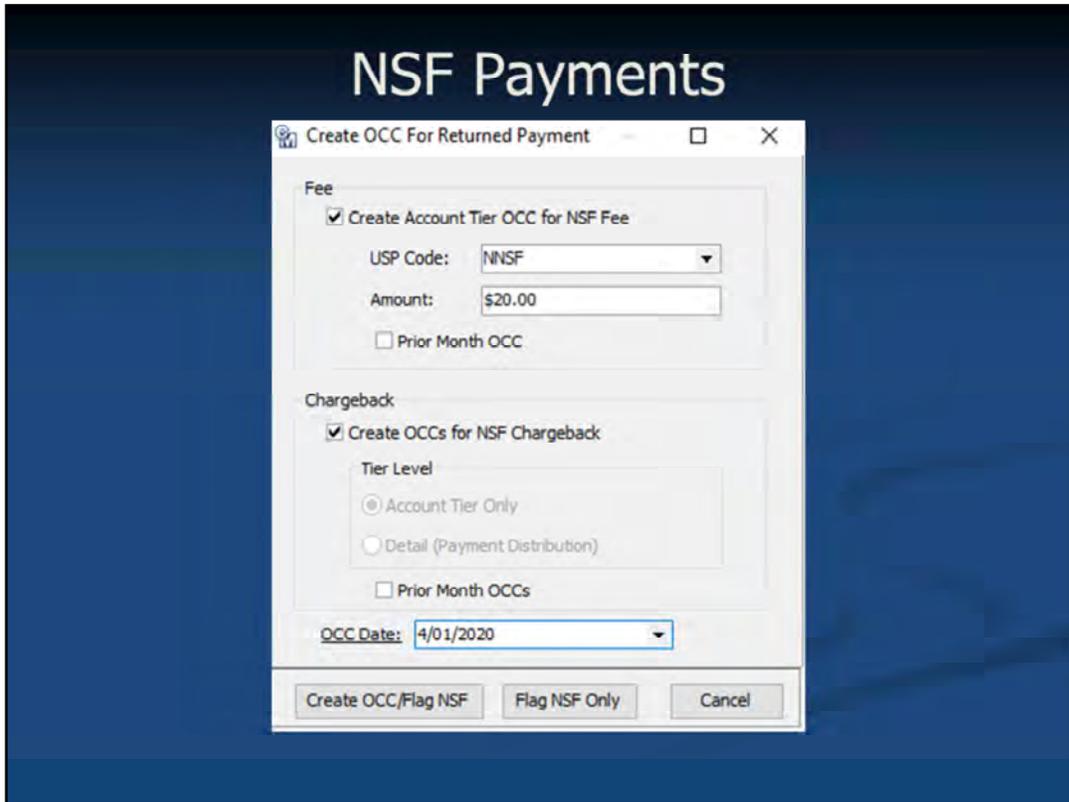
Alerts
Special Instructions Account
Payment Arrangement - History Account

Payment History

Batch Name: JR122719 Pay Date: 12/27/2019
Amount: \$131.06 Method: Check
Status: Applied Method Num:
Statement Date: 01/01/2020 Pay Class: Full Pay
 Returned Item (NSF)

Batch Name	Pay Date	Amount	NSF	Method	Method Num	Status	CC Tran ID	Statement Date	Date
JR122719	12/27/2019	\$131.06	<input type="checkbox"/>	Check		Applied		01/01/2020	0
JR112919	11/29/2019	\$93.80	<input type="checkbox"/>	Check		Applied		12/01/2019	
112719LL	11/27/2019	\$40.00	<input type="checkbox"/>	Check		Applied		12/01/2019	
JR082919	08/29/2019	\$161.14	<input type="checkbox"/>	Check		Applied		09/01/2019	
JR042319	04/23/2019	\$40.12	<input type="checkbox"/>	Check		Applied		05/01/2019	
030419SF	03/04/2019	\$40.20	<input type="checkbox"/>	Check		Applied		04/01/2019	
020519SF	02/05/2019	\$80.40	<input type="checkbox"/>	Check		Applied		03/01/2019	
120518SF	12/05/2018	\$90.50	<input type="checkbox"/>	Check		Applied		01/01/2019	
110518SF	11/05/2018	\$181.65	<input type="checkbox"/>	Check		Applied		12/01/2018	
100518SF	10/05/2018	\$182.14	<input type="checkbox"/>	Check		Applied		11/01/2018	
090618SF	09/06/2018	\$181.50	<input type="checkbox"/>	Check		Applied		10/01/2018	

Flagging a payment as NSF is done through History at Payment Entry.



The Create OCC for Returned Payment screen will automatically open. It's at this point you decide which OCCs you want the system to auto-generate. You can select Create OCC/Flag NSF or Flag NSF Only. You can also choose to charge just the fee or just the chargeback, but the default is both. Additionally, you have the option to create the OCCs as Prior Month OCCs.

NSF Payments

Confirm ✕


 This payment will be marked NSF and OCCs will be created. Once a payment is marked NSF it may not be undone. Proceed?

All Rpt Areas		OCC By Source						Page 1 of 1			
CO # : 470		For Account Number 460, Unbilled OCCs						4/10/2020 9:03:04 AM			
OCN # : 470a		SUCCESS TEL 20.1						Muphoff			
Acct Number	Acct Name	Date	Tax	Extended Description	Taxes					Changed By	
GL Acct	PMDA	Start Bill Date	Amount	Source	Fed	State	Loc1	Loc2	Loc3	Loc4	Changed Date
Status	Perm	End Bill Date	Quantity	Batch Name							
456	LORI SALES - M3	04/01/2020	ACCT-456								
5260.000	N		131.06	Payment NSF							Muphoff
Applied	N		1	AR RefPymt							04/10/2020
				NACB NSF CHARGE BACK - ALL NETWORK							
456	LORI SALES - M3	04/01/2020	ACCT-456								
5260.000	N		20.00	Payment NSF	0.60	1.50	1.00	0.60	0.20	0.10	Muphoff
Applied	N		1	AR NSF Fee							04/10/2020
				NNSF NSF FEE - ALL NETWORKS							
General Ledger Record Total2			Totals:	\$151.06	\$0.60	\$1.50	\$1.00	\$0.60	\$0.20	\$0.10	
Billing GL Override JE: MRA: RA:											
Company Record Total: 2			Totals:	\$151.06	\$0.60	\$1.50	\$1.00	\$0.60	\$0.20	\$0.10	

Once you've made your OCC selection, a confirmation screen will appear. It's important to note that once you flag a payment as NSF, you cannot reverse it, so you want to be sure you're highlighted on the correct check amount before choosing Yes.

Once you've chosen Yes, the OCC By Source report will be displayed, showing all OCCs that were generated, along with a total amount.

NSF Payments

Information

 This payment has been flagged as Non-Sufficient Funds (NSF). The customer notification letter has been set up.

Would you like to:

(Save) - Save for later printing
(Print) - Print now
(Skip) - Do not print

SUCCESS TELEPHONE COMPANY - F
111 ADMIRAL DR STE 2
BLAIR, NE 68008-2522

LORI SALES - M3
ATTN: LORI
2300 HICKORY CIR
BLAIR, NE 68008

Account Number: 456
Main Number: (319)555-1451
Date: Apr 10, 2020

Notification of Returned Payment

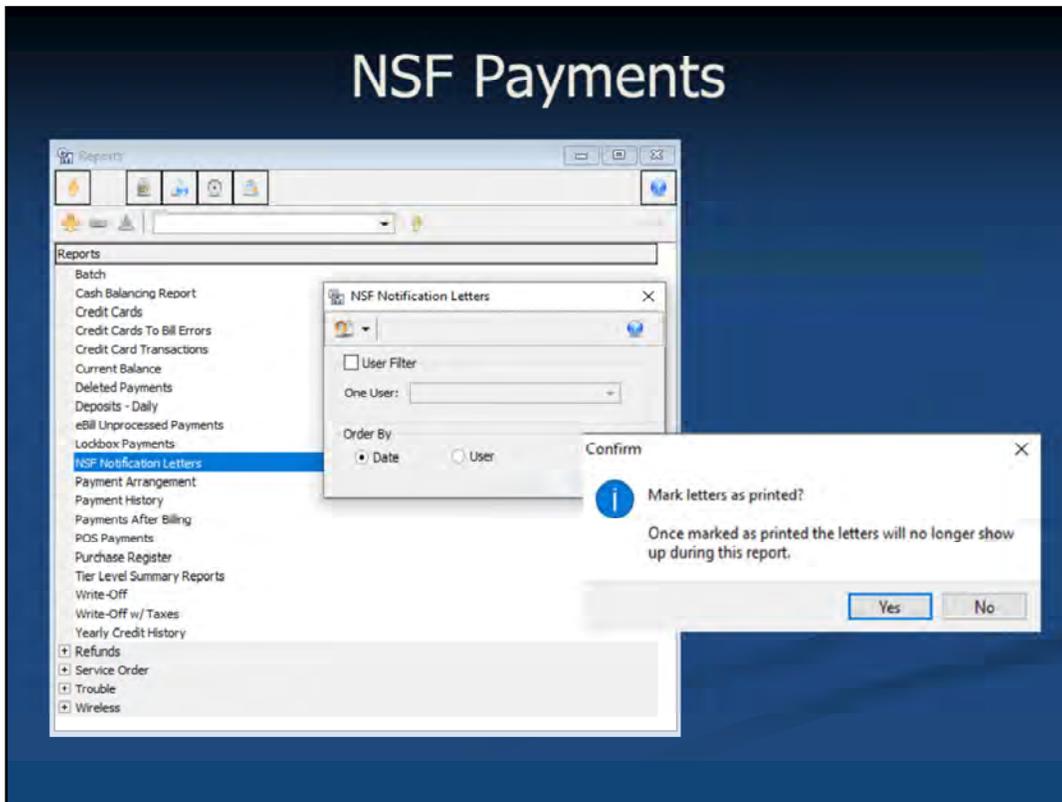
Your payment of \$131.06 posted on December 27, 2019 has been returned for insufficient funds. The following charges have been added to your account for this returned payment:

Insufficient Check Fee	\$20.00
------------------------	---------

Please remit cash or money order to cover these charges. If payment is not received before the 15th of the month, your service will become subject to disconnection on that date, as this payment represents your monthly service(s). If you have any questions, please contact our office at 319-555-1212.

If the NSF Letter option has been enabled, an Information prompt will appear. This allows you to Save the letter and print it later, print the letter now or skip the letter altogether.

NSF Payments



Historical NSF letters that have been saved can be re-printed using the NSF Notification Letters report located in the Reports Suite, under the Receivables section.

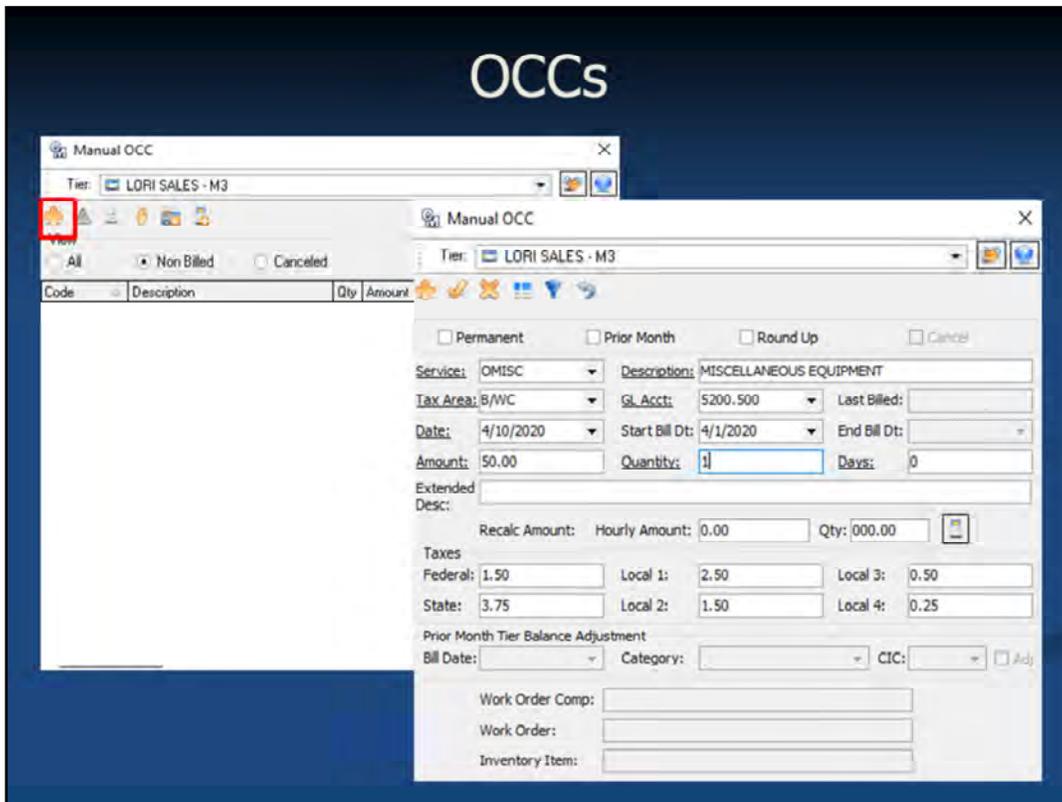
Once the letters are printed, a Confirm prompt will allow you to select if you want to mark the letters as printed. This will take those letters out of the batch queue. If the letters printed OK, choose Yes. If there was any problem, be sure to choose No so that you can attempt to correct the problem and reprint later.

NSF Payments

The screenshot shows the 'Payment Entry' window. On the left is a navigation tree with 'History' selected. The main area displays account information for 'LORI SALES - M3' and a 'Payment History' section. The 'Payment History' section includes fields for Batch Name (JR122719), Pay Date (12/27/2019), Amount (\$131.06), Method (Check), Status (Applied), and Statement Date (01/01/2020). Below these fields is a table listing payment history items. The first row of the table is highlighted in blue and has an 'NSF' checkbox checked, which is circled in red. The table columns are: Batch Name, Pay Date, Amount, NSF, Method, Method Num, Status, CC Tran ID, and Statement Date.

Batch Name	Pay Date	Amount	NSF	Method	Method Num	Status	CC Tran ID	Statement Date
JR122719	12/27/2019	\$131.06	<input checked="" type="checkbox"/>	Check		Applied		01/01/2020
JR112919	11/29/2019	\$93.00	<input type="checkbox"/>	Check		Applied		12/01/2019
112719LL	11/27/2019	\$40.00	<input type="checkbox"/>	Check		Applied		12/01/2019
JR082919	08/29/2019	\$161.14	<input type="checkbox"/>	Check		Applied		09/01/2019
JR042319	04/23/2019	\$40.12	<input type="checkbox"/>	Check		Applied		05/01/2019
030419SF	03/04/2019	\$40.20	<input type="checkbox"/>	Check		Applied		04/01/2019
020519SF	02/05/2019	\$80.40	<input type="checkbox"/>	Check		Applied		03/01/2019
120518SF	12/05/2018	\$90.50	<input type="checkbox"/>	Check		Applied		01/01/2019
110518SF	11/05/2018	\$181.65	<input type="checkbox"/>	Check		Applied		12/01/2018
100518SF	10/05/2018	\$182.14	<input type="checkbox"/>	Check		Applied		11/01/2018
090618SF	09/06/2018	\$181.50	<input type="checkbox"/>	Check		Applied		10/01/2018

Through Payment History you can now see that payment is flagged as NSF. Remember – this cannot be undone.



Manual OCCs are OCCs created outside of Service Orders, Trouble Tickets and Sales Leads. The icon is available regardless of the tier you're on in Inquiry. You can view All OCCs which shows history, Non Billed OCCs and Canceled OCCs.

The Permanent, Prior Month and Round Up options default to unchecked and are typically left this way. Permanent would be used if you want this charge or credit to be extended to additional months. Prior Month is used if this particular credit is being used to adjust a prior month's bill. Round up is used if you are utilizing the round-up for charity feature available in Customer Master.

The Description of the OCC is populated based on the description of the USP Code used. It can be changed. You can also include an Extended description, which will also print on the bill. This is sometimes used to indicate the number of labor hours or a specific piece of equipment.

OCCs

The screenshot shows a 'Manual OCC' window with the following fields and values:

- Tier: LORI SALES - M3
- Permanent: Prior Month: Round Up: Cancel:
- Service: OMISC Description: MISCELLANEOUS EQUIPMENT
- Tax Area: B/WC GL Acct: 5200.500 Last Billed: [empty]
- Date: 4/10/2020 Start Bill Dt: 4/1/2020 End Bill Dt: [empty]
- Amount: 50.00 (highlighted in red) Quantity: 1 Days: 0
- Extended Desc: [empty]
- Recal Amount: [empty] Hourly Amount: 0.00 Qty: 000.00
- Taxes: Federal: 1.50 Local 1: 2.50 Local 3: 0.50 State: 3.75 Local 2: 1.50 Local 4: 0.25
- Prior Month Tier Balance Adjustment: Bill Date: [empty] Category: [empty] CIC: [empty] [Adj]
- Work Order Comp: [empty] Work Order: [empty] Inventory Item: [empty]

The amount populates with the amount of the USP Code used. It can be changed to a different amount and/or to a credit amount. A credit amount needs a dash (-) in front of it, or you can use the Reverse icon.

Billing Inquiry – Verify OCC

Account: 456 - LORI SALES - M3 Bill Date: 04/01/2020

Recurring Charges: **Current OCCs** | Billed OCCs | Bill History

Description	USP	Source	Status	Date	Taxes	Qty	CIC	G	Amount
Tier: Account - LORI SALES - M3									
MISCELLANEOUS EQUIPMENT	OMISC	MN	A	04/10/2020	10.00	1	50		50.00
									50.00

Totals: Recurring Charges: \$50.11 Rec Chg Credits: [\$116.18] **Current OCCs: \$50.00** Billed OCCs: \$0.00 Bill History: \$0.00

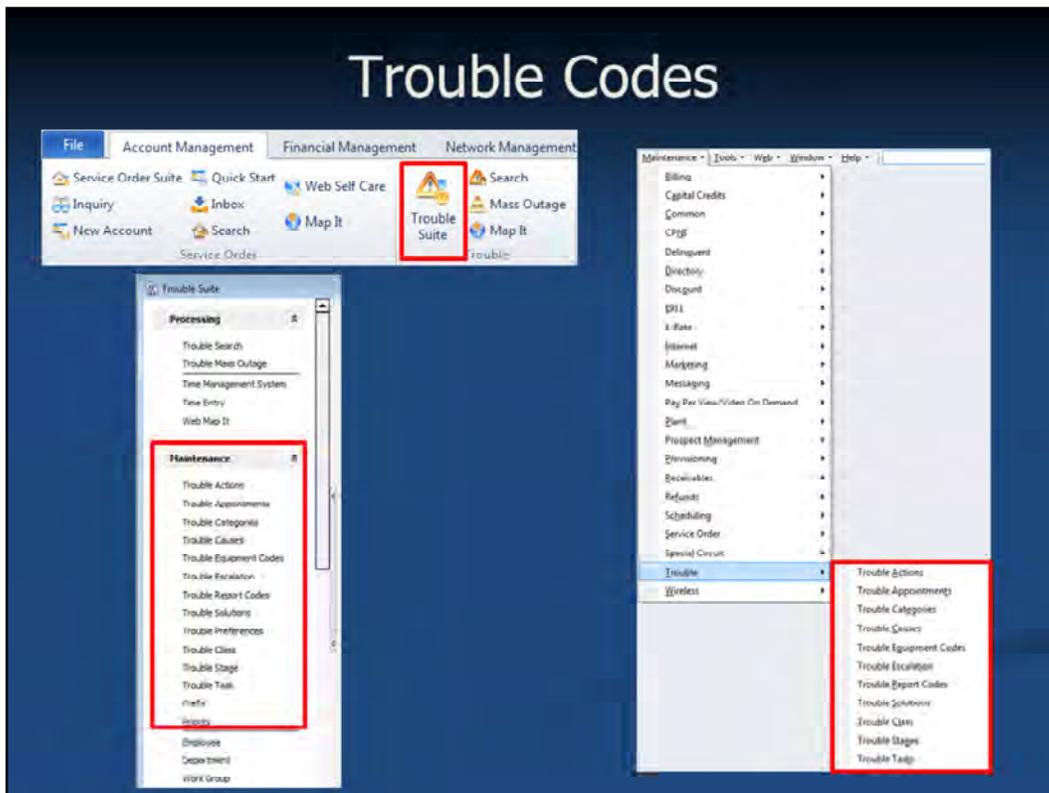
Billing Inquiry will show the non-billed OCCs at the bottom of the window with detail on the Current OCCs tab. To see historical OCCs, change the Bill Date to a previous month and view the Billed OCCs tab.

Chapter

8

Trouble Tickets

Trouble Codes

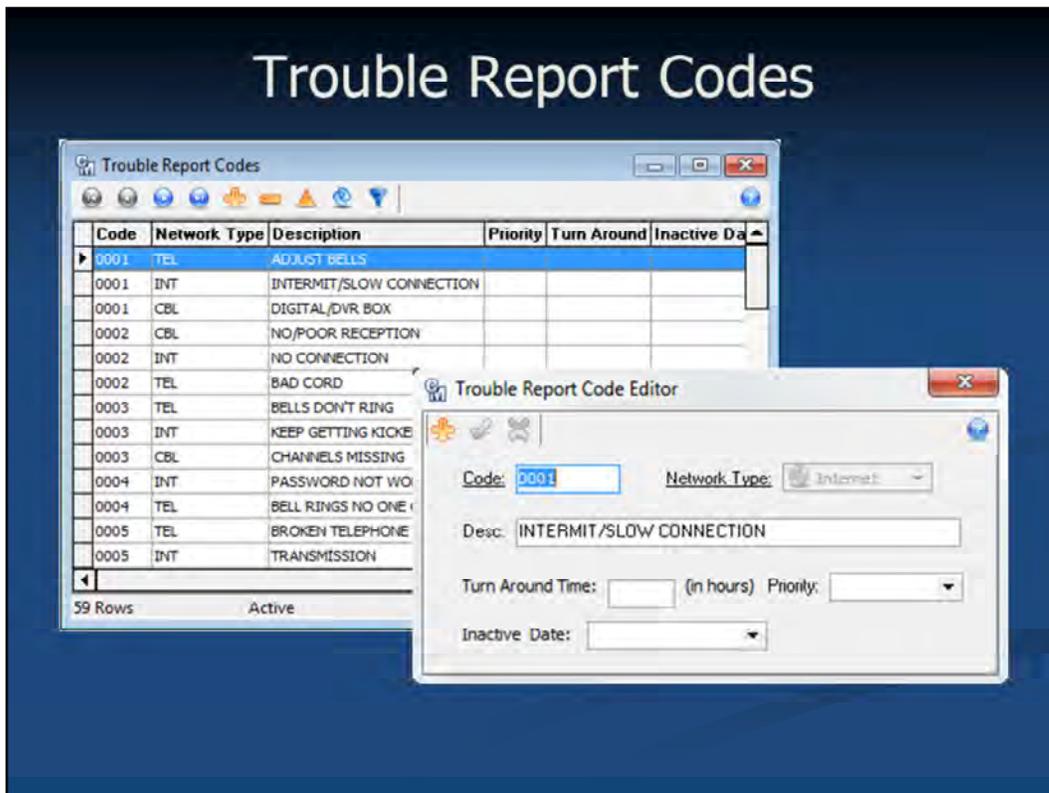


To begin using the Customer Master Trouble module, it's important to understand some of the maintenance tables required to use the system.

The maintenance tables utilized are Actions, Appointments, Categories, Causes, Equipment Codes, Escalation, Report Codes and Solutions. All of these tables may be accessed from the Trouble Suite in the Account Management tab and also by navigating to Maintenance – Trouble.

We'll discuss the most critical codes to Trouble Tickets in their order of importance.

Trouble Report Codes



We'll discuss Trouble Report Codes first.

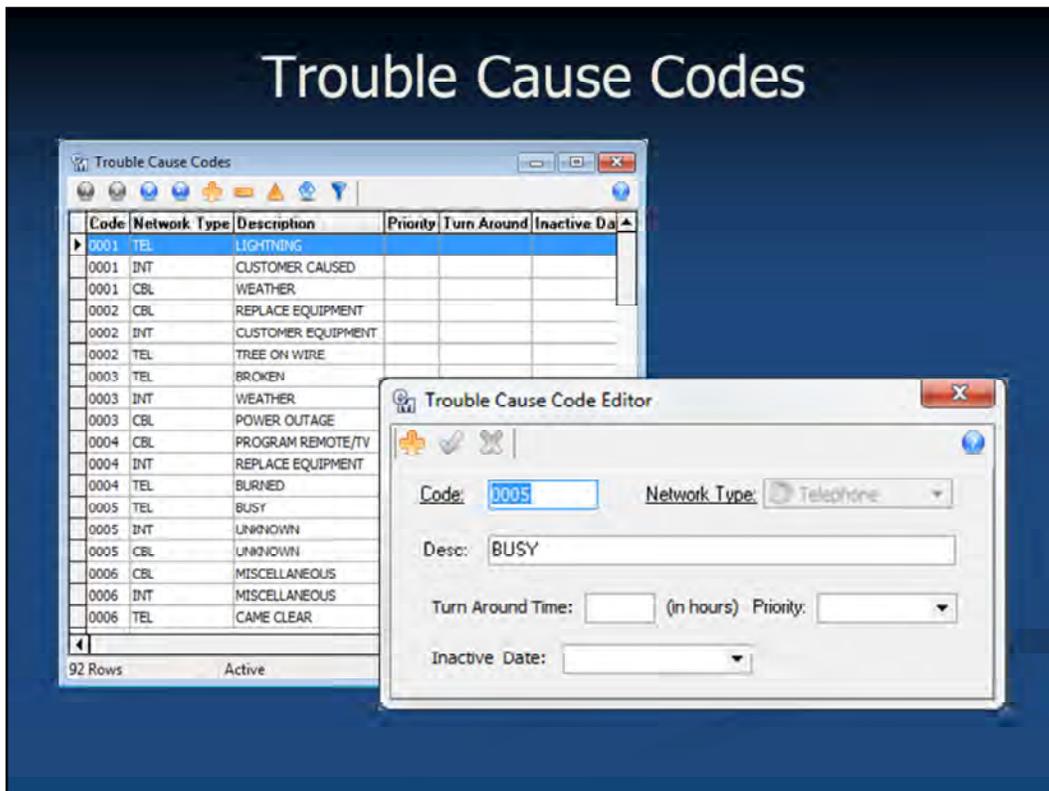
Report Codes represent customer descriptions of the trouble they are having with their service. A report code is required information when a trouble ticket is opened.

MACC has a default list of Trouble Report Codes for Telephone-related issues, or your company may define your own list.

The Trouble Report Code editor consists of a Code, and it may be related to a Network Type. It also contains a Description. Optionally, you can enter a Turn Around Time and a Priority on the Code.

The Inactive Date column will display inactive dates added to Trouble Report Codes.

Trouble Cause Codes

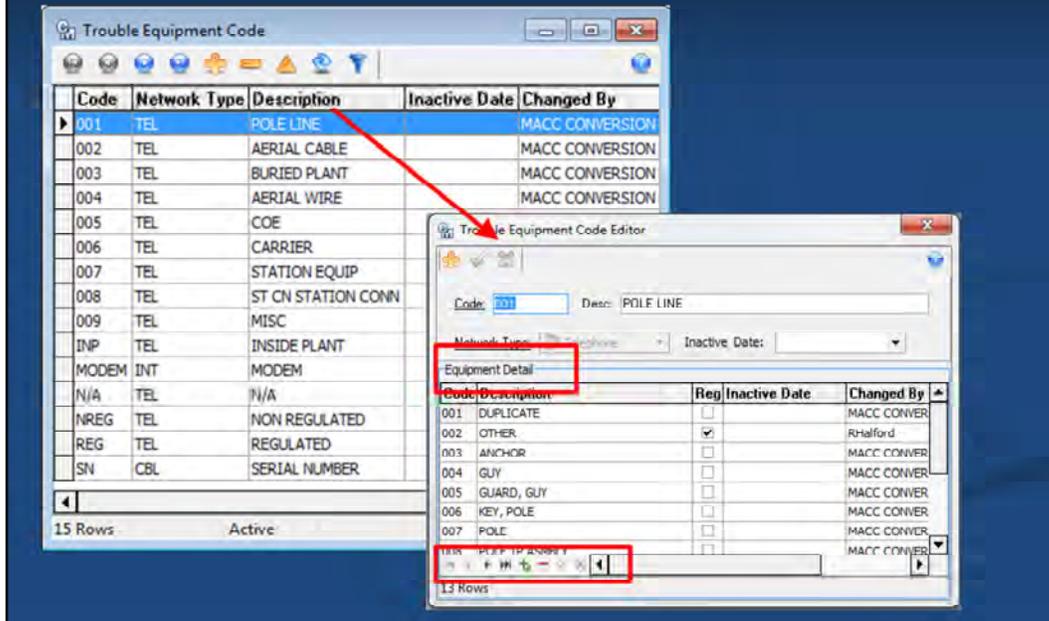


Trouble Cause Codes are company-specific descriptions of the possible root causes of network trouble. A Cause Code is required information when a trouble ticket is cleared.

Cause Codes also consist of a Code and Description. They will be related to a specific Network Type. Optionally, they may include Turn Around Time and Priority.

The Inactive Date column will display inactive dates added to Trouble Cause Codes.

Trouble Equipment Codes



When you point to Trouble on the Maintenance menu and choose Equipment Codes, the Trouble Equipment Code window appears.

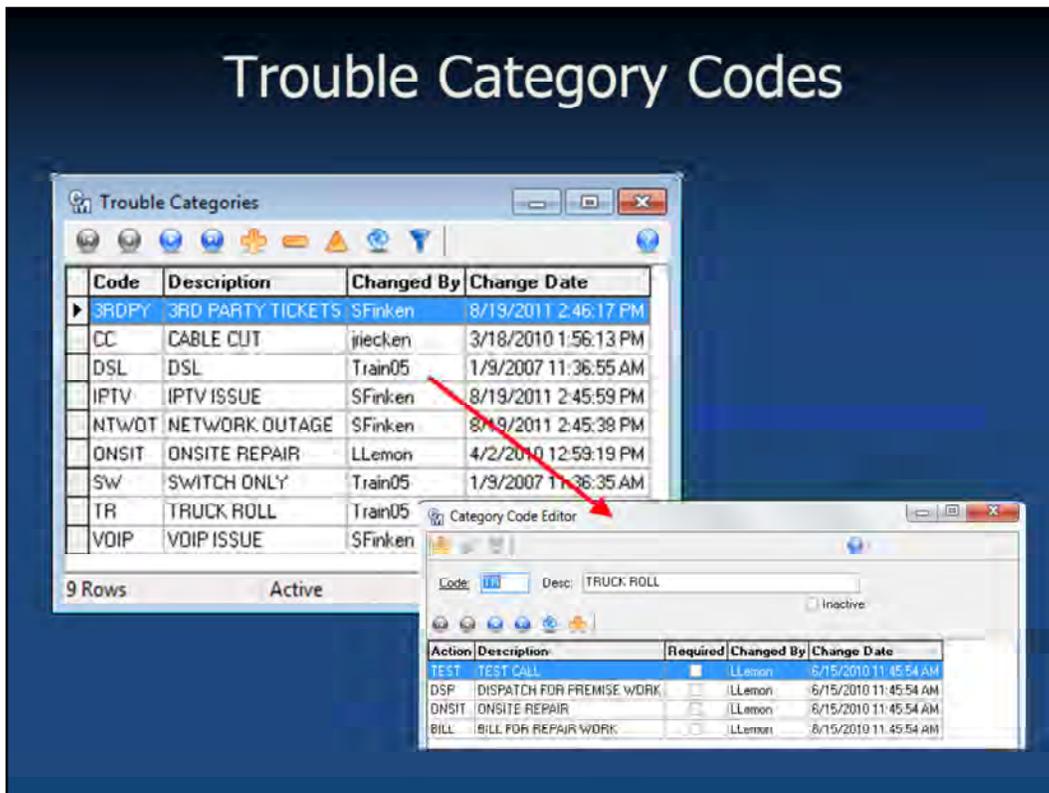
The Trouble Equipment Code window is where various equipment types that may result in a trouble ticket (user-defined, company-specific codes used to denote plant materials) are listed. Equipment Codes can be treated as individual plant items, or as general plant groups (such as "Central Office," "Buried Plant," etc.) with each group containing related plant items or Trouble Equipment Detail. Trouble Equipment Detail is a further description of the more general Trouble Equipment Code. You must fill in an Equipment Code and Detail in order to be able to clear a TEL trouble ticket. These fields are not required on Trouble Tickets for other networks but may still be populated in.

You can enter an unlimited number of Trouble Equipment Codes and Equipment Detail Codes. In addition, you can enter plant information for each of the networks that your company maintains.

Again, MACC has a standardized list of Trouble Equipment Codes and Trouble Equipment Detail for your company to use for TEL networks or you may create your own.

One often overlooked aspect of Trouble Equipment is the Plant Regulated check box. Its extremely important to check this field if your plant is regulated for reporting purposes.

Trouble Category Codes



When you point to Trouble on the Maintenance menu and choose Category Code, the Trouble Category window appears.

The Trouble Category window is where you may add company-unique Trouble Categories to further define your trouble tickets. This is completely customizable for your company, and is not required in a trouble ticket.

Trouble Categories can have Actions added to them to track tasks required to complete that category of Trouble Ticket. Categories are also required in order to utilize Trouble Escalation.

Action Codes

The screenshot displays the 'Trouble Actions' window with a table of action codes and a 'Trouble Action Editor' dialog box. The table lists various action codes, network types, descriptions, and flags. The 'BILL' code is highlighted, and the editor dialog shows its details.

Code	Network Type	Description	Repeatable	Required	Cha
BILL	TEL	BILL FOR REPAIR WORK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	JFres
DSP	TEL	DISPATCH FOR PREMISE WORK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	jriec
ONSIT	TEL	ONSITE REPAIR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	jriec
RC	TEL	REPAIR CABLE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LLen
SCHED	CBL	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BSte
SCHED	CEL	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KBro
SCHED	DIR	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KBro
SCHED	INT	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
SCHED	PAG	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
SCHED	SEC	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
SCHED	TEL	Update Trouble Ticket in M4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TEST	TEL	TEST CALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

The 'Trouble Action Editor' dialog box shows the following fields:

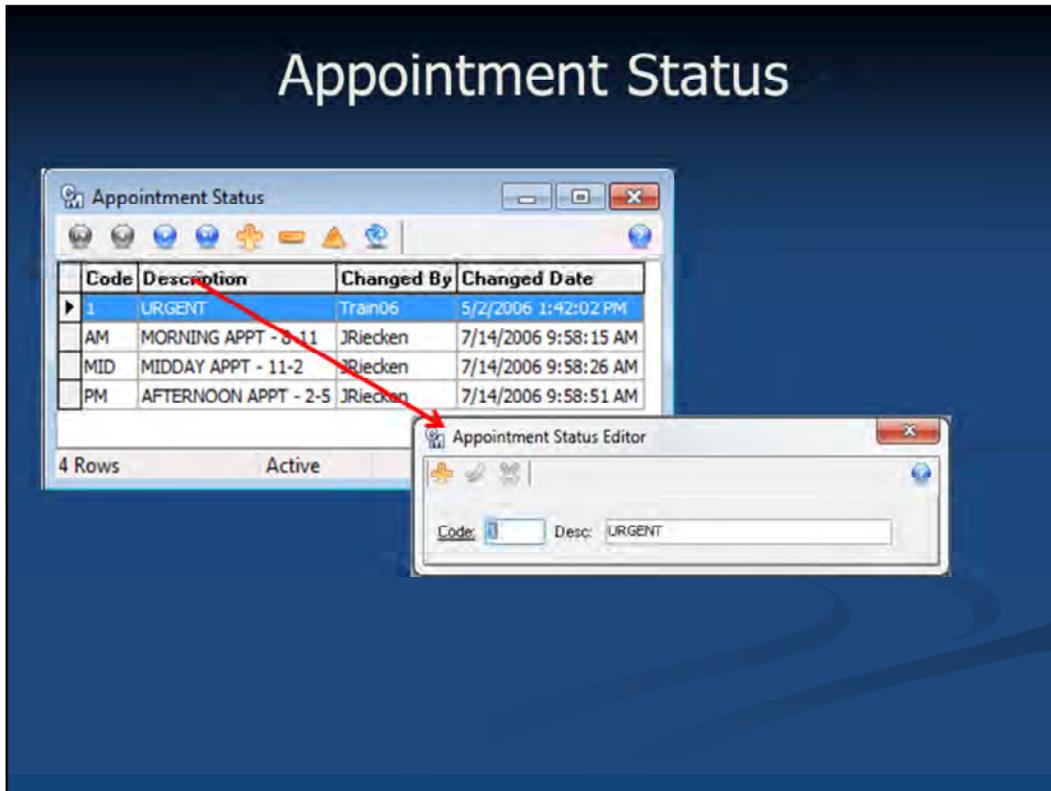
- Code: BILL
- Network Type: Telephone
- Desc: BILL FOR REPAIR WORK
- Inactive
- Repeatable
- Required

Action codes are optional maintenance fields that can be used to indicate various types of work that could be performed during the Trouble Ticket lifecycle. Codes set up within the maintenance fields are available for selection within the Actions screen of a Trouble Ticket. In addition, there are optional date/time fields and an employee field available. Actions can also appear above the Work Performed group box on a printed Trouble Ticket.

Actions can be optionally utilized in the Trouble Escalation module.

In addition, tickets distributed to a third party, such as a carrier, can be tracked from this screen.

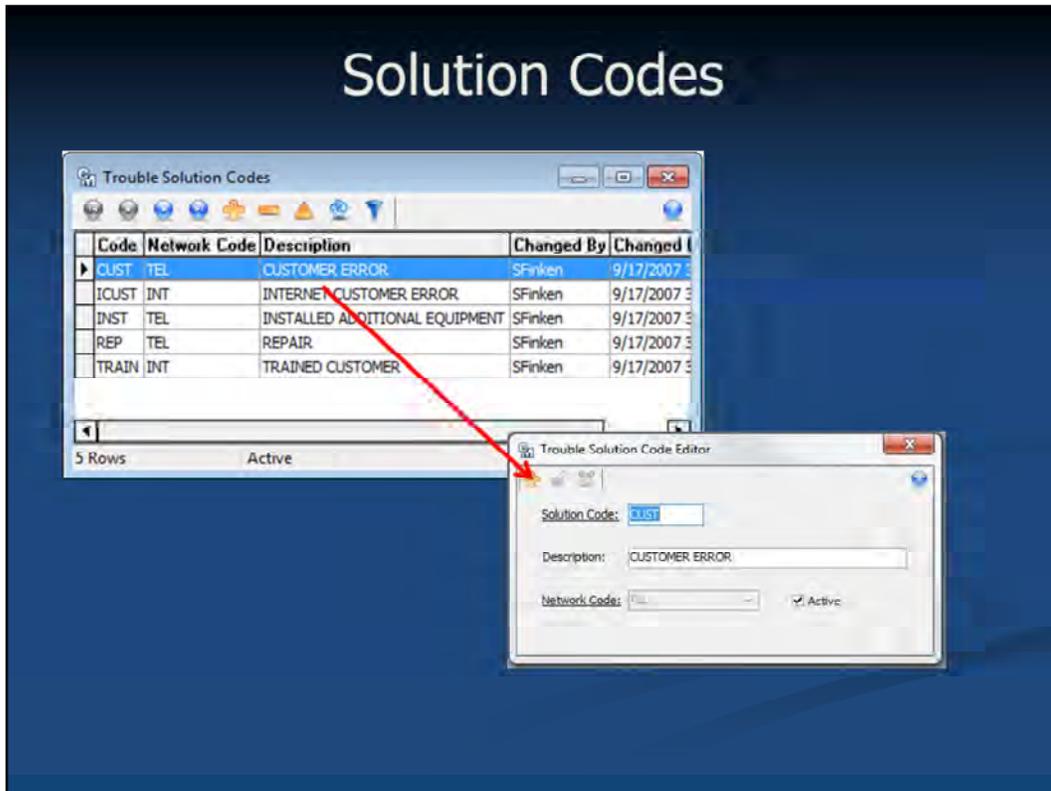
Appointment Status



An optional maintenance table is available to create user-defined appointment statuses to attach to the trouble ticket. These statuses could be set up as different times of the workday or different priorities. It's up to the user wants to classify different appointments for their technicians.

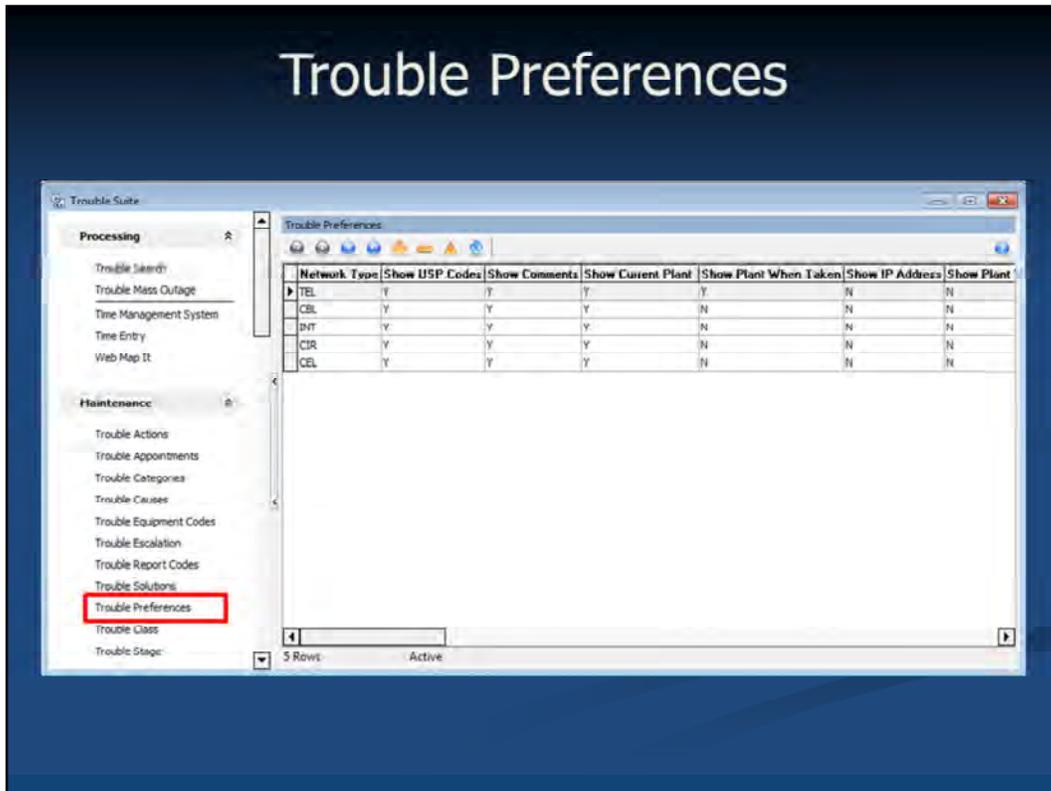
The Appointment Status field automatically populates when a Trouble Ticket is scheduled from the Advanced Scheduler screen.

Solution Codes



When you select Solution, the Trouble Solution Codes window appears. This table allows you to define Solution Codes and then attach them to Trouble Tickets. Once again, the Solution Code is tied into a specific network (e.g., TEL). This information may be helpful for reporting, but is not required when processing a Trouble Ticket.

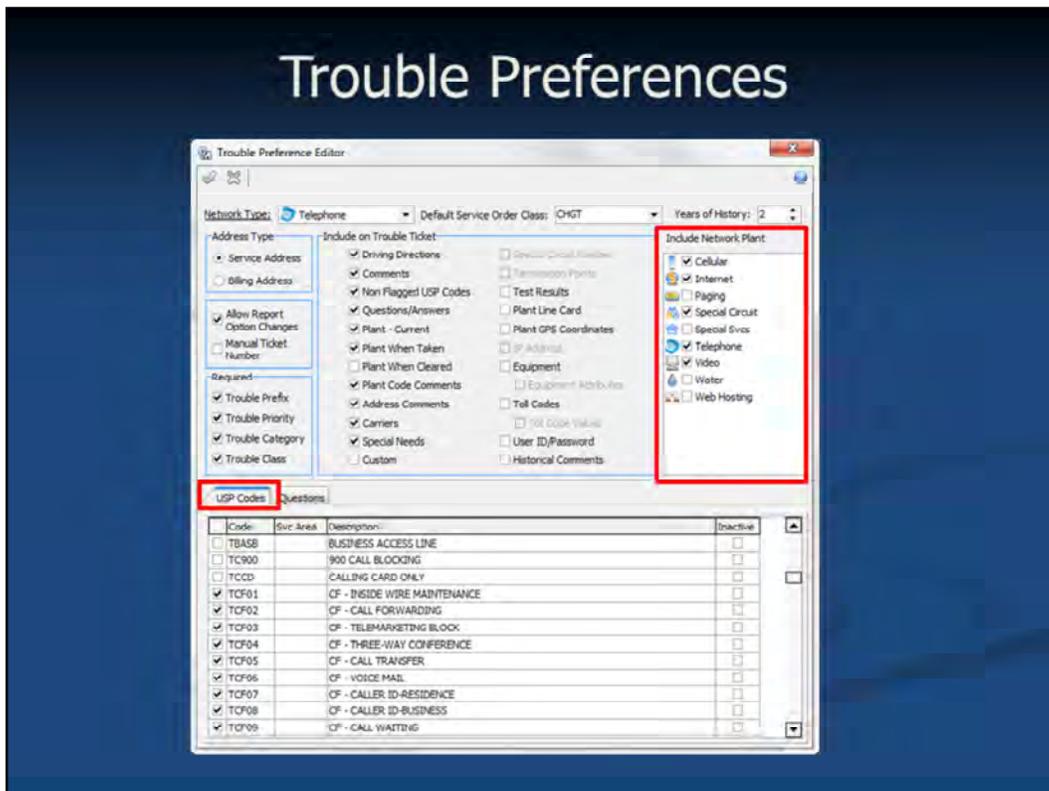
Trouble Preferences



When you choose Trouble Preferences from the Trouble Suite window, the Trouble Preferences dialog box appears. Trouble Preferences chosen here will affect the way Trouble tickets are prepared and managed. You must have Preferences created for each network type you choose to create Trouble Tickets for.

Unique Trouble Preferences may be selected for each Network Type. The dialog box display grid contains data rows for network types that have preferences set for them. These preferences may be edited using standard procedures. To add preferences for a new network type, click the add button (+) and select an available network type from the drop-down field, then post the new preferences to expand the editor window and add detail information as described below.

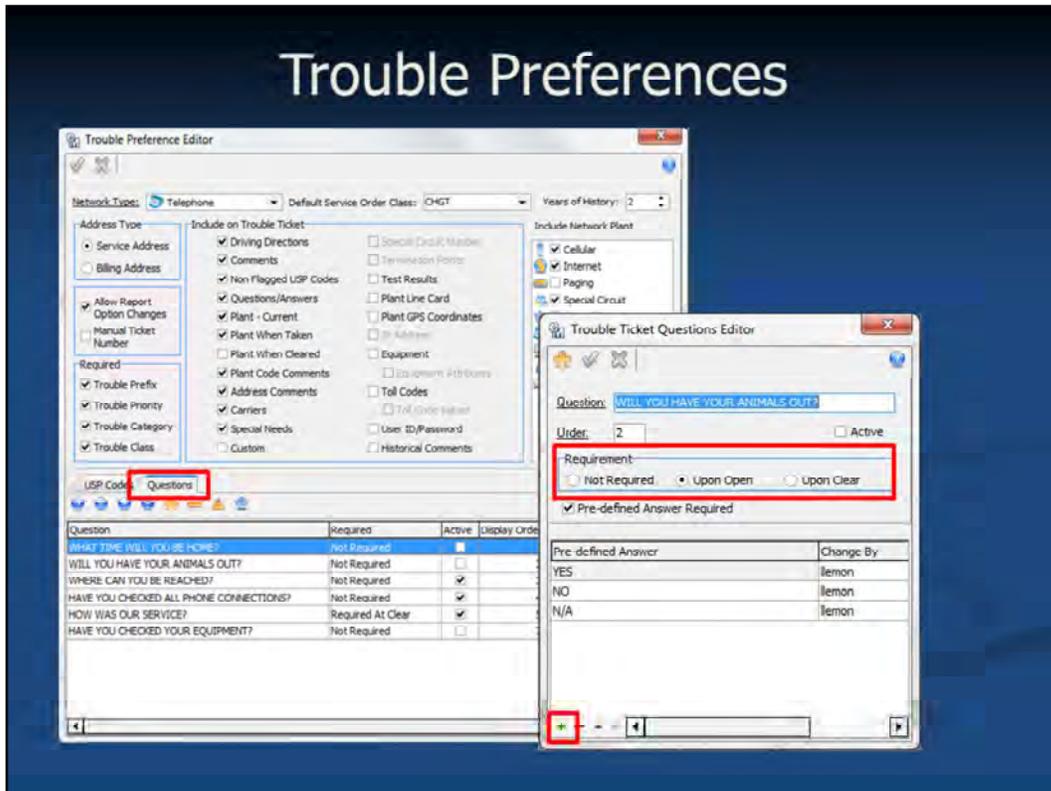
Trouble Preferences



The following information is stored in each network's trouble preferences editor screen:

- Address Type: Select the Address Type to be used for Trouble Tickets
- Allow Change of Report Options: When checked, service representatives will be able to change the default printing options when printing a Trouble Ticket.
- Manual Ticket #: When checked, Trouble Tickets will be entered manually by service representatives rather than automatically by the Customer Master system.
- Include on Trouble Ticket: Checking the fields under this heading causes the referenced information to appear on the printed Trouble Ticket.
- History Years: Enter a number or use the up and down arrows to set the number of years of Trouble History that should appear on the printed Trouble Ticket.
- USP Codes: Select the network USPs to appear on Trouble screens and, if the USP Codes option is selected at the "Include On Trouble Ticket" area, on Trouble Tickets. Click the USP Codes tab and move the appropriate USP codes from the left pane to the right pane of the tab window. USP codes added here, when also assigned to the account for which the Trouble Ticket is being created, will be displayed in the USP window of the Trouble Ticket Editor. If you select to print USP codes on Trouble Tickets, the USPs selected here will, if assigned to the account, also appear on the printed Trouble Ticket. USPs appearing in the left window for selection have been designated for the network on the USP maintenance dialog box.
- The Include Network Plant options give the ability to print any additional selected networks' plant with the Trouble Ticket. This will be discussed more in depth later in the training.

Trouble Preferences



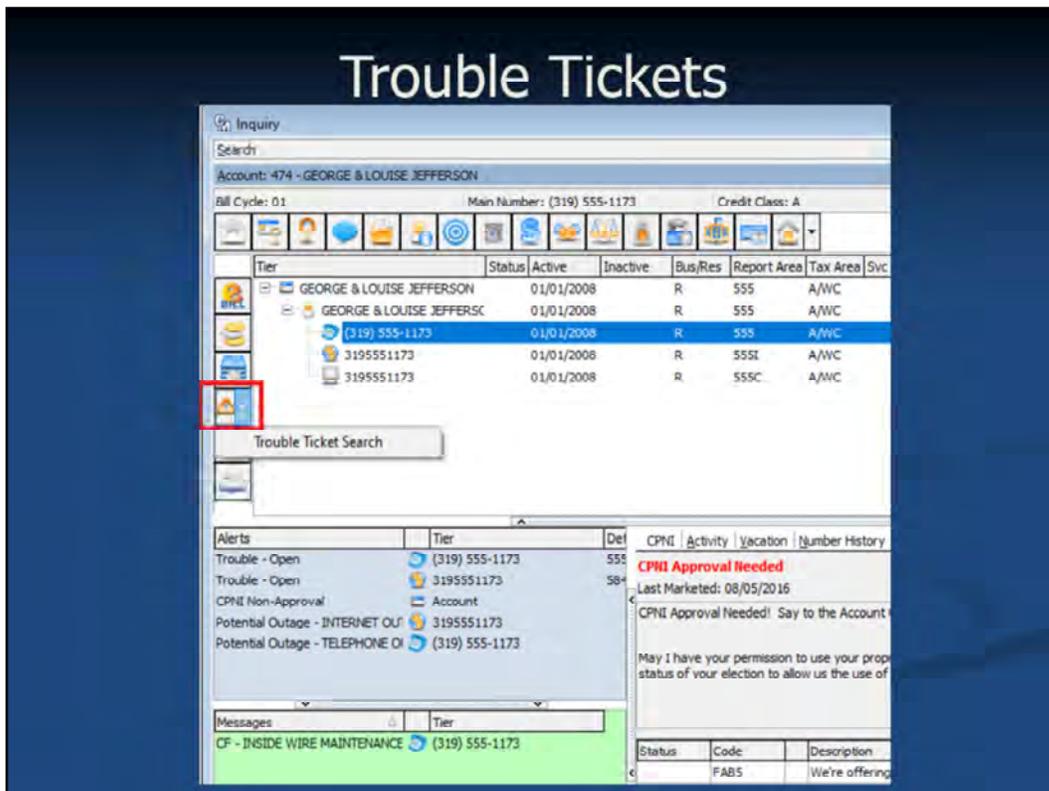
To add Trouble Questions, you may click on the Questions tab. Here, you may add questions to be asked by service personnel when taking a Trouble call. You may select a Display # order. In addition, you may mark them as Required at Open or Required at Close (or leave not required).

You can also add pre-defined answers to select from during a Trouble Ticket

Post the Trouble Preference information for the network.

Remember, Trouble Preferences are by Network, so in order to utilize Trouble for all networks, you must enter preferences on each network.

Trouble Tickets



To initiate a Trouble Ticket, you should start by using Inquiry to find the appropriate Network. Notice that the trouble icon will only be illuminated if you are on the Network tier – not on the Customer or Account tiers. You'll also notice that Alerts may appear for Trouble – Cleared and Trouble – Open. This will indicate if a Trouble Ticket has been cleared in the last twelve months, and the cleared date, or if there is an open ticket. (Note: these features will only be available if they have been turned on in the Alerts maintenance table.)

To launch the Trouble Ticket, click on the Trouble icon. You can optionally click the drop-down arrow to open up a Trouble Ticket Search on the highlighted network.

If a previous outstanding trouble ticket is open on this network, the Trouble Selection grid will appear, allowing you to select to edit the original ticket. To add a new ticket, you may click on the insert (+) button.

If no previous outstanding trouble ticket is open, the system will automatically take you into the Trouble Ticket Editor (wizard).

Create

The screenshot shows the 'Trouble Ticket Editor' window. At the top, it displays 'Ticket Num: New Ticket' and 'GEORGE & LOUISE JEFFERSON'. Below this, there are fields for 'Network: (319)555-1173', 'Type: Telephone', 'Status: Active', and 'Active Dt: 01/01/2008'. The main form area contains several dropdown menus: 'Report Code: 0018', 'Address: 20440 HIGH HILL LN', 'Prefix: 001TT', 'Priority: AM', 'Category: IT', and 'Class: PHONE'. A 'Description' field contains the text: 'Customer hasn't been able to dial out since storm last night. Getting no dial tone or receiving any calls.' At the bottom of the window, there are four buttons: 'Cancel Setup', '1. Create', 'CRM', and 'Create Ticket'.

At the Trouble Editor, the system will walk you through the various stages of the Trouble Ticket. The first stage of taking a ticket includes the following information:

- Report Code: A code describing the nature of the complaint made by the customer:
- Address: The network address. If there are multiple addresses attached to the account, one address can be selected from this drop-down field. *Note: the account's primary address appears by default.*
- Prefix: Used as a company-specific identifier for common trouble tickets. This is not a required field.
- Priority: A priority for this trouble ticket. This is not a required field.
- Category: This is an optional drop-down field. Choose your company-specific Trouble Category. If your company uses Trouble Escalation, this field should be completed.
- Description: A user-defined description of the trouble ticket. This is a free-form field and should include enough detail that a technician would understand the issue being reported.

Trouble Questions

The screenshot shows the 'Trouble Ticket Editor' window. At the top, it displays 'Ticket Num: 527' and 'GEORGE & LOUISE JEFFERSON'. Below this, there are fields for 'Network: (319)555-1173', 'Type: Telephone', 'Serv Type:', and 'Tech Type:'. There are also checkboxes for 'Plant Regulated', 'Mass Outage', 'Pending Network', and 'SO'. On the right, it shows 'Num: 474', 'Status: Active', 'Active Dt: 01/01/2008', and 'Inactive Dt:'. Below the header is a table with columns: 'Question', 'Answer', 'Pre-defined Answer', 'Changed By', and 'Changed Dt'. The table contains three rows of questions: 'WHERE CAN YOU BE REACHED?', 'HAVE YOU CHECKED ALL PHONE CONNECTIONS?', and 'HOW WAS OUR SERVICE?'. The 'Pre-defined Answer' column has checkboxes, with the second one checked. Below the table is a text area with the message 'Please answer required questions.' and a 'To Take:' button. At the bottom, there are fields for 'Address: 20440 HIGH HILL LN', 'Report Code: 0018', 'Prefix: 001TT', 'Category: TR', 'Priority: AM', and 'Class: PHONE'. A 'Description:' field contains the text: 'Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.'

Trouble Questions can be designed as a script for trouble-shooting with the customer, asking leading questions, or collecting information and are set up from the Trouble Preferences window. From this window, you can provide an Answer to each Question. Required answers will be displayed with a checkmark in the Req column. Those Questions that are required must be answered before the ticket can be cleared.

Taken – To Dispatch

The screenshot shows the 'Trouble Ticket Editor' window. At the top, it displays 'Ticket Num: 527' and 'GEORGE & LOUISE JEFFERSON'. Below this, there are fields for 'Network: (319)555-1173', 'Type: Telephone', and 'Serv Type: Tech Type'. A navigation bar includes 'Stages', 'Actions', 'Questions', 'Comments', 'History', and 'Cancel'. A toolbar contains icons for 'SO Equipment', 'SO Plant', 'Address', 'Net. USP Codes', and 'SO Comments'. The main area features a 'Taken' section with a dropdown for 'By:' (set to 'John Smith'), a 'Time:' dropdown (set to '5/10/2017'), and a time field (set to '01:27 PM'). Below this is a '2. Taken: Complete' status with a '0 mins ago' timestamp and a 'To Dispatch' button. At the bottom, there are fields for 'Address: 20440 HIGH HILL LN', 'Report Code: 0018', 'Prefix: 001TT', 'Category: TR', 'Priority: AM', and 'Class: PHONE'. A 'Description:' field contains the text: 'Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.'

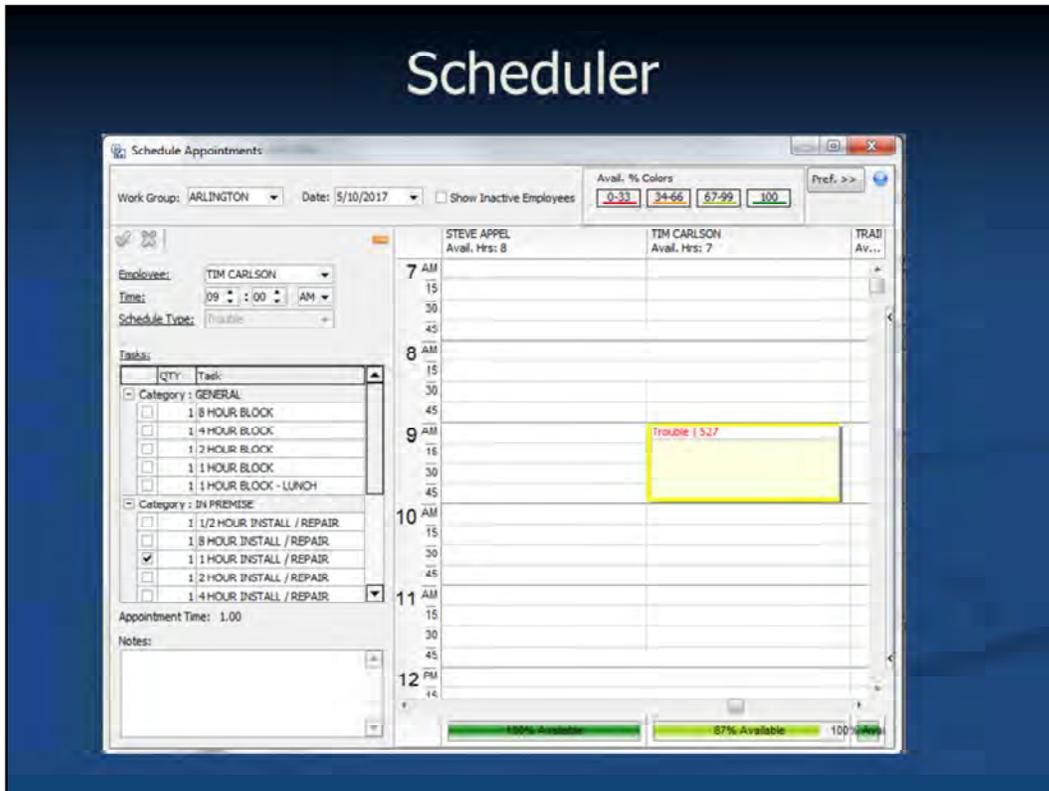
At the next screen of the wizard, you'll see the information from the previous screen listed at the bottom. A taken by, date, and time field will be displayed and can be changed as needed. It will be auto-filled with a date and time stamp based on when the previous screen was entered.

Dispatch

The screenshot displays the 'Trouble Ticket Editor' window for a ticket titled 'GEORGE & LOUISE JEFFERSON'. The interface includes a top navigation bar with tabs for 'Stages', 'Actions', 'Questions', 'Comments', 'History', and 'Cancel'. A 'Schedule Appointment' button is prominently displayed. Below this, there are two main sections: 'Assigned To' and 'Appointment'. The 'Assigned To' section contains fields for Employee (CBOOTH), Time (5/10/2017 01:28 PM), Department, and Work Group, each with a dropdown menu and a time selection field. The 'Appointment' section includes a Status dropdown, a Time field (12:00 AM), and a 'Picked Up' section with a 'By:' dropdown and a Time field (12:00 AM). A '3. Dispatch: Incomplete' status is shown with a 'Back to Taken' button and a 'To Close' button. At the bottom, there is a 'Bilable' section with fields for Address (20440 HIGH HILL LN), Report Codes (0018), Prefix (001TT), Category (TR), Priority (AM), and Class (PHONE). A 'Description' field contains the text: 'Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.'

The following screen is all about scheduling and assigning your Trouble Ticket. If your company uses the Advanced Scheduler, you'll click on the Schedule Appointment button.

Scheduler



If you are using the Scheduler, you'll need to use the following fields to help you with creating an appointment:

- Work Group: Companies may have specific personnel that are available in certain areas or for certain types of work. The corresponding employees' calendars will be made available based on the Work Group selected.
- Date: The scheduled appointment date.
- Employee: Enter the employee to whom you are assigning the Trouble Ticket.
- Time: Will be auto-populated once you select a time on the calendar, or you can enter a time in this field.
- Schedule Type: Will be auto-populated with a "Trouble" type.
- Tasks: This is a company-specific list of scheduled tasks. Select the Category and Task from the grid.
- Notes: A free-form field to enter scheduling notes.

Dispatch – Assigned To

The screenshot shows the 'Trouble Ticket Editor' window for ticket 527. The ticket is assigned to T. Carlson and has an appointment scheduled for 5/10/2017 at 09:00 AM. The status is '3. Dispatch: Incomplete'. The interface includes fields for Employee, Time, Department, Work Group, Appointment Status, Appointment Time, Picked Up By, and Picked Up Time. A description field contains the text: 'Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.' The interface also includes a 'Schedule Appointment' button and a 'Back to Taken' button.

Field	Value
Ticket Num	527
Network	(319)555-1173
Type	Telephone
Assigned To	T. Carlson
Appointment Time	5/10/2017 09:00 AM
Appointment Status	3. Dispatch: Incomplete
Description	Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.

Back at the Dispatch screen, the Assigned and Appointment information should be completed, with the exception of the Appointment Status.

Trouble Inbox

The screenshot shows a software interface with a 'Trouble Inbox' window. The top navigation bar includes 'File', 'Account Management', and 'Financial Management'. The 'Inbox' menu item is highlighted. The main window displays a list of tickets with the following columns: Ticket, Work Group, Report Code, Customer Name, Appointment Time, Taken Date, Taken By, Assigned To, Test Type, Network, Report, and Description. The data is as follows:

Ticket	Work Group	Report Code	Customer Name	Appointment Time	Taken Date	Taken By	Assigned To	Test Type	Network	Report	Description	Category
506	0003	DONGLAS FA			8/4/2016	RHafford	TEL	319550	BELLS DONT I	TR		
527	0018	GEORGE & LOUIE			5/20/2017	JMahan	CHRIS BOOTH	TEL	319555	CANT DIAL OUT	TEL	
525	0001	KATHY SALES -1			2/2/2017	11 Muphoff	Mark Ughoff	CR	319555C	COGITAL/DVR BOX		
824	0003	TOM SAUVIER			2/2/2017	11 Muphoff		TEL	319555	BELLS DONTY RING		
523	0001	KRISTI SALES			1/26/2017	JRHafford	ROSS HALFC	TEL	319555C	ADJUST BELLS		
522	0001	CHRIS SALES			12/27/2016	Muphoff		TEL	319555	ADJUST BELLS		
521	0001	JILL SALES			12/15/2016	Muphoff		CR	319555	COGITAL/DVR BOX		
519	0004	LANE FROST			11/29/2016	Shacklen	JARIE L RICE	INT	319555C	PASSWORD NOT V		
515	0001	STEVEN BARBER			10/6/2016	Shacklen	JNY	319555C	INTERNET/SLOW C			
514	0019	TORRY LEE SCP			9/16/2016	JRHafford		TEL	319555	CANT HEAR		
513	0003	SPARKY KOPPEL			9/12/2016	JRHafford	CR	319555	CONWELLS PRISON			
507	0018	CLAIRE SIMES			8/17/2016	JRHafford		TEL	319555	CANT DIAL OUT		
505	0010	JIM & PAM ANDI			8/1/2016	Shacklen	JARIE L RICE	TEL	319555C	CANT BE CALLED		
504	0010	TAMTHA STERN			8/1/2016	Shacklen	JARIE L RICE	TEL	319555C	CANT BE CALLED		
501	0010	KIMBERLY JUMP			8/1/2016	Shacklen	JARIE L RICE	TEL	319555	CANT BE CALLED		
500	0019	SPHELLEY SALES			7/19/2016	Neman	LINDA LEPOH	TEL	319555	CANT HEAR		
495	0001	STEVE G SALES			6/28/2015	JRHafford	JILL ARTHUR	TEL	319555	ADJUST BELLS		
492	0001	KATHY SALES -1			8/13/2015	JRHafford		INT	319555C	INTERNET/SLOW C		
491	0018	STEVE A SALES			8/11/2015	JRHafford		TEL	319555C	CANT DIAL OUT		
489	0001	SUCCESS PUBLI			5/7/2015	Shacklen	INT	319555	INTERNET/SLOW C	DSL		
487	0001	STEVE G SALES			1/23/2015	Shacklen		TEL	319555	ADJUST BELLS		

Your technician should be monitoring their Trouble Inbox to find tickets assigned to them. They may also receive an e-mail or text message, reminding them to look in their Inbox for a new ticket. Any user may click on My Trouble to see their assigned tickets or Work Group/Department Trouble to see tickets assigned to their respective departments and groups.

Dispatch – Picked Up

The screenshot shows the 'Trouble Ticket Editor' window for ticket number 527. The interface includes a header with ticket details, a navigation bar with tabs like 'Stages', 'Actions', and 'Questions', and a main form area. The 'Picked Up' field is highlighted with a red box, showing 'By: TCarlson' and 'Time: 5/10/2017 01:33 PM'. A red lightning bolt icon is next to the 'By' field. Below the 'Picked Up' field, there is a status indicator '3. Dispatch: Incomplete' and a 'Back to Taken' button. The bottom section of the form contains address and category information.

Ticket Num: 527
Network: (319)555-1173
Type: Telephone
Service Type: Tech Type

Plant Regulated:
Mass Outage:
Pending Network:
SO:

GEORGE & LOUISE JEFFERSON
Num: 474
Status: Active
Active Dt: 01/01/2008
Inactive Dt:

Assigned To:
Employee: TCarlson
Time: 5/10/2017 01:34 PM

Appointment:
Status: PM
Time: 5/10/2017 02:00 PM

Picked Up:
By: TCarlson
Time: 5/10/2017 01:33 PM

3. Dispatch: Incomplete
Back to Taken Complete required stages

Description: Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.

Address: 20440 HIGH HILL LN
Report Code: 0018 **Prefix:** 001TT
Category: TR **Priority:** AM
Class: PHONE

Now, you're ready to indicate when the ticket was Picked Up to be worked on, and who picked up the ticket. You may use the lightning bolt icons to quickly mark the Picked Up By and Time fields. Or, you may enter the information manually.

Clear

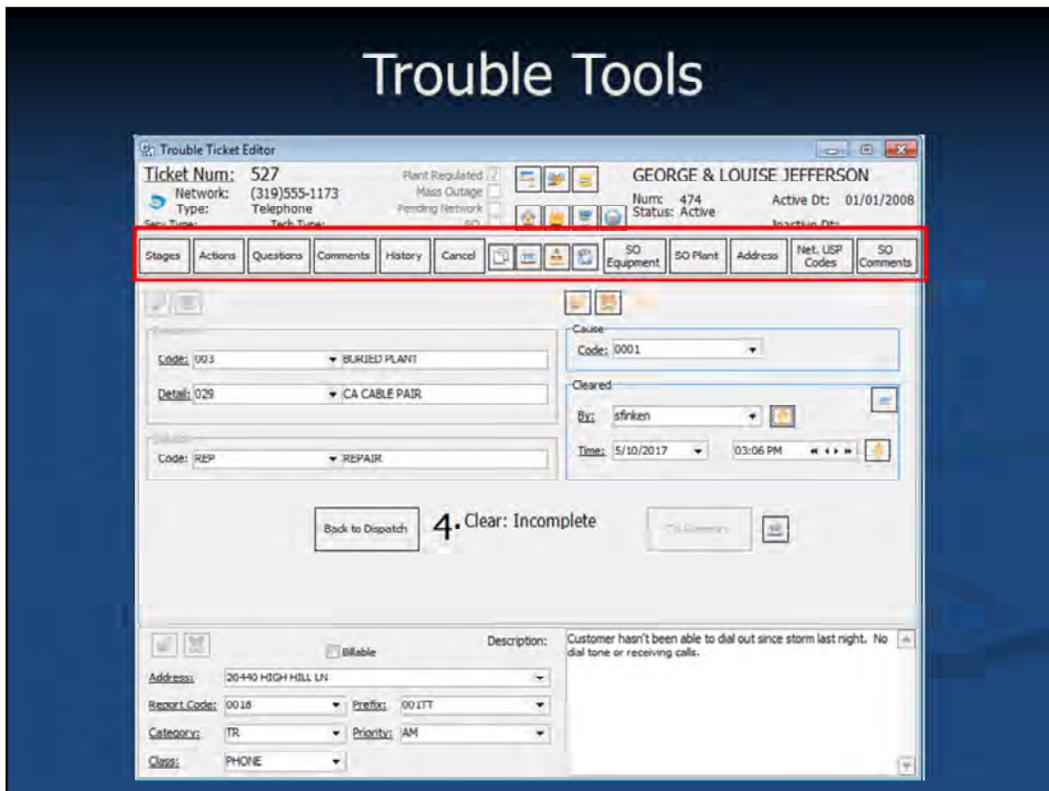
The screenshot shows the 'Clear' screen in the Trouble Ticket Editor. The window title is 'Trouble Ticket Editor'. The customer name is 'GEORGE & LOUISE JEFFERSON'. The ticket number is 527. The network is (319)555-1173, type is Telephone, and status is Active. The cause code is 0001, cleared by 'sfriken', and cleared time is 5/10/2017 03:06 PM. The description is 'Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.' The address is 20440 HIGH HILL LN. The category is TR, priority is AM, and the time is PHONE. A '4. Clear: Incomplete' button is visible.

Once the work is done, you may clear the ticket. At the Clear screen, you'll need to select a Plant Code, Plant Detail, Cause Code, Cleared By and Cleared Time. At the Cleared fields, you can use the lightning bolts to auto-select the current user and time. The Solution Code is optional. All of this information is critical to your trouble reporting.

Toward the bottom of the screen, a Billable checkbox can be used to indicate that this ticket is subject to additional charges. Reporting is available based on the Billable field.

Normally we would click on the Clear Ticket icon. Before we do, we will review some additional fields on the screen.

Trouble Tools



The various trouble screen options are listed as buttons across the top of the wizard window. These screens can be used for the following:

- Stages: Can be used to stage specific types of Trouble Tickets.
- Actions: Can be used to track specific Actions (when they were started and finished) associated with this Category of ticket.
- Questions: This screen can be used to review trouble-related Questions that must be answered. Can be used for troubleshooting or asking leading questions of the customer.
- Comments: Use this screen to add additional comments related to this ticket.
- History: Will provide a grid of previous Trouble Tickets on this network.
- Cancel: If you choose to Cancel, the ticket will be closed.
- Trouble Ticket Copy: Use this tool to copy this Trouble Ticket's details to another ticket. Typically used for a mass outage.
- Print: Use the printer button to print a paper copy of the ticket.
- SO Equipment: Displays any Premise Equipment that is associated with this Network, either tracked via the Equipment window or AM Inventory.
- SO Plant: Displays the Plant details associated with this Network Address.
- Address: Displays details regarding addresses associated with this account.
- Net. USP Codes: Will display the USP codes (marked as trouble-related at preferences) associated with this network.
- SO Comments: Displays any service order-related comments associated with this account

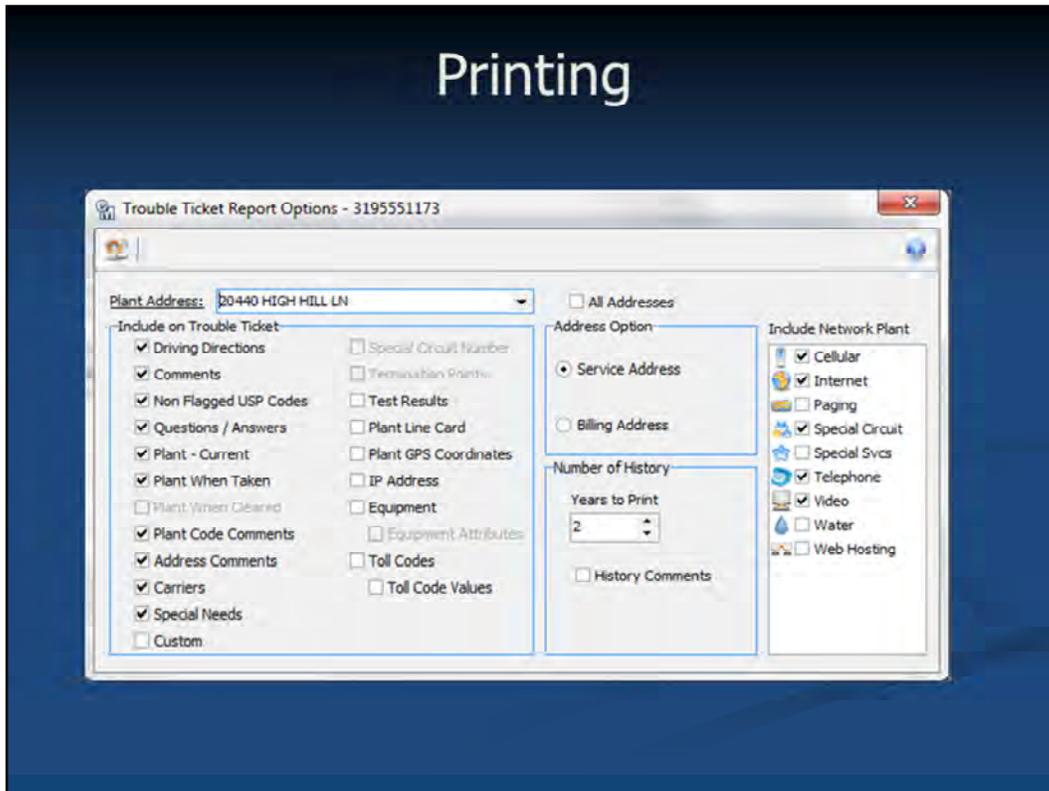
Trouble Tools

The screenshot shows the 'Trouble Ticket Editor' window for account 'GEORGE & LOUISE JEFFERSON'. The ticket number is 527, network is (319)555-1173, and the status is Active. A red box highlights the top right area containing checkboxes for 'Plant Regulated', 'Mass Outage', and 'Pending Network', along with an 'SO' checkbox. Below these are tabs for 'Stages', 'Actions', 'Questions', 'Comments', 'History', 'Cancel', 'SO Equipment', 'SO Plant', 'Address', 'Net. USP Codes', and 'SO Comments'. The main area has fields for 'Cause' (Code: 0001), 'Cleared' (By: sfrinken, Time: 5/10/2017 03:06 PM), and 'Description' (Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.). A '4. Clear: Incomplete' button is visible. At the bottom, there are fields for 'Address' (20440 HIGH HILL LN), 'Report Code' (00 IS), 'Prefix' (00 ITT), 'Category' (TR), 'Priority' (AM), and 'Class' (PHONE).

Other information available at the top of the Trouble window include a checkbox for Plant Regulated. That indicates that a regulated Plant Equipment Code item has been associated with this Trouble Ticket. The Mass Outage checkbox would be selected if this Trouble Ticket had been included in a Mass Outage. The Pending Network icon indicates that the Trouble Ticket is associated with a network that is pending in an unfinished Service Order. The SO checkbox would be selected if there were also a service order open on the parent account related to this network.

The Inquiry Account Overview, CRM, and Manual OCC windows may be accessed from the Trouble window as well as the ability to open a new Service Order on the account and attach Electronic Documents.

Printing

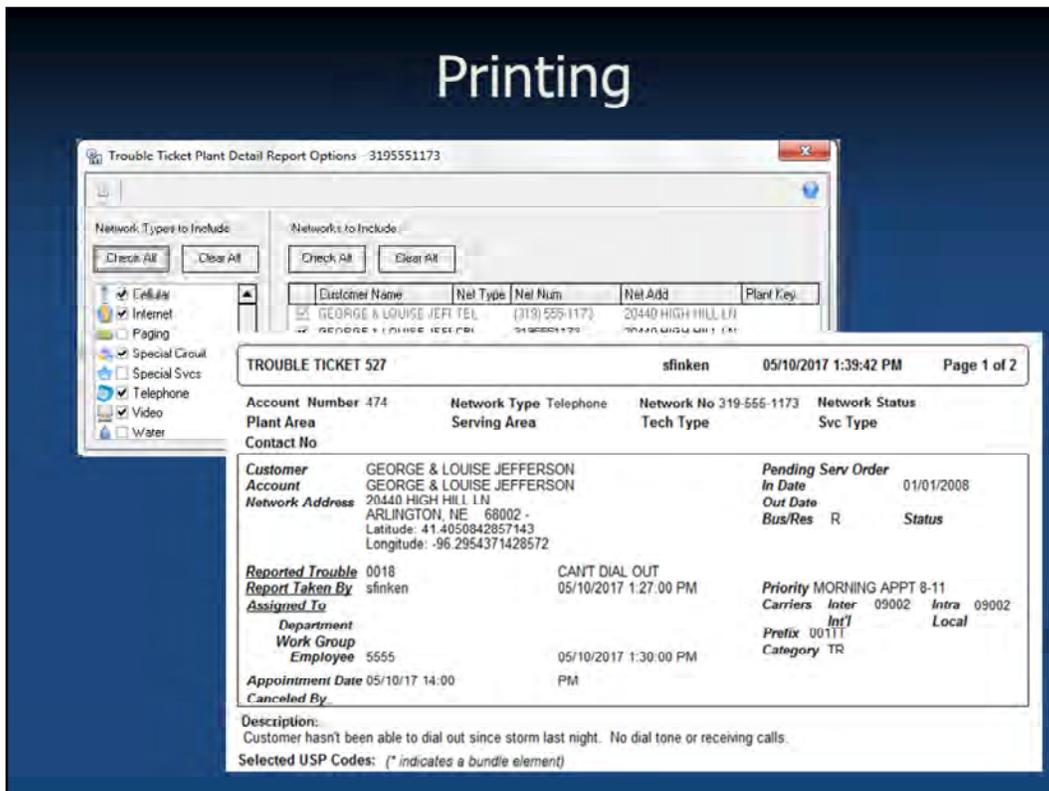


After posting your Trouble Ticket, you may choose to Print.

If at Preferences, you did NOT select "Allow Changes to Report Options", the fields will be grayed out, and will not be available for change.

- **Include on Trouble Ticket:** Select from the available options by checking the box to the left of the option. Each option selected will appear on the printed Trouble Ticket.
- **Address Options:** To print the service address, click the Service Address radio button. To print the billing address, click the Billing Address radio button.
- **Number of History Years to Print:** To print previously recorded trouble information associated with this account, use the up and down arrows of this field to select the number of trouble history years you would like to view.
- **Include Network Plant:** Allows the printing of plant associated with other networks on the account.

Printing



If the option to include network plant is selected, the trouble ticket for the main network will be generated in the report viewer, as usual. When this window is closed, a print options window appears, allowing the user to choose which networks' plant will appear on a subsequent report. This window – the Trouble Ticket Plant Detail Report Options window – shows the networks that appear under the associated account.

After clicking print from the Trouble Ticket Plant Detail Report Options window, the report listing plant detail for all associated networks appears for printing.

Clear

Trouble Ticket Editor

Ticket Num: 527 Plant Regulated GEORGE & LOUISE JEFFERSON
Network: (319)555-1173 Mass Outage Num: 474 Active Dt: 01/01/2008
Type: Telephone Pending Network Status: Active
Serv Type: Tech Type: SQ Inactive Dt:

Stages Actions Questions Comments History Cancel SO Equipment SO Plant Address Net. USP Codes SO Comments

Code: 003 BLKIED PLANT Code: 0001

Detail: 029 CA CABLE PAIR Cleared

Code: REP REPAIR By: sfriken Time: 5/10/2017 03:06 PM

Back to Dispatch 4. Clear: Incomplete

Billable Description: Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.

Address: 20140 HIGH HILL LN

Report Code: 0018 Prefix: 001TT

Category: TR Priority: AM

Class: PHONE

After all information is entered at the Clear screen, the Trouble Ticket is ready to be cleared. If the Trouble Ticket is billable, it's important to make sure that the ticket has been billed before proceeding.

Ticket Summary

Ticket Num: 527
Network: (319)555-1173
Type: Telephone
Serv Type: Tech Type: SO

Plant Registered: Mass Outage
Pending Network: SO

GEORGE & LOUISE JEFFERSON
Num: 474
Status: Active
Active Dt: 01/01/2008
Inactive Dt:

Stages Actions Questions Comments History

SO Equipment SO Plant Address Net. USP SO
Code Code

Times:
Taken: 05/10/2017 1:27:00 PM by sfinken
Assigned: 05/10/2017 1:30:00 PM by TCarlson
Appointment: 05/10/2017 2:00:00 PM - Status: PM
Picked Up: 05/10/2017 1:35:22 PM by TCarlson
Cleared: 05/10/2017 3:06:00 PM by sfinken

Codes:
Cause Code: 0001 LIGHTNING
Equipment Code: 003 BURIED PLANT
Equipment Detail: 029 CA CABLE PAIR
Solution Code: REP REPAIR

Back to Ticket 5 Summary

Description: Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.

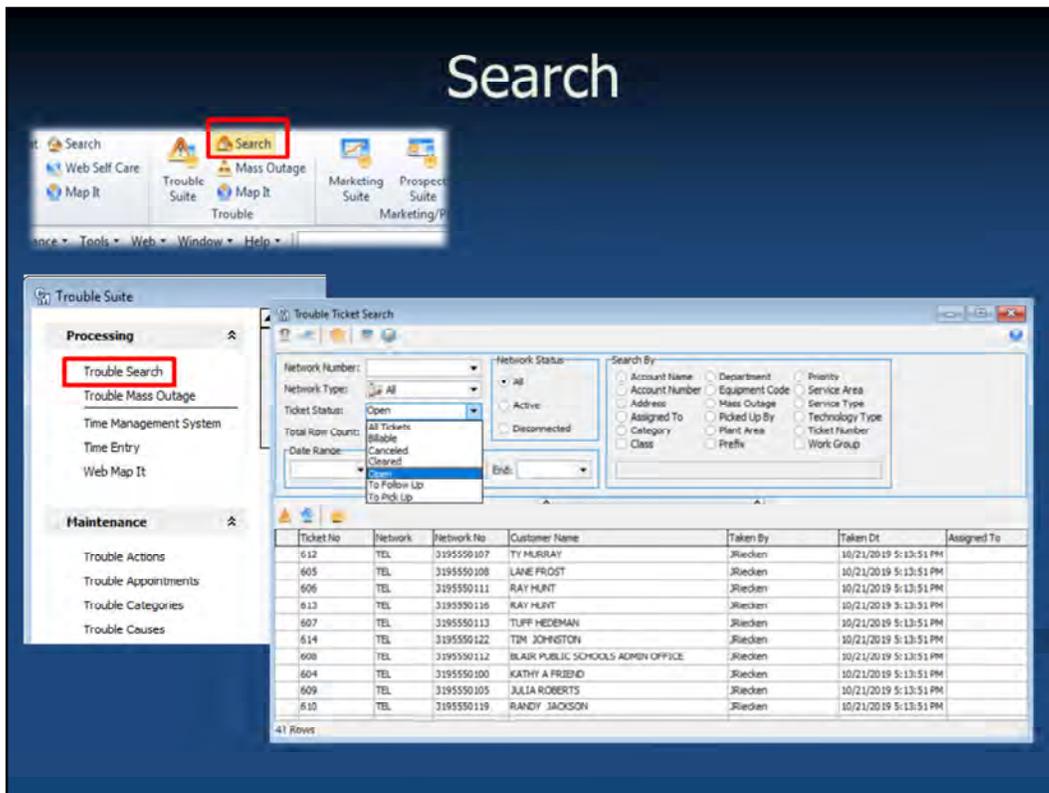
Address: 20440 HIGH HILL LN
Report Code: 0018 Prefix: 001TT
Category: TR Priority: AM
Client: PHONE

Follow Up:
By: [Field]
Time: 12:00 AM

The final screen of the Trouble Editor wizard is a summary of the Trouble Ticket. It displays all of the dates and times that are critical to trouble reporting, which we will discuss later in this chapter.

In the Follow Up section of this screen, you can indicate when any Follow Up has been done or add a future date as a reminder for follow up that occurs once the ticket is cleared. Using search criteria at the Trouble Search, you can find all tickets that have not had Follow Up in order to see what additional work effort might be needed. We'll look at Trouble Search next.

Search

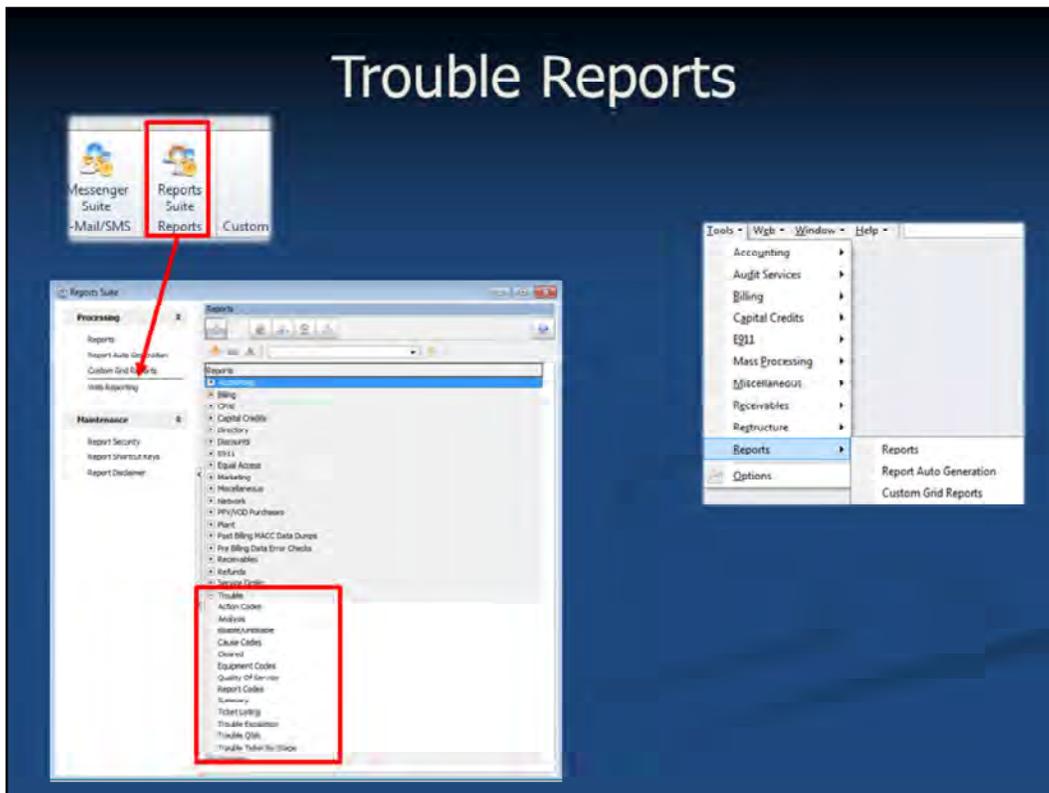


To search for Trouble Tickets use the Search icon in the Trouble Ribbon or from the Trouble Suite window. The Trouble Ticket Search window functions as a search tool to locate trouble tickets, regardless of their status. In addition, this window can be used as a gateway to opening a new trouble ticket, updating an existing trouble ticket, or canceling a trouble ticket.

Use the Ticket Status filter to see All Tickets, Billable, Canceled, Cleared, Open, To Clear, To Follow-Up, or To Pick Up. You may also search by a wide variety of criteria options. A date range may be required based on certain ticket status options. The columns listed in the grid can also be filtered – making it very easy to find what you’re looking for.

To edit a Trouble Ticket, double-click on the ticket in the grid or click on the Edit button. If you right-click in the grid, you’ll have the option to Export the information to a .CSV file, which is very helpful for customized reporting and analysis.

Trouble Reports



Trouble Reports can be accessed from the Report Suite or by navigating to Tools – Reports – Trouble, the following reports are available for your use:

- Analysis: Provides a breakdown of trouble codes and the hours spent working on each by your company's technicians. This report can also be generated for cause codes.
- Billable/Unbillable: This report provides information on billable and non-billable trouble tickets. When the Billable check box on the Trouble Ticket Editor is selected, the trouble ticket will appear on this report as billable. Likewise, if the Billable checkbox is not selected, the Trouble Tickets will appear as unbillable on this report.
- Cleared: This report provides a listing of troubles cleared per plant group over a specified period of time.
- Quality of Service Report: Provides a listing of trouble reported by your customers over a specified period of time. Typically used for PUC reporting.
- Summary: This report provides a listing of your company's plant codes a breakdown of associated trouble information for each.
- Ticket Listing: Provides a listing of your company's trouble tickets according to their status (uncleared, cleared, canceled, etc.), as well as other reporting criteria.
- Trouble Escalation: This report provides a list of all escalated tickets based on a variety of circumstances.
- Trouble Q&A: Allows you to report on accounts that had specific answers to questions set up through the Preferences table.

Trouble Reports

The screenshot displays a software window titled "Trouble Analysis Report Options" with various filtering and sorting controls. To the right, a report titled "Trouble Analysis Report Cause Codes, All Dates SUCCESS TEL PRODUCTION 17.1" is shown. The report includes a header with page information and a table with columns for Cause Code, Number, Total Time Worked (Hrs), Average Time Worked (Hrs), Total Time Elapsed (Hrs), and Average Time Elapsed (Hrs).

Cause Code	Number	Total Time Worked (Hrs)	Average Time Worked (Hrs)	Total Time Elapsed (Hrs)	Average Time Elapsed (Hrs)	
0001	LIGHTNING	1	0.02	2,737.83	2,737.83	
0002	TREE ON WIRE	153	10,322.95	67.47	53,540.98	349.94
0003	BROKEN	3	0.50	0.17	812.95	270.98
0004	BURNED	19	702.65	36.98	4,387.68	230.93
0005	BUSY	7	17.45	2.49	8,195.53	1,170.79
0006	BUSY	4	362.63	90.66	2,710.65	677.66
0007	CAME CLEAR	14	1.80	0.13	2,624.23	187.45
0008	CARBON FUSE	1	1.77	1.77	3.37	3.37
0008	CARD DEFECTIVE	3	72.00	24.00	123.30	41.10
0011	CONNECTING CO FAULT	2	0.60	0.30	5.70	0.35

The Trouble Analysis Report is one of the more commonly used reports for management of trouble tickets. Available criteria include filtering by Main Report Area or Report Area. In addition, you can identify a date range for the report. Finally, you may select to sort the report by Trouble Codes or by Cause Codes.

Trouble Reports

Cleared Trouble Report Options

Main Report Area Options
 Do Not Group
 Group By All Areas
 Select One Area: [Dropdown]

Network Options
 Do Not Group
 Group By All Network Types
 Select a Network Type: [Dropdown]

Report Area Options
 Do Not Group
 Group By All Areas
 Select One Area: [Dropdown]

Service Type Options
 All Service Types
 One Service Type: [Dropdown]

Technology Type Options
 All Technology Types
 One Technology Type: [Dropdown]

Mass Outage Options
 Include All Outages
 Exclude All Outages
 Select One Outage: [Dropdown]

Trouble Taken Date Range
 Show All Dates
 Begin: [Dropdown] End: [Dropdown]

Summary of Exchange Troubles Cleared
 Dates, All Svc Types, All Tech Types
 SUCCESS TEL PRODUCTION 17.1
 Page 1 of 3
 5/10/2017 1:48:53 PM
 slinken

Cause Found	Count	Cleared Date
0001 WEATHER	3	06/21/2012
0002 CUSTOMER EQUIPMENT	1	08/15/2013
0004 REPLACE EQUIPMENT	1	12/15/2011
0006 MISCELLANEOUS	1	11/28/2011
BAD/W BAD WIRE	2	01/23/2008
CEL CELL	1	08/07/2012
Total Trouble Tickets Cleared For Equipment Group:		9
0001 LIGHTNING	1	12/15/2011
0003 BROKEN	96	10/25/2011
0004 BURNED	3	04/09/2009
0006 CAME CLEAR	1	12/15/2011
0011 CONNECTING CO FAULT	1	10/22/2009
0012 CORROSION	1	03/01/2016
0076 UNKNOWN	2	11/19/2014
	1	05/11/2012

Another critical trouble management report is the Cleared Trouble Report. The Trouble Cleared Report provides a listing of troubles cleared per plant group over a specified period of time.

Again, you may filter on Main Report area or Report Area. In addition, you have the option to select a Taken Date Range.

Trouble Reports

Quality of Service Report
 on 01/01/2016 to 5/10/2017
 Page 1 of 1
 5/10/2017 1:50:30 PM
 sfinken

EL PRODUCTION 17.1

Mail: All Solution Code: All Report By: All
 Category Option: All

Reported Code and Description		Assigned To		
Cause Description	Equipment Code Description	Date and Time	Employee Picked Up By	Worked HRS
Equipment Detail Description	Solution Description	Regulated	Date and Time	Employee Cleared By
			Date and Time	Elapsed HRS
0018 CANT DIAL OUT			TCarlson 05/10/17 13:30	
0001 LIGHTNING				
003 BURED PLANT		Y	TCarlson 05/10/17 13:35	1.52
029 CA CABLE PAIR				
REP REPAIR			sfinken 05/10/17 15:06	1.65

Description: Customer hasn't been able to dial out since storm last night. No dial tone or receiving calls.

**** Grand Totals ****

Trouble Calls Cleared Within 24 Hours:	1	100.00 %	Trouble calls cleared per Report Area:	1.00	Trouble Calls:	1
Average Repair Interval (hours):	1.00		Total Active Networks:	1545	Picked Up:	1
Appointments Met:	1 of 1	100.00 %	Trouble calls cleared per 100 Networks:	0.06	Cleared:	1
ANY Repeat Trouble Within 10 Days:	0	0.00 %				

The Trouble Quality of Service Report is commonly used to send to the company's Public Utilities Commission.

Again, you may filter on Main Report area or Report Area. Here, you also have the option to Group by Exchange. You may choose a Status, and a Sort Order. In addition, you may indicate a Date Range. The Report Telephone By selections allow you to designate of the Trouble Plant Codes were Regulated, Non-Regulated, or you may select All. Finally, you may select a Full Report, or simply Telephone – with or without Descriptions. There is also an option to designate Repeat Troubles within a specified number of days.

Employee Options allow you to print a report based on an employee's action and their name.

Trouble Reports

The screenshot shows a software interface for generating trouble reports. The top part is a dialog box titled 'Trouble Summary Report Options' with various filter settings. The bottom part is a report table with the following data:

All Rpt Areas CO # : 470 OCN # : 470a			Trouble Summary Report All Dates, All Svc Types, All Tech Types, All Bus/Res Types, Cleared Trouble SUCCESS TEL PRODUCTION 17.1				Page 1 of 2 5/10/2017 1:51:09 PM slinken	
Equip. Code	Equip. Detail	Equip. Description	Network	Number Valid	Total Time Worked (Hrs)	Average Time Worked (Hrs)	Total Time Elapsed (Hrs)	Average Time Elapsed (Hrs)
001	003	ANCHOR	NT	9	262.57	29.17	7,101.58	789.06
001	001	DUPLICATE	TEL	5	8.82	1.36	4,100.93	836.19
001	005	GUARD, GUY	TEL	33	19.52	0.59	23,065.82	696.96
001	006	KEY, POLE	TEL	1	24.00	24.00	24.03	24.03
001	002	OTHER	TEL	2	2.85	1.33	2.83	1.42
001	007	POLE	TEL	60	685.10	11.42	3,429.07	57.15
001	007	POLE	TEL	5	46.15	8.03	7,909.77	1,581.95
002	003	BLOCK, CONN	TEL	3	642.12	214.04	1,554.47	518.16

The Trouble Summary Report provides a listing of your company's plant codes with a breakdown of associated trouble information for each.

Again, you may filter on Main Report area or Report Area. In addition, you have the option to select a Taken Date Range.

Trouble Reports

The screenshot displays a software interface for generating trouble reports. On the left, a 'Trouble Listing Report Options' dialog box is open, showing various filtering and sorting options. On the right, a 'Ticket Listing' report is displayed, showing a table of tickets with columns for Number, Category, Priority, Appointment Taken On, and Appointment Picked Up. The report is sorted by Ticket Number in ascending order.

Trouble Listing Report Options Dialog:

- Main Report Area Options:** Do Not Group (selected), Group By All Areas, Select One Area.
- Network Options:** Do Not Group (selected), Group By All Network Types, Select a Network Type.
- Report Area Options:** Do Not Group (selected), Group By All Areas, Select One Area.
- Mass Outage Options:** Include All Outages (selected), Exclude All Outages, Select One Outage.
- Service Type Options:** Do Not Group (selected), All Service Types.
- Technology Type Options:** Do Not Group (selected), All Technology Types, One Technology Type.
- Search Options:** Uncleared Tickets (selected), Cleared Tickets, Canceled Tickets, To Pick Up, To Follow Up, All Trouble Tickets.
- Sort Order:** Ascending (selected), Descending.
- Field:** Ticket Number (selected), Priority, Account Name, Prefix, Date Taken, Service Area, Appointment.
- Date Taken Range:** Begin, End.
- Appointment Date Range:** Begin, End.

Ticket Listing Report:

Page 1 of 3
Sort by Ticket No
L PRODUCTION 17.1
5/10/2017 1:51:52 PM
sflinck

Number	Category	Priority	Appointment Taken On	Appointment Picked Up
State	Svc Type	Tech Type	Taken By	Followed Up
State	Zip	Cleared	Cancelled	
555-1041			01/23/2015	JRiecken
	8850 BERRY HILL RD			
	BLAIR	NE 68008		
489	SUCCESS PUBLIC SCHOOL	successint DSL	05/07/2015	JRiecken
	11140 BRIDGEVIEW DR			
	BLAIR	NE 58008		
497	STEVE A SALES	(319) 555-0124	08/11/2015	RHalford
	11300 SPRING DR			
	BLAIR	NE 68008		
492	KATHY SALES - M	3195550011	08/13/2015	RHalford
	10700 SERENITY LN			
	BLAIR	NE 68008		

Another commonly used report is the Trouble Ticket Listing Report. It provides a listing of your company's trouble tickets according to their status (uncleared, cleared, canceled, etc.), as well as other reporting criteria.

As with other reports, the same filtering options apply. Here, you may search by the status. You also have the ability to select a sort order – either ascending or descending, date ranges for both the Taken Date and the Appointment Date. You may also select for filter on Tickets taken by a specific employee.

Trouble Reports

The screenshot shows a software interface for generating trouble reports. On the left is a 'Trouble Escalation Report Options' dialog box with various filters and checkboxes. On the right is the 'Trouble Escalation Report' table, which lists tickets with columns for Ticket, Account Name, Network, Date Taken, Assigned To, Category, Escalation Method, and Level. The table shows two tickets: one for Douglas Fairbanks Jr and one for Lane Frost.

Trouble Escalation Report Options Dialog:

- Main Report Area Options:**
 - Do Not Group
 - Group By All Areas
 - Select One Area: [Dropdown]
- Report Area Options:**
 - Do Not Group
 - Group By All Areas
 - Select One Area: [Dropdown]
- Sort By:**
 - Trouble Ticket #
 - Category
 - Assigned To
 - Escalation Level
 - Escalation Method
 - Action Code
- Escalation Levels:**
 - Action Start/Stop: Low, Medium, High
 - Open-to-Picked Up: Low, Medium, High
 - Open-to-Assigned To: Low, Medium, High
 - Open-to-Cleared: Low, Medium, High
- Ticket Options:**
 - Category: [Dropdown]
 - Assigned To: [Dropdown]
 - Include Comments

Trouble Escalation Report Table:

Page 1 of 1
5/10/2017 1:52:52 PM
sflinken

Sort By Trouble Ticket
SUCCESS TEL PRODUCTION 17.1

Open-to-Picked Up	Open-to-Assigned To	Open-to-Cleared	Include Comments
<input checked="" type="checkbox"/> Low	<input checked="" type="checkbox"/> Low	<input checked="" type="checkbox"/> Low	<input type="checkbox"/>
<input checked="" type="checkbox"/> Medium	<input checked="" type="checkbox"/> Medium	<input checked="" type="checkbox"/> Medium	<input type="checkbox"/>
<input checked="" type="checkbox"/> High	<input checked="" type="checkbox"/> High	<input checked="" type="checkbox"/> High	<input type="checkbox"/>

Ticket	Account Name Address	Network	Date Taken City	Assigned To State Zip	Category	Escalation Method	Level Action
506	DOUGLAS FAIRBANKS JR 534 RIVER RD	TEL- 3195551385	8/4/2016 8:31:00 AM BLAIR	NE 68008	TR	Open-to-Cleared	H
518	LANE FROST 331 MAIN ST	TEL- 3195550108	11/29/2016 1:24:00 PM BLAIR	RIECKEN, JULIE L NE 60000	TR	Open-to-Cleared	H

Total Number of Tickets: 2

The Trouble Escalation Report provides a listing of all escalated Trouble Tickets based on various escalation levels and categories.

Trouble Reports

The screenshot shows a software interface for generating trouble reports. On the left is a dialog box titled 'Trouble Q&A Report Options' with the following settings:

- Questions:** All, Select One Question: [dropdown]
- Answers:** All, Select One Answer: [dropdown]
- Network Options:** Effective Date Range: All Dates, Date Range
- Do Not Group, Group By All Network Types
- Select a Network Type: [dropdown]
- Begin: [input], End: [input]
- Sort Answer By: Date Taken, Network Number, Customer Name

On the right is a preview of the report output:

Trouble Question and Answer Report
 for Selected Question, All Answers
 Dates, By Date Taken, Network TEL
 SUCCESS TEL PRODUCTION 17.1

Page 1 of 2
 05/10/2017 1:53:51 PM
 sinken

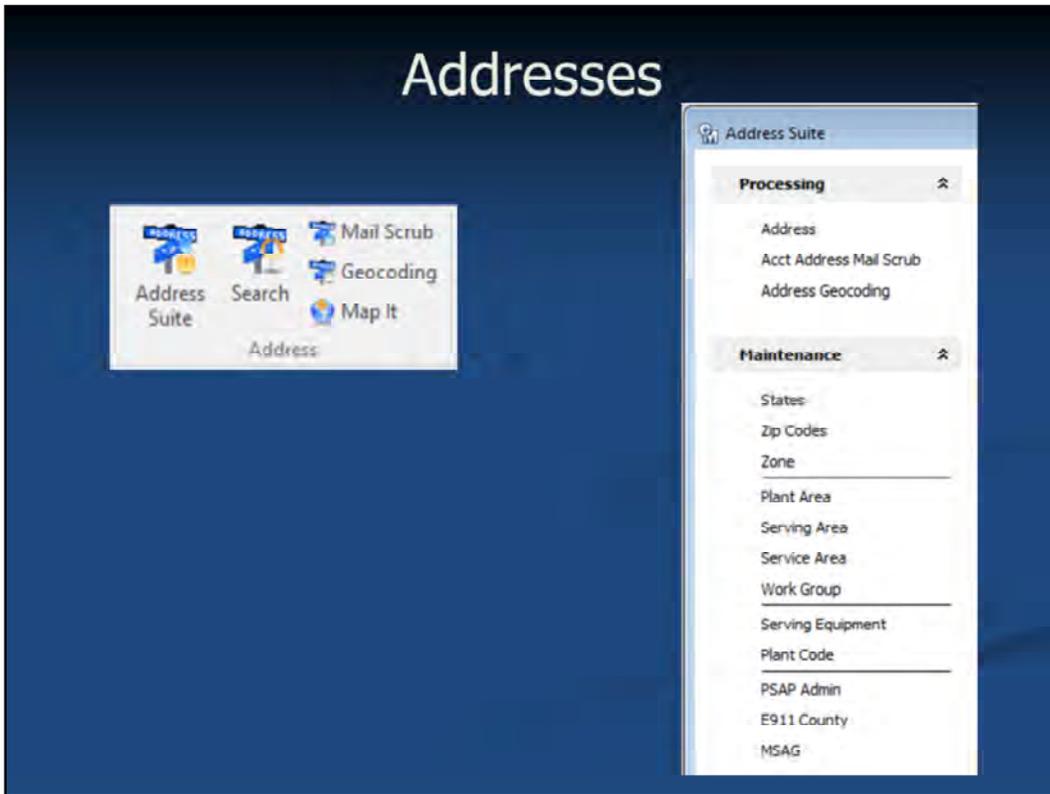
Network Number	Customer	Trouble Ticket	Taken Date
Question: HAVE YOU CHECKED ALL PHONE CONNECTIONS?			
Answer: ALL CONNECTIONS ARE FINE			
(319) 555-1082	DELANEY, KIM	331	09/28/2011
Answer: YES			
(319) 555-1047	SALES, JEFF	308	03/17/2011
(319) 555-1047	SALES, JILL	308	03/17/2011
(319) 555-1005	REAGAN, KATHY	313	03/18/2011
(319) 555-1173	JEFFERSON, GEORGE & LOUISE	320	04/14/2011

The Trouble Q&A Report works much like the Class Q&A related to Service Orders. You can print reports based on the Trouble Questions and/or Answers on each ticket. You can generate a report for all Questions and all Answers, a single Question and all Answers, or a single Question and a single Answer.

Chapter

9

Customer Master Addresses



Valid addresses are critical in Customer Master. Not only are they necessary for Plant, they also need to be correct for accurate reporting for FCC 477, HUBB and E911.

All of the tools you need to manage your addresses can be found through Address Search and the Address Suite on the Account Management ribbon.

Addresses

The screenshot shows a software window titled "Address". It features a toolbar with icons for navigation and editing. The main form area contains the following fields:

- Type:** A group box containing three radio buttons: "Acct/Cust", "Network", and "All". The "All" radio button is selected.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A text input field followed by a dropdown menu.
- ZIP:** A text input field followed by a dropdown menu.
- ZIP +4:** A text input field.
- Plant Key:** A text input field.

There are two types of Common addresses – Acct/Cust and Network. Acct/Cust is the billing address – used on the Account and, in most cases, the Customer tiers. Network is the service address – used on the Network tiers. Sometimes both address types are the same and sometimes they're different. For example a billing and service address might be 1435 Adams St in Blair NE. Other times, the billing address might be PO Box 123 in Blair NE and the service address 1435 Adams St in Blair NE.

Addresses can also be active and inactive. Active means it's available for use – and possibly already in use. Inactive means the address has been flagged as inactive and is no longer available for selection. Just because an address is flagged as inactive doesn't mean it's not currently in use or has been used in the past.

New Address

Address Editor

Type: Acct/Cust Network Both

Address 1: 2153 JACKSON ST

Address 2:

City: BLAIR State: IL

ZIP: 68008 ZIP +4: Inactive Address

Zone:

Plant Key:

Latitude: Send to GPS Interface

Longitude:

Census Tract: + Block: SAC:

Auto-Assigned Values | Servicing Equipment | Servicing Terminals | E911 | Internet Deployment | Comments

Auto-Assigned Values Enabled

Tax Area: Service Area:

Plant Area: Report Area:

Serving Area: Work Group:

The best way to create an address is to build it through the maintenance table. Besides the basic address information, you have additional address-related options including Auto-Assigned Values, E911 and Internet Deployment information (used for HUBB reporting).

New Address

Address Editor

Type: Acct/Cust Network Both

Address 1: 2153 JACKSON ST

Address 2:

City: BLAIR State: NE

ZIP: 68008 ZIP +4: Inactive Address

Delivery Point: Check Digit: Scrubbed

Zone:

Plant Key:

Latitude: Send to GPS Interface

Longitude:

Census Tract: + Block: SAC:

Auto-Assigned Values | Serving Equipment | Servicing Terminals | E911 | Internet Deployment | Comments

Auto-Assigned Values Enabled

Tax Area: E/M/C Service Area:

Plant Area: BLR Report Area:

Serving Area: Work Group: BLAIR

Auto-Assigned Values are values such as Tax Area and Plant Area that you can pre-assign to the address as you're building it. When the address is used on a tier, those values will auto-populate. This is a real time-saver and cuts down on user error.

Note: these values are defaults and can be changed as needed when the address is being used.

Note: you might want to consider not including a Report Area, depending on how yours are set up.

New Address

The screenshot shows the 'Address Editor' form with the following fields and values:

- Type: Acct/Cust Network Both
- Address 1: 2153 JACKSON ST
- Address 2: (empty)
- City: BLAIR State: IE
- ZIP: 68008 ZIP +4: (empty) Inactive Address
- Delivery Point: (empty) Check Digit: (empty) Scrubbed
- Zone: (empty)
- Plant Key: (empty)
- Latitude: (empty) Send to GPS Interface
- Longitude: (empty)
- Census Tract: (empty) + Block: (empty) SAC: (empty)

Navigation tabs: Auto-Assigned Values | Serving Equipment | Servicing Terminals | **E911** | Internet Deployment | Comments

The E911 section contains:

- PSAP: SWBELL E911 Possible
- E911 Community: BLAIR
- E911 County: WASH

Adding E911 information will help with updates to the E911 screen on the Telephone network tier and with reports and files.

New Address

The screenshot shows the 'Address Editor' window with the following fields and options:

- Type: Acct/Cust Network Both
- Address 1: 2153 JACKSON ST
- Address 2: [Empty]
- City: BLAIR State: VE
- ZIP: 68008 ZIP +4: [Empty] Inactive Address
- Delivery Point: [Empty] Check Digit: [Empty] Scrubbed
- Zone: [Empty]
- Plant Key: [Empty]
- Latitude: [Empty] Send to GPS Interface
- Longitude: [Empty]
- Census Tract: [Empty] + Block: [Empty] SAC: [Empty]

Navigation tabs: Auto-Assigned Values | Serving Equipment | Serving Terminals | E911 | **Internet Deployment** | Comments

The 'Internet Deployment' section is highlighted with a red box and contains:

- Deployment Date: 4/8/2020
- Max Download Speed (mbps): 50
- Max Upload Speed (mbps): 10

Internet Deployment information is required for HUBB reporting and must be included with the address. If you don't include it now, you'll have to add it later.

New Address

Address Editor

Type: Acct/Cust Network Both

Address 1: 2153 JACKSON ST

Address 2:

City: BLAIR State: NE

ZIP: 68008 ZIP 4-4: Inactive Address

Delivery Point: Check Digit: Scrubbed

Zone:

Plant Key:

Latitude: Send to GPS Interface

Longitude:

Census Tract: + Block: SAC:

Auto-Assigned Values: **Serving Equipment** | **Serving Terminals** | 911 | Internet Deployment | Comments

Comment	Change By
<no data to display>	

Serving Equipment and Servicing Terminals can include plant-related information. Comments might include something such as the side of the street, the color of the house and so on.

New Address

The screenshot shows the 'Address Editor' window with the following fields and values:

- Type: Acct/Cust Network
- Address 1: 2153 JACKSON ST
- Address 2: (empty)
- City: BLAIR State: NE
- ZIP: 68008 ZIP +4: (empty) Inactive Address
- Delivery Point: (empty) Check Digit: (empty) Scrubbed
- Zone: (empty)
- Plant Key: (empty)
- Latitude: 41.549004192747802 Send to GPS Interface
- Longitude: -96.145065330005579
- Census Tract: 311770501.01 + Block: 1011 SAC: (empty)

At the bottom, there are tabs for: Auto-Assigned Values | Serving Equipment | Servicing Terminals | E911 | Internet Deployment | Comments

Once all of the information has been entered it's just a matter of saving the address. Geocoding values will automatically populate if the address is good. MACC uses ESRI for geocoding information.

New Address

The screenshot shows the 'Address Editor' window with the following fields and values:

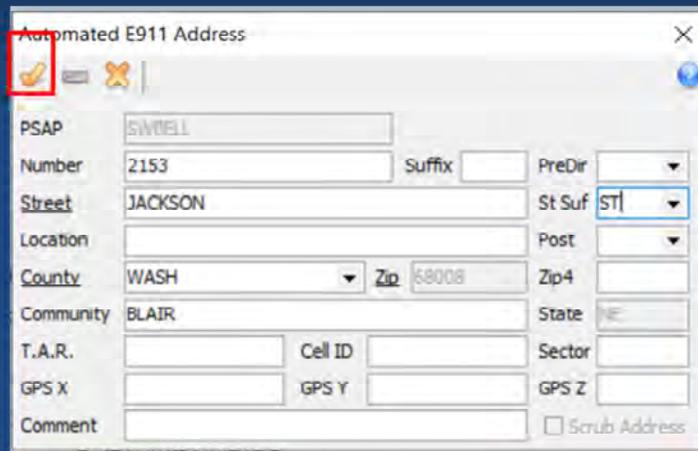
- Type: Acct/Cust Network
- Address 1: 2153 JACKSON ST
- Address 2: (empty)
- City: (empty) State: ME
- ZIP: 68008 ZIP +4: (empty) Inactive Address
- Delivery Point: (empty) Check Digit: (empty) Scrubbed
- Zone: (empty)
- Plant Key: (empty)
- Latitude: 41.549004192747802 Send to GPS Interface
- Longitude: -96.145065330005579
- Census Tract: 311770501.01 + Block: 1011 SAC: (empty)

At the bottom, there are tabs for 'Auto-Assigned Values', 'Serving Equipment', 'Serving Terminals', 'E911', 'Internet Deployment', and 'Comments'. Two icons in the top toolbar are highlighted with red boxes: a red heart and a blue plus sign.

Once the address is saved, you'll want to scrub it against the MSAG to make sure it's valid for E911 reporting. One of two information prompts will be triggered – either the address is valid or it isn't. In some cases, it might be seen as invalid because the street suffix, for E911, needs to go in the suffix field.

You'll also want to link the address to the E911 version of the address.

New Address



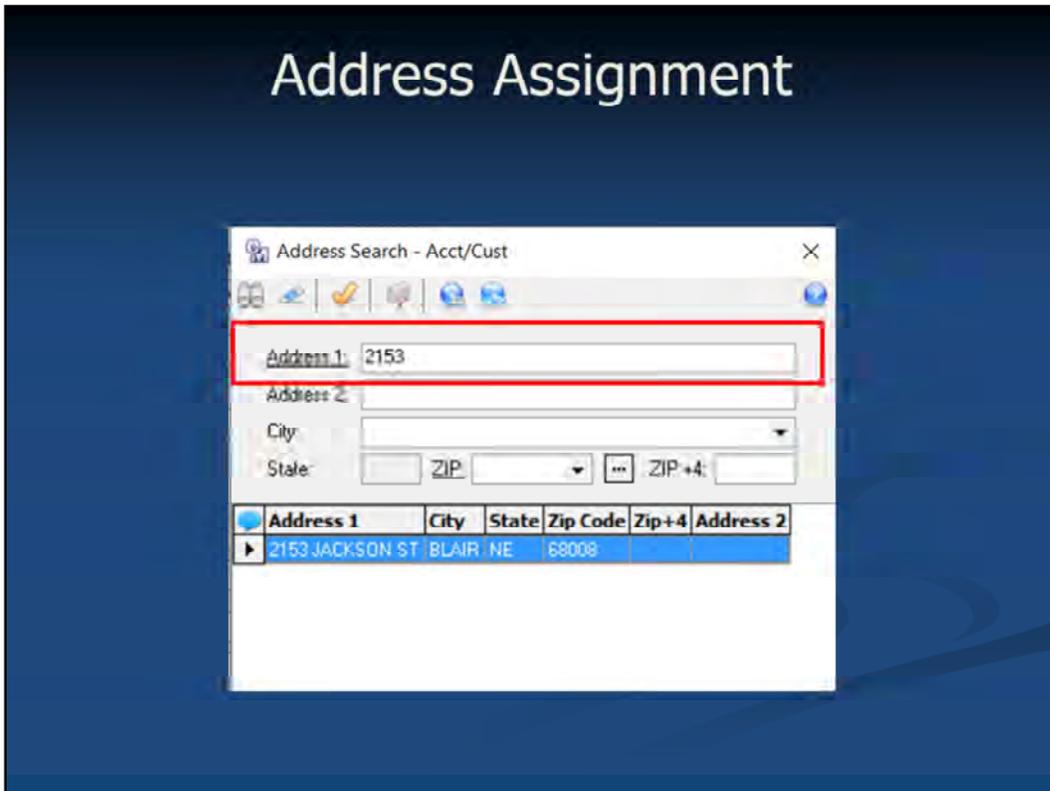
The screenshot shows a software window titled "Automated E911 Address" with a close button (X) in the top right corner. Below the title bar are three icons: a save icon (highlighted with a red box), a refresh icon, and a delete icon. The form contains the following fields:

PSAP	SWOELL		
Number	2153	Suffix	
Street	JACKSON	St Suf	ST
Location			
County	WASH	Zip	68008
Community	BLAIR	State	NE
T.A.R.		Cell ID	
GPS X		GPS Y	
GPS Z			
Comment			

At the bottom right of the form, there is a checkbox labeled "Scrub Address" which is currently unchecked.

All that's needed to create the link between the two addresses is to save the information on the Automated E911 Address screen.

Address Assignment



The key to using the address is searching for it. The rule for searching is 'Less Is More' – search on as little of the address as possible. If you get too many results, you can narrow your search by adding more.

Address Assignment

Account: 1755

Active: On Vacation Print Summary
Disconnected: Surcharge Taxable Bill in Advance
First Name: HEATHER Last Name: HOFFMAN
Full Name: HEATHER HOFFMAN
Miscellaneous:

Billing Address: 2153 JACKSON ST ...

BLAIR NE 68008 -

Acct Status: Bill Code: 01
Service Area: Payment Matrix: 01
Report Area: 555 Tax Tax Area: B/WC
Bill Medium: Paper Exempt Code:
Bill Format: MACC 3 Exp. Date:
Bill Language: English
Agent: Bus • Res RES

Discount

Taxable
 Fed
 State
 L1
 L2
 L3
 L4

Any auto-assigned values will populate when the address is selected. Any other required values will need to be filled in manually. In this example, Tax Area was populated based on the auto-assigned values linked to the address at the time it was built.

Note: some values, such as Bill Cycle and Payment Matrix, will auto-populate if they've been set as defaults.

Address Assignment

The screenshot shows a 'Customer' form with the following fields and values:

- Active:
- Disconnected:
- First Name: HEATHER
- Last Name: HOFFMAN
- Full Name: HEATHER HOFFMAN
- Customer Address: 2153 JACKSON ST
- City: BLAIR
- State: NE
- Zip: 68008
- Zip +4:
- Cust Status:
- Tax Area: B/WC
- Exempt Code:
- Exp. Date:
- Service Area:
- Report Area: 555
- Bus: Res:
- Taxable: Fed, State, L1, L2, L3, L4

Red boxes highlight the 'Customer Address' section (including City, State, Zip, and Zip +4) and the 'Tax' section (including Cust Status, Tax Area, Exempt Code, Exp. Date, Service Area, Report Area, and the Bus/Res radio buttons).

The Customer tier address and values will populate based on the Account tier information.

Address Assignment

The screenshot displays a 'Network' form with the following fields and values:

- Active: On Hold: Mult Address:
- Disconnected: Surcharge Taxable:
- Type:
- Description: HEATHER HOFFMAN
- Service Type: Technology Type:
- Line Card Type: Trouble Priority:
- Service Address: 2153 JACKSON ST
BLAIR, NE 68008
- Network Status:
- Service Area:
- Report Area: 555
- Plant Area: BLR
- Serving Area:
- Work Group: BLAIR
- Tax Area: B/WC
- Exempt Code:
- Exp. Date:
- Special Needs: Hearing, Medical Condition, Physical, Speech, Visual

If the address exists as a Network tier address, the information will populate from the information on the Account and Customer tiers. Based on the values included when the address was built, those fields will auto-populate. In this example, you can see that besides Tax Area, Plant Area and Work Group were populated based on the auto-assigned values.

If the address doesn't exist as a Network tier address, the Address Search screen will open and you'll need to search for it, or create it 'on the fly'. Creating addresses through Service Order is not recommended as there isn't the opportunity to add/link auto-assigned values. Additionally, all E911 verification will need to be done through the order.

Managing Addresses

The screenshot shows a software interface titled 'Address' with a form and a table. The form includes fields for Type (Acct/Cust, Network, All), Address 1 (100), Address 2, City, State, ZIP, and Plant Key. Below the form is a table with 12 columns: Type, Address 1, City, Ad, Pla, State, Zip, Zip+, Inactive Address, Used on Tr, LIS, Latitude, and Longitude. The table contains 14 rows of address data, with the last row indicating 169 total rows and an 'Active' status.

Type	Address 1	City	Ad	Pla	State	Zip	Zip+	Inactive Address	Used on Tr	LIS	Latitude	Longitude
Network	8100 N PARK	ARLINGTON			NE	68002		<input type="checkbox"/>	0	No	41.4817405239071	-96.3453065432618
Acct/Cust	11000 SUNNYSIDE DR	BLAIR			NE	68008		<input type="checkbox"/>	0	No		
Network	11000 SUNNYSIDE DR	BLAIR			NE	68008		<input type="checkbox"/>	0	No	41.4379110477577	-96.1196622945781
Acct/Cust	1001 MACC DR	BLAIR			NE	68008		<input type="checkbox"/>	0	No		
Acct/Cust	1000 ADAMS ST	BLAIR			NE	68000		<input type="checkbox"/>	0	No		
Acct/Cust	1001 ADAMS ST	BLAIR			NE	68001		<input type="checkbox"/>	0	No		
Acct/Cust	1002 ADAMS ST	BLAIR			NE	68002		<input type="checkbox"/>	0	No		
Acct/Cust	1003 ADAMS ST	ARLINGTON			NE	68002		<input type="checkbox"/>	0	No		
Acct/Cust	1004 ADAMS ST	ARLINGTON			AZ	68002		<input type="checkbox"/>	0	No		
Acct/Cust	1005 ADAMS ST	ARLINGTON			AK	68002		<input type="checkbox"/>	0	No		
Acct/Cust	1006 ADAMS ST	FORT CALHOUN			NE	68023		<input type="checkbox"/>	0	No		
Acct/Cust	1007 ADAMS ST	KENNARD			NE	68004		<input type="checkbox"/>	0	No		
Acct/Cust	1008 ADAMS ST	BLAIR			IL	68008		<input type="checkbox"/>	0	No		
Acct/Cust	1009 ADAMS ST	BLAIR			NE	68009		<input type="checkbox"/>	0	No		
169 Rows		Active										

There are lots of different ways the address table can grow with bad addresses and clean-up can be a daunting task.

As you work through your clean-up, you'll be using the Address Search and Address Suite. The general rule of thumb is that if the incorrect version of the address doesn't exist you can correct it in the table. If there are incorrect versions and the correct address exists, you'll have to update accounts with the correct version through Service Order. All incorrect versions should be flagged as inactive.

Managing Addresses

The screenshot shows a software interface for managing addresses. At the top, there is a title bar and a menu bar. Below the menu bar is a form with the following fields:

- Type: Acct/Cust Network All
- Address 1:
- Address 2:
- City:
- State: ZIP: ZIP ++:
- Plant Key:

Below the form is a data grid with the following columns:

Type	Address 1	City	Ad	Pla	State	Zip	Zip4	Inactive Address	Used on Tiers	Δ	TS	Latitude	Longitude
Network	1008 LARIAT LN	BLAIR			NE	68000		<input type="checkbox"/>	0	o			
Network	1009 LARIAT LN	BLAIR			NE	68000		<input type="checkbox"/>	0	o			
Network	100 TRAVELER'S LN	BLAIR			NE	68008		<input type="checkbox"/>	0	o			
Network	10100 CRIMSON LN	BLAIR			NE	68008		<input type="checkbox"/>	1	o		41.5238983789081	-96.2711205593654
Network	2100 LINCOLN ST	BLAIR			NE	68008		<input type="checkbox"/>	1	o		41.5428571641279	-96.1443501182628
Network	6100 HIDDEN VALLEY LI	BLAIR			NE	68008		<input type="checkbox"/>	2	o		41.4666204013116	-96.1316658795759
Network	1100 SUNRISE DR	BLAIR			NE	68008		<input type="checkbox"/>	3	o		41.5550127939064	-96.1521685435421
Network	1100 STILLMEADOW CI	BLAIR			NE	68008		<input type="checkbox"/>	3	o		41.5538341379362	-96.1500272928244
Network	1002 MACC DR	BLAIR			NE	68008		<input type="checkbox"/>	3	o		41.5298527694908	-96.1454884306453
Network	1001 MACC DR	BLAIR			NE	68008		<input type="checkbox"/>	3	o		41.5298527694908	-96.1454884306453
Network	1001 W EAGLE ST	ARLINGTON			NE	68002		<input type="checkbox"/>	4	o		41.4525531492096	-96.3577857329244
Network	100 LINDEN CIR	BLAIR			TEL NE	68008		<input type="checkbox"/>	17	o		41.5582727805655	-96.1445928156051
Network	100 ELKHORN OAKS CI	ARLINGTON			NE	68002		<input type="checkbox"/>	21	o		41.4817405239071	-96.3453065432611

To help with clean-up, you'll want to use the Used on Tiers column in the grid. This will tell you whether the address has been or is currently in use. If the incorrect address isn't currently in use or hasn't been, you can simply delete it.

Managing Addresses

The screenshot shows the 'Address' application window. At the top, there is a toolbar with various icons. Below the toolbar, there are several input fields: 'Type' (with radio buttons for 'Acct/Cust' and 'Net'), 'Address 1' (containing '999'), 'Address 2', 'City', 'State', 'ZIP' (with a dropdown arrow), 'ZIP +4', and 'Plant Key'. A dropdown menu titled 'Address Report' is open, showing two options: 'Address Report' and 'Usage Report', with 'Usage Report' highlighted by a red box. Below the form is a table with the following columns: Type, Address 1, City, Adr/Pla, State, Zip, Zip+4, Inactive Address, and Used on Tiers. The table contains several rows of address data.

Type	Address 1	City	Adr/Pla	State	Zip	Zip+4	Inactive Address	Used on Tiers
Network	999 9TH ST	BLAIR		NE	68008		<input type="checkbox"/>	0
Network	999 9TH ST	BLAIR		IL	68008		<input type="checkbox"/>	0
Network	999 9TH STREET	BLAIR		NE	68008		<input type="checkbox"/>	0
Network	999 NINTH ST	BLAIR		NE	68000		<input type="checkbox"/>	0
Network	999 W EAGLE ST	ARLINGTON		NE	68002		<input type="checkbox"/>	0
Network	999 9TH STR	BLAIR		NE	68008		<input checked="" type="checkbox"/>	3
Network	999 9TH ST	BLAIR		NE	68000		<input type="checkbox"/>	4

If the Used on Tiers column shows the address has been or is in use and it's incorrect, you'll need to rely on the Address Usage Report. You can access this directly through the table.

Managing Addresses

All Rpt Areas		Address Usage Report				Page 1 of 1			
CO #:						04/09/2020 8:23:12 AM			
OCN #:						Lemon			
Type	Comp	Account / Member #	Tier #	Details	Primary/Secondary	Pending SL #	Pending SO #	Inactive Date	Plant
ADD				999 9TH STR					Y
CBL	470	112	3195551353	PAM JUMPSTART	P				Y
INT	470	112	3195551353	PAM JUMPSTART	P				Y
TEL	470	112	(319) 555-1353	PAM JUMPSTART	P				Y

In this example, you can see the incorrect address is used on multiple Network tiers of an active account. Because the correct version of the address already exists, a Service Order will be needed to correct the address on the tiers.

Duplicate Zip Codes

The screenshot shows a 'Zip Code Report' window with the following options:

- Status Options: Active, Inactive, All
- Report Options: Addresses By Zip Code, Duplicate Zip Codes, Zip Code Listing

The report header includes:

- All Rpt Areas
- CO # : 470
- OCN # : 470a
- Zip Code Listing Report - Active
- Order by Zip Code
- SUCCESS TEL PRE-RELEASE 20.1
- Page 1 of 2
- 4/9/2020 8:28:34 AM
- LLemon

Community	State	Zip
BRIMINGHAM	AL	12345
MIDLOTHIA	VA	23112
DETROIT	MI	48208
MISSOURI VALLEY	IA	51586
BLAIR	NE	68000
BLAIR	NE	68000
ARLINGTON	NE	68002
ARLINGTON	AZ	88002
ARLINGTON	NE	88002
BEVERLY HILLS	CA	90002
BLAIR	NE	68002
HOLLYWOOD	CA	68002
LOS ANGELES	CA	68002
FORT CALHOUN	NE	68003
KENNARD	NE	68004
SENNINGTON	NE	68007
SENNINGTON	CA	68007

Zip Codes are one way addresses get created incorrectly. Use the Duplicate Zip Code report to find those that are incorrect. Here we can see that there are three versions of zip codes for the community of Arlington and only one is correct.

Once you have your list, you'll be able to start your clean-up by using the table and searching on the incorrect versions through the drop-down in the Zip field.

Duplicate Addresses

Type	Address 1	City	Adr	Pla	State	Zip	Zip+	Inactive Address	Used on Tiers	LIS
Acct/Cust	999 9TH ST	BLAIR			NE	68008		<input type="checkbox"/>	0	No
Network	999 9TH ST	BLAIR			NE	68008		<input type="checkbox"/>	0	No
Acct/Cust	999 NINTH ST	BLAIR			NE	68000		<input type="checkbox"/>	0	No
Acct/Cust	999 9TH STREET	BLAIR			NE	68008		<input type="checkbox"/>	0	No
Network	999 9TH ST	BLAIR			IL	68008		<input type="checkbox"/>	0	No
Network	999 9TH STREET	BLAIR			NE	68008		<input type="checkbox"/>	0	No
Network	999 NINTH ST	BLAIR			NE	68000		<input type="checkbox"/>	0	No
Acct/Cust	999 9TH ST	BLAIR			NE	68000		<input type="checkbox"/>	0	No
Acct/Cust	999 9TH STR	BLAIR			NE	68008		<input type="checkbox"/>	2	No
Network	999 9TH STR	BLAIR			NE	68008		<input type="checkbox"/>	3	No
Network	999 9TH ST	BLAIR			NE	68000		<input checked="" type="checkbox"/>	4	No

Duplicate addresses are another way to clutter up your table. Duplicates may exist because the wrong version was entered first and then not corrected but rather added incorrectly. Duplicate addresses can also be created because the 'less is more' rule wasn't followed.

In this example, there are multiple versions of 999 9th St in Blair. Only one account/customer tier version and one network version are correct. As mentioned previously, you'll need to use the Address Usage report and update the accounts that have the incorrect version through Service Orders. You can delete any versions that aren't currently in use or haven't been used.

Non-Address Information

Address

Type: Acct/Cust Network All

Address 1: ATTN

Address 2:

City:

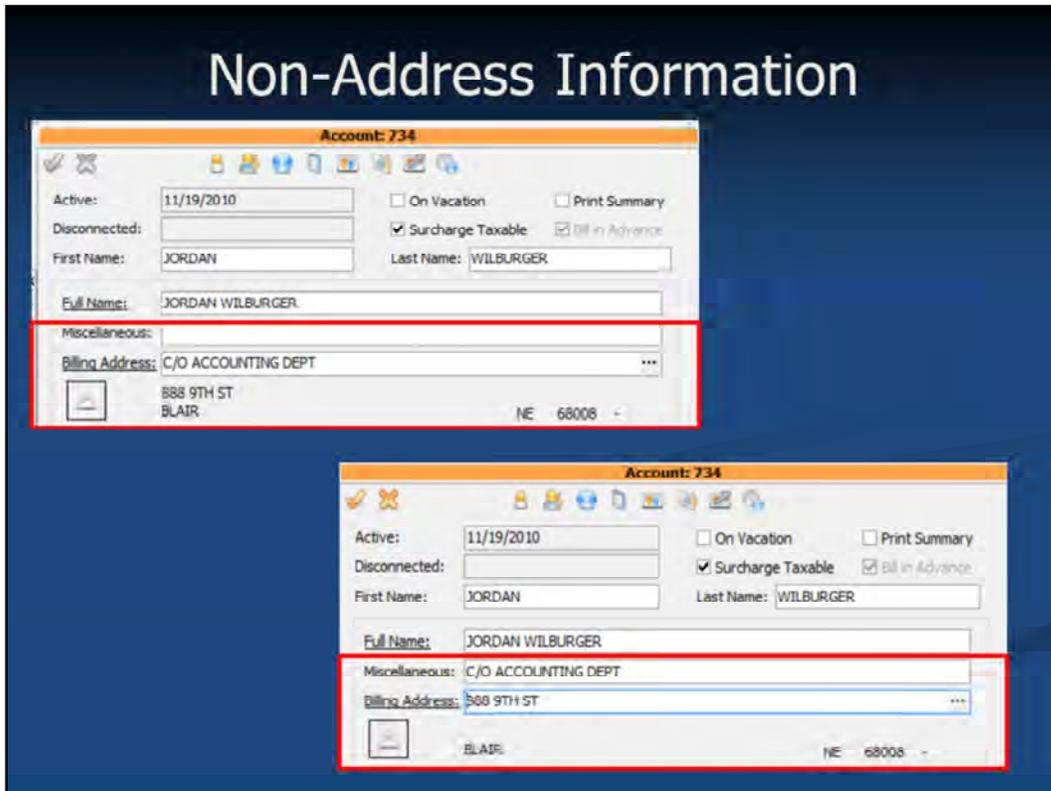
State: ZIP: ZIP +4:

Plant Key:

Type	Address 1	City	Ad	Pla	State	Zip	Zip4	Inactive Address	Used on Tiers
Network	ATTN: KRIS	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: SUSAN	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: SHERRY	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: SUE	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: KATHY	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: CRYSTAL	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: MARGARET	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: ALLI	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: MARK	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: TIM	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: ROBBIN	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: CAROLYN	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: JULIE	BLAIR			NE	68008		<input type="checkbox"/>	1
Network	ATTN: ROSS	BLAIR			NE	68008		<input type="checkbox"/>	1

Sometimes non-address information ends up as an Account/Customer or Network tier address. These could include ATTN, C/O, DEPT and so on. These are not 'true' addresses.

Non-Address Information



Instead, this information belongs in the Miscellaneous field on the Account tier. Clean-up of non-address information requires Service Orders.

Addresses

RULES

- Whenever possible, create the address in the table
- Whenever possible, correct the address in the table
- When in doubt, use USPS.gov

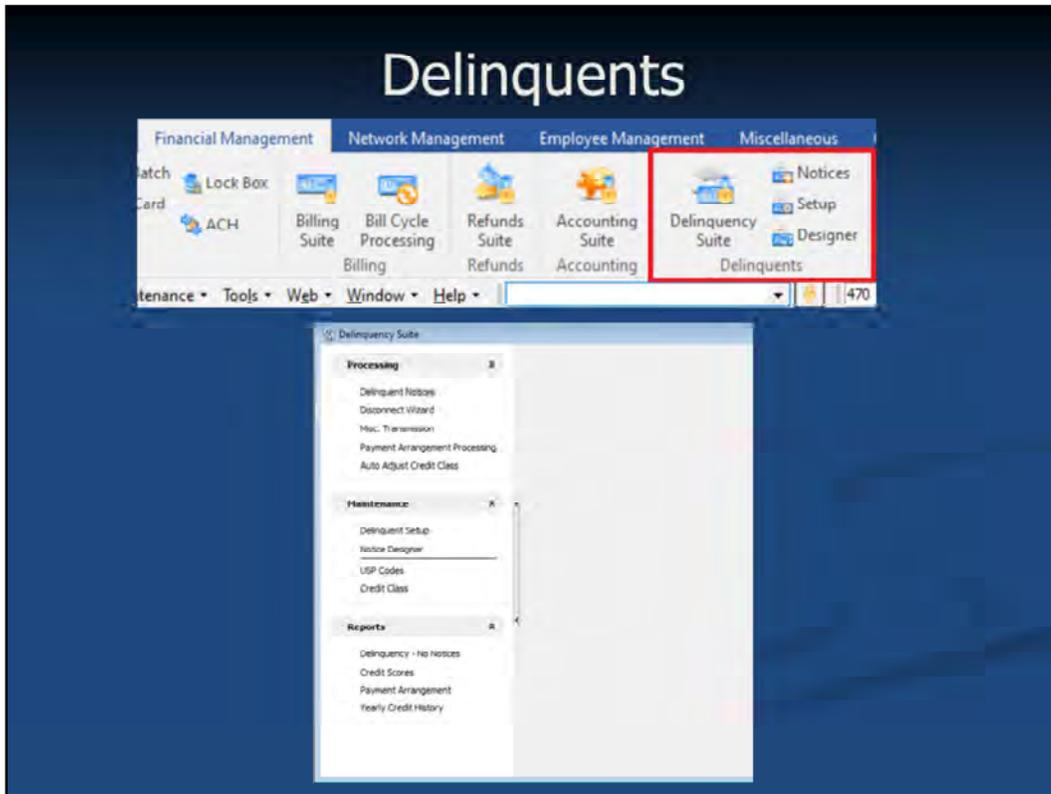
In the end, there are three rules to managing addresses:

- Whenever possible, create the address in the table
- Whenever possible, correct the address in the table
- When in doubt, use USPS.gov

Chapter

10

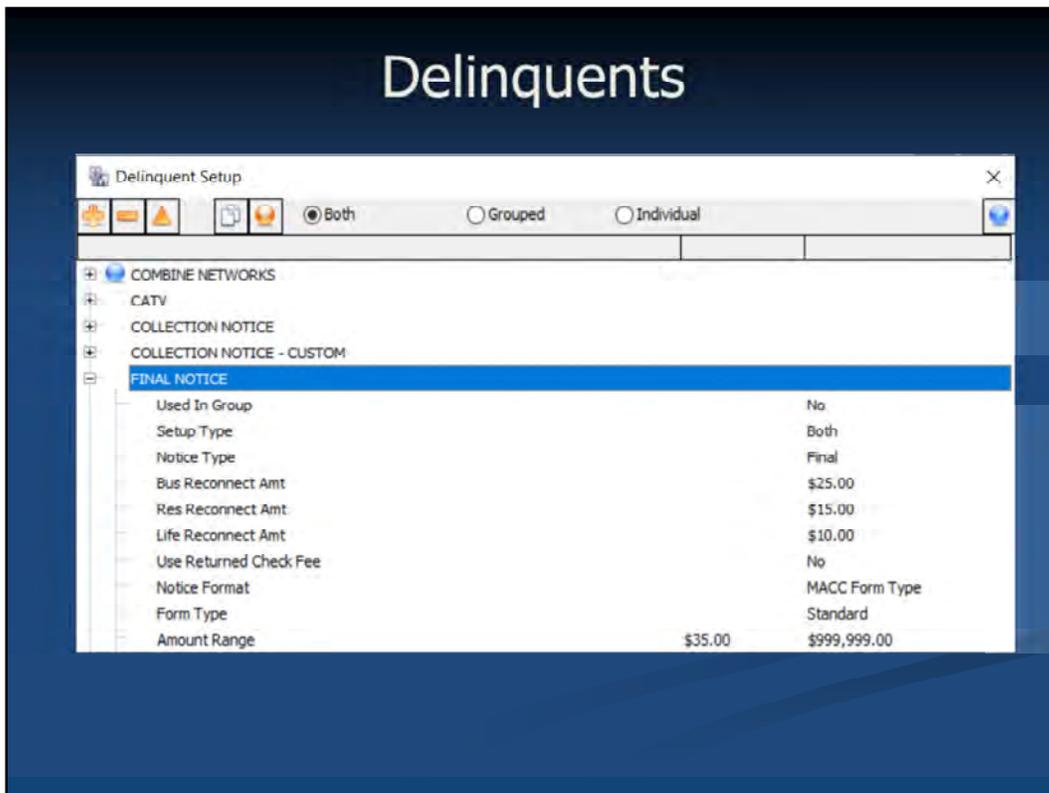
Customer Master Processes



The delinquents module within Customer Master allows you to identify accounts that meet selected criteria related to balances and activity and generate lists that can be used to contact those customers or generate penalties for those accounts.

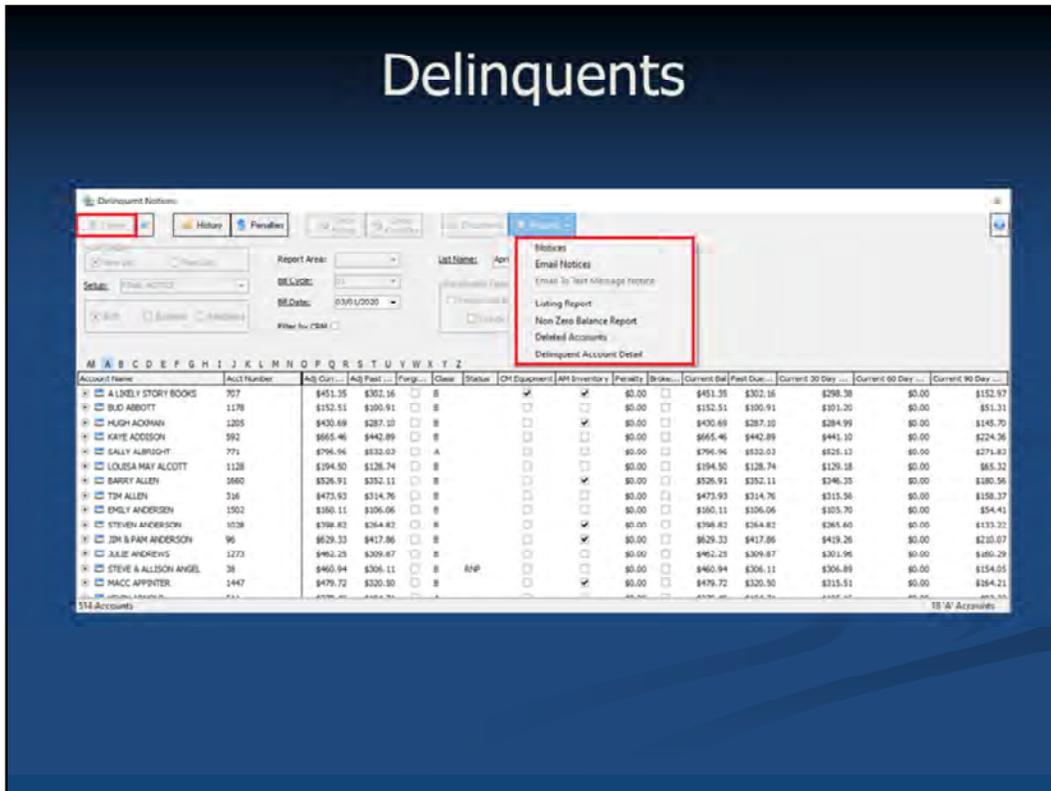
The Delinquency Suite contains all the processing, maintenance tables and reports related to delinquents.

Delinquents



A company can have as many different Delinquent Setups as desired, based on how notices are required to be generated. For example, a company may have a list that is for a specific network type or for customers that they consider to be collections accounts. They may also want one setup for a notice and another for late penalties. There are numerous filtering options within the setup that can be used to narrow down exactly which accounts qualify to appear on the associated list.

Delinquents



Once the setup is in place, the Delinquent list can be generated by clicking Delinquent Notices in the processing section of the suite or by going to Packages-Delinquents-Notices. Select the desired setup and the Bill Date which you'd like to generate the list for. You'll also want to establish a List Name so you can identify the list for historical tracking.

When the list is created, it can be reviewed by generating the Delinquent Listing Report or other reports found under the Reports icon. Individual accounts can be marked as forgiven to exempt them from receiving a printed notice or penalty.

Click the History Icon at the top of the screen to save the list. In addition, penalties can be applied by clicking the Penalties icon. The list of accounts can be recalled at any point by using the Past List option once it's been saved.

Delinquents

Delinquent Notice Options

Balance:
 Past Due
 Current

Show Balance:
 Past Due
 Current

Sorted Prior Options:
 Show
 Balance w/o 900 Calls
 Tier
 Main Number
 Item Basic

Tier Options:
 Account (One Notice per Account)
 Network (One Notice per Network Type)
 Tier (One Notice per Tier)

Show Accounts with Balance <= Zero
 Include Payment Bar Code

Disconnect Date: 4/4/2020

Extension Dates: +

Include Notices that could be emailed.
 Include Notices that could be Text Message.
 Suppress CRM Filtered

Sort Options:
First Field:
 ZIP Code
 Last Name
 Main Number
 Report Area
Second Field:
 ZIP Code
 Last Name
 Main Number
 Report Area

Options | Form Adjustments

When printing the notices, you'll set the selections for display and other options from the Delinquent Notice Options screen.

Delinquents

SUCCESS TELEPHONE COMPANY - F
111 ADMIRAL DR STE 2
BLAIR, NE 68008-2522

ELSA FROZEN
321 ARENDALE RD
BLAIR, NE 68000

Notice Date: April 1, 2020
Account Number: 1570
Disconnect Date: April 10, 2020
Local Basic Charges: \$58.32
Non-Basic Charges: \$177.22
Toll Charges: \$0.00
900 Call Charges: \$0.00
Total Amount Past Due: \$235.54

04700000001570000000235548



For questions regarding this notice, call: 319-555-1212 (TTY/TDD: 1-800-555-1212)

Service Numbers: VID5551250, DSL4445563, (319) 555-0132

DISCONNECT NOTICE

This is a friendly reminder that we haven't received payment and your account is past due. To avoid disconnection you must pay your balance in full. Please disregard notice if payment has already been mailed.

If services are disconnected, there will be a reconnection fee of \$30.00 for Telephone, \$25.00 for Cable and \$25.00 for Internet.

If you are unable to make your payment in full, you may make an affordable weekly or monthly installment payment arrangement. The overdue amount must be paid in a reasonable period of time. If you would like to make a payment arrangement or have questions regarding this notice, please contact our Customer Service Representative at 1-800-SUCCESS (1-800-782-2377).

You may be eligible for our residence Lifeline Service Program which would reduce your local telephone bills. Check with our Customer Service Representative for further details.

There are virtually unlimited ways for a company to design the content and appearance of the notice and information that is presented to the customer. There are options for full-page, three-to-a page, including a company logo and including different receivables-related fields on the notice.

Auto-Disconnect

The screenshot shows the 'Delinquent Notices' application interface. At the top, there are navigation buttons: 'Generate', 'History', 'Penalties', 'Undo History', and 'Undo'. A 'Disconnect' button is highlighted with a red box. Below these are various filters and options, including 'List Name' (April 20), 'Report Area', 'Bill Cycle' (01), and 'Bill Date' (03/01/2020). There are also radio buttons for 'Both', 'Business', and 'Residence'. A table of accounts is displayed below, with columns for Account Name, Acct Number, Adj Curr..., Adj Past..., Forg..., Class, Status, and CM Eo. The table lists 14 accounts, including 'A LIKELY STORY BOOKS', 'BUD ABBOTT', 'HUGH ACKMAN', 'KAYE ADDISON', 'SALLY ALBRIGHT', 'LOUISA MAY ALCOTT', 'BARRY ALLEN', 'TIM ALLEN', 'EMILY ANDERSEN', 'STEVEN ANDERSON', 'JIM & PAM ANDERSON', 'JULIE ANDREWS', 'STEVE & ALLISON ANGEL', and 'MACC APPINTER'. The bottom of the screen shows '514 Accounts'.

Account Name	Acct Number	Adj Curr...	Adj Past ...	Forg...	Class	Status	CM Eo
A LIKELY STORY BOOKS	707	\$451.35	\$302.16	<input type="checkbox"/>	B		
BUD ABBOTT	1178	\$152.51	\$100.91	<input type="checkbox"/>	B		
HUGH ACKMAN	1205	\$430.69	\$287.10	<input type="checkbox"/>	B		
KAYE ADDISON	592	\$665.46	\$442.89	<input type="checkbox"/>	B		
SALLY ALBRIGHT	771	\$796.96	\$532.03	<input type="checkbox"/>	A		
LOUISA MAY ALCOTT	1128	\$194.50	\$128.74	<input type="checkbox"/>	B		
BARRY ALLEN	1660	\$526.91	\$352.11	<input type="checkbox"/>	B		
TIM ALLEN	316	\$473.93	\$314.76	<input type="checkbox"/>	B		
EMILY ANDERSEN	1502	\$160.11	\$106.06	<input type="checkbox"/>	B		
STEVEN ANDERSON	1028	\$398.82	\$264.82	<input type="checkbox"/>	B		
JIM & PAM ANDERSON	96	\$629.33	\$417.86	<input type="checkbox"/>	B		
JULIE ANDREWS	1273	\$462.25	\$309.87	<input type="checkbox"/>	B		
STEVE & ALLISON ANGEL	38	\$460.94	\$306.11	<input type="checkbox"/>	B	RNP	
MACC APPINTER	1447	\$479.72	\$320.50	<input type="checkbox"/>	B		

The Auto-Disconnect module can be used to take the generated list of accounts from the setup and mass generate service orders for the suspend or disconnect for non-pay process. You can access the auto-disconnect wizard through the Delinquent Notices screen or from Packages-Delinquency-Disconnect Wizard.

Auto-Disconnect

Delinquent Disconnects - Service Order Batch Wizard

Delinquent Disconnects - Options

Defaults: [Dropdown]

List Name: April 2020 Final

Tier Options

Tier Status: DNP

Disconnect Entire Account

Disconnect Network Only

Select One Network Tier: [Dropdown]

Status Options

Active

Suspended

Disconnected

Special Needs Options

Exclude Accounts with the following:

Hearing Visual

Physical Speech

Other Medical Condition

Other Options

Include Credit and Zero Balances

Select Report Areas

Generate OCCs for Non-Returned Equipment

Service Order Category: [Dropdown]

Service Order Class: DNP

Disconnect / Service Order Effective

Effective Today: (03/31/2020)

Relative Date: [Dropdown]

Effective Date: 3/31/2020

Disconnect Options

Suppress Apply Confirmation Prompt(s)

Suppress LIS Number Assignment Prompt(s)

Payment Arrangement Options

No Exclusions

Exclude Accounts with Active Payment Arrangements

Include Accounts with Broken Payment Arrangements

Sort Order

Account Last Name

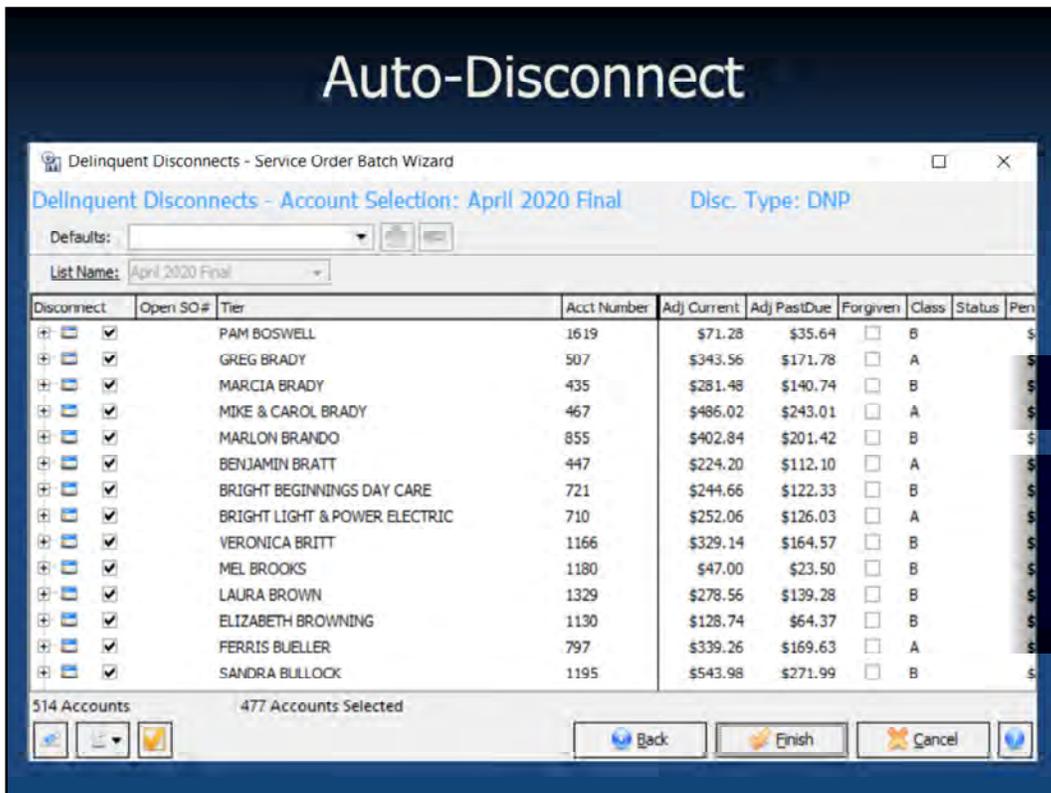
Account Number

Optional Service Order Comment:

April 2020 Disconnects

Back Next Cancel

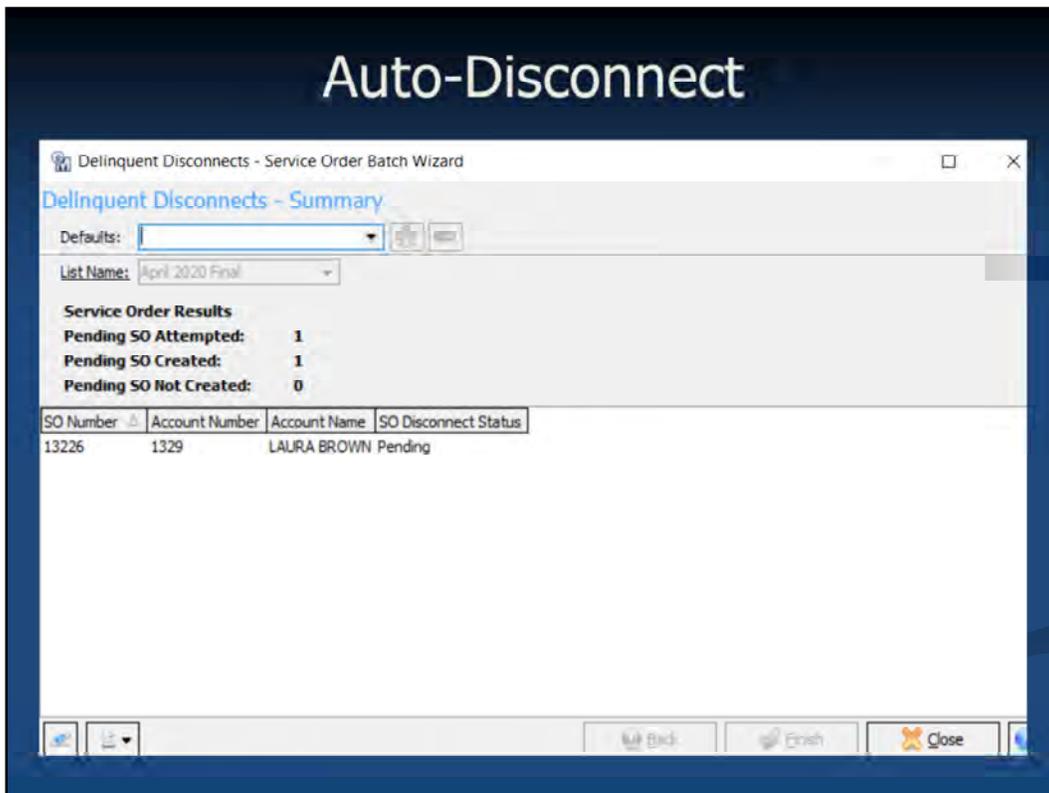
From the Service Order Batch Wizard screen, you can specify options for the disconnect process, just as you would for an individual service order. There are various filters for excluding selected accounts and narrowing the tiers that will be suspended/disconnected. Once the selections have been made, click Next to proceed to the Account Selection screen.



The Account Selection screen allows one final opportunity to review the accounts and networks that will be associated with the suspend/disconnect process. You can manually deselect those you want to exempt from this process. If an account is marked as forgiven it will automatically be removed from the disconnect process. Once you click Finish, the system will auto-generate the service orders for selected accounts.

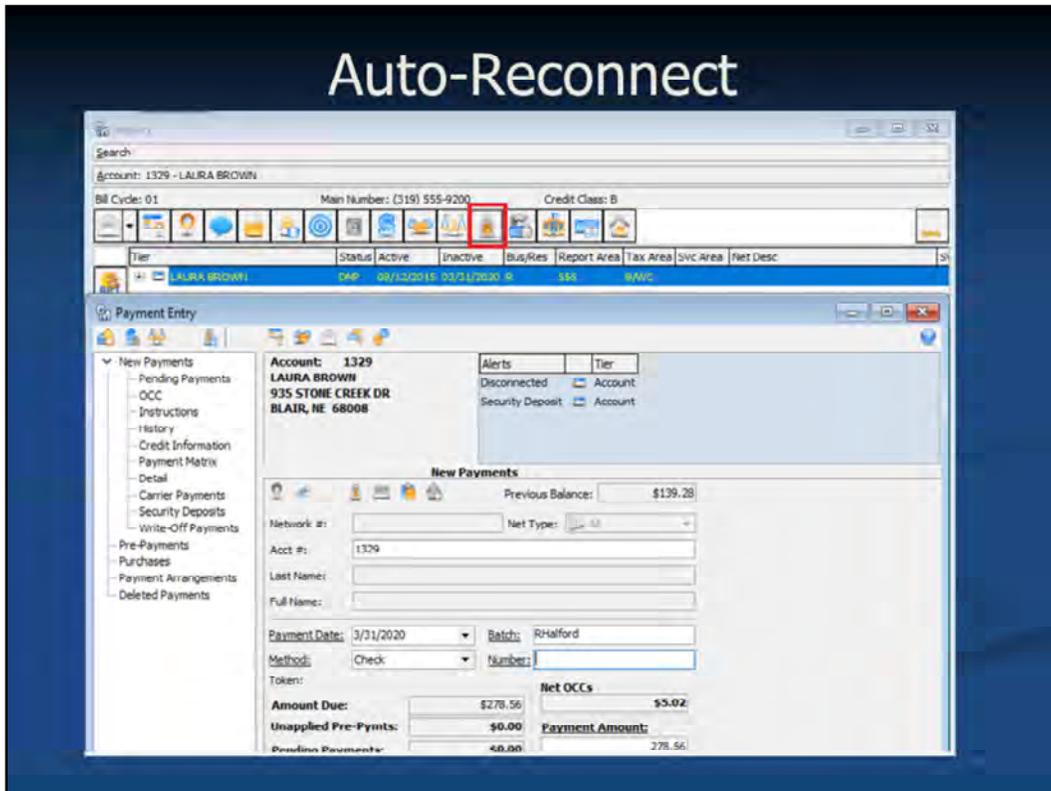
Note: There are options from the tier status editor that can be enabled to have these service orders applied or left pending.

Auto-Disconnect



The final screen of the batch wizard will display the associated Service Order numbers, account numbers and names and Service Order status for associated accounts.

Auto-Reconnect



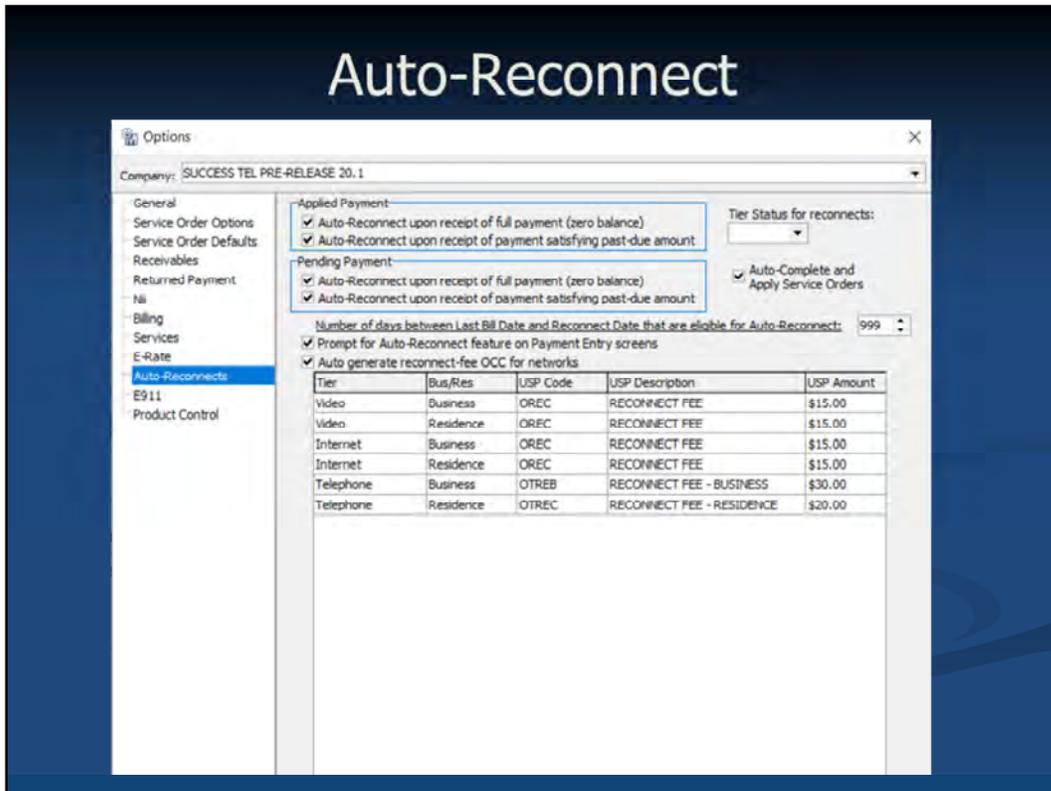
Accounts that have been suspended or disconnected through the Auto Disconnect Wizard (or individually) can be automatically reconnected with the Auto-Reconnect tool. There are several items that need to be set up correctly, including eligible tier statuses and company options.

Auto-Reconnect

The screenshot displays the 'Tier Status Editor' window. At the top, the status is set to 'DNP' and the Billing Action is 'Reconnect'. The Description is 'DISCONNECT NON-PAY'. The 'Eligible for Auto-Reconnects' checkbox is checked and highlighted with a red box. Other options include 'Eligible for Credit Class Auto-Adjustment' (checked) and 'Disconnect Auto-Complete and Apply Service Orders' (unchecked). The 'Payment Defaults' tab is active, showing 'Default Payment Method' as 'Check' and 'Allow Cancel Payment Arrangement' checked. The 'Prompt for Auto-Reconnect feature on Payment Entry screens' checkbox is also checked and highlighted with a red box. The 'Template Builder' section shows 'Month (MM)' and 'Year (YY)' selected, with a sample format of [%JR%][%MM%][%DD%][%YY%].

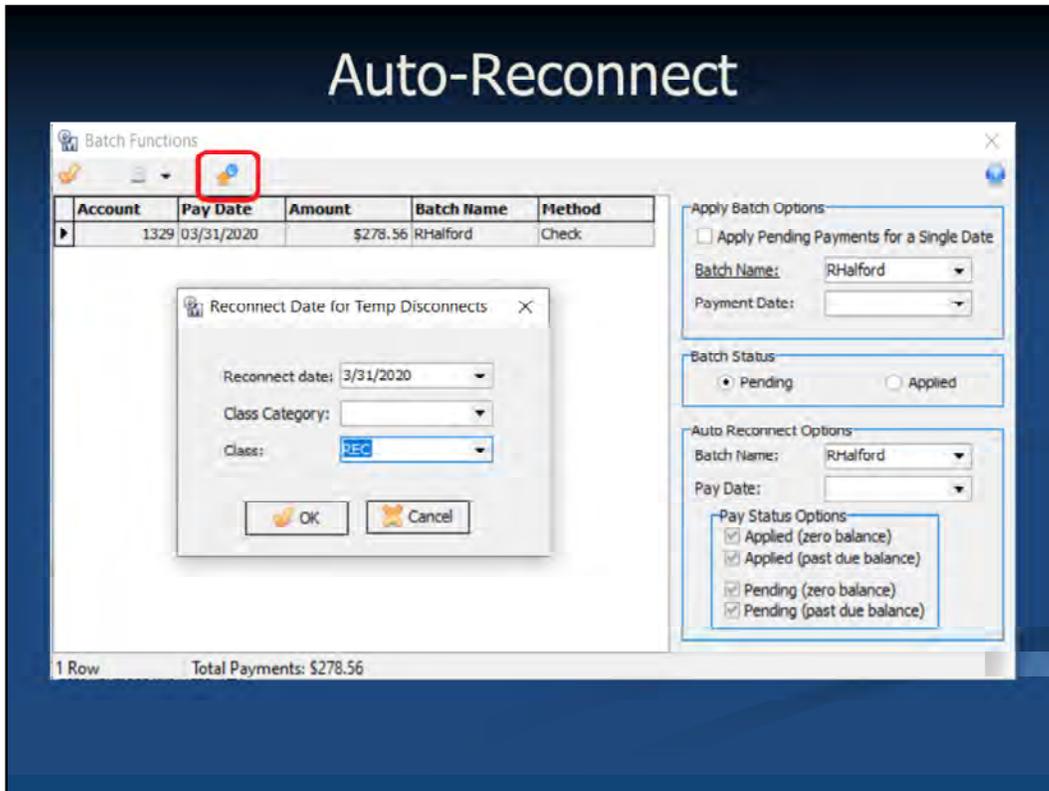
Through the Tier Status Editor, you'll want to flag tier statuses that are eligible for the auto-reconnect process. If you want the process to reconnect on an individual payment basis, each employee from the employee editor will need to be flagged accordingly.

Auto-Reconnect



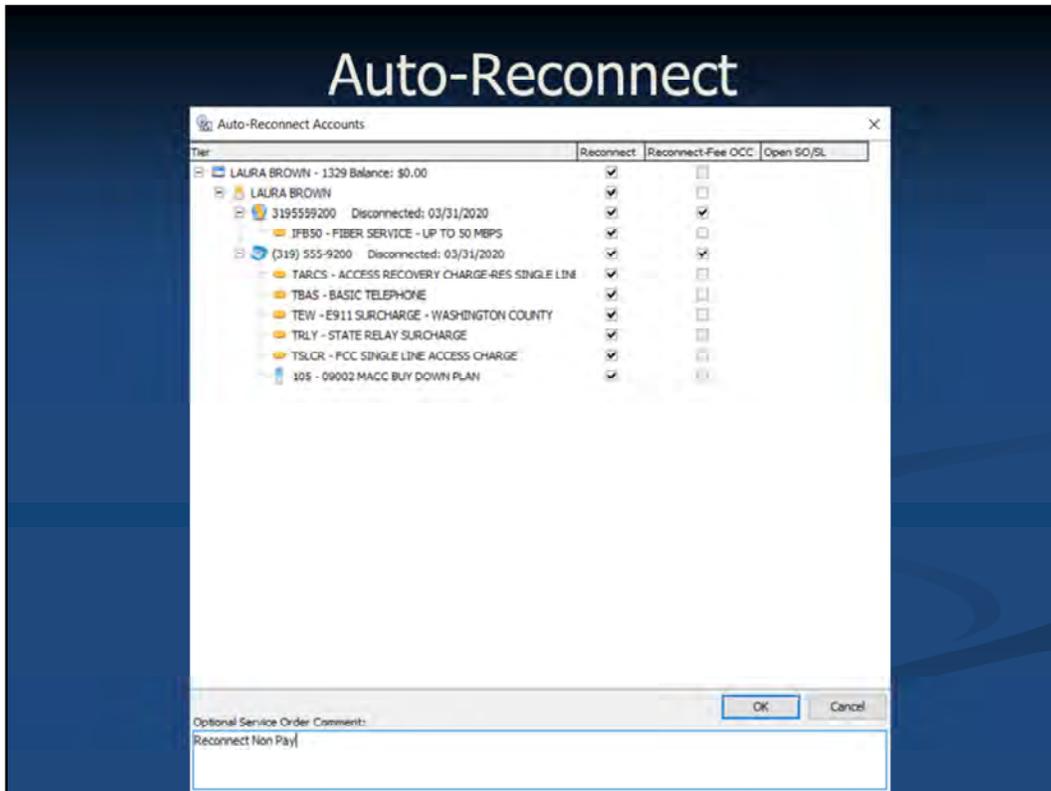
In order to use the Auto-Reconnect functionality, you'll need to set several options from the Tools-Options screen. You can determine what types of payments will generate an auto-reconnect, date range filtering and also whether the system should add a one-time charge during this process.

Auto-Reconnect



If the auto reconnect isn't done on an individual payment basis, the system will find eligible accounts and prompt to reconnect in a batch process at the time the payment batch is applied. In addition, you can always manually generate the process at a later time by clicking the reconnect icon within the Batch Functions screen. Set the reconnect date and class (if desired) and click OK to see the accounts associated with the process.

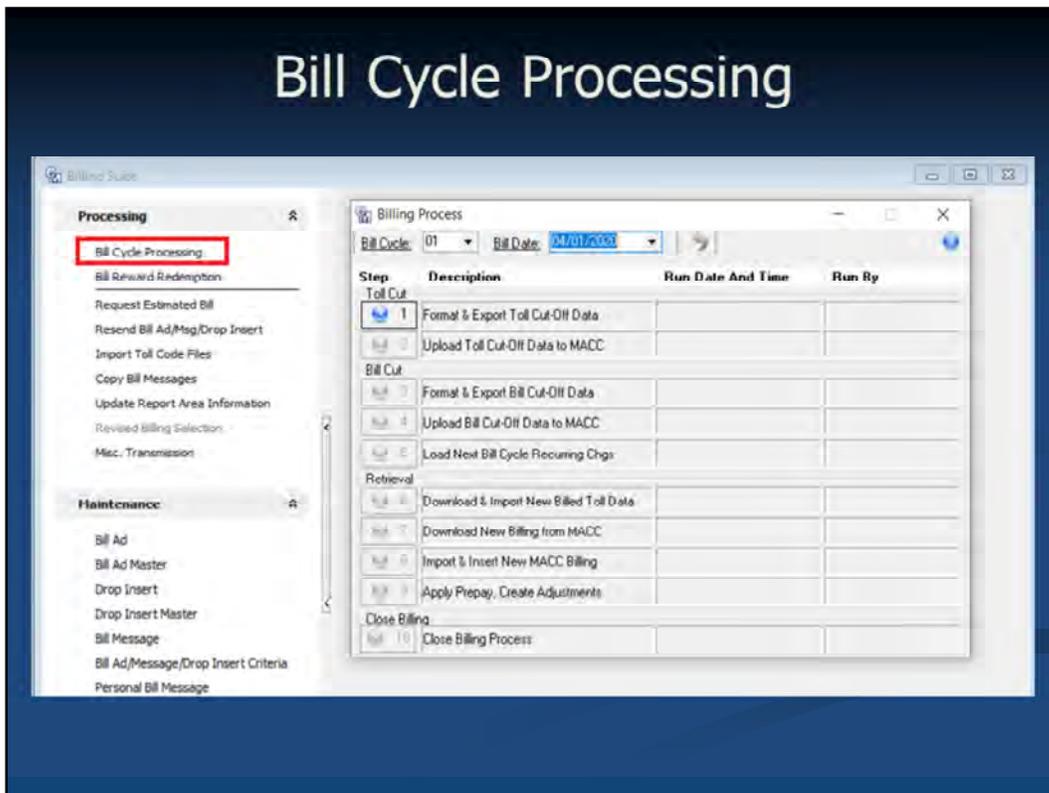
Auto-Reconnect



The Auto-Reconnect Accounts screen will display eligible accounts with associated tiers and services that the account had at the time of disconnect. By default, all services and tiers are selected to be reconnected but you can manually deselect if you don't want the service to be added back during the reconnect process. Any accounts that already have a pending service order will need to be reconnected manually. You can optionally add a Service Order comment at the bottom of the screen-this will apply to all accounts being reconnected.

Note: Like the Disconnect Wizard, options can be enabled that allow these orders to be auto-applied or left in a pending status to manually finish.

Bill Cycle Processing



The Bill Cycle Processing screen is where each of the 10-steps of the transmit process are executed. The bill cycle process consist of a toll cut, bill cut, retrieval process and a close billing process. This can be accessed by clicking Bill Cycle Processing from the Billing Suite or by navigating to Packages-Billing-Bill Cycle Processing. After each step is completed, it will receive a date/time and employee stamp for the individual that completed it.

Bill Cycle Processing



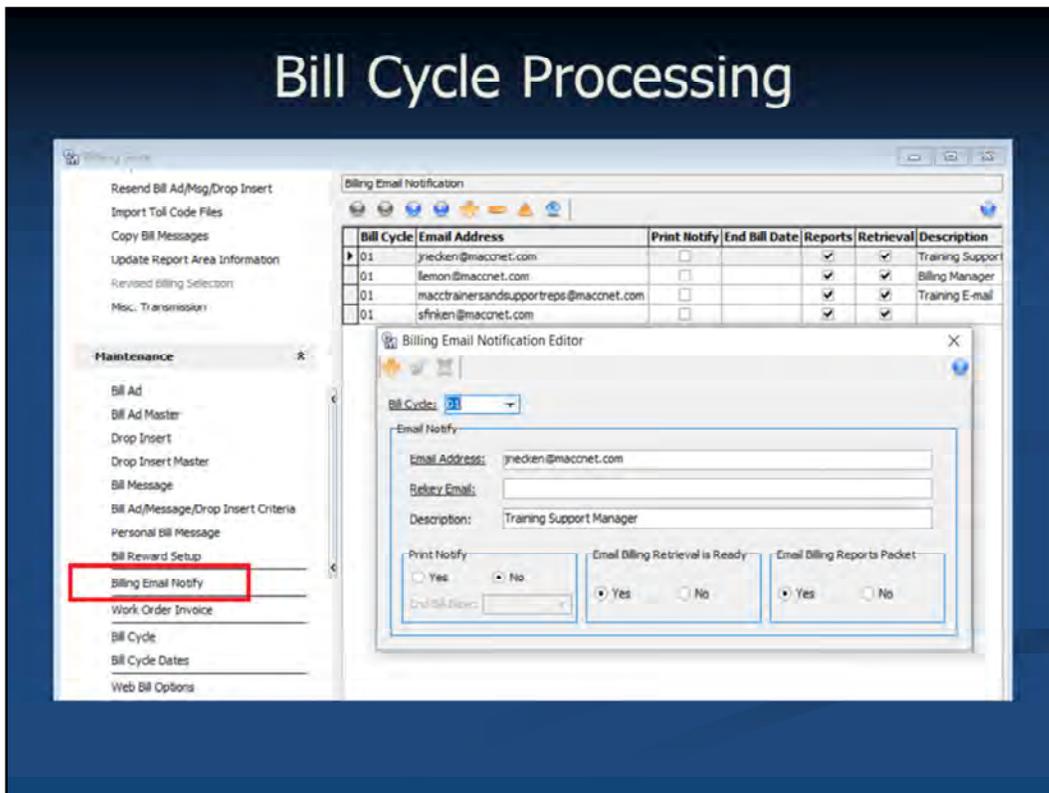
Customer Master Transmit Bill Cycle Processing (CM 15.1 & up)

The following table describes the steps involved in processing your monthly billing information. This table is for the purpose of tracking monthly bill cycle steps. For instruction purposes, the "Suites" tab drop down will be used.

SUITE	SECTION / OPTION	DESCRIPTION	1	2	3	4	5	6	7	8	9	10	11	12
TOIL CUT TRANSMISSION														
1	Service Order Suite	Processing / Service Order Search All applicable service orders involving toll should be applied at this time. Use service order search to view service orders. Search by pending, completed, and locked.												
2	Billing Suite	Processing / Misc. Transmission If Calling Card / Toll Free information is maintained, transmit the file to MACC during Toll Cut.												
IMPORTANT REMINDER														
It is recommended that all other users exit Customer Master during Toll Cut & Transmission (Steps 1-2). This can be verified by running the "Connected Users Report" found under Billing Suite / Reports.														
3	Billing Suite	Processing / Bill Cycle Processing Select Bill Cycle and Bill Date Step 1: Format and Export Toll Cut-Off Data <ul style="list-style-type: none"> Carrier Table Report: Will print if there are carriers without a carrier name. (Update carrier names if needed.) Tax Area Master Report: Verify tax areas have the proper tax percentages. Toll Summary Report: Compare this report to prior-month report to check for variations in totals. 												
4	Billing Suite	Processing / Bill Cycle Processing Step 2: Upload Toll Cut-Off Data to MACC												
PRE-BILLING DATA REVIEWS														
5	Service Order Suite	Processing / Service Order Search All applicable service orders should be applied at this time. Use service order search to view service orders. Search by pending, completed, and locked.												
6	Receivables Suite	Processing / Apply Batch Verify all payment batches have been applied and all credit card payments have been processed.												

The Bill Cycle Processing sheet is available for download on the Client Pages and provides step-by-step instructions for running each billing step.

Bill Cycle Processing



If you would like emails that notify you your billing is ready to be reviewed and retrieved, you can add your email address to the Billing Email Notification Editor within the Billing Suite. These emails can also be configured to include billing reports that will help with your review process.

Bill Cycle Processing



Company Number 470, Bill Cycle 01

Below, a **green light** means its corresponding step is complete. A **red light** indicates work on that step of the process is currently in progress or information/data is needed.

To use this page, please remember the following points...

- From the time we receive all of the necessary data, MACC requires up to five business days to process your company's bills.
- This page uses an automated process to update the status of your billing. In the event of a problem with any of the data you submit, we will contact you.
- Be sure to note the date listed next to "toll file received." It will indicate whether your company's information has been updated for the billing month.
- This page will not update or "refresh" automatically. To see the most up-to-date information, you will need to refresh the page using your browser's refresh button or "F5" on your keyboard.

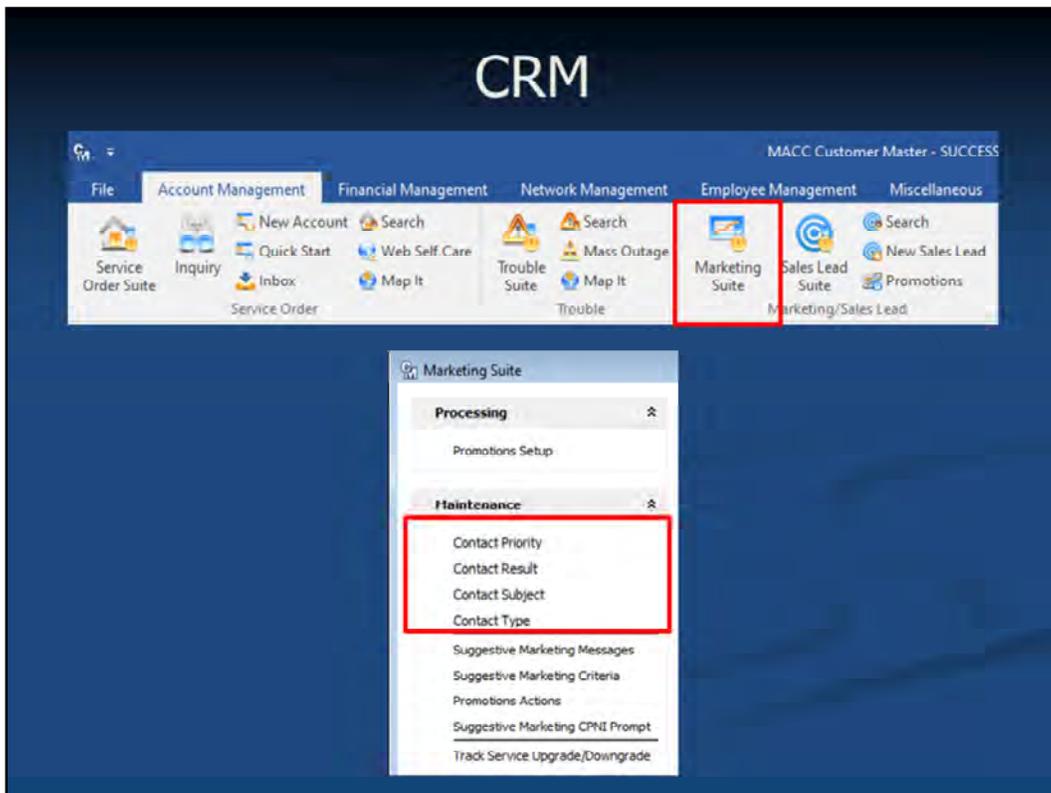
Billing Status
Customer Master Toll file received **Friday, March 06, 2020 11:34:00 AM**
Once this light is green, it indicates we have received your toll file. It may take as long as 30 minutes from the time of transmittal completion before the status of your bill is updated. Please keep in mind that at this point, we have only received your toll file, we have not verified it. If problems arise, we will contact you. Once this light is green, steps one and two of the monthly

From the client pages, you can check the status of your billing including updates for files transmitted.

Chapter

11

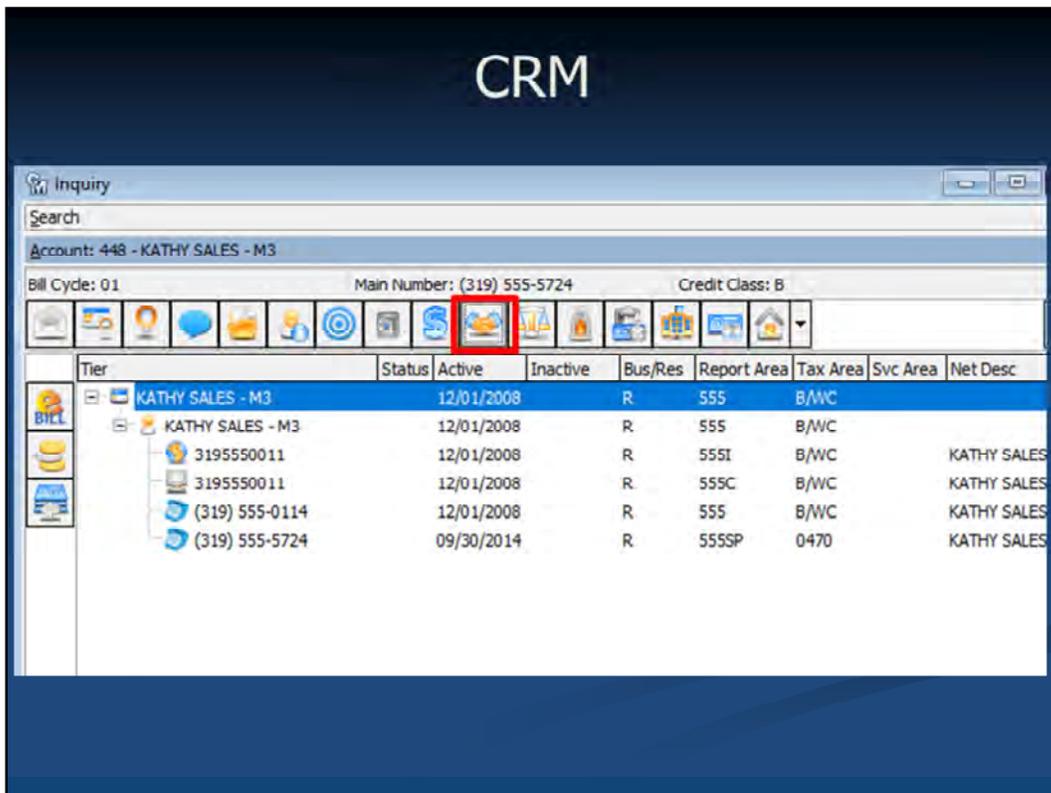
Customer Master Marketing



Client Relationship Management is a tool that will make it easy for you to track all types of contacts with your customers for easy access to information, reporting and research.

Several maintenance tables require setups to allow the tool to be used. These can all be found from the Marketing Suite window.

- Contact Type – indicates how the customer contact is made; phone in, phone out, etc.
- Contact Subject – indicates the topic of the customer contact.
- Contact Result – indicates the outcome of the customer contact; can include default verbiage that can be overwritten when creating a contact on an account.
- Contact Priority – indicates the level of severity of the customer contact; not required when creating a contact on an account.



Creating Account Contacts can be done from multiple locations within the customer's account. You'll find the CRM icon (Hand Shake) on Inquiry, Service Order (both standard and Quick Start), Trouble Tickets, Payment Entry and Sales Lead. You can also view existing contacts through the Account Overview screen. Contacts entered through Service Order or Trouble Tickets will remain even if the order or ticket is canceled.

CRM

Contact: 448 - KATHY SALES - 112

Deleted Include Notices Include CPNI Include NSF Include ACH Include Notifications

Type	Priority	Subject	Payment Note	Inquiry Note	Note Expire Date	Result	Needs Attention	Contact By	Contact Date	Entered By	Entered Date
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	llemon	9/2/2014 2:36:09 PM	llemon	9/2/2014 2:36:09 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	llemon	9/2/2014 2:34:29 PM	llemon	9/2/2014 2:34:29 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	llemon	9/2/2014 2:33:57 PM	llemon	9/2/2014 2:33:57 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	lLemon	8/6/2014 5:15:52 AM	lLemon	8/6/2014 5:15:52 AM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	12/18/2013 2:41:44 PM	jriecken	12/18/2013 2:41:44 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	12/18/2013 2:41:07 PM	jriecken	12/18/2013 2:41:07 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	11/12/2013 2:35:33 PM	jriecken	11/12/2013 2:35:33 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	11/6/2013 4:00:17 PM	jriecken	11/6/2013 4:00:17 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	11/5/2013 8:49:17 AM	jriecken	11/5/2013 8:49:17 AM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	11/5/2013 8:48:52 AM	jriecken	11/5/2013 8:48:52 AM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	10/30/2013 2:52:47 PM	jriecken	10/30/2013 2:52:47 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	10/30/2013 2:50:02 PM	jriecken	10/30/2013 2:50:02 PM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	10/30/2013 11:07:34 AM	jriecken	10/30/2013 11:07:34 AM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	10/17/2013 10:46:51 AM	jriecken	10/17/2013 10:46:51 AM
MRKT	PROMO		<input type="checkbox"/>	<input type="checkbox"/>		ACTN	<input type="checkbox"/>	jriecken	10/17/2013 10:46:35 AM	jriecken	10/17/2013 10:46:35 AM
PHIN	MEDIUM	PROMO	<input type="checkbox"/>	<input type="checkbox"/>		DECL	<input type="checkbox"/>	jriecken	4/6/2011 8:24:51 AM	jriecken	4/6/2011 8:26:53 AM
MAIL		EXPCN	<input type="checkbox"/>	<input type="checkbox"/>		RENEW	<input type="checkbox"/>	jriecken	4/6/2011 8:23:19 AM	jriecken	4/6/2011 8:23:46 AM
PHIN	HIGH	DEL	<input type="checkbox"/>	<input type="checkbox"/>		VM	<input type="checkbox"/>	JRIECKEN	1/9/2009 2:58:00 PM	jriecken	1/9/2009 2:58:54 PM

26 Rows Active

At the Contact window, all previous contacts will be displayed in a grid. Add a new contact by clicking on the Insert icon. Review an existing contact by highlighting the record.

Several contact records are created programmatically, including a record when a delinquent notice is generated. Deleted rows, Notices, CPNI, NSF, ACH (one-time payment) and Notifications generated from the messenger suite are also auto-create contact records. To view these flag the options above the grid.

CRM

The screenshot shows a window titled "CRM Contact Editor" with the following fields and options:

- Contact:** 448 - KATHY SALES - M3
- Type:** PHIN (dropdown)
- Subject:** CHANG (dropdown)
- Priority:** (dropdown)
- Result:** SOREM (dropdown)
- Result Verbiage:** (text area containing "Custome wrianted to cancel cable services.")
- Note:** Inquiry Payment Needs Attention
- Expiration Date:** (dropdown)
- Contact:**
 - Date/Time:** 4/16/2020 12:00 AM (with auto-populate icon)
 - By:** MUPHOFF (with auto-populate icon)

Choose options for Type, Subject and Result using the drop-down fields. You can also select a Priority but it isn't required.

You can flag the contact for Payment Note and/or Inquiry Note. When you pull the account up through Inquiry or Payment Entry, the contact information will display, including the verbiage.

The Contact Date/Time and By can be auto-filled by clicking on the auto-populate icons.

CRM

CRM Contact

Contact: 448 - KATHY SALES - M3

Deleted
 Include Notices
 Include CPNI
 Include NSF
 Include ACH
 Include Notifications

Type	Priority	Subject	Payment Note	Inquiry Note	Note Expire Date	Result	Needs Attention	Contact By	Contact
PHIN		CHANG	<input type="checkbox"/>	<input type="checkbox"/>		SOREM	<input type="checkbox"/>	MUPHOFF	4/16/20

All Rpt Areas
CO # : 470
OCN # : 470a

Account Contacts Report
Sorted by Contact Date
SUCCESS TEL 20.1

Page 1 of 3
4/17/2020 8:37:14 AM
MUPhoff

Contact Type: All
 Contact Dates: All
 Account: 448

Contact Priority: All
 Account Status: Both

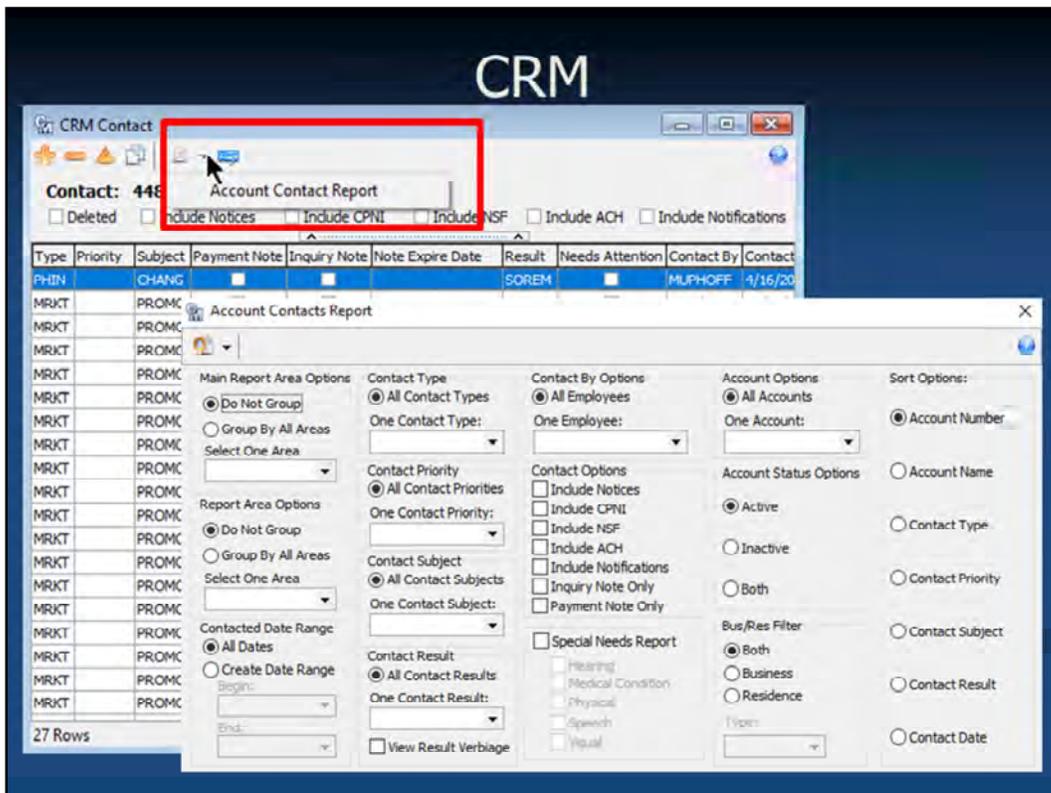
Contact Subject: All
 Contact By: All Employees
 Contact Result: All

Include ACH
 Include NSF
 Include Notification

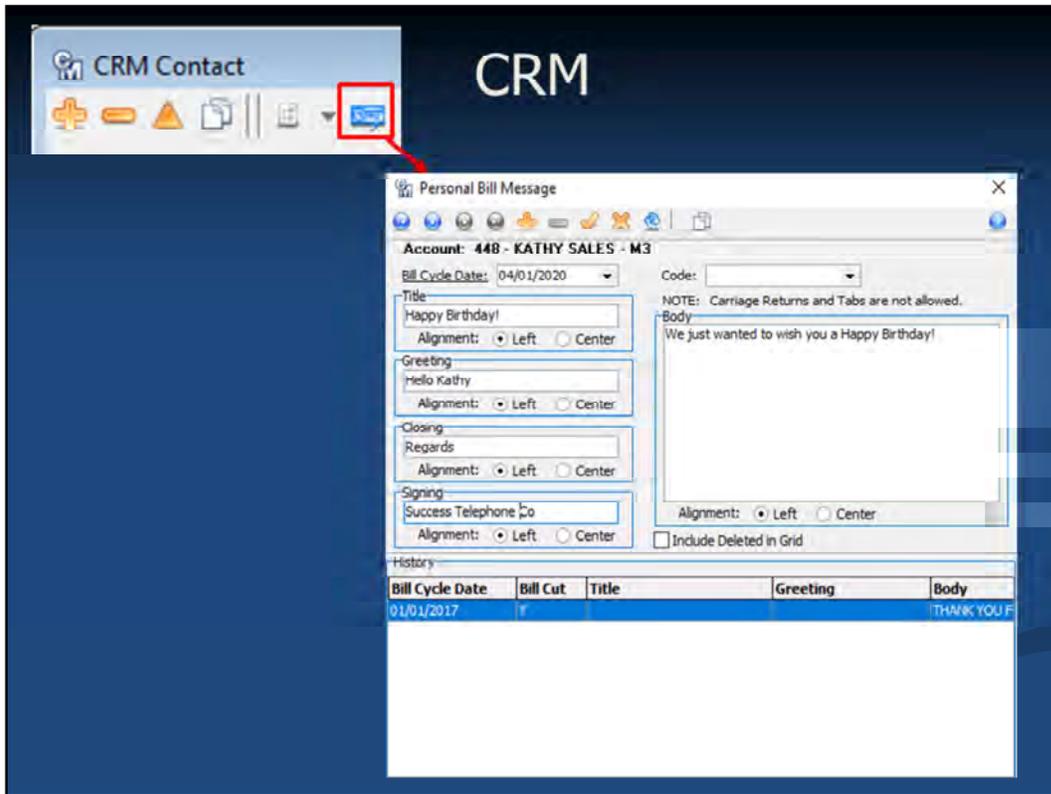
Include CPNI
 Include Notices
 Include Inquiry Only
 Include Payment Only

Acct Number	Account Name	Bus/Res	Contact Type	Contact Priority	Contact Subject	Contact Result	Contact Date	Contact By
448	SALES, KATHY	R	PHIN		CHANG	SOREM	4/16/2020	MUPHOFF
	Result Verbiage: Custome wanted to cancel cable services.							
448	SALES, KATHY	R	MRKT		PROMO	ACTN	12/22/2016 9:40:32 AM	JRecken
	Result Verbiage: Promotions Contact made for MARCH with AUTO							
448	SALES, KATHY	R	MRKT		PROMO	ACTN	12/22/2016 9:39:35 AM	JRecken
	Result Verbiage: Promotions Contact made for MARCH with AUTO							
448	SALES, KATHY	R	MRKT		PROMO	ACTN	12/22/2016 9:38:33 AM	JRecken
	Result Verbiage: Promotions Contact made for MARCH with MailLabels							
448	SALES, KATHY	R	MRKT		PROMO	ACTN	02/1/2015 0:20:03 AM	JRecken
	Result Verbiage: Promotions Contact made for BETTERINT with MailLabels							
448	SALES, KATHY	R	MRKT		PROMO	ACTN	3/17/2015 9:55:37 AM	LLemon
	Result Verbiage: Promotions Contact made for MARCH with AUTO							
448	SALES, KATHY	R	MRKT		PROMO	ACTN	3/9/2015 2:26:10 PM	JRecken

Through the CRM window you can run the Account Contacts Report for Selected Account by clicking on the Report icon. The individual account report has no options, but will show all contacts and includes totals at the end of the report.



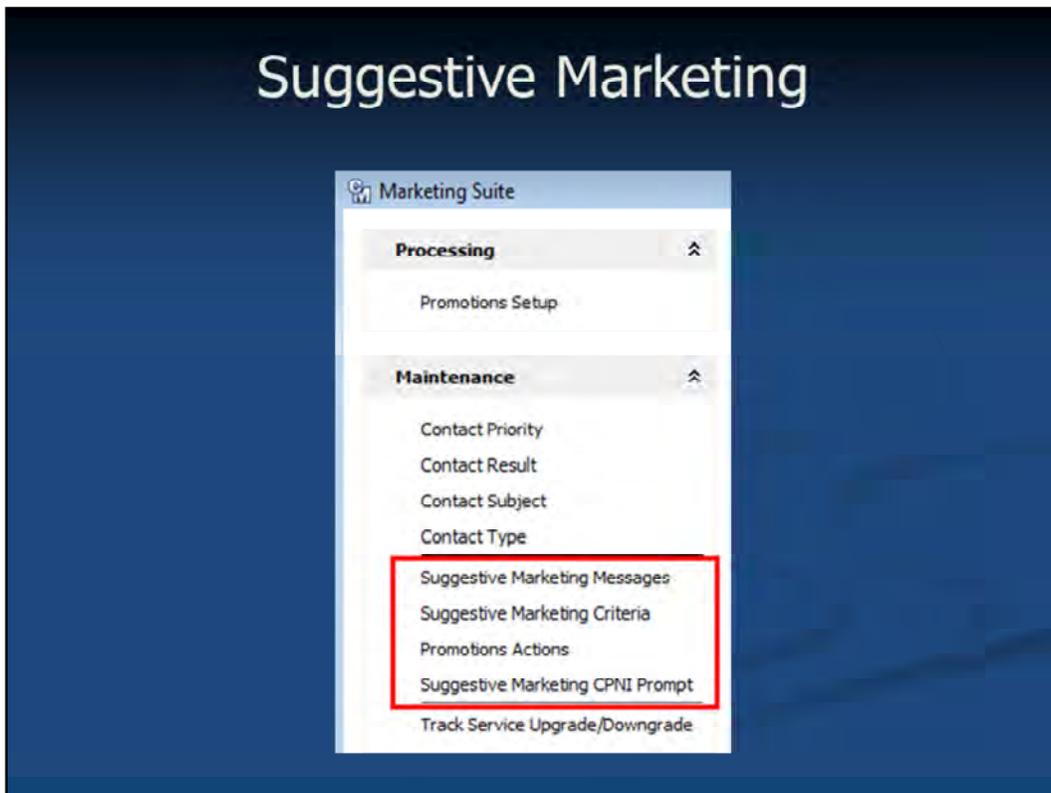
Click on the drop-down arrow next to the Report icon to run the full Account Contacts report. There are many options available on this report, so you'll want to have an idea of the information you need to see and then make the appropriate selections. In addition to viewing more generic contact information, such as balance inquires, you can also gather marketing-related information by selecting marketing-related types, subjects and results.



One additional option through the CRM Contact screen is Personal Bill Message. Click on the icon to create a message for this customer. The message will run for just the next billing and will print at the top of the first detail page, moving any other detail page messages down.

You can also create a personal bill message template that can be used on multiple accounts. To assign it to an account just select the code from the drop-down and modify it as needed.

Suggestive Marketing

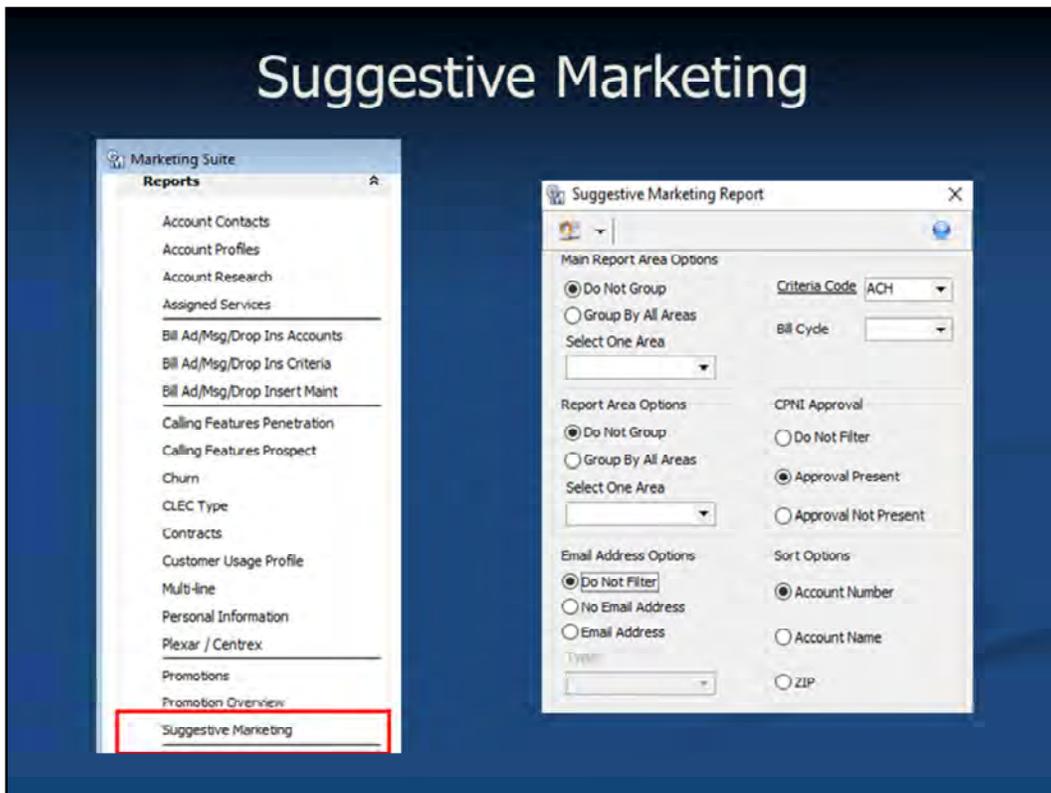


Customer Master offers quite a few marketing-related options, including Suggestive Marketing. Suggestive Marketing is a way to determine at-a-glance what promotions or service upgrades for which a customer might qualify. To implement the process you'll need to complete three maintenance tables, all found from the Marketing Suite window or through Maintenance – Marketing.

Suggestive Marketing Messages are the 'scripts' your customer service reps will use to upsell services to customers who qualify. Criteria is then established to target customers for those messages. Suggestive Marketing Criteria works just like the criteria used for Bill Messages, Drop Inserts and On-Bill Ads.

You'll also need to set up a CPNI prompt. This is text that will allow your service reps to get one-time approval from the customer in order to tell them about the promotions for which they're eligible. The prompt will only display on accounts that do not have CPNI approval.

Suggestive Marketing



The Suggestive Marketing report found from the Marketing suite will show all accounts eligible for a specific message. You could establish criteria for a possible promotion before creating a message. Once the criteria is in place, run this report to see if enough accounts qualify to make the promotion valuable.

Suggestive Marketing

The screenshot shows the 'Inquiry' window for account 456 - LORI SALES - M3. The account details include: Account: 456 - LORI SALES - M3, Main Number: (319) 555-1451, Credit Class: A, and Bill Cycle: 01. A table lists the account's history with columns for Tier, Status, Active/Inactive dates, Buy/Res, Report Area, Tax Area, Svc Area, Net Desc, Svc Type, Tech Type, and Cap Crd.

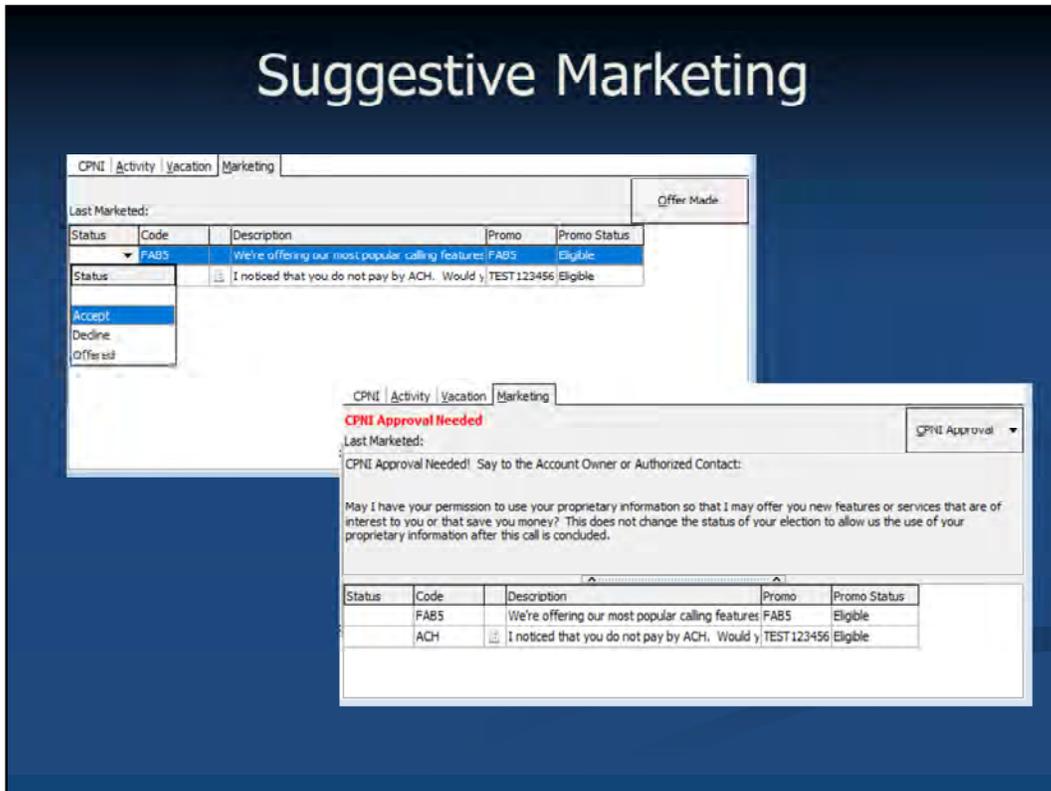
Tier	Status	Active	Inactive	Buy/Res	Report Area	Tax Area	Svc Area	Net Desc	Svc Type	Tech Type	Cap Crd
LORI SALES - M3		12/01/2008		R	555		B/WC				99456
LORI SALES		12/01/2008		R	555		B/WC				99456
(319) 555-0118		09/13/2012		R	555		A/WC	LORI SALES			99456
(319) 555-1060		12/01/2008		R	555		B/WC	LORI SALES			99456
3195551060		12/01/2008		R	555C		B/WC	LORI SALES			99456

The 'Marketing' tab is active, showing a 'CPNI Approval Needed' message. Below the message is a table of promotional offers:

Status	Code	Description	Promo	Promo Status
	FAB5	We're offering our most popular calling features FAB5	FAB5	Eligible
	ACH	I noticed that you do not pay by ACH. Would y	TEST123456	Eligible

Once the setup is complete, Customer Master takes care of the rest. When you inquire on an account, any promotions for which that customer may be eligible will display on the Marketing tab in the lower right corner of Inquiry.

Suggestive Marketing



Simply share the information in the Description field and then change the Status (Accept, Decline, Offer). Then click on the Offer Made button.

If a customer doesn't have CPNI approval, CPNI Approval Needed will display along with the CPNI prompt text. Select either Temporary Approval Received or Denied before continuing. If approval is received, the qualifying messages will display along with options for changing the Status and the Offer Made button. If approval isn't received, any qualifying messages will be removed.

Suggestive Marketing

CPNI | Activity | Vacation | Marketing

CPNI Temporarily Approved

Last Marketed: 04/17/2020

Status	Code	Description	Promo	Promo Status
	FAB5	We're offering our most popular calling features	FAB5	Accepted
	ACH	I noticed that you do not pay by ACH. Would y	TEST 123456	Eligible

CRM Contact

Contact: 456 - LORI SALES - M3

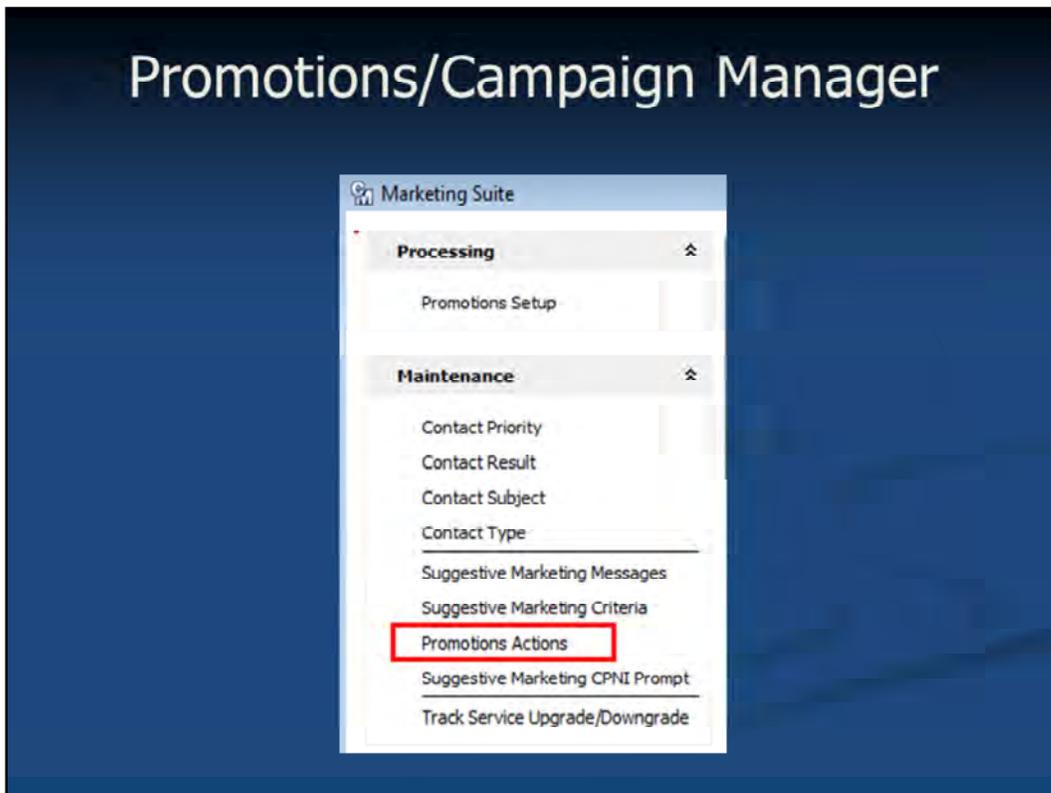
Deleted Include Notices Include CPNI Include NSF Include ACH Include Notifications

Type	Priority	Subject	Payment Note	Inquiry Note	Note Expire Date	Result	Needs Attention	Contact By	Contact Da
MRKT		PROMO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SOLD	<input checked="" type="checkbox"/>	MUphoff	4/17/2020
MRKT		PROMO	<input type="checkbox"/>	<input type="checkbox"/>		OFFER	<input type="checkbox"/>	MUphoff	4/17/2020

Once the Offer Made button has been selected, the Last Marketed date will populate. In addition, CRM records will be created. The verbiage for each CRM record will include the specific offer details.

The link between Suggestive Marketing and CRM is a great way to tie two sets of information together for additional tracking and reporting.

Promotions/Campaign Manager

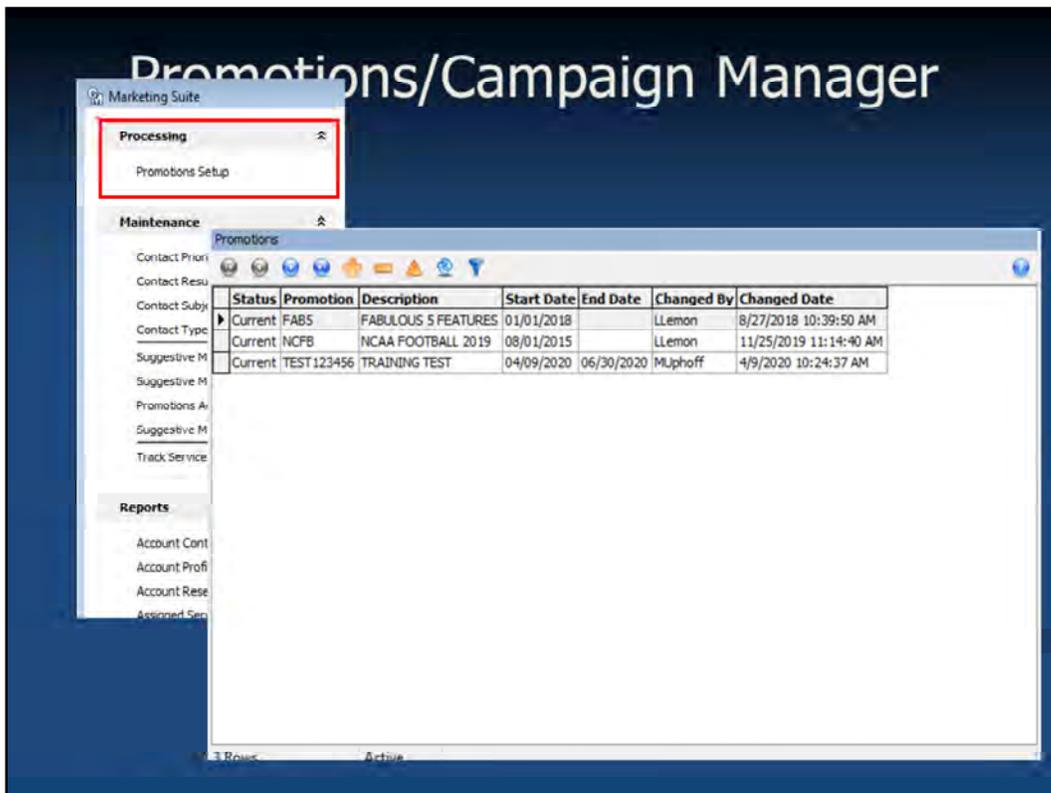


Customer Master's Marketing Campaign Manager is functionality that incorporates several independent marketing options. Through the setup, you can combine Client Relationship Management, Suggestive Marketing and Promotions to create one powerful marketing tool that includes automatic behavior triggers and extensive reporting capabilities.

To enable all aspects of the Campaign Manager, you'll first want to set up Promotion Actions through the Marketing Suite. Actions represent how the promotion is being relayed to customers. Using Actions will allow for the tracking of customers reached as well as costs involved and the automatic creation of CRM records.

There are some Actions that are hard-coded:

- Email
- Mail Labels
- Offered from Inquiry
- Offered Accepted from Inquiry
- Offered Declined from Inquiry



Next you'll want to establish your promotions through Processing in the Marketing Suite. The Promotions grid will display all of the promotions previously set up. You can filter and sort on any of the columns and export all or parts of the grid.

To edit an existing Promotion, highlight the record and double-click or click on the Edit icon. To delete a Promotion, highlight the record and click on the Delete icon. You will not be able to delete any that have already been used but you can flag them as inactive if needed.

As a Promotion reaches its assigned End Date, the Status will move from Current to Expired but will still be available for use until it's flagged as inactive.

You can recycle Promotions by simply removing or changing the End Date.

Promotions/Campaign Manager

Promotion Campaign Manager

Promo Code: FAB5
Description: FABULOUS 5 FEATURES

Promotion

Accounts
Actions
Service Orders
Sales Lead!

Promotion

Promotions:

Promotion Code: FAB5 Inactive
Description: FABULOUS 5 FEATURES
Start Date: 4/1/2005 End Date:

Suggestive Marketing:

Dates:

Goals:

Monthly Revenue:
Accounts:

Costs and Gains:

Installation:
Monthly Gain:

To add a new Promotion, click on the Insert icon. First, enter a Promotion Code and a Start Date. The code can have up to ten alpha and/or numeric characters. The Description field is not required but it's recommended a further description of what the code represents be included.

At this point, you can be done with the setup if you want to track your promotions independently. This means basic setup, a flag and association of a promotion to an account along with very limited reporting.

To make full use of the Campaign Manager, you'll want to continue with the setup.

Promotions/Campaign Manager

Promotion Campaign Manager

Promo Code: FAB5
Description: FABULOUS 5 FEATURES

Promotion

Accounts
Actions
Service Orders
Sales Leads

Promotion

Promotion Code: FAB5 Inactive
Description: FABULOUS 5 FEATURES
Start Date: 4/1/2020 End Date:

Suggestive Marketing

Criteria: FAB5

Goals

Monthly Revenue: \$1,000.00
Accounts: 500

Costs and Gains

Initiation: \$150.00
Monthly Gain: \$50

To tie Promotions with Suggestive Marketing and CRM, you'll add a Criteria set. You can also track Goals as well as Costs and Gains information. Tying all pieces together uses full marketing functionality called Promotions Campaign Manager.

There are other setup pieces needed for full use of the Campaign Manager and additional automatic behaviors that will simplify and streamline your marketing efforts. Which includes being able to see accounts that are eligible for the promotion based on the suggestive marketing criteria, track the Promotion Actions associated with Cost and any Actions made through e-mail, mail labels or Inquiry.

Promotions/Campaign Manager

CPNI | Activity | Vacation | Marketing

CPNI Temporarily Approved
Last Marketed: 04/17/2020

Offer Made

Status	Code	Description	Promo	Promo Status
Accept	FAB5	We're offering our most popular calling features	FAB5	Accepted
	ACH	I noticed that you do not pay by ACH. Would y	TEST123456	Eligible

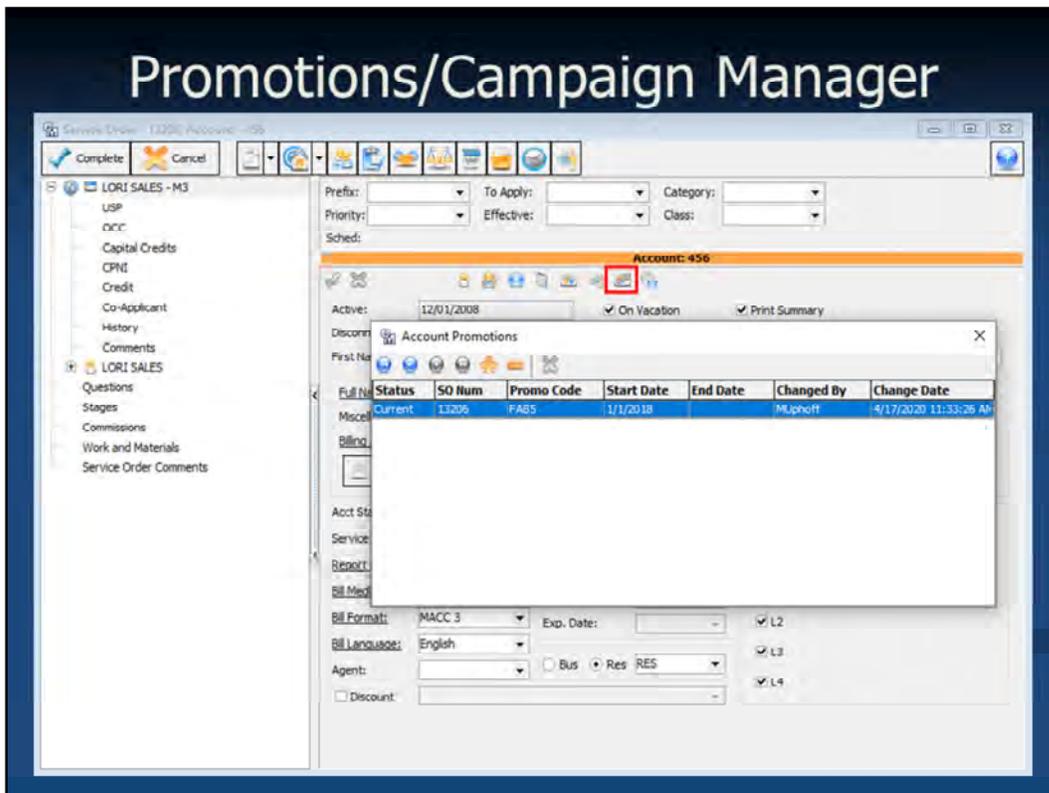
Warning

⚠ Open Service Order for Promotions: FAB5?

Yes No

When a Suggestive Marketing message is linked to a Promotion, you'll see that Promo code, along with the marketing code and detail. Once a Status of Accept is entered and the Offer Made button selected, a prompt to open a service order will display.

Promotions/Campaign Manager



Within the open order, click on the Promotions icon on the Account node to see the promotion now linked to the account.

Continue to work the order as needed. Remember that even though the promotion has been accepted, a service order opened and the promotion displayed, any USP activity needed for the promotion will need to be done manually.

Promotions/Campaign Manager

CPNI | Activity | Vacation | Marketing

CPNI Temporarily Approved
Last Marketed: 04/17/2020

Status	Code	Description	Promo	Promo Status
	FAB5	We're offering our most popular calling features	FAB5	Accepted
	ACH	I noticed that you do not pay by ACH. Would you like to?	TEST123456	Eligible

CRM Contact

Contact: 456 - LORI SALES - M3

Deleted Include Notices Include CPNI Include NSF Include ACH Include Notifications

Type	Priority	Subject	Payment Note	Inquiry Note	Note Expire Date	Result	Needs Attention	Contact By	Contact Date
MRKT		PROMO	<input type="checkbox"/>	<input type="checkbox"/>		OFFER	<input type="checkbox"/>	MUphoff	4/17/2020
MRKT		PROMO	<input type="checkbox"/>	<input type="checkbox"/>		SOLD	<input type="checkbox"/>	MUphoff	4/17/2020

Once the account's Inquiry screen is refreshed, you'll see the Promo Status updated to indicate the offer was accepted or declined. If a message was only offered, the Promo Status will remain as Eligible.

As offers are made, records will be added to CRM.

These same CRM records can be seen on the CRM tab of Accounts through Promotions.

Promotions/Campaign Manager Reports

Account Contacts
Promotions
Promotion Overview

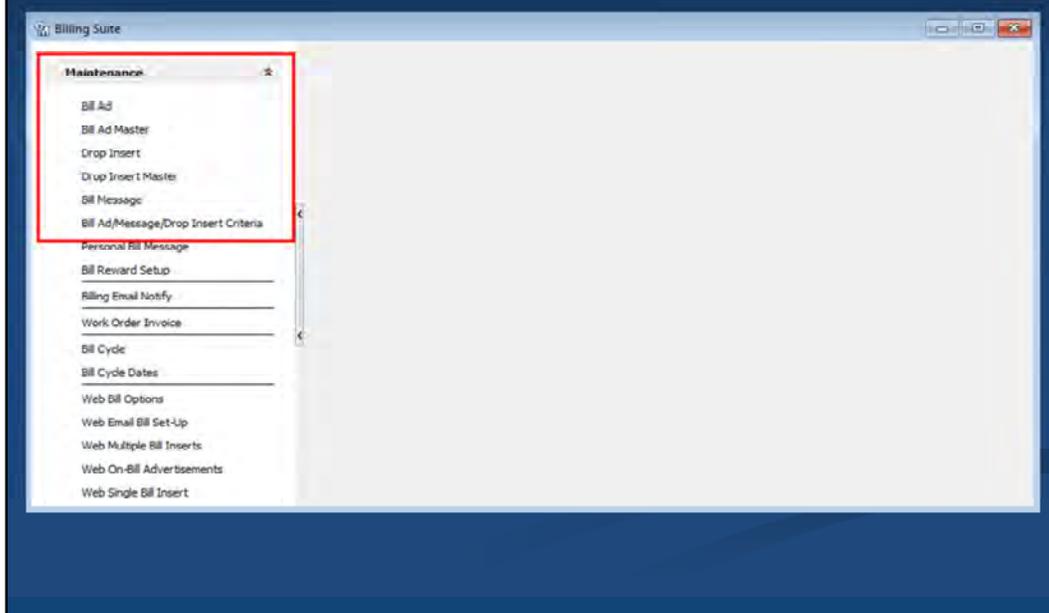
There are several reports available for monitoring your promotions. They can be found through the Marketing and Reports Suites.

The first is the Account Contacts report. This is the same report seen previously and includes data pulled from CRM records. To see how many customers are signing up for a promotion through Inquiry – Suggestive Marketing, run the report on a Type of MRKT, a Subject of PROMO and a Result of SOLD. Include View Result Verbiage to see the specific promotions.

The Promotions report will show accounts that have accepted promotions. Among other options, the report can be run by all or just one promotion and by current, expired or both statuses of promotions.

The Promotion Overview report is a high-level report that summarizes a marketing campaign. Select a single campaign from the drop-down and click on the Printer icon to launch the report.

Bill Messages/Drop Inserts/On-Bill Ads



Some Additional marketing tools come in the form of Bill Messages, Drop Inserts and On-Bill Ads.

Using bill messaging tools in Customer Master is a great way to communicate with your customers. Not only do they allow you to update your customers with important information such as rate changes, but they also allow you to target specific groups of customers for sales and promotions.

All bill messaging options can be found in the Billing Suite.

Bill Messages/Drop Inserts/On-Bill Ads

Bill Message Editor

Code: [] Description: [BLAIR TAX INCREASE] Priority: [1]

Bill Cycle: [] End Bill Date: [12/01/2021]

Select Print Location: *Linked to Criteria - cannot change Print Location*

Face Page First Detail Page

Lines 1-10 | Lines 11-20 | Lines 21-30

Optional

Message Title: [BLAIR CITY TAX INCREASE] Text Align: [Center]

Message Text: Text Presentation: [As Entered] Text Align: [Center]

1 This is to notify you that effective next month

2 the Blair City Tax rate will increase from 2% to 3%.

3 This increase may apply to some or all of your basic, regulated services.

4 These services are denoted with an * on your monthly statement.

5 Contact Success Telephone at 402-555-3555 if you have any questions.

6

7

8

9

10

In the Billing Suite, under the Maintenance tab click on Bill Message. Then click on the Insert icon to create a new message. If you need to edit an existing Bill Message highlight the message you wish to edit and double click, or click on the Edit icon to make changes to an existing message.

To create a new message, you'll need a Code and Description as well as a Priority. A Face Page message will always have a priority of one and you can have only one Face Page message on any one bill. Detail Page messages use priority to determine the order in which the messages will appear on bills. No more than 10 Detail Page messages will print on any one bill.

If you have more than one Bill Cycle you'll need to select a cycle from the drop-down. Then select an End Bill Date. The date selected will be the last bill on which the message will print.

Bill Messages/Drop Inserts/On-Bill Ads

Bill Message Editor

Code: 011 Description: BLAIR TAX INCREASE Priority: 1

Bill Cycle: Select Print Location: *Linked to Criteria - cannot change Print Location*

End Bill Date: 12/01/2021

Lines 1-10

Optional Message Title: BLAIR CITY TAX INCREASE Text Align: Center

Message Text: Text Presentation: As Entered Text Align: Center

1 This is to notify you that effective next month

2 the Blair City Tax rate will increase from 2% to 3%

3 This increase may apply to some or all of your basic, regulated services.

4 These services are denoted with an * on your monthly statement.

5 Contact Success Telephone at 402-555-5555 if you have any questions.

6

7

8

9

10

Next, if you choose to include a title, enter it in the Optional Message Title field and select your Text Align – either Center or Left.

Then, choose your Text Presentation. This is how the message will present on the bill. As Entered will present line by line, exactly as you have entered it. Wrap Text will ignore the ‘end’ of each line of text and continue with the next line, using all of the character spaces allowed per line, based on the bill format. Face Page message presentation allows for 45 characters per line on MACC2 and MACC3. Detail Page message presentation allows for 80-plus characters per line on MACC2 and up to 52 characters per line on MACC3.

Choose your Text Align for the text of your message and then enter the text. A Face Page message can have up to five lines of text with a title or up to seven lines of text without a title. A Detail Page message can have up to thirty lines of text, whether or not a title is included.

Be sure to post your changes once you’ve completed your text and other options.

Bill Messages/Drop Inserts/On-Bill Ads

The screenshot shows the 'Bill Criteria Wizard' dialog box. It has three tabs: 'Bill Ad', 'Bill Message', and 'Drop Insert'. The 'Bill Message' tab is selected. The 'Criteria Code' is '12POF' and the 'Description' is '12 PACK OF FEATURES PROMO'. The 'Assign to Bill Message Code' is 'PRO 12'. A hint says: 'HINT: Leave this blank to unlink the criteria from a bill message.' The 'Criteria Level' section has radio buttons for 'Company', 'Main Report Area', 'Report Area', 'Tax Area', and 'Service Area', with 'Company' selected. Below it, 'Look in These Tiers' has checkboxes for 'Account', 'Customer', 'Network', and 'CPNI Account Approval', with 'Account', 'Customer', and 'Network' checked. The 'Select Other Options' section has three columns: 'Not Used' (selected), 'Services' (with sub-options for 'LSP Codes and Bundles', 'Toll Calls', 'Payment Options', 'Activation Date Ranges', 'Disconnect Date Ranges', and 'Carrier'), 'Locality' (with sub-options for 'Not Used', 'ZIP Code', and 'NPA/NXX/Line Number', and a 'Filter Network Types' checkbox), and 'Bus/Res' (with sub-options for 'Not Used', 'Business', and 'Residence'). At the bottom are buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

After you have created your Bill Message you need to link the message to criteria and can do so by clicking on the Criteria Wizard icon at Bill Message or through the Billing Suite. There are many additional options available for including or excluding customers. Once you have completed all you selections and save your Bill Message will be linked and ready for billing.

Bill Messages/Drop Inserts/On-Bill Ads

The screenshot displays a software interface for managing Drop Inserts. At the top, a window titled 'Drop Insert' contains a table with the following data:

Code	Description	End bill Date	Changed By	Changed Date
BILL	BILL FORMAT CHANGE	12/1/2021	JRiecken	11/29/2019 4:19:32 PM
BILLEX	BILL EXPLAINER	12/1/2021	JRiecken	11/29/2019 4:19:36 PM
BITS	BACK TO SCHOOL INTERNET SPECIAL	12/1/2021	JRiecken	11/29/2019 4:19:39 PM
CCARD	CREDIT CARD AUTO PAY	12/1/2021	JRiecken	11/29/2019 4:19:43 PM
DIG	DIAL BEFORE YOU DIG	12/1/2021	JRiecken	11/29/2019 4:19:46 PM
DSC	DIGITAL SPORTS CHANNEL	12/1/2021	JRiecken	11/29/2019 4:19:49 PM
HBSHSF	HBO & SHOWTIME SPECIAL OFFER SF	12/1/2021	JRiecken	11/29/2019 4:19:53 PM
HOWL	HOWL-O-WEEN HUMANE SOCIETY	12/1/2021	JRiecken	11/29/2019 4:20:34 PM
LPB	LARGE PRINT BILLS			
SCHED	HUSKER BASEBALL SCHEDULE			
TVE	TV EVERYWHERE			
ULTBUN	ULTIMATE BUNDLE PROMO			

Below the table, a 'Drop Insert Editor' dialog box is open, showing the following fields:

- Code: DROP
- Description: DROP INSERT
- End Bill Date: 05/01/2020

Drop Inserts are another great way to communicate with your customers. While the setup isn't quite as involved as for bill messages, all the 'pieces' still need to be completed in order to get your inserts to your customers.

From the Billing Suite, select Drop Insert. Click on the Insert icon to create a new code and description or highlight an existing code and either double click or click on the Edit icon to update.

Bill Messages/Drop Inserts/On-Bill Ads

Tray	Code	Description	End Bill Date
1:	BILLEX	BILL EXPLAINER	12/01/2021
2:	SCHED	HUSKER BASEBALL SCHEDULE	12/01/2021
3:			
4:			
5:			

Next, The Drop Insert Master editor is where you'll assign the tray, or the order, for each insert. You can have up to five inserts in any given month. The trays work as follows:

- 1 Insert – use Tray 1
- 2 Inserts – use Tray 2 and Tray 1; Tray 2 will be the first insert seen in the bill
- 3 Inserts – use Tray 3, Tray 2 and Tray 1; Tray 3 will be the first insert seen in the bill
- 4 Inserts – use Tray 4, Tray 3, Tray 2 and Tray 1; Tray 4 will be the first insert seen in the bill
- 5 Inserts – use Tray 5, Tray 4, Tray 3, Tray 2 and Tray 1; Tray 5 will be the first insert seen in the bill

Bill Messages/Drop Inserts/On-Bill Ads

The screenshot shows the 'Bill Criteria Wizard' dialog box. It has a title bar with a minimize, maximize, and close button. The 'Criteria Type' section has three radio buttons: 'Bill Ad', 'Bill Message', and 'Drop Insert', with 'Drop Insert' selected. Below this, there are text boxes for 'Criteria Code' (containing 'BILLEX') and 'Description' (containing 'NEW CUSTOMER BILL EXPLAINER'). A dropdown menu for 'Assign to Drop Insert Code' is set to 'BILLEX'. A hint text reads: 'HINT: Leave this blank to unlink the criteria from a drop insert.' The 'Criteria Level' section has five radio buttons: 'Company', 'Main Report Area', 'Report Area', 'Tax Area', and 'Service Area', with 'Company' selected. Below this is a section 'Look in These Tiers' with four checkboxes: 'Account' (checked), 'Customer', 'Network', and 'CPNI Account Approval'. The 'Select Other Options' section is divided into three columns. The first column has radio buttons for 'Not Used', 'Services', 'Payment Options', 'Activation Date Ranges', 'Disconnect Date Ranges', and 'Carrier', with 'Activation Date Ranges' selected. The second column has radio buttons for 'Not Used', 'ZIP Code', and 'NPA/NOX/Line Number', with 'Not Used' selected, and a checkbox for 'Filter Network Types'. The third column has radio buttons for 'Not Used', 'Business', and 'Residence', with 'Not Used' selected, and a dropdown menu. At the bottom, there are four buttons: 'Back <', 'Next >', 'Finish', and 'Cancel'.

Just like bill messages, drop inserts need to be linked to criteria in order for them to get to the right customers.

Bill Messages/Drop Inserts/On-Bill Ads

Bill Ad/Bill Message/Drop Insert Accounts Report

Billing Cycle: Bill Cycle: 01, Bill Date: 04/01/2020

Print Options: Detail, Summary

Report Type: Bill Ad, Bill Message, Drop Insert, Personal Bill Message

Drop Insert Accounts
Bill Cycle 01 - 04/01/2020 - Summary
SUCCESS TEL 20,1

CO #: 470
OCN #: 470a

Page 1 of 1
4/17/2020 2:32:03 PM
MUp hoff

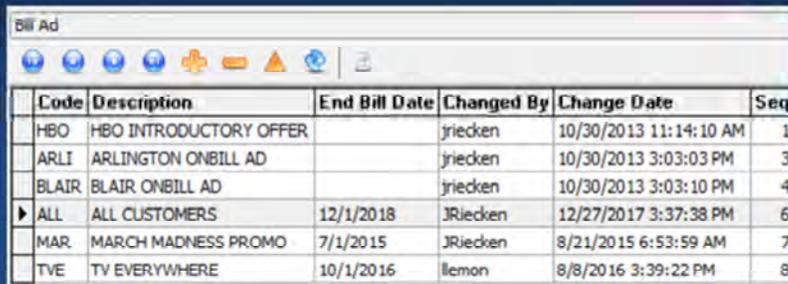
Code	Description	End Bill Date
BILLEX	BILL EXPLAINER	12/01/2021
	Total: 763	Paper: 757 Other: 6
SCHED	HUSKER BASEBALL SCHEDULE	12/01/2021
	Total: 51	Paper: 51 Other: 0
Grand Total: 814		

NOTE: The criteria code shown could be one of many that qualified the Account for eligibility.

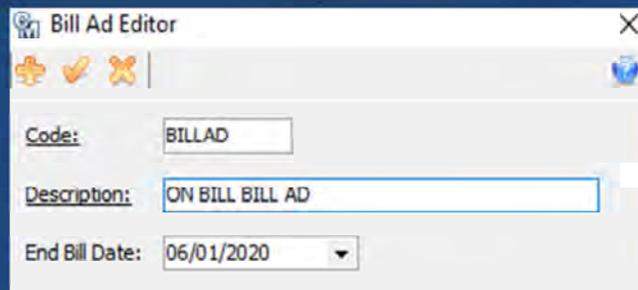
With drop inserts, it's very important you run the Bill Ad/BillMsg/Drop Insert report because you'll need to either send or have MACC produce the right amount of inserts. Run in Summary, as seen here, the report gives you the total number of accounts. Run by Detail, each account that qualifies for the insert will be listed. Run by either option, the report will also show the bill medium and can be e-mailed as well as exported to a .csv file.

Remember that this report also includes inactive accounts so keep that in mind when determining the number of inserts to order or send. You might consider taking a look at your previous month's BL51A – check the bill medium records to help you with your insert estimate.

Bill Messages/Drop Inserts/On-Bill Ads



Code	Description	End Bill Date	Changed By	Change Date	Seq
HBO	HBO INTRODUCTORY OFFER		jriecten	10/30/2013 11:14:10 AM	1
ARLI	ARLINGTON ONBILL AD		jriecten	10/30/2013 3:03:03 PM	3
BLAIR	BLAIR ONBILL AD		jriecten	10/30/2013 3:03:10 PM	4
▶ ALL	ALL CUSTOMERS	12/1/2018	JRiecken	12/27/2017 3:37:38 PM	6
MAR	MARCH MADNESS PROMO	7/1/2015	JRiecken	8/21/2015 6:53:59 AM	7
TVE	TV EVERYWHERE	10/1/2016	llemon	8/8/2016 3:39:22 PM	8



Bill Ad Editor

Code:

Description:

End Bill Date:

On-Bill Ads have setup steps very similar to Drop Inserts. To first enable the Bill Ad option, flag the Use Bill Ads indicator through Tools – Options – Billing. Once that’s been done, you can start building your ads.

Through the Billing Suite, select Bill Ad. Click the Insert icon to create a new one. Enter a Code and Description. End Bill Date is optional. If you enter one, that will be the last bill date on which the ad will display. Not having a date means the ad will be on bills perpetually.

Bill Messages/Drop Inserts/On-Bill Ads

Bill Cycle	Bill Date	Past Bill Cut	Use Bill Ad	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Change By	Changed Date
01	04/01/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					Lemon	3/6/2020 10:01
01	03/01/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					Lemon	2/3/2020 11:11
01	02/01/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					JRecken	12/27/2019 4:44
01	01/01/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					JRecken	11/29/2019 4:44
01	12/01/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					JRecken	11/9/2019 4:44
01	11/01/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					JRecken	10/1/2019 1:11
01	10/01/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ALL					JRecken	8/29/2019 5:55

Priority	Code	Description	End Bill Date
1:	ALL	ALL CUSTOMERS	12/01/2020
2:	ARLI	ARLINGTON ONBILL AD	

Next, you'll need to establish your ads in the Bill Ad Master. Choose a Bill Cycle and a Bill Date from the drop-downs. Then, select your ads from the Code drop-downs. Priority is used when a customer qualifies for more than one ad, based on its linked criteria. Only one ad can print on a bill.

Each Code will have a View hyperlink to your ad data here at MACC. If there's a problem viewing the ad, most likely the ad itself hasn't been set up at MACC – you'll need to contact MACC's Creative Services team.

Bill Messages/Drop Inserts/On-Bill Ads

Bill Criteria Wizard

Criteria Type: Bill Ad Bill Message Drop Insert

Criteria Code: ALL Description: ALL

Assign to Bill Ad Code: ALL

HINT: Leave this blank to unlink the criteria from a bill ad.

Criteria Level: Company Main Report Area Report Area Tax Area Service Area

Look in These Tiers: Account Customer Network CPNI Account Approval

Select Other Options:

Not Used Services

USP Codes and Bundles Toll Codes

Payment Options Activation Date Ranges Disconnect Date Ranges Carrier

Locality: Not Used ZIP Code NPA/NXX/Line Number

Filter Network Types

Bus/Res: Not Used Business Residence

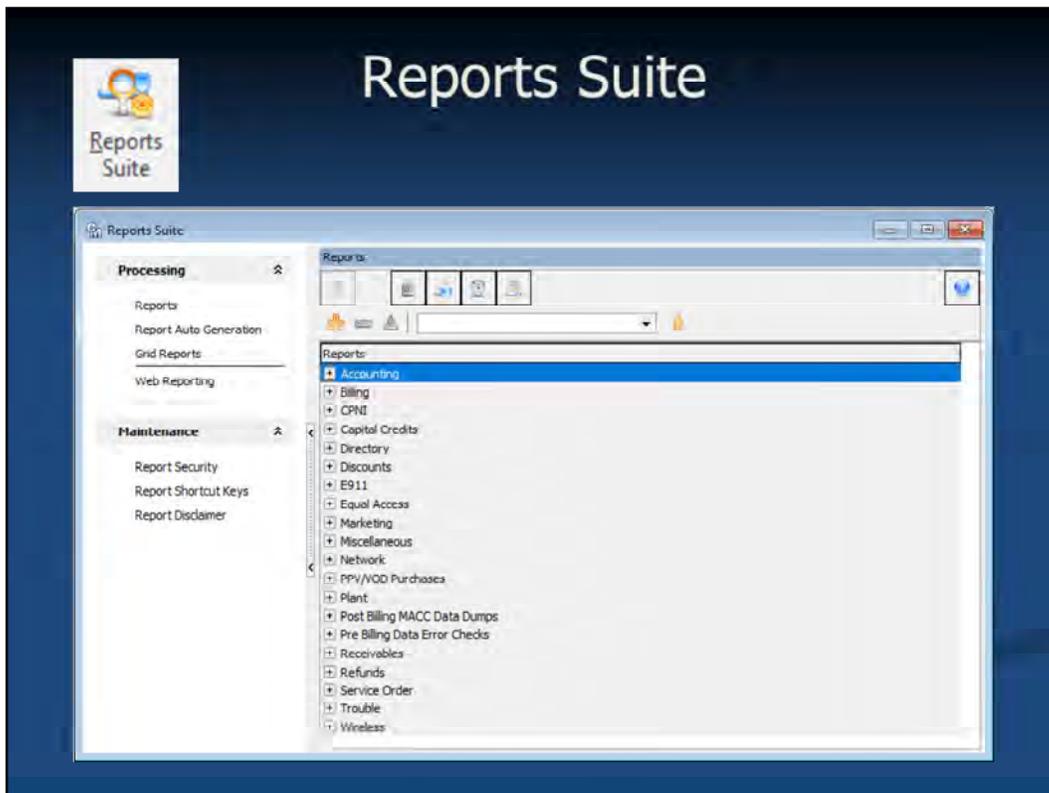
Back Next Finish Cancel

After you've finished the Bill Ad and Bill Ad Master setups, you'll need to create and link a set of criteria. On-Bill Ads can go to all accounts as well as selective. If it's an ad going to everyone, the Criteria Level will most likely be Company and the Look in These Tiers will probably be Account. If you're targeting a specific group of customers, you'll need to select options and work through the wizard accordingly.

Chapter

12

Customer Master Reports



Most of the tools you will need to run Customer Master reports can be found in the Reports Suite. Here, you'll see a list of all of the categories of reports. Clicking on the + to the left of each report category will expand the list to show you each canned report. You may also search for a report in the search bar, which can be very handy. We'll look at several of our favorite canned reports, and then review some other commonly used report tools.

Account Master Listing

The screenshot shows the 'Account Master Listing Options' dialog box with the following settings:

- Main Report Area Options:** Do Not Group, Group By All Areas, Select One Area: [Dropdown]
- Account Options:** All Accounts, One Account: [Dropdown]
- Account Status Options:** All Statuses, Active, Begin: 3/1/2020, End: 4/8/2020, Disconnected, Begin: [Dropdown], End: [Dropdown], Permanent Disconnect, Suspend, One Status: [Dropdown], Group By Status
- Bill Cycle Options:** All Bill Cycles, One Bill Cycle: [Dropdown]
- Report Area Options:** Do Not Group, Group By All Areas, Select One Area: [Dropdown]
- Network Type Options:** All Network Types, One Network Type: [Dropdown]
- Service Type Options:** All Service Types, One Service Type: [Dropdown]
- Technology Type Options:** All Technology Types, One Technology Type: [Dropdown]
- Bus/Res:** Both, Business, Residence, One: [Dropdown]
- Agent Options:** All Agents, One Agent: [Dropdown]
- Sort By:** Account Name, Account Number, Account Active Date, Account Inactive Date, Account Zip Code, Display Secondary Network Addresses

The Account-Master Listing Report, found under the Billing reports category, provides a complete listing of your company's customer accounts. Criteria includes things such as Main Report Area, Report Area, Bus/Res Filtering, All or One Account, Network Type, Service Type and Technology Type. The Account Status Options filters allow you to look at various statuses. In this example, we're looking for Active accounts with a specific Begin and End date. You can also filter by Bill Cycle or Agent (who "sold" the account). Sort options are also available.

Keep in mind that this report could be lengthy if you have many accounts (active or disconnected), and do not enter criteria to narrow down your results.

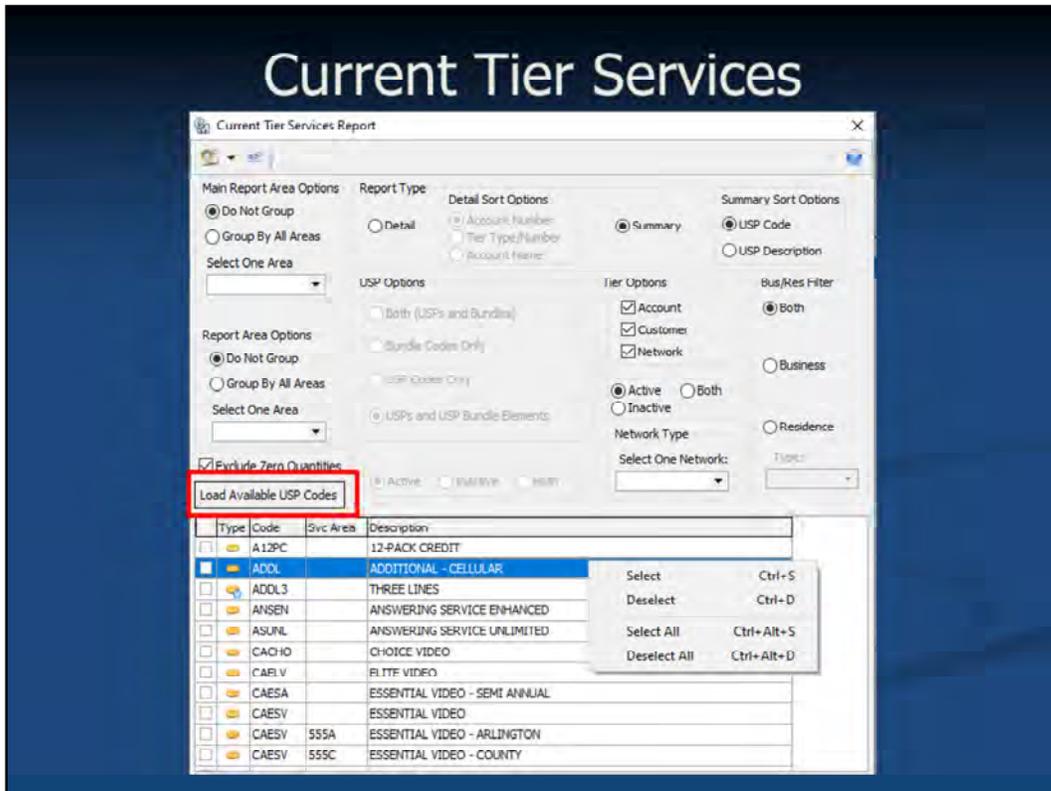
Account Master Listing

All Rpt Areas		Accounts Master Listing Report										Page 1 of 1	
CO # : 470		Active Accounts Between 3/1/2020 - 4/8/2020										4/8/2020 11:46:16 AM	
OCN # : 470a		Sorted by Account Name										JRiecken	
												SUCCESS TEL PRE-RELEASE 20.1	
Account Number	Acct Status	Acc/Tier	Acc/Tier	Bus/	Account Name	Tech	Tier	Agent	Account Address	City	St	Zip Code	
Svc Type	Active Date	Inactive Date	Res	Tier Type/Number	Type	Status	Add Type	Service Address					
1750		03/26/2020		R	DOE, JOHN				100 ELKHORN OAKS CR	ARLINGTON	NE	68002	
DSL	03/26/2020		R	INT 3195550123	DSL	P		100 ELKHORN OAKS CR	ARLINGTON	NE	68002		
DIG	03/26/2020		R	CBL 3195550129	DIG	P		100 ELKHORN OAKS CR	ARLINGTON	NE	68002		
R1	03/26/2020		R	TEL (319)555-9972	TEL	P		100 ELKHORN OAKS CR	ARLINGTON	NE	68002		
1751		04/01/2020		R	PAULSEN, PAM				1435 ADAMS ST	BLAIR	NE	68008	
DIG	04/01/2020		R	CBL 3195553971	DIG	P		1435 ADAMS ST	BLAIR	NE	68008		
DSL	04/01/2020		R	INT 3195553971	DSL	P		1435 ADAMS ST	BLAIR	NE	68008		
R1	04/01/2020		R	TEL (319)555-9971	TEL	P		1435 ADAMS ST	BLAIR	NE	68008		
1752		03/31/2020		R	TEST, TEST				100 ELKHORN OAKS CR	ARLINGTON	NE	68002	
DIG	03/31/2020		R	CBL 11112222	DIG	P		100 ELKHORN OAKS CR	ARLINGTON	NE	68002		
DSL	03/31/2020		R	INT 11112222	DSL	P		100 ELKHORN OAKS CR	ARLINGTON	NE	68002		
R1	03/31/2020		R	TEL (319)555-1815	TEL	P		100 ELKHORN OAKS CR	ARLINGTON	NE	68002		
Number of Accounts for Company:											3		

The report will display a summary of the account and it's corresponding tiers based on the report criteria selected.

In addition to the Account Master Listing, there is also a Network Master Listing which is a summary of network information.

Current Tier Services



The Current Tier Services Report, found under the Billing Reports category, allows you to generate reports of all current services assigned to accounts, by either a summary or detail option. It's similar to the existing Unit Service Register Report, but is a current snapshot in time. Options include selections based on Main Report Area, Report Area, Report Type (Detail or Summary), USP Options, Tier Options, Exclude Zero Quantities, Bus/Res Filter, and Network Type.

When you have entered your initial criteria, click the Load Available USP Codes bar, which will list USP codes in the grid below. Select one, many or all USPs from the grid.

To select a block of rows: select the top record, hold down the Shift key and select the bottom row. To select multiple rows not in a block, select the first record, hold down the Ctrl key and select the additional rows. You can also right-click and choose Select All or Deselect All.

Launch the report when finished.

You may also export your results to .CSV.

Current Tier Services

Current Tier Services Report										Page 1 of 30	
USPs and USP Bundle Elements Exclude Zero Quantities										4/8/2020 10:24:17 AM	
SUCCESS TEL PRE-RELEASE 20.1										JRiecken	
All Rpt Areas CO # : 470 OCN # : 470a										Selected Network Types: All Network Types	
Selected USP and Service Area Codes: IDSLA / IDSLB / IDSLC 500M / IDSLD / IDSLE / IDSLF //											
Account No	Account Name / Address	Parent	USP	Description	In Date	Out Date	Service Area	Occurs	Quantity	Amount	
8	MURRAY, TY 1300 JACKSON ST BLAIR IL 60008		IDSLB	DSL SERVICE - UP TO 25 MBPS	12/01/2019			1	1	48.50	
N	3195550107 555i INT		IDSLB	DSL SERVICE - UP TO 25 MBPS				1	1	48.50	
								Tier Group Total:		1	48.50
9	EROST, LANE 354 MAAM ST BLAIR NE 68008		IDSLF	DSL SERVICE - UP TO 100 MBPS	11/25/2019			1	1	99.99	
N	3195550210 555i INT		IDSLF	DSL SERVICE - UP TO 100 MBPS				1	1	99.99	
								Tier Group Total:		1	99.99
11	HUNT, RAY 8001 VICTORY LN BLAIR NE 68008		IDSLD	DSL SERVICE - UP TO 50 MBPS				1	1	56.50	
II	3190000111 555i INT		IDSLD	DSL SERVICE - UP TO 50 MBPS				1	1	56.50	
								Tier Group Total:		1	56.50
13	HEDEMAN, TUFF 1300 JACKSON ST BLAIR IL 60008		IDSLA	DSL SERVICE - UP TO 10 MBPS	03/17/2003			1	1	35.95	
N	3195550113 555i INT		IDSLA	DSL SERVICE - UP TO 10 MBPS				1	1	35.95	
								Tier Group Total:		1	35.95
30	ANGEL, STEVE & ALLISON 1300 JACKSON ST BLAIR IL 60008		IDSLB	DSL SERVICE - UP TO 25 MBPS	11/25/2019			1	1	38.37	
N	3195550121 555i INT TP		IDSLB	DSL SERVICE - UP TO 25 MBPS				1	1	38.37	
								Tier Group Total:		1	38.37
40	OHMS, AMOND 1300 JACKSON ST BLAIR IL 60008		IDSLB	DSL SERVICE - UP TO 25 MBPS	11/25/2019			1	1	26.03	
N	3195550135 555i INT EXTRM		IDSLB	DSL SERVICE - UP TO 25 MBPS				1	1	26.03	
								Tier Group Total:		1	26.03

Detail

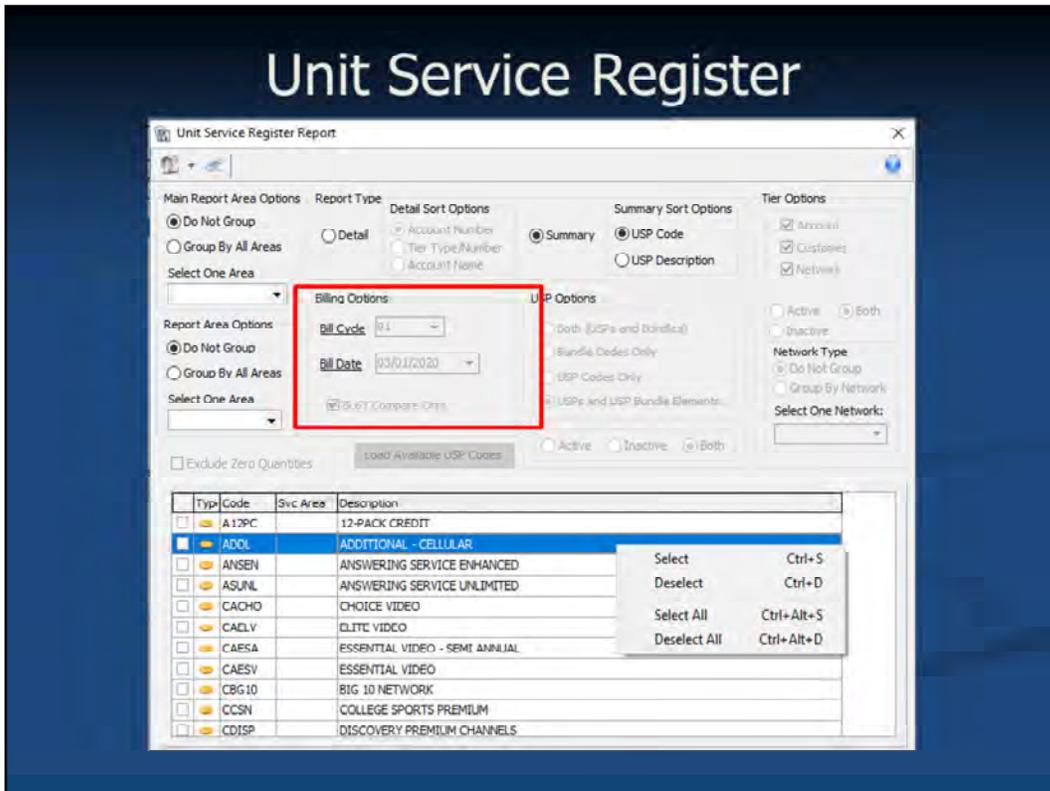
Current Tier Services Report (Active Tiers Active USPs All Tier Levels)										Page 1 of 1	
USPs and USP Bundle Elements, Bus/Res: ALL By USP Code										4/8/2020 10:25:21 AM	
SUCCESS TEL PRE-RELEASE 20.1										JRiecken	
All Rpt Areas CO # : 470 OCN # : 470a										Selected Network Types: All Network Types	
Selected USP and Service Area Codes: IDSLA / IDSLB / IDSLC 500M / IDSLD / IDSLE / IDSLF //											
Level	USP	Description	Service Area	Occurs	Quantity	Amount					
N	IDSLA	DSL SERVICE - UP TO 10 MBPS		40	40	1,430.00					
N	IDSLB	DSL SERVICE - UP TO 25 MBPS		99	99	4,147.92					
N	IDSLD	DSL SERVICE - UP TO 50 MBPS		110	119	9,384.48					
N	IDSLE	DSL SERVICE - UP TO 75 MBPS		46	46	3,450.00					
N	IDSLF	DSL SERVICE - UP TO 100 MBPS		35	35	3,499.65					
Company Total:				330	339	18,920.05					

Summary

These are examples of the Current Tier Services Report in Detail and Summary. Detail shows every tier that has the selected services. Summary simply shows counts (Occurs), quantities and amounts of the selected services.

Occurs is how many times the USP is present. Quantity considers the quantity of each code. You could have a USP code that occurs on a tier one time (1), but the quantity of that USP is three (3).

Unit Service Register



The Unit Service Register, found under the Billing Reports category, will look very similar in function to the Current Tier Services Report. However, the Unit Service Register is more directly tied to a specific past bill cycle. The other criteria is basically the same as the Current Tier Services report.

You will be required to select a Bill Cycle and Bill Date. BL67 Compare Only is used to reproduce a report to historically match the BL67 report in Bill Master.

The USPs will be listed in the grid below, and you are able to select and deselect just as you did for the Current Tier Services report.

Unit Service Register

All Rpt Areas		Unit Service Register-Detail Bill Cycle 01, 03/01/2020				Page 1 of 30				
CO # : 470		BL67 Compare Only		USPs and USP Bundle Elements		4/8/2020 10:56:48 AM				
OCN # : 470a		SUCCESS TEL PRE-RELEASE 20.1				JRiecken				
Selected USP and Service Area Codes: IDSLA / DSLB / DSLD / DSLE / DSLF										
Account No	Account Name / Address		Parent	USP	Description	Service Area	Occurs	Quantity	Amount	
Level	Tier Number	Net Area	Network	Bundle	Code					
8		MURRAY, TY	1300 JACKSON ST	BLAIR IL	68008					
N	3196550197	5551	INT	DSL	DSL SERVICE - UP TO 25 MBPS		1	1	46.50	
							Tier Group Total:	1	1	46.50
9		FROST, LANE	331 MAIN ST	BLAIR NE	68008					
N	3196550210	5551	INT	DSL	DSL SERVICE - UP TO 100 MBPS		1	1	99.99	
							Tier Group Total:	1	1	99.99
11		HUNT, RAY	8501 VICTORY LN	BLAIR NE	68008					
N	3196550111	5551	INT	DSL	DSL SERVICE - UP TO 50 MBPS		1	1	56.50	
							Tier Group Total:	1	1	56.50

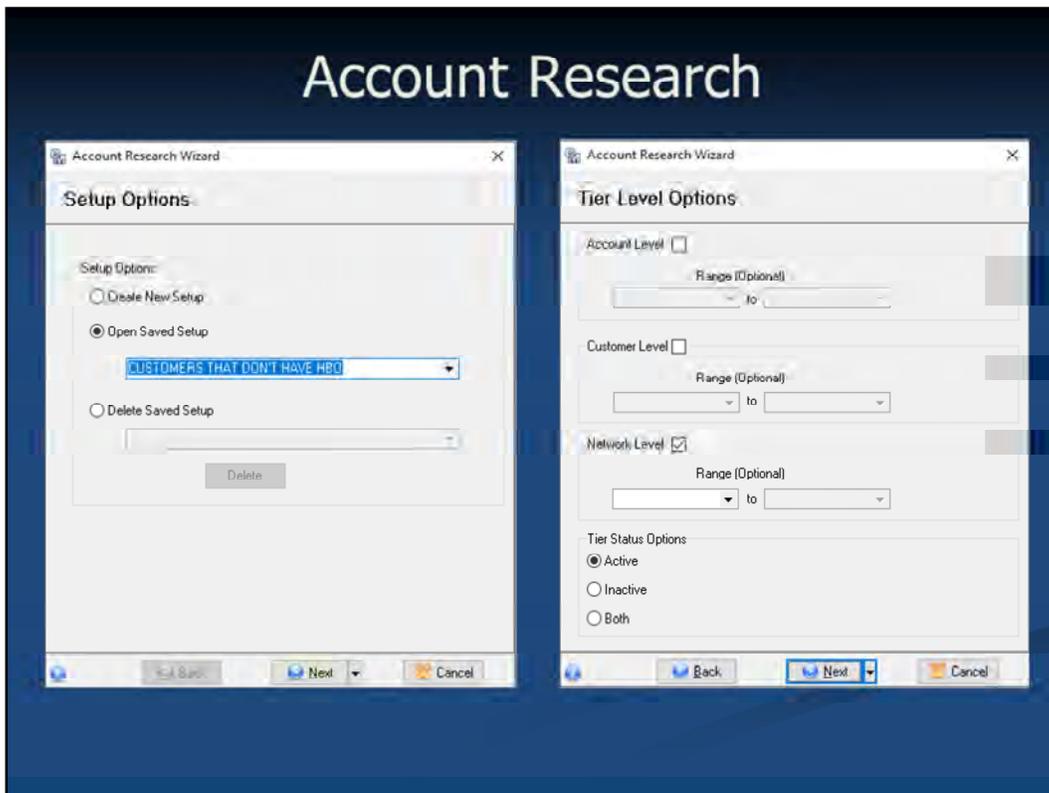
Detail

All Rpt Areas		USP Code Summary (Active and Inactive Tiers, Active and Inactive USPs All Tier Levels)				Page 1 of 1	
CO # : 470		Bill Cycle 01, 03/01/2020 - BL67 Compare Only		USPs and USP Bundle Elements		4/8/2020 11:04:54 AM	
OCN # : 470a		SUCCESS TEL PRE-RELEASE 20.1				JRiecken	
Selected USP and Service Area Codes: IDSLA / DSLB / DSLD / DSLE / DSLF						Selected Network Types:	
Level	USP	Description	Service Area	Users	Occurs	Quantity	Amount
N	IDSLA	DSL SERVICE - UP TO 10 MBPS		40	40	40	1,420.03
N	IDSLB	DSL SERVICE - UP TO 25 MBPS		99	99	99	4,117.23
N	IDSLD	DSL SERVICE - UP TO 50 MBPS		110	110	110	6,327.98
N	IDSLE	DSL SERVICE - UP TO 75 MBPS		44	44	44	3,240.00
N	IDSLF	DSL SERVICE - UP TO 100 MBPS		34	34	34	3,309.66
Company Total:				327	327	336	18,504.90

Summary

These are examples of the Unit Service Register Report in Detail and Summary. Detail displays every tier that has the selected services. Summary simply shows counts, quantities and amounts of the selected services.

Account Research

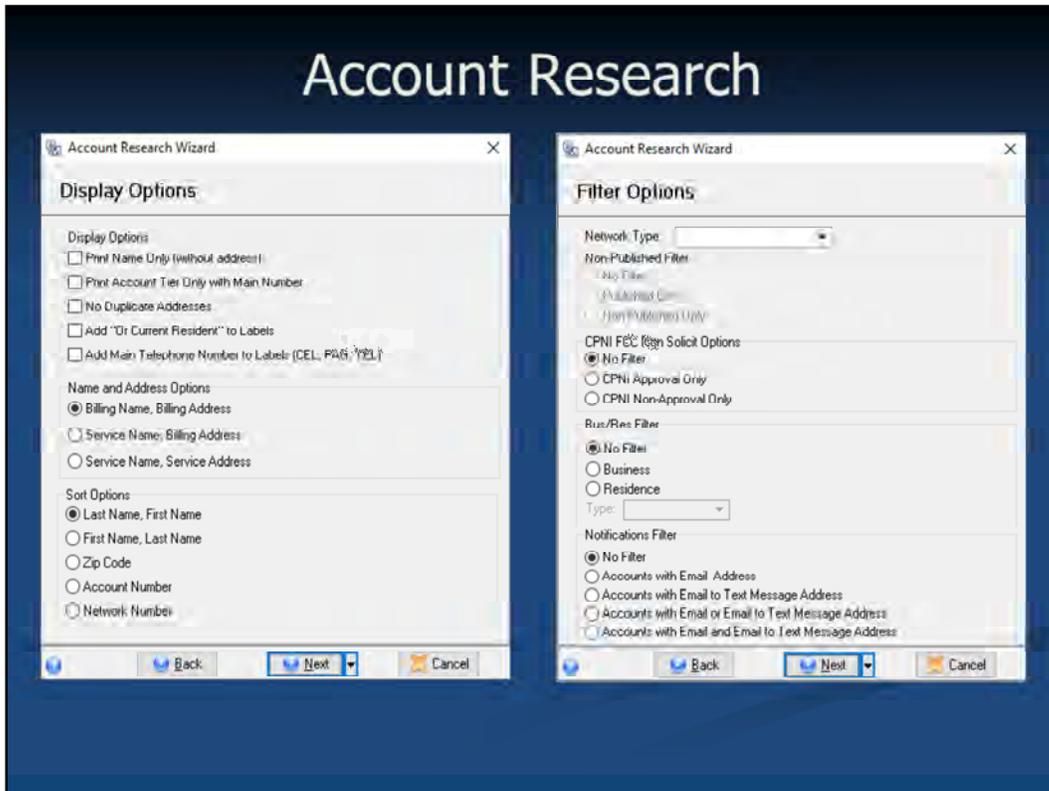


Found under the Marketing category of reports, the Account Research Report is a powerful tool to help you find specific lists of accounts based on criteria. You can also save your report criteria to return to the options, and refresh the reports with new data later. There are multiple screens in the Account Research wizard.

Setup Options allow you Create, Open Saved, or Delete Saved Setups. Click Next to proceed to through the wizard.

Tier Level Options determine which tiers – Account, Customer or Network will be used, as well as the Tier Status Options..

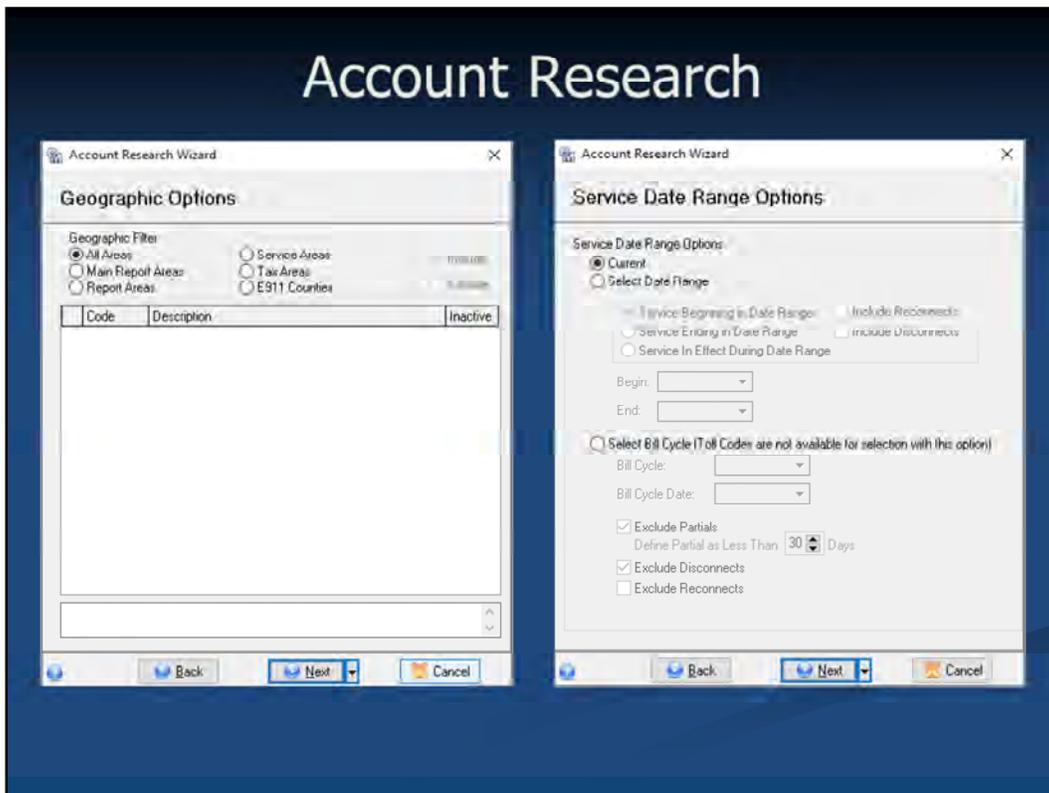
Account Research



Display Options gives you the opportunity to establish what information will be included in your results, and how the information will be sorted.

Filter Options allows you to filter based on Network Type, CPNI Indicator, Bus/Res, or Notification Filters.

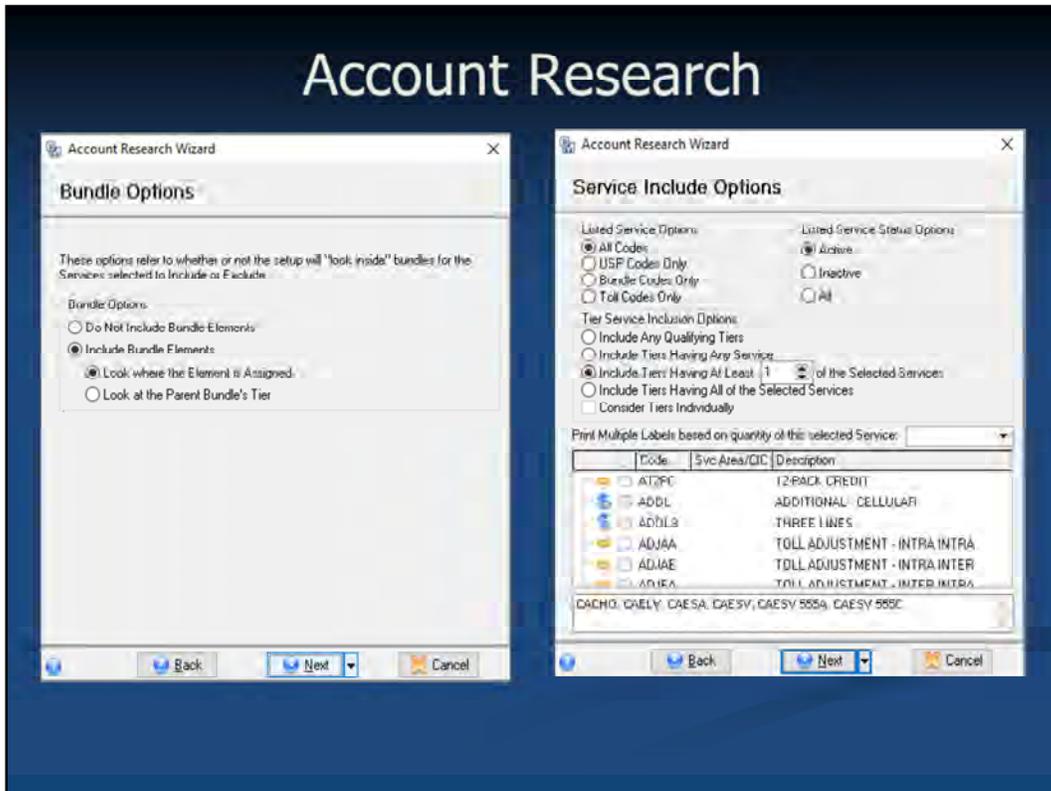
Account Research



Geographic Options allow you to filter based on account details such as Main Report Area, Report Area, Service Area, Tax Area, or E911 County.

Service Date Range Options let you filter accounts based on a variety of date filters.

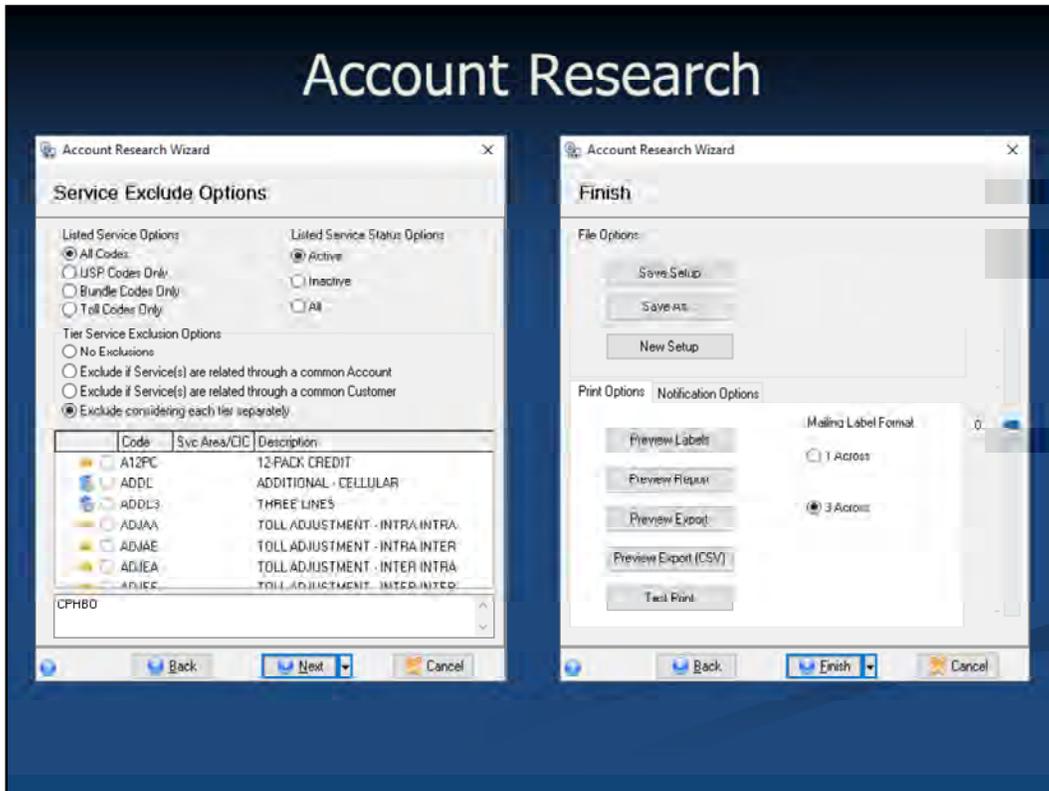
Account Research



Bundle Options gives you the opportunity to choose to filter on Bundle Elements.

Service Include Options is used to set criteria to filter accounts based on the existence of service USPs or Bundles.

Account Research



Service Exclude Options will filter based on the non-existence of certain USP or Bundles.

Finally, the Finish screen is where you can Save Setup for future use. From this window, you can also perform previews of Labels, Reports, or data Exports. Another tab is available for Notification Options, which allows you to send marketing email notifications to the customers that met all of your criteria.

Aged Trial Balance

Account Name	Account Number	Inactive Date
<input checked="" type="checkbox"/> BAKER, HENRY	7	
<input checked="" type="checkbox"/> MURRAY, TY	8	
<input checked="" type="checkbox"/> FROST, LANE	9	
<input checked="" type="checkbox"/> HUNT, RAY	11	
<input checked="" type="checkbox"/> HEDEMAN, TUFF	13	
<input checked="" type="checkbox"/> SALES, BEN	23	
<input checked="" type="checkbox"/> JOHNSTON, TIM	33	
<input checked="" type="checkbox"/> ANGEL, STEVE & ALLISON	38	
<input checked="" type="checkbox"/> OHMS, AMOND	40	
<input checked="" type="checkbox"/> JONES, JEFF	44	
<input checked="" type="checkbox"/> NORTH, ANTHONY	50	
<input checked="" type="checkbox"/> DIGGING, BILL & BETTY	56	

The Aged Trial Balance is a popular report found under the Receivables reports category. It provides a listing of balances owed and payments made by selected customers. Criteria includes Main Report, Report Area, Print Detail or Category Totals, Bill Cycle, Bus/Res Options, Account Options and In Collections Options. Most important is the Report Selection criteria, which determines which accounts qualify based on their balances. Once you have your criteria established, click Load Accounts to launch the report.

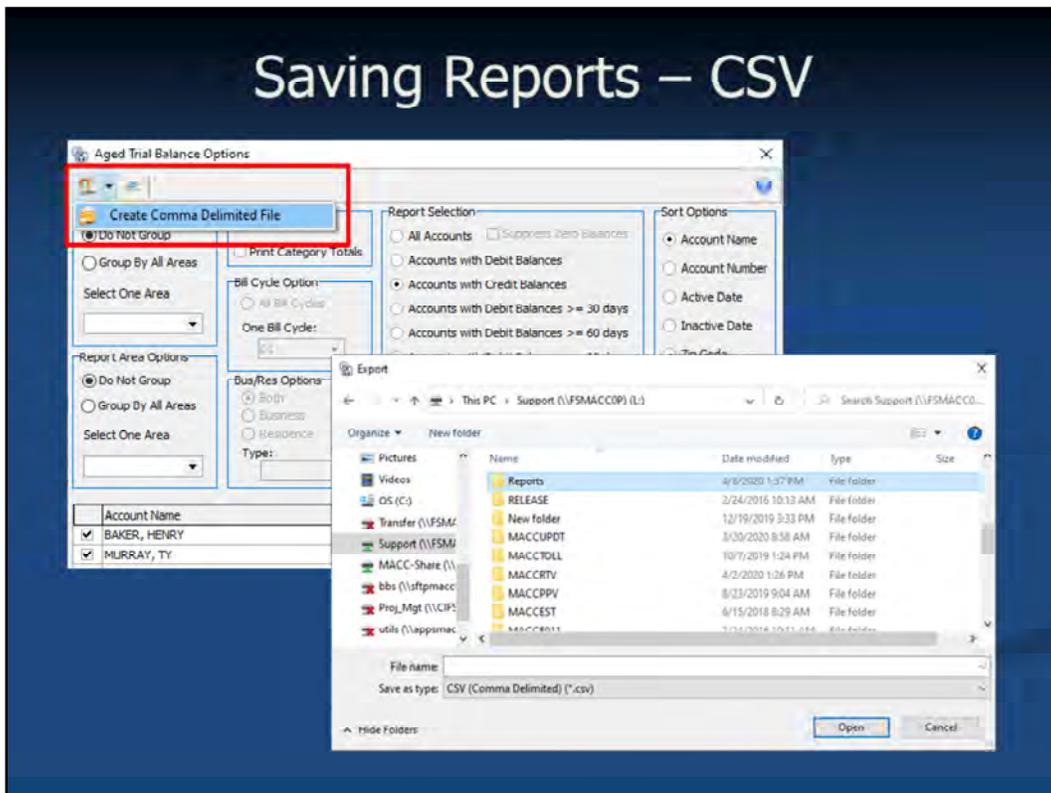
This report could be lengthy if you aren't careful with your criteria, so pay close attention to your selections before executing the report.

Aged Trial Balance

All Rpt Areas		Aged Trial Balance Report				Page 1 of 1					
CO # : 470		SUCCESS TEL PRE-RELEASE 20.1				4/8/2020 1:06:41 PM					
OCN # : 470a		JRiecken									
Report Selection: Accounts with Credit Balances		Bill Cycle Option: 01		<input type="checkbox"/> Print Detail							
<input type="checkbox"/> Suppress Zero Balances		Bus/Res Option: Both		<input type="checkbox"/> Print Category Totals							
Account Option: Active		Bus/Res Type:		Sort Option: Account Name							
<input checked="" type="checkbox"/> Include in Collections											
Account Name	Account Number	Inactive Date	Last Post Date	Last Payment	Total Balance	Unapplied Pre Payments	Balance Under 30 Days	Balance 30-59 Days	Balance 60-89 Days	Balance 90 and Over	Total
LINDA'S LEMON PE	1462		07/08/2016	300.00	-187.79	0.00	0.00	0.00	0.00	-187.79	-187.79
MARSH, STAN	1315		05/20/2016	121.50	-2,555.65	0.00	0.00	92.45	92.45	-2,740.55	-2,555.65
MURRAY, TY	8		12/27/2019	1,416.00	-825.48	0.00	0.00	147.26	147.26	-1,120.00	-825.48
ROSS HALFORD	1454			0.00	-51.07	0.00	0.00	0.00	0.00	-51.07	-51.07
SALES, JILL	455		03/31/2020	50.00	-50.00	0.00	0.00	-21.35	-14.39	-14.26	-50.00
TOLKEN, J R R	1153		11/29/2019	870.00	-346.44	0.00	0.00	87.76	87.76	-521.96	-346.44
WILDER, THORNTON	1152		04/23/2019	1,241.00	-490.00	0.00	0.00	63.85	63.85	-617.70	-490.00
Company Totals:		Record Count:		7	-4,506.43	0.00	0.00	369.97	376.93	-5,253.33	-4,506.43

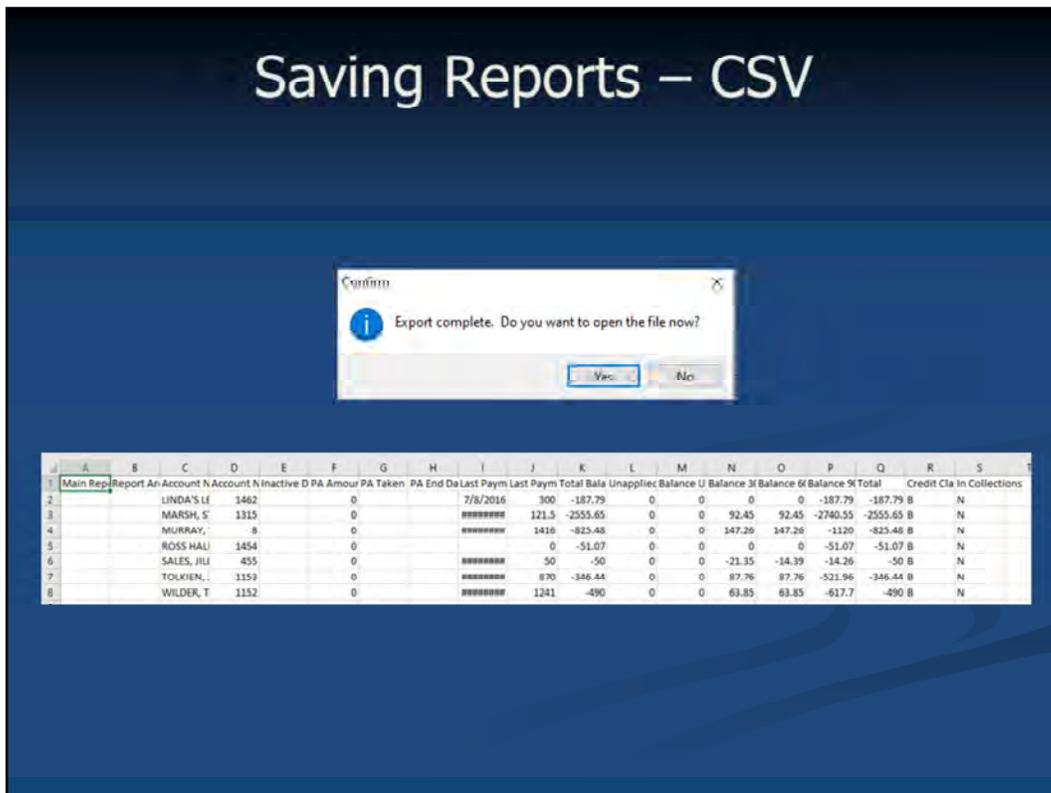
The finished report will display account balances based on the criteria selected with details in the 0-30, 30-59, 60-90 and 90 and Over buckets.

Saving Reports – CSV



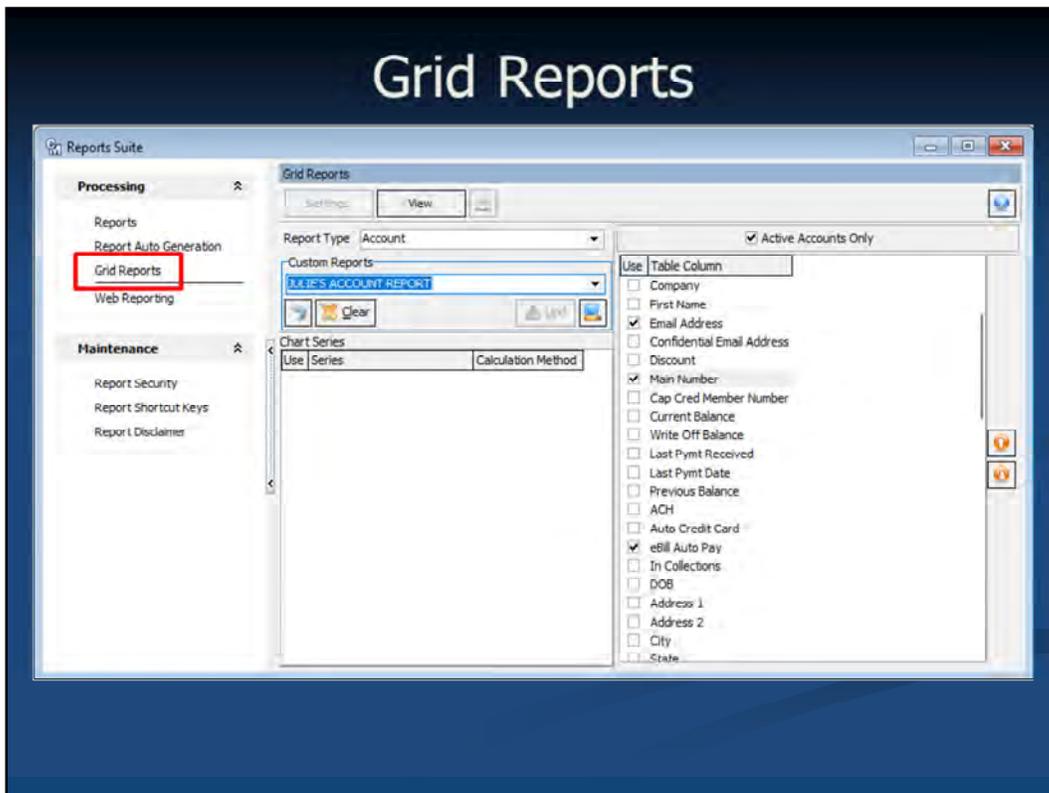
Many reports can be saved to a .CSV so that they can be further manipulated, if desired. Click on the drop-down arrow in the upper left corner of the screen to find the Create Comma Delimited File option. When you choose to create a CSV, you will need to select a location to save the file. You might want to have a folder just to manage your saved files.

Saving Reports – CSV



After clicking Open, the system will give you the option to open the file that was just created. The file will open in Excel. If you are a savvy Excel user, you can now further manipulate the data.

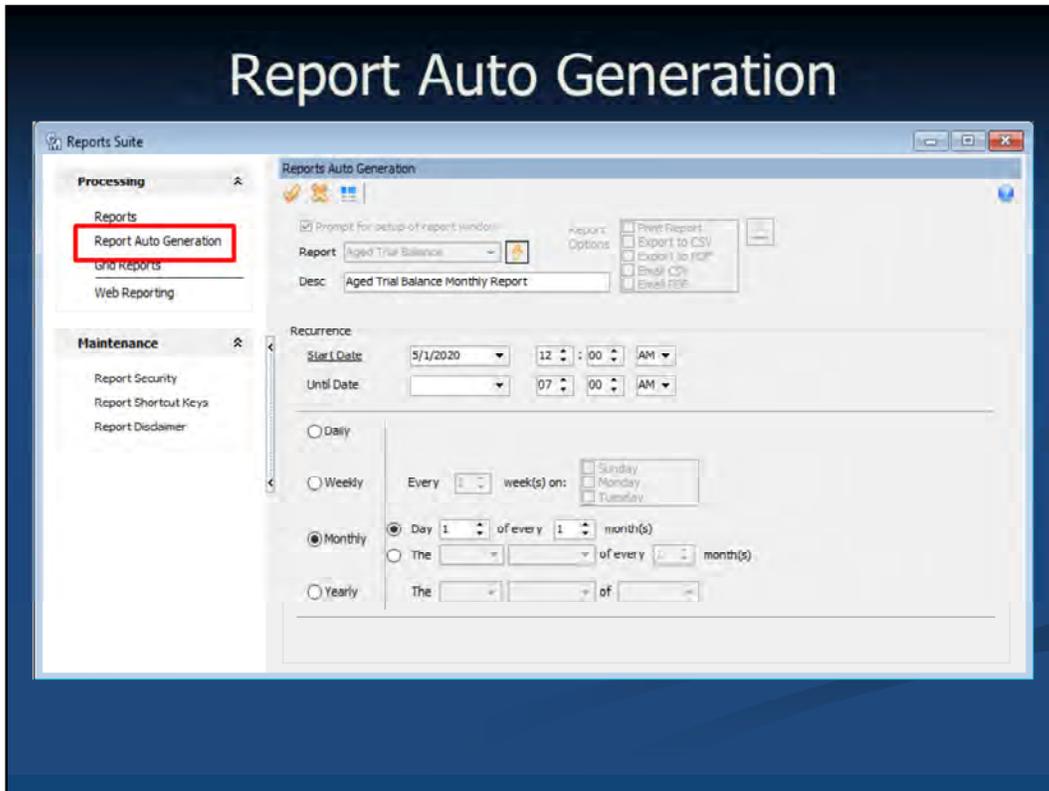
Grid Reports



Grid Reports are a very helpful tool to extract data into a report. Grid Reports are available at the Report Suite. Once there, you can select a Report Type. The available fields for that Report Type will appear in the list. Select the fields you want included in your results. You may also filter to display Active Accounts Only – which is especially helpful.

Click on View to see your results. These results can be exported or printed.

Report Auto Generation



Another report option is Report Auto Generation, which allows you to schedule reports to run at a specific date and time. You can either have it prompt you to run the report, or schedule it to be run when you're away from the office.

FCC 477 & HUBB

The image shows two overlapping software windows. The top window is titled "FCC Form 477 Report: 12/31/2019 - NE". It features a search bar for "Export DBA Name" and a navigation menu with options: "2 - Fixed Broadband Deployment", "6 - Fixed Broadband Subscription", "7 - Mobile Wireless Broadband Subscription", and "8 - Mobile Local". Below the menu is a table with the following data:

Block	Technology	Technology Description	Consumer	Con Downst	Con Upstrea	Bus/Gov
310399729001282	10	Asymmetric xDSL	<input checked="" type="checkbox"/>	5	2.5	<input type="checkbox"/>
310539638001155	10	Asymmetric xDSL	<input checked="" type="checkbox"/>	5	2.5	<input checked="" type="checkbox"/>
311770501011004	10	Asymmetric xDSL	<input checked="" type="checkbox"/>	7	3	<input checked="" type="checkbox"/>
311770501011005	10	Asymmetric xDSL	<input checked="" type="checkbox"/>	25	5	<input checked="" type="checkbox"/>
311770501011009	10	Asymmetric xDSL	<input checked="" type="checkbox"/>	25	5	<input checked="" type="checkbox"/>

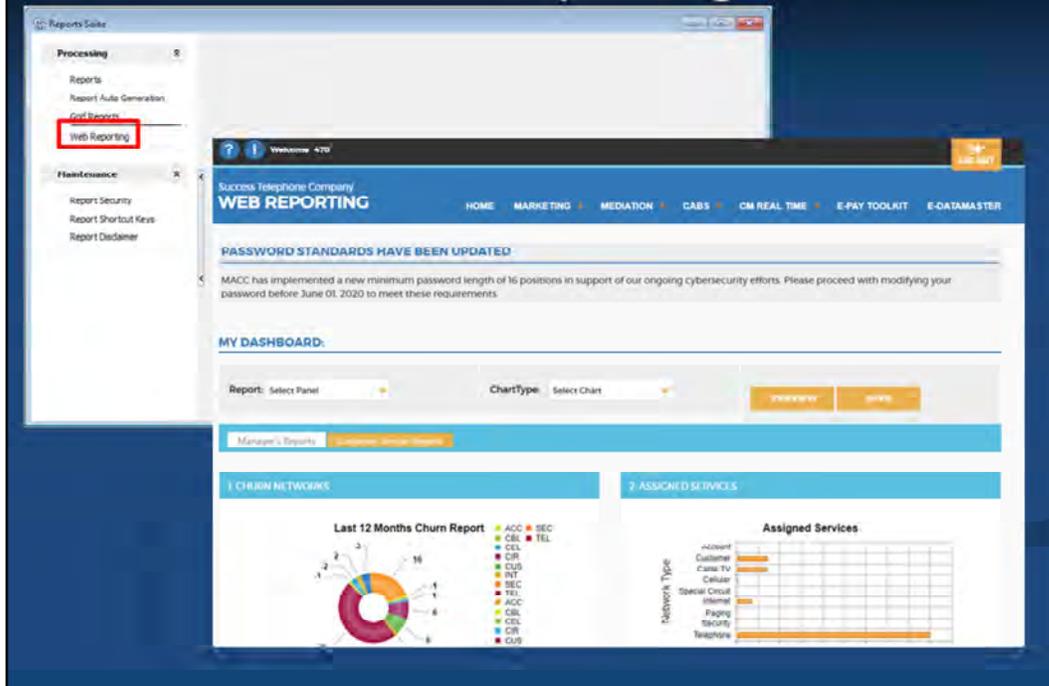
The bottom window is titled "FCC HUBB Report: 01/07/2020". It displays a detailed table with the following columns: Study Area ID, Latitude, Longitude, Date of Data, Max Down, Max Up, Download, # of Lines, HUBB L, Carrier Local, Address, City, State, and Zip Code. The data rows are as follows:

Study Area ID	Latitude	Longitude	Date of Data	Max Down	Max Up	Download	# of Lines	HUBB L	Carrier Local	Address	City	State	Zip Code
124701	41.452553143209	-86.3577857329245	8/31/2018	25	5	5	1	3036	100 TRAVELER'S LN	BLAIR	NE	68009	
124701	41.452553143209	-86.3577857329245	6/1/2018	50	25	5	1	345	1001 W EAGLE ST	ARLINGTON	NE	68002	
124701	41.452553143209	-86.3482179953614	6/1/2018	50	25	5	3	208	101 W EAGLE ST	ARLINGTON	NE	68002	
124701	41.523852769490	-86.1454884306458	1/1/2018	50	10	5	2	39140	101 MAIN ST	BLAIR	NE	68008	
124701	41.523852769490	-86.1454884306458	1/1/2018	50	10	5	3	86318641865	101 MAIN ST	BLAIR	NE	68008	
124701	41.523852769490	-86.1454884306458	1/1/2018	50	10	5	1	1495	102 MAIN ST	BLAIR	NE	68008	
124701	41.452579213361	-86.348341978199	6/1/2018	50	25	5	1	233	102 W EAGLE ST	ARLINGTON	NE	68002	
124701	41.452579213361	-86.348341978199	1/1/2018	50	10	5	1	1954	105 MAIN	BLAIR	NE	68008	

You should be aware of the term FCC 477. This is a report that your company is required to submit to the FCC regarding internet and telephone availability. We won't go into the report in detail during this session. Additional training is available on the 477 process.

The FCC HUBB Report is needed for some companies to track High Cost Internet Broadband information. Again, we won't discuss in detail during Jump Start, but it's important for you to be aware of the term and availability in Customer Master.

Other Reporting



Another series of report tools are available by going to the Reports Suite and choosing Web Reporting. Here, you'll find the Web Reporting Dashboard, additional Marketing Reports, Data Mediation Reports, CABS, Customer Master Real Time Reports, the E-Pay Toolkit and E-Datamaster. The E-Datamaster reports are also sometimes provided to customers via CD, and they are the reports produced during your bill cycle process.