

BEST PRACTICES IN REV.IO BILLING

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COMMISSION CUTOFF



COMMISSION CUTOFF

CREATE COMMISSION BATCHES FOR A SET DATE

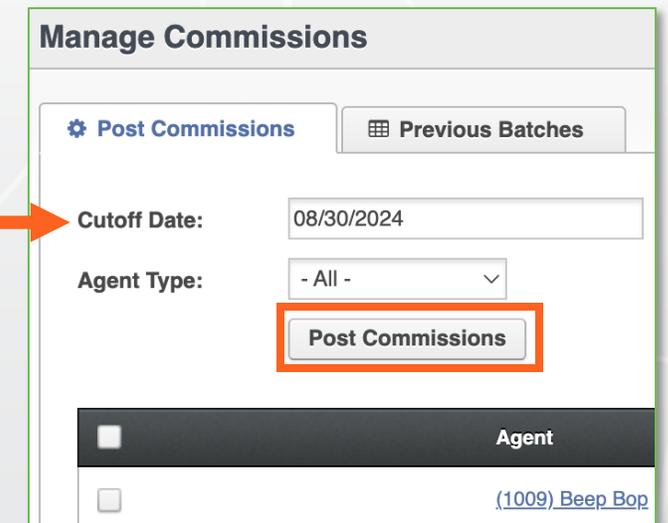
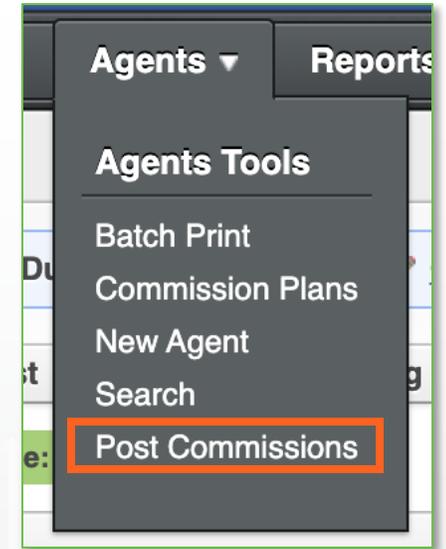
- Task batching was “real time”...if you wanted to cut off commission payouts at the end of the month, you had to log in as close to the end of the month as possible and run the jobs right then.
- Now you can log in at any time after the desired cutoff date and key in the date that you want to use as the cutoff and it will include anything **up to and including** that cutoff date.



COMMISSION CUTOFF

REPLACES TASK BATCHING IF DESIRED

- The navigation list under the Agents tab changes to show “Post Commission” instead of the old “Task Batching”.
- Set your cutoff date and the Post Commissions.
- Now one single Post Commissions job instead of 2.



COMMISSION CUTOFF

THINGS TO KNOW

- Requires you to use the new standard 9 commission reports (plus the 9 matching Agent Portal reports).
- Contact Client Success if you wish to have this turned on.
- Upon feature activation, all previous task batching groups will get a cutoff date equal to the "Created Date" that the system currently uses.



PROCESSES



BUILDING PROCESSES JUST GOT EASIER!

PROCESSES ARE INVALUABLE FOR:

- Completing required customer and/or service fields to ensure billing accuracy and eliminate mistakes.
- Providing documentation when onboarding new team members to allow them to become efficient and independent in Rev.io Billing faster.
- Notifying internal team and/or customers when milestones are completed and/or tasks are due.



GOOD PROCESS TASKS TO HAVE

BE PROACTIVE ABOUT ELIMINATING MISTAKES AND OMISSIONS! BE SURE TO CHECK:

- The correct **Usage Plan Group** is on all services with usage.
- All **identifiers** (TN, DIDs, etc.) are populated on all services so there are no unbillable calls.
- The **contract dates** are entered and accurate.
- The **Agent** is on the account prior to activation and the correct **commission plan** is applied.
- The **first bill is accurate** after activation.
- The customer signs up for **BillCenter**.



PROCESSES

ORDERS, TICKETS & REQUESTS

- Customize processes for different types of orders (different product types, different order types like new or disconnect, etc.)
- Customize processes for different types of tickets based on Settings > Ticket Types.
- Automate processes to avoid needing to manually start them.

Edit Process

Save Add New Phase Cancel

Process

Name: Wholesale Order Entry Process v2

Type: Order

Active

Auto Assign

User: --None--

User Group: --None--

Phases

Show: Active Inactive

Export:

Phase Name		
Pre-Processing Checks	↓	Options
New Client Set Up	↑ ↓	Options
Accounting Order Check	↑ ↓	Options
PO Recording	↑ ↓	Options
Old Number Porting/New Number	↑ ↓	Options
On-Prem PBX	↑ ↓	Options
Hosted PBX	↑ ↓	Options
Teams Provisioning	↑ ↓	Options
Teams - Alert Dan - Add to RAMP	↑ ↓	Options
Call Flow Documentation and Server Provisioning	↑ ↓	Options
Order Product From Provider	↑ ↓	Options
Tracking Shipment	↑ ↓	Options
Port Scheduled	↑ ↓	Options
Order Complete	↑	Options



NEW PROCESS VISUALIZER EXPORT TOOL

SAMPLE NEW ORDER PROCESS VISUALIZED WITH PHASES, TASKS, AND ROUTES

Process_Phase_ID	Phase_Name	Status										
934	Old Number Porting/New Number	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete while task is open	Order can be manually completed or sent while task is open	Complete task when order is completed	Cancel task when order is canceled
		1182	Add the DIDs to the Account	Add the DIDs to Rev.IO	Porting	0	Do Nothing	Do Nothing	No	No	No	Yes
		1183	Port Existing Number	Phone Number Porting	Porting	0	Do Nothing	Do Nothing	No	No	No	Yes
		1184	New Phone Number Assignment	New Phone Number Assignment	New Number Assigned	0	Do Nothing	Do Nothing	No	No	No	Yes
	Route	ID	Name	Process	Next_Process_Phase							
		472	Hosted PBX on Order	Wholesale Order Entry Process v2	Hosted PBX							
		473	No PBX	Wholesale Order Entry Process v2	Order Product From Provider							
		474	On-Prem PBX on Order	Wholesale Order Entry Process v2	On-Prem PBX							
		481	Teams - Existing Customer	Wholesale Order Entry Process v2	Teams Provisioning							
935	Accounting Order Check	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1181	Review Order	Review Order	Pre-processing	0	Do Nothing	Do Nothing	No	No	No	Yes
	Route	ID	Name	Process	Next_Process_Phase							
		470	Hardware on the Order	Wholesale Order Entry Process v2	PO Recording							
		471	No Hardware on the Order	Wholesale Order Entry Process v2	Old Number Porting/New Number							
937	Call Flow Documentation and Server Provisioning	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1180	Call Flow Documentation	Call Flow Documentation	Provisioning	0	Do Nothing	Do Nothing	No	No	No	Yes
941	Port Scheduled	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1177	Schedule Port Date	Schedule Port Date	None	0	Do Nothing	Do Nothing	No	No	No	Yes
		1178	911 - 933 Test	911 - 933 Test	None	0	Do Nothing	Do Nothing	No	No	No	Yes
951	Order Complete	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1172	Order Complete Checklist	Mark this complete when the port has been finalized. Mark the completion date to the same date as the date the port occurred.	Activation	0	Complete order	Do Nothing	No	No	No	Yes
		1173	Review Commissions	Review Commissions	Commission Check	0	Do Nothing	Do Nothing	No	No	No	Yes
952	Pre-Processing Checks	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1188	Order Equipment Check	Equipment Check	Equipment Review	0	Do Nothing	Do Nothing	No	No	No	Yes
		1189	Review Customer Set Up	Review Customer Set Up	Pre-processing	0	Do Nothing	Do Nothing	No	No	No	Yes
	Route	ID	Name	Process	Next_Process_Phase							
		476	Existing Wholesale Client	Wholesale Order Entry Process v2	Accounting Order Check							
		477	New Wholesale Client	Wholesale Order Entry Process v2	New Client Set Up							
953	PO Recording	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1170	Record the PO	Record the PO in QB	Order Review	0	Do Nothing	Do Nothing	No	No	No	Yes
954	Hosted PBX	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1187	Clone Template	Clone Template	PBX	0	Do Nothing	Do Nothing	No	No	No	Yes
	Route	ID	Name	Process	Next_Process_Phase							
		479	No Teams	Wholesale Order Entry Process v2	Call Flow Documentation and Server Provisioning							
		480	Teams	Wholesale Order Entry Process v2	Teams Provisioning							
955	On-Prem PBX	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1186	Build On-Prem Server	Build On-Prem Server	PBX	0	Do Nothing	Do Nothing	No	No	No	Yes
	Route	ID	Name	Process	Next_Process_Phase							
		475	No Teams	Wholesale Order Entry Process v2	Call Flow Documentation and Server Provisioning							
		478	Teams	Wholesale Order Entry Process v2	Teams Provisioning							
956	Order Product From Provider	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1190	Provisioning	Provisioning	Provider Notification	0	Do Nothing	Do Nothing	No	No	No	Yes
957	Tracking Shipment	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1171	Record the Tracking Info	Record the Tracking	Comm-Core Tracking/Shipping	0	Do Nothing	Do Nothing	No	No	No	Yes
958	New Client Set Up	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1185	Add New Client to CW	Add New Client to CW	Connectwise Task	0	Do Nothing	Do Nothing	No	No	No	Yes
959	Teams Provisioning	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1191	Provision Teams	Provision Teams	Provisioning	0	Do Nothing	Do Nothing	No	No	No	Yes
995	Teams -Alert Dan -Add to RAMP	Active										
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete w	Order can be manually	Complete task wh	Cancel task when order is canceled
		1227	Setup RAMP for Teams	Setup RAMP for Teams	Activation	0	Do Nothing	Do Nothing	Yes	No	No	Yes



NEW PROCESS VISUALIZER EXPORT TOOL

SAMPLE DISCONNECT ORDER PROCESS VISUALIZED WITH PHASES, TASKS, AND ROUTES

Process Phase ID	Phase Name	Status											
126	Cancellation Request Received	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete while task is open	Order can be manually completed or sent while task is open	Complete task when order is completed	Cancel task when order is canceled	
		185	Formal Request Review	Review Cancel Form	Information Review	0	Do Nothing	Hold order	No	No	No	Yes	
		186	Service Contract Review	Contract Status	Information Review	0	Do Nothing	Do Nothing	No	No	No	Yes	
	Route	ID	Name	Process	Next_Process_Phase								
		73	Contract Complete, Date Request	Service Cancellation	Service Disconnection with Specific Date								
		74	Contract Complete, Disconnect ASAP	Service Cancellation	Service Disconnection ASAP								
		75	Contractual Obligation Remains	Service Cancellation	Contract Not Fulfilled								
130	Contract Not Fulfilled	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		190	Outstanding Commitment	Calculate Balance	Billing and Payments	0	Do Nothing	Do Nothing	No	No	No	Yes	
	Route	ID	Name	Process	Next_Process_Phase								
		76	Balance Accepted	Service Cancellation	Balance Accepted								
		77	Balance Not Accepted, Will Honor Contract	Service Cancellation	Agreement to be Honored								
133	Review with Agent/Client	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		194	Inform of Outstanding Contract	Notify Agent/Client	Contact Sales Agent	0	Do Nothing	Do Nothing	No	No	No	Yes	
	Route	ID	Name	Process	Next_Process_Phase								
		81	Continue with Disconnect	Service Cancellation	Balance Accepted								
		82	Do Not Continue with Disconnect	Service Cancellation	Agreement to be Honored								
131	Balance Accepted	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		191	Calculate	Usage and Contract Balance Billing	Billing and Payments	0	Do Nothing	Do Nothing	No	No	No	Yes	
		193	Disconnection Date or ASAP	Document	Pre-processing	0	Do Nothing	Do Nothing	No	No	No	Yes	
	Route	ID	Name	Process	Next_Process_Phase								
		80	Service Disconnection Approved	Service Cancellation	Service Disconnection ASAP								
132	Agreement to be Honored	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		192	Will Fulfill Agreement	Cancel Disconnect Order	Order Correction	0	Complete order	Do Nothing	No	No	No	No	
134	Service Disconnection with Specific Date	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		196	Service Disconnect with Requested Date	Set Calendar Reminder to Cancel on Date	Provider Notification	0	Do Nothing	Do Nothing	No	No	No	Yes	
141	Hold for Disconnect Date	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		205	Date of Disconnect	Hold Until Disconnect	Deactivation	0	Do Nothing	Do Nothing	No	No	No	Yes	
127	Service Disconnection ASAP	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		195	Service Disconnection	Service Disconnection	Deactivation	0	Do Nothing	Do Nothing	No	No	No	Yes	
135	Billing Summary	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		197	Third-Party Providers	Outstanding Issues	Information Review	0	Do Nothing	Do Nothing	No	No	No	Yes	
	Route	ID	Name	Process	Next_Process_Phase								
		83	Third-Party Billing is Final	Service Cancellation	ConnectWise Account Closure								
		84	Outstanding Issues Remain	Service Cancellation	Hold for Issue Resolution								
140	Hold for Issue Resolution	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		202	Hold Billing	Resolution of Vendor Issues	Vendor Info	0	Do Nothing	Do Nothing	No	No	No	Yes	
136	ConnectWise Account Closure	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		204	ConnectWise	Account Closure	Connectwise Task	0	Do Nothing	Do Nothing	Yes	No	No	Yes	
137	RAMP	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually con	Complete task when on	Cancel task when order	
		199	RAMP Server Button	Hit the Button	Deactivation	0	Do Nothing	Do Nothing	No	No	No	Yes	
138	Server Decommissioning	Active											



NEW PROCESS VISUALIZER EXPORT TOOL

SAMPLE SERVICE TYPE-SPECIFIC ORDER PROCESS VISUALIZED WITH PHASES, TASKS AND ROUTES

Process_Phase_ID	Phase_Name	Status											
32	Pull Provision Ship	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete while task is open	Order can be manually completed or sent while task is open	Complete task when order is completed	Cancel task when order is canceled	
		49	Pull Provision and Ship Product	Pull Provision and Ship Product	K12 Provisioning and Processing	0	Do Nothing	Do Nothing	No	No	No	Yes	
	Route	ID	Name	Process	Next_Process_Phase								
		156	Texting on Order	K12 Provisioning	Software								
		157	No Texting on Order	K12 Provisioning	Order Complete								
218	Software	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually cc	Complete task when	Cancel task when ord	
		321	Set Up Texting	Set Up Texting	Provisioning	0	Do Nothing	Do Nothing	No	No	No	Yes	
70	Order Complete	Active											
	Task	ID	Name	Subject	Type	Alarm_Hours	On Task Completion	On Task Cancellation	Phase can complete	Order can be manually cc	Complete task when	Cancel task when ord	
		96	Order Completion Checklist	Mark complete when port is finalized. Mark the completion date to the same date as the date the port occurred.	None	0	Complete order	Do Nothing	No	No	No	Yes	
		120	Review Commissions	Review Commissions	None	0	Do Nothing	Do Nothing	No	No	No	Yes	



COLLECTIONS



COLLECTIONS BEST PRACTICES

FAMOUS QUOTE

“Collections works, if you work collections.”

- Lorrie Browne

DOES YOUR COLLECTIONS PROCESS NEED SOME UPDATES?

- Are you constantly getting “off track” with collections?
- Are you manually moving accounts to different collection steps?
- Are there times when you just wish it worked differently or had different timing?



MAKE SURE GRACE PERIODS WORK

GRACE PERIOD = DAYS SINCE THE LAST STEP

DAYS = DAYS SINCE DUE DATE

- Automating steps will ensure things like emails go out on time with no manual intervention.
- Emails are easy to automate. “front load” your collection template with automated email steps.
- Automating “order” steps like “disconnect” only automates generating the order. It does NOT automate the completion of the order, so you maintain control over that.

The screenshot shows the 'Edit Collection Template' interface. At the top, there are navigation tabs: Home, Customers, Activity, Agents, Reports, Settings, and Admin. Below the tabs, the title 'Edit Collection Template' is displayed. There are 'Save' and 'Cancel' buttons. The 'Description' field contains 'STANDARD TEMPLATE' and the 'Balance Limit' field contains '0.0100'. Below this is the 'Collection Steps' section, which includes an 'Add a Step' dropdown menu set to 'Letter' and an 'Add' button. The main part of the interface is a table with the following columns: Description, Grace Period, Day, and Options. The 'Grace Period' and 'Automated Step' columns are highlighted with orange boxes. The table contains the following data:

Description	Grace Period	Day	Options
First Email Letter	1	1	Automated Step Options
Second Email Letter	14	15	Automated Step Options
Final Email Letter	14	29	Automated Step Options
Phone Call	3	32	Options
Disconnect Notification Letter	1	33	Automated Step Payment Promise Failure Step Options
Disconnect	1	34	Automated Step Options
Confirmation of Disconnect Letter	5	39	Options
Send to Collection Agency	0	39	Options
Write off past due balance	1	40	Options



INDEPENDENT STEPS KEEP YOU ON TRACK

ALLOWS YOU TO “CATCH UP” IF A MANUAL STEP IS NOT COMPLETED ON TIME

Options for: LETTER EMAIL

Description: Second Email Letter

Grace Period: 14

From Email: NAME@YOURDOMAIN.COM

To Contacts: -Select Contact Types-

CC: Add Additional Emails CC Agent

BCC: Add Additional Emails BCC Agent

Subject: PAST DUE ACCOUNT

Independent Step

Automate Step

Include Invoice: None

Display Data:

Preview Email:

Content

Format Font Family Font Size

\$LOGOS

Dear \$CUST\$

This is a reminder that your account is past due in the amount of \$DUE\$. Please promptly log on to the [BillCenter](#) to make your payment today.

Thank you!

The Acme Billing Team

- Use for an automated step that occurs **AFTER** a manual step.
- All automated steps keep you on track, but a manual step that doesn't get completed can get your process off-track.
- By making it **Independent**, regardless of when the manual step was completed, when it hits the “**days**” configured, it will move to that step independent of anything that happened before it.



ROUTE OUTSIDE PROCESS AS NEEDED

SOMETIMES SITUATIONS REQUIRE SKIPPING STEPS

- **Payment Promise Failure Step** should be set if a customer breaks a Promise to Pay or a Payment Arrangement so that they go straight to a later step instead of starting over at the beginning.
- **Closure Step** does the same thing, but works when an account is CLOSED and has an amount that goes overdue.

Collection Steps				
Add a Step: Letter <input type="button" value="Add"/>				
Description	Grace Period	Day		Options
First Email Letter	1	1	Automated Step	<input type="button" value="Options"/>
Second Email Letter	14	15	Automated Step	<input type="button" value="Options"/>
Final Email Letter	14	29	Automated Step	<input type="button" value="Options"/>
Phone Call	3	32		<input type="button" value="Options"/>
Disconnect Notification Letter	1	33	Automated Step Payment Promise Failure Step	<input type="button" value="Options"/>
Disconnect	1	34	Automated Step	<input type="button" value="Options"/>
Confirmation of Disconnect Letter	5	39	Closure Step	<input type="button" value="Options"/>
Send to Collection Agency	0	39		<input type="button" value="Options"/>
Write off past due balance	1	40		<input type="button" value="Options"/>



INCLUDE BILLS WITH EMAIL NOTICES

OPTIONAL AND CONFIGURABLE

Options for: LETTER EMAIL

Description: First Email Letter

Grace Period: 1

From Email: EMAIL@YOURDOMAIN.COM

To Contacts: -Select Contact Types- ▾

CC: Add Additional Emails CC Agent

BCC: Add Additional Emails BCC Agent

Subject: YOUR PAYMENT IS LATE

Independent Step

Automate Step

Include Invoice: None
 Most Recent Invoice
 All Overdue Invoices

Display Data:

Preview Email:

- **Include Invoice** will attach either no bills, the most recent bill, or all overdue bills.



AUTOMATE PHONE CALLS AND/OR SMS

CONTACT CLIENT SUCCESS FOR ASSISTANCE IN CONFIGURING

- We can add .wav files and have our IVR service make phone calls and/or send text messages automatically if you wish.
- There is a very small per-call charge if you opt to set this up.
- Contact Client Success if you wish to explore this option.



BILL CENTER



BILLCENTER TWEAKS

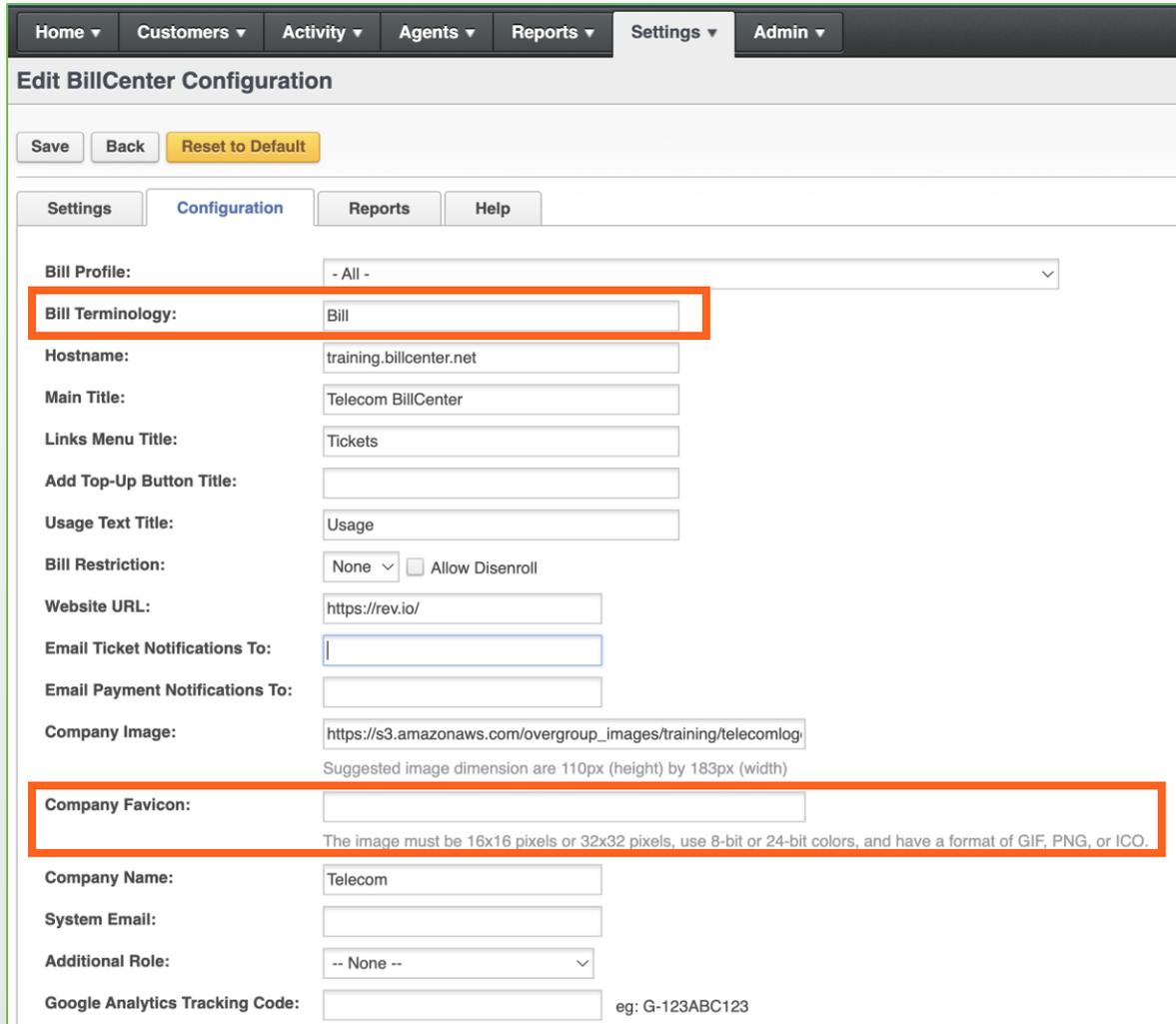
RANDOM SETTINGS TAB OPTIONS YOU MAY HAVE MISSED

- Footer HTML: Add a custom footer to the bottom of your Bill Center instance.
- Auto Pay Status Change: Determine if customers can change their Auto Pay enrollment online.
- Ticket Contact Information: Hide contact information if you don't want customers to be able to see ticket responders' name/email.
- Applying Payments to Specific Bills: Determine if customers can make payments on specific bills or if all payments made online simply apply to the oldest balance on the account.
 - *Sister permission to use if you want to force them to have to select a specific bill.*

The screenshot shows the 'Settings' page with the 'Configuration' tab selected. The page has a navigation bar with 'Settings', 'Configuration', 'Reports', and 'Help' tabs. Below the navigation bar, there is a 'Navigation Preview' section with three buttons: 'Menu Option', 'Active Option', and 'Menu Option'. Below that is a 'Title Preview' section with the text 'Page Title', and a 'Hyperlink Preview' section with the text 'Regular Hyperlink'. Below these are three color selection fields: 'Navigation Color' (38a5e0), 'Title Color' (166f9e), and 'Link Color' (2c5e9d). There is a checkbox for 'Use HTML Footer' which is checked. Below this is a 'Footer HTML:' section with a large empty text area. Below that is a 'Global Settings:' section with several checkboxes: 'Enable Auto Pay Status Change' (checked), 'Show Receipts for Non-Billcenter Payments' (checked), 'Hide Wireless Section' (checked), 'Hide Provider Information' (checked), 'Hide Ticket Contact Information' (unchecked), 'Split Wireless Usage by Service' (unchecked), 'Use customized summaries (not based off service allowances) for Billcenter usage summaries.' (unchecked), and 'Allow applying payments to specific Bill' (checked). The 'Footer HTML:', 'Enable Auto Pay Status Change', 'Hide Ticket Contact Information', and 'Allow applying payments to specific Bill' options are highlighted with orange boxes. A 'Screenshot' button is located in the bottom right corner.

BILLCENTER TWEAKS

RANDOM CONFIGURATION TAB OPTIONS YOU MAY HAVE MISSED



The screenshot shows the 'Edit BillCenter Configuration' page with the 'Configuration' tab selected. The page includes a navigation bar with tabs for Home, Customers, Activity, Agents, Reports, Settings, and Admin. Below the navigation bar are buttons for Save, Back, and Reset to Default. The configuration fields are as follows:

Bill Profile:	- All -
Bill Terminology:	Bill
Hostname:	training.billcenter.net
Main Title:	Telecom BillCenter
Links Menu Title:	Tickets
Add Top-Up Button Title:	
Usage Text Title:	Usage
Bill Restriction:	None <input type="checkbox"/> Allow Disenroll
Website URL:	https://rev.io/
Email Ticket Notifications To:	
Email Payment Notifications To:	
Company Image:	https://s3.amazonaws.com/overgroup_images/training/telecomlog Suggested image dimension are 110px (height) by 183px (width)
Company Favicon:	
Company Name:	Telecom
System Email:	
Additional Role:	-- None --
Google Analytics Tracking Code:	eg: G-123ABC123

- **Bill Terminology:** Change what you call the "Bill" for your customers. Want to call it an invoice or a statement? Make it happen here!
- **Company Favicon:** Customize the favicon your customers see to be yours instead of Rev.io's.



BILLCENTER TWEAKS

RANDOM CONFIGURATION TAB OPTIONS YOU MAY HAVE MISSED (Continued)

- Maximum Credit Card Payment and Payment Restriction: Set a maximum credit card payment amount and/or restrict ACH payments if desired.
- Registration Text: Customize the messaging customers see when signing up for Bill Center access.
- Autopay Message and Autopay TOS: Customize the messaging customers see when signing up for autopay and/or add Terms of Service for autopay for your customers to view.

Maximum Credit Card Payment:
If no maximum value is entered, then no payment limit is set

Payment Restriction: Disable ACH

Registration Text:

Auto Pay Message:

Auto Pay TOS:

Displays a message on the Auto Pay enrollment page

Displays & requires terms of service to be accepted when a d Auto Pay

Screenshot



BILLCENTER TWEAKS

CREATE A HELP CENTER FOR YOUR CUSTOMERS

The screenshot shows the 'Edit BillCenter Configuration' interface. At the top, there are navigation buttons: 'Save', 'Back', and 'Reset to Default'. Below these are tabs for 'Settings', 'Configuration', 'Reports', and 'Help'. The main area contains a 'Question:' text input field and an 'Answer:' rich text editor with a toolbar. An 'Add Question' button is located below the answer field. At the bottom, there is a section titled 'Current Questions and Answers' containing a table with columns for 'Question', 'Created', and 'Action'.

Question	Created	Action
Who do I call if I have a question about my bill?	4/10/2020	Edit or Delete
What do I do if I have a service outage?	6/10/2021	Edit or Delete
How do I add additional service to my account?	6/16/2021	Edit or Delete
How do I request new voice service?	11/10/2021	Edit or Delete
Who do I call for service	7/26/2022	Edit or Delete
Question	8/17/2022	Edit or Delete

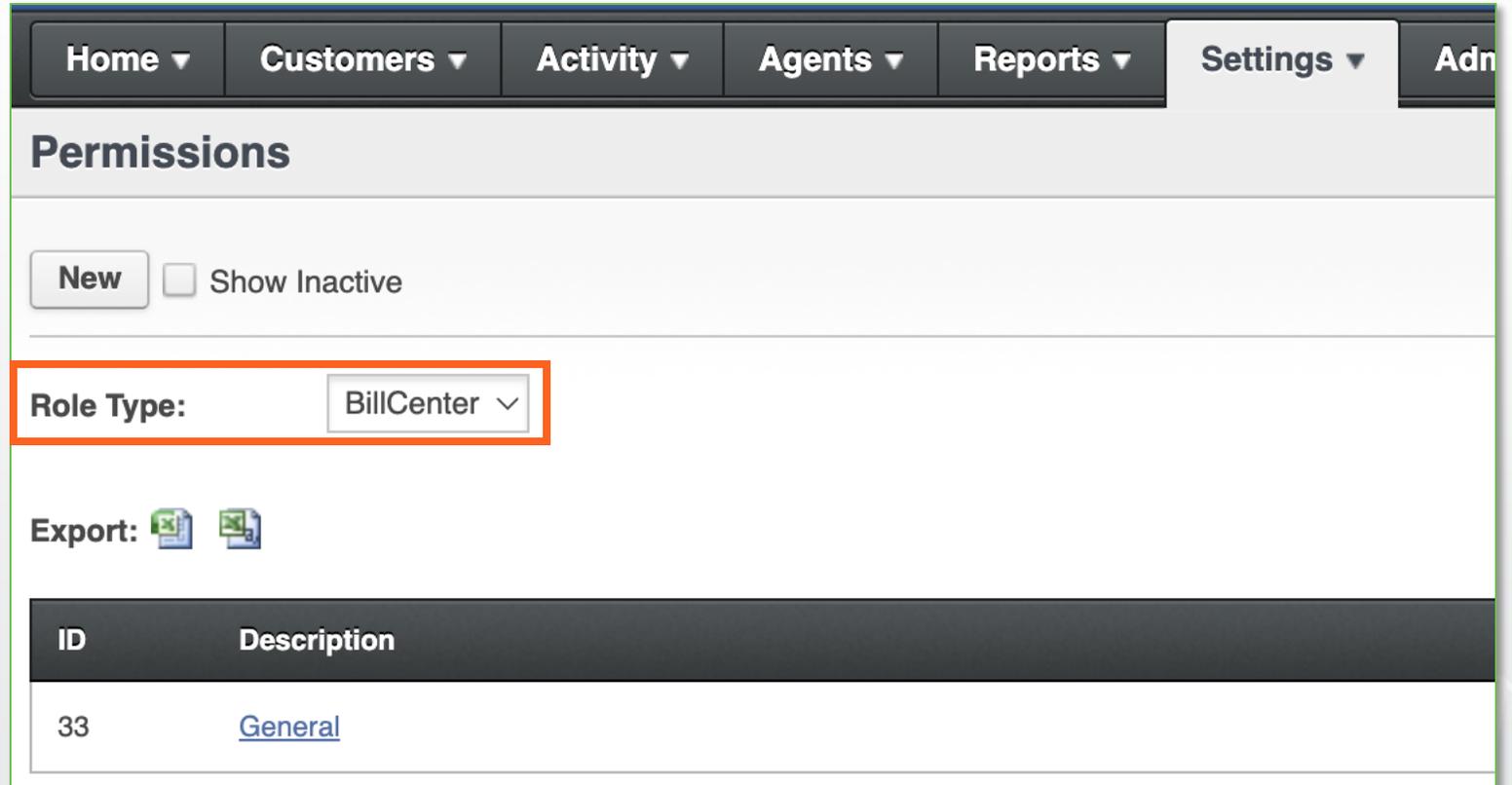
Do you often get questions from your customers about the same topics? Make your Bill Center a FAQ center for your customers to self-serve!



BILLCENTER TWEAKS

USE BILLCENTER PERMISSIONS TO SHOW/HIDE THINGS IN YOUR PORTAL

- Switch Role Type to Bill Center.
- Proceed with caution!!! Best practice would be to copy the one there and tweak so you can always go back.



Home ▾ Customers ▾ Activity ▾ Agents ▾ Reports ▾ Settings ▾ Adm

Permissions

New Show Inactive

Role Type: BillCenter ▾

Export:  

ID	Description
33	General



BILL MESSAGES



REQUEST TEMPLATES



CUSTOMIZE REQUEST TEMPLATES

FOR CUSTOM BRANDED QUOTES USING MS WORD

LOGO HERE

Exceptional phone service. Unparalleled support.
Reliable and customizable to keep your business running. Always.

All-Inclusive Features
Every plan includes all our features, ensuring your business has everything it needs.

24/7 Support
We prioritize 24/7 quick and efficient customer support to keep your business running smoothly.

Secure and Reliable
Our network boasts a 99.999% SLA guarantee and robust encryption for enhanced reliability and security.

Quote #:
{{RequestID}}

Term: 12 Months Date: {{TodaysDate}}

One-Time Charges	Monthly Charges
Devices: {{SubtotalNRC\Currency}}	Service: {{SubtotalMRC\Currency}}
Taxes: {{SubtotalTaxesNRC\Currency}}	Taxes: {{SubtotalTaxesMRC\Currency}}

sales@ | 50 | www. .net



LOGO HERE

Exceptional phone service. Unparalleled support.
Reliable and customizable to keep your business running. Always.

All-Inclusive Features
Every plan includes all our features, ensuring your business has everything it needs.

24/7 Support
We prioritize 24/7 quick and efficient customer support to keep your business running smoothly.

Secure and Reliable
Our network boasts a 99.999% SLA guarantee and robust encryption for enhanced reliability and security.

Customer Name
3343 Peachtree Rd NE Ste 100
Atlanta, GA 30326

Quote #: 443 Term: 12 Months Date: 8/13/2024

One-Time Charges	Monthly Charges
Devices: \$ 0.00	Service: \$ 95.80
Taxes: \$ 0.00	Taxes: \$ 20.28
Total: \$0.00	Total: \$116.08

Taxes vary based on location of service. This quote is valid for 30 days.
Detailed summary of charges to follow on the next page.

sales@ | 150 | www. .net



MORE INSPIRATION...

LOGO HERE

Monthly Taxes

Description	Amount
FEDERAL COST RECOVERY CHARGE	\$ 0.00
FEDERAL COST RECOVERY FEE	\$ 0.32
FEDERAL UNIVERSAL SERVICE FUND	\$ 3.11
GA UNIVERSAL ACCESS FUND	\$ 0.14
LOWNDES CO. 911 SURCHARGE	\$ 1.50

One-Time Charges

Description	Quantity	Price	Subtotal
Monthly Charges			
Description	Quantity	Price	Subtotal
Call Waiting Feature	1	\$ 5.00	\$ 5.00
Voice Mail Feature	1	\$ 5.00	\$ 5.00
Voice Essential Seat License	1	\$ 13.95	\$ 13.95

One-Time Taxes

Description	Amount
-------------	--------

Monthly Taxes

Description	Amount
COBB CO. 911 SURCHARGE	\$ 1.50
FEDERAL COST RECOVERY CHARGE	\$ 0.00
FEDERAL COST RECOVERY FEE	\$ 0.32
FEDERAL UNIVERSAL SERVICE FUND	\$ 3.11
GA UNIVERSAL ACCESS FUND	\$ 0.14

One-Time Charges

Description	Quantity	Price	Subtotal
Monthly Charges			
Description	Quantity	Price	Subtotal

LOGO HERE

By signing below _____ with a US Federal EIN of _____ have read and agree to ALL the terms and conditions described in _____ Communications' Terms of Service Agreement (the "Agreement") /termsofservice. Customer also certifies awareness of the Ser _____ he Agreement and that Service will not be used by anyone o _____ it first notifying the end user of such limitations listed in Section 4 of the Ag _____ affirmatively acknowledge _____ ar has read and un _____ Agreement, (2) Customer _____ there is the possibi _____ be able to contact em _____ dialing 9-1-1 using _____ scenarios that have b _____ action 4, and (3) Customer understands that they must inform user _____ vice o _____ not able to contact emergency services by dialing 9-1-1 _____ for the scenarios that have been described in Section 4. This document serves as the "Quote" referenced in Section 5 of the Agreement.

The effective date of the Agreement begins immediately upon Customer signature.

Representative Signature: _____

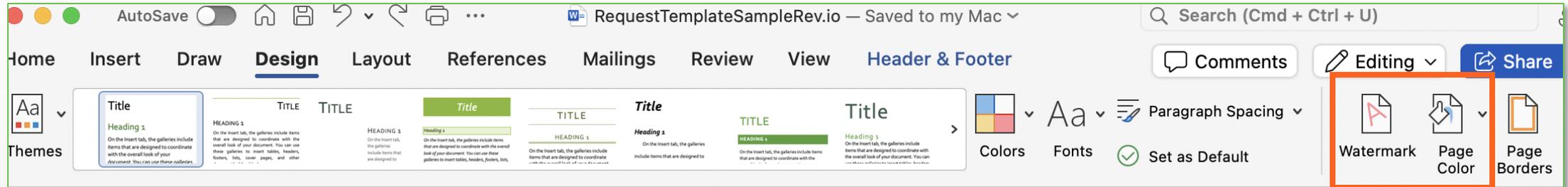
Name: _____

Date: _____



MICROSOFT WORD MAIL MERGE

USING MICROSOFT WORD – GOOGLE IT OR PAY A COLLEGE STUDENT!



- Access the Design or Layout tab.
- Click Watermark, add a picture, and use the “washout” option.
- Click Page Color to add a background color.



SETTINGS > REQUEST TEMPLATES

UPLOAD YOUR WORD DOCUMENT

The screenshot shows the 'Request Templates' settings page. The 'Add New Template' button is highlighted with an orange box. An orange arrow points from this button to the 'Choose File' button in the 'Edit Request Template' modal. The modal contains the following fields:

- Name:** New Template
- Bill Profile:** - All -
- Status:** Active
- File Upload:** Choose File or Drag file to upload

The main page also features a 'Test Template' button, a 'Status' dropdown set to 'Active', and a table of existing templates.

Template Name	File
Blue Basic Template	Template2_Blue_Basic.doc
Blue Detailed Template	Template2_Blue_Detailed.doc
Default	Default_Template.doc



TAX CALCULATOR



TAX CALCULATOR TOOL

KIND OF HIDDEN, BUT HANDY

The screenshot shows a web application interface. On the left is a navigation menu with a dark grey background. The top row of the menu includes 'Home', 'Customers', 'Activity', 'Agents', 'Reports', and 'Settings'. Below this, there are three main sections: 'Home' (with 'Alerts' and 'My Profile'), 'Tools' (with 'Agent Locator', 'FTP Sites', 'Local Calling Area', 'NPA/NXX Lookup', and 'Tax Calculator'), and 'Rev.io Payments'. The 'Tax Calculator' option in the Tools section is highlighted with an orange box. An orange arrow points from the top-left corner of the menu area towards the 'Tax Calculator' option. Another orange arrow points from the 'Tools' section header towards the 'Tax Calculator' option. The main content area on the right shows the 'Tax Calculator' tool. It has a 'Calculate' button at the top left. Below it, the 'By:' field is highlighted with an orange box and contains radio buttons for 'Package', 'Product' (selected), 'Product Type', and 'Tax Class'. There is also a 'Tax-Inclusive' checkbox. The 'Product' dropdown menu is set to '(1139) B Voice Product'. The 'Amount' field contains '100.00'. The 'Country' dropdown is set to 'United States'. The 'Zip/Postal Code' field is split into '30062' and '0000'. The 'Class' field has radio buttons for 'Residential' (selected), 'Lifeline', and 'Business'. Below the input fields, there is a 'Monthly' summary section with the following values: Subtotal: \$100.00, Taxes: \$3.80, Total: \$103.80. At the bottom, there is a table with the following data:

Description	Tax Authority	Effective Date	Tax Rate	Surcharge	Subtotal
GA UNIVERSAL ACCESS FUND	STATE		2.625%		\$2.82
FEDERAL COST RECOVERY FEE	FEDERAL		0.976%		\$0.98



UNBILLABLE CALLS



WHAT IS AN UNBILLABLE CALL?

SIMPLE – A CALL WE CANNOT BILL TO A CUSTOMER

Two Potential Reasons:

- Service Not Found
- No Valid Rate Plan



WHY BOTHER WITH UNBILLABLE CALLS?

EVERYONE WANTS ACCURATE BILLS!

- Unless ALL calls are “free” to your customers, this is the only way to tell if you’re billing for all of the usage you should be – usage your provider is charging YOU for.
- Inconsistent clean-up of unbillable calls when you offer “free” minutes can cause inaccurate overbilling, which leads to dissatisfied customers.



SERVICE NOT FOUND – 1ST MATCH

CALL MUST MATCH TO A SERVICE BASED ON THE IDENTIFIER

The identifier on the CDR must find a matching identifier on a service:

- Telephone Number or DID
- Trunk Group
- Circuit ID
- IP Address
- Etc.

To correct: Add the identifier onto the correct service



NO VALID RATE PLAN – 2ND MATCH

CALL MUST FIND A RATE ON THE SERVICE/CUSTOMER FOR THE TYPE OF CALL IT IS

The call's rate type must find a rate in the Usage Plan Group on the service (or a “special rate” on the customer)

- Usage – LD – Interstate (or Intrastate or Intralata)
- Usage – LD – 800 – Interstate (or Intrastate or Intralata or Local)
- Usage – LD - International
- Usage – Tollfree
- Usage – Local
- Etc.

To correct: Add a rate for the type of call to all Usage Plan Groups affected (be aware of call direction and/or zero-rated calls, and missing Usage Plan Groups)



UNBILLABLE CALLS REPORT

Home Customers Activity Agents Reports Settings Admin

Welcome to Training

Unbillable Calls

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Search By: All

Back Run Report Re-Rate Calls

Start Date: 06/01/2024 End Date: 7/31/2024

Call Types: Intralata Interstate Intrastate Local International

Reasons: No valid rate plan Service not found

Export: Record Count: 50,000

Filter Results: Filter Clear

1 2 3 4 5 6 7 8 9 10 ...

	CDR_ID	Billed TN	Other TN	Other Location	Call Date	Seconds	Cost	Minutes	Rate Type	Product Type	Direction	Usage Plan Group	Provider	File	Line	
<input type="checkbox"/>	6351007	(240) 837-1725	+1 (301) 751-0628	6/21/2024 8:44 AM EDT	6/21/2024 8:44 AM EDT	48	0.0000	0.800000	LOCAL	Usage - Local	Outbound		METASWITCH	10000009288_20240701_130893927_CDRS.csv	156538	
<input type="checkbox"/>	6351010	(301) 274-8282	+1 (240) 419-1608	6/21/2024 8:44 AM EDT	6/21/2024 8:44 AM EDT	18	0.0000	0.300000	LOCAL	Usage - Local	Inbound		METASWITCH	10000009288_20240701_130893927_CDRS.csv	156541	
<input type="checkbox"/>	6377249	(800) 383-6266	+1 (703) 850-1539	6/21/2024 8:44 AM EDT	6/21/2024 8:44 AM EDT	42	0.0000	0.700000	INTERSTATE	Usage - LD - 800 - Interstate	Inbound		METASWITCH	10000009288_20240701_130893927_CDRS.csv	182839	
<input type="checkbox"/>	6377250	(703) 850-1539	+1 (301) 895-8552	6/21/2024 8:44 AM EDT	6/21/2024 8:44 AM EDT	42	0.0000	0.700000	INTERSTATE	Usage - LD - Interstate	Outbound		METASWITCH	10000009288_20240701_130893927_CDRS.csv	182840	
<input type="checkbox"/>	6377254															
<input type="checkbox"/>	6377272															

Line	CDR_ID	Product_Type_ID	Carrier Customer ID	Customer_ID	Reason
156538	6351007	181	22022863		Service not found.
156541	6351010	181	22022863		Service not found.
182839	6377249	29	22024254		Service not found.
182840	6377250	25	22024254		Service not found.

Usage Plan Group	Provider	File	Line	CDR_ID	Product_Type_ID	Carrier Customer ID	Customer_ID	Reason
2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240701_130894401_CDRS.csv	12149	6409087	25	22013255	1008	No valid rate plan.
0.03 Overage + Int + 0.035 TF	SOTEL_SYSTEMS	10000009288_20240701_130893927_CDRS.csv	11503	6206974	28	22011136	1021	No valid rate plan.
0.03 Overage + Int + 0.035 TF	METASWITCH	10000009288_20240701_130893927_CDRS.csv	181504	6375936	32	22024251	1500	No valid rate plan.





Recipe:

Unbillable Calls Clean-Up

from: Rev.io Training serves: Its purpose

prep time: Quick if you are on top of it! total time: Ugh! If you ignore it!!

1. Run **Unbillable Calls Report** with **both reasons** checked for level set. Note numbers of each.

2. Run **Unbillable Calls Report** with just **"No Valid Rate Plan"** checked and then sort by rate type and work on each usage plan group that has missing rates. Make sure to check for services that have no Usage Plan Group assigned at all! Then re-rate calls.

3. Now run **Unbillable TNs Report**. Sort on grid by **Quantity column** until you get the identifier with the most unbillable calls at the top and start researching which service that number belongs on and add it to the service. Re-rate calls after clean up.

4. Enjoy accurate billing and leaving no unbilled revenue on the table!



2ND ROUND UNBILLABLE CALLS REPORT

RUN FOR "NO VALID RATE PLAN" ONLY

Unbillable Calls

Start Date: 07/01/2024 End Date: 8/31/2024

Call Types: Intralata Interstate Intrastate Local International

Reasons: No valid rate plan Service not found

Export: Record Count: 178

All Date	Seconds	Cost	Minutes	Rate Type	Product Type	Direction	Usage Plan Group	Provider	File	Line	CDR_ID	Product_Type_ID	Carrier Customer ID	Customer_ID	Reason
/31/2024 :54 PM DT	102	0.0000	1.700000	TOLLFREE	Usage - LD - Interstate	Inbound	2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240801_130905139_CDRS.csv	16304	6653960	25	22013255	1008	No valid rate plan.
/31/2024 :20 PM DT	270	0.0000	4.500000	TOLLFREE	Usage - LD - Interstate	Inbound	2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240801_130905139_CDRS.csv	16303	6653959	25	22013255	1008	No valid rate plan.
/30/2024 0:50 PM DT	90	0.0000	1.500000	TOLLFREE	Usage - LD - Interstate	Inbound	2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240801_130905139_CDRS.csv	15872	6653530	25	22013255	1008	No valid rate plan.
/25/2024 1:31 PM DT	96	0.0000	1.600000	TOLLFREE	Usage - LD - Interstate	Inbound	2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240801_130905139_CDRS.csv	14990	6652650	25	22013255	1008	No valid rate plan.
/25/2024 1:37 AM DT	786	0.0000	13.100000	TOLLFREE	Usage - Toll-Free	Outbound	2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240801_130905139_CDRS.csv	4317	6642006	183	22013255	1008	No valid rate plan.
/25/2024 1:14 AM DT	792	0.0000	13.200000	TOLLFREE	Usage - Toll-Free	Outbound	2.9 Overage + Int + 2.9 TF	METASWITCH	22010664_20240801_130905139_CDRS.csv	4316	6642005	183	22013255	1008	No valid rate plan.
/25/2024 0:40 AM	300	0.0000	5.000000	TOLLFREE	Usage - Toll-Free	Outbound	2.9 Overage + Int + 2.9	METASWITCH	22010664_20240801_130905139_CDRS.csv	4281	6641950	183	22013255	1008	No valid



UNBILLABLE TNs REPORT

USE TO FIND "SERVICE NOT FOUND" UNBILLABLE CALLS IN EASIER MANNER

Home Customers Activity Agents Reports Settings Admin

Welcome to Training

Unbillable TNs

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Search By: All

Back Start Date: 06/01/2024 End Date: 07/31/2024 Run Report

	Sum
Quantity:	74,447
Cost:	0.00

Export:

Filter Results: Filter Clear

1 2 3 4 5 6 7 8 9 10

Billed TN	Quantity	Cost	First Call	Last Call	Provider
3012748359	3008	\$0.00	6/3/2024 6:04 AM EDT	6/28/2024 5:43 PM EDT	METASWITCH
8003836266	2409	\$0.00	6/1/2024 6:53 AM EDT	6/30/2024 6:01 PM EDT	METASWITCH
3012748307	2324	\$0.00	6/3/2024 6:00 AM EDT	6/28/2024 5:54 PM EDT	METASWITCH
2408371725	2257	\$0.00	6/1/2024 7:37 AM EDT	6/30/2024 11:37 PM EDT	METASWITCH
2405289763	1943	\$0.00	6/1/2024 4:37 AM EDT	6/30/2024 10:42 PM EDT	METASWITCH
3012748303	1889	\$0.00	6/1/2024 8:29 AM EDT	7/1/2024 12:49 AM EDT	METASWITCH
8142830602	1776	\$0.00	6/1/2024 7:43 AM EDT	6/30/2024 6:29 PM EDT	METASWITCH



AFTER CLEAN-UP, RE-RATE

CALLS WILL RE-RATE AFTER CLEAN-UP – SEVERAL METHODS

- Re-rate happens **automatically** overnight.
- From the Unbillable Calls Report, you can press the **Re-Rate Calls button** to re-rate.
- In a pinch, you can submit a **ticket** and have our team force a re-rate of calls.



PRICING CHANGES



SERVICE CONTRACT PRICE INCREASES

AUTOMATICALLY APPLY INCREASES AT SPECIFIED TIME INCREMENTS

Will only show for services that have service-level contract dates on them.

The screenshot displays a service contract management interface. At the top, there are navigation tabs: Note, Ticket, Task, Order, Request, Audit Log, Add Tag, More, and Return To Customer. Below these are status indicators: Pwd Protected, E-Bill, Disconnect Order Pending, and Next Cycle: 9/1/2024. A checkbox for 'Group By Service' is checked. The main area shows a list of service contracts with columns: Item, Description, Start, Stop, Automatic Expiration End, Do Prorate Disconnect, Source, Total Months, Remaining Months, Remaining Days, Billed Through, Rate, Quantity, and Remaining Amount. Three contracts are visible, each with a corresponding 'Edit Contract Rules' dialog box overlaid. The dialog boxes show 'Increase' percentage and 'Interval' options (1 Year, 2 Years, 3 Years). The '1 Year' interval is selected in the third dialog. A 'Contract Analyzer' menu item is highlighted in the top right. An 'Actions' menu is also visible, with 'Remove Pending Increases' highlighted. A summary box at the bottom shows: Data Service | Service ID: 3096 | Charges: \$75.00 | Service Contract Start: 8/1/2020 | Stop: 8/1/2024 | Price Increase: 10.0000% | Interval: 1 Year.

Item	Description	Start	Stop	Automatic Expiration End	Do Prorate Disconnect	Source	Total Months	Remaining Months	Remaining Days	Billed Through	Rate	Quantity	Remaining Amount
Data Service - Service Product: 5125	T1 - Data	8/1/2020	8/1/2024		Yes	Service	48	0	0	8/31/2024	\$75.00	1	\$0.00
Data Service - Service Product: 5126	T1 - Data	8/1/2020	8/1/2024		Yes	Service	48	0	0	8/31/2024	\$75.00	1	\$0.00
Data Service - Service Product: 5125	T1 - Data	8/1/2020	8/1/2024		Yes	Service	48	0	0	8/31/2024	\$85.00	1	\$0.00

Data Service | Service ID: 3096 | Charges: \$75.00
Service Contract Start: 8/1/2020 | Stop: 8/1/2024 | Price Increase: 10.0000% | Interval: 1 Year

Note: No orders generate using this functionality

Note: Must have permission enabled for Contract Analyzer



GLOBAL PRODUCT RATE CHANGE

SETTINGS > PRODUCT CATALOG

The screenshot shows the 'Product Catalog' interface. At the top, there are filter dropdowns for Status (Active), Class (-- All --), Provider (-- All --), Bill Profile (-- All --), G/L Code (- Select -), Service Type (- Select -), Product Type (-- All --), and Currency (-- All --). Below the filters is an 'Export' button and a search bar with 'Filter Results: VOICE'. The main table lists products with columns: ID, Description, Code 1 (USOC), Rate, Type, Order Completion Billing, States, Provider, Creates Order, G/L Code, Active, and Options. The first row (ID 1140) is highlighted in yellow. A modal window titled 'Product Rate Change' is open over the first row, showing details for Product ID 1140, Description 'B License Product', Code/USOC 'Global Crossing', Provider 'Global Crossing', State, Class 'Residential/Business', and Rate '\$20.00'. The 'New Rate' field is set to '\$ 22.00'. The 'Apply To' section has 'New Customers Only' selected. An orange arrow points from the 'Rate Change' button in the modal to the 'Options' button in the table row.

ID	Description	Code 1 (USOC)	Rate	Type	Order Completion Billing	States	Provider	Creates Order	G/L Code	Active	Options
1140	B License Product		\$20.00	Recurring - Feature	Yes		Global Crossing	Yes		Yes	Options
1141	B Phone Product		\$6.00	Recurring - Feature	Yes		Inhouse	Yes			Edit Copy Rate Change
1139	B Voice Product		\$10.00	Recurring - Feature							
1136	Call Waiting Feature	CW100	\$5.00	Recurring - Feature					3102 - Voice Services	Yes	Options

Change a product's rate globally for all customers who have that product currently OR just for all new customers only.

Note: No orders generate using this functionality

Note: Must have permission enabled for change rates



MANAGE PRODUCTS

PERMISSION BASED

Can select and change rates on one location or on all locations in hierarchy from Services & Activity section using “Manage Products” link.

Use filters to find products.

The screenshot displays the 'Manage Products' interface. At the top, there is a navigation bar with tabs: Home, Customers, Activity, Agents, Reports, Settings, and Admin. Below this, the 'Manage Products' section includes a 'Bulk Actions' dropdown menu with 'Change' selected, and an 'Apply' button. A 'Change' modal is open, showing fields for Description, Rate (set to \$33.00), and Effective Date (set to Next Billing Period). A 'Change' button is highlighted in the modal. In the background, a 'Services & Activity' box shows 'Manage: Products' highlighted. A table of products is visible, with columns for Date, Rate, Quantity, and Is Credit. Two orange arrows point to specific product entries in the list.

Date	Rate	Quantity	Is Credit
3/1/2021	\$32.00 each	3	No
6/15/2020	\$8.00 each	1	No
6/4/2024	\$5.00 each	1	No
7/13/2022	\$5.00 each	1	No
7/13/2022	\$0.00 each	1	No
8/18/2022	\$5.00 each	1	No
8/17/2021	\$50.00 each	1	No
8/18/2022	\$25.00 each	1	No

Note: No orders generate using this functionality

Note: Must have permission enabled for Manage Products



REPORT BUILDER



CREATE YOUR OWN REPORTS

REPORTS > NEW REPORT

New Report

Save Save & Run Cancel Share Report Dashboard Report

Description: REPORT OF XYZ

Long Description: This is a description that shows other people or myself how I built this report and what it is pulling so no one is confused.

Category: Onboarding

Max Results:

Dataset

Source: CustomerProduct Data Dictionary

Restriction: None

Columns Filters User Prompts

Filter Columns: name Options: [select all](#) [deselect all](#)

Available Columns	Selected Column
Parent - Name	Customer - Name
Service Address - Company Name	
Service Address - Name	
Service Address - Name First	
Service Address - Name Last	
Service Address - Name Middle Initial	

- Don't share reports until you have tested and know they work.
- Category is which section it displays in in the list of reports.
- Dataset is where you have to select the closest view to get the data you need.
- Save and Run button to run it and test – you can always go back and edit.

Multiple entries for keywords:
BEFORE the hyphen is the **table** &
AFTER the hyphen is the **field** within
that table



BUILD REPORT BY ADDING COLUMNS/FIELDS

SAVE AND RUN TO VIEW RESULTS

Edit Report if you need to change something.

The screenshot shows a report configuration interface. At the top, there are tabs for 'Columns', 'Filters', and 'User Prompts'. Below these, there is a 'Filter Columns' field with the value 'product' and 'Options: select all deselect all'. The main area is divided into two columns: 'Available Columns' and 'Selected Column'. The 'Available Columns' list includes various fields like 'CustomerProduct - Customer Product ID', 'CustomerProduct - FRC End Date', etc. The 'Selected Column' list includes 'Customer - Name', 'Parent - Name', 'Service Address - Line 1', etc. An arrow points from the 'Available Columns' list to the 'Selected Column' list.

The screenshot shows the 'View Report' interface. At the top, there are buttons for 'Back', 'Clear Cache', 'Edit Report', 'Report SQL', and 'Send Report'. An orange arrow points to the 'Edit Report' button. Below the buttons, there is a search bar and a 'Printer-Friendly Version' button. The main content area displays the report title '(1300) REPORT OF XYZ' and a description: 'This is a description that shows other people or myself how I built this report and what it is pulling so no one is confused.' Below the description, there is a summary table with the following data:

	Sum
CustomerProduct Cost:	8,308.40
CustomerProduct Rate:	79,452.88
CustomerProduct Quantity:	6,540

Below the summary table, there is an 'Export' section with a grid of numbers (1-10) and a 'Printer-Friendly Version' button. The main data table has the following columns: Customer Name, Parent Name, Service Address Line 1, Service Address Line 2, Service Address City, Service Address State, Service Address Zip, CustomerProduct Description, CustomerProduct Cost, CustomerProduct Rate, and CustomerProduct Quantity. The data rows are as follows:

Customer Name	Parent Name	Service Address Line 1	Service Address Line 2	Service Address City	Service Address State	Service Address Zip	CustomerProduct Description	CustomerProduct Cost	CustomerProduct Rate	CustomerProduct Quantity
Rev.io		3340 Peachtree Rd NE	Ste 2850	Atlanta	GA	30326	Local Voice Service	0.0000	0.0000	1
Rev.io		3340 Peachtree Rd NE	Ste 2850	Atlanta	GA	30326	Voice Feature	0.0000	5.0000	1
Rev.io		3340 Peachtree Rd NE	Ste 2850	Atlanta	GA	30326	Regulatory Fee	0.0000	14.7900	1
Rev.io		3340 Peachtree Rd NE	Ste 2850	Atlanta	GA	30326	Conference Account	0.0000	15.0000	1
Rev.io		3340 Peachtree Rd NE	Ste 2850	Atlanta	GA	30326	Wireless Plan	0.0000	14.9500	1
Rev.io		3340 Peachtree Rd NE	Ste 2850	Atlanta	GA	30326	Handset	0.0000	5.0000	1



USE FILTERS AND/OR USER PROMPTS

The screenshot shows a data tool interface with three tabs: 'Columns', 'Filters', and '? User Prompts'. The 'Filters' tab is selected and highlighted with a red box. Below the tabs, there are two filter conditions. The first condition is 'Service Address - State' equal to 'GA'. The second condition is 'Customer - Activation Date' greater than or equal to '08/01/2024'. An orange arrow points to the 'Add Filter' button in the top right corner of the filter configuration area.

- Add filter(s) that will always filter the data.
- Use AND/OR operators.
- "Nest" filters using groups to imitate SQL querying.

The screenshot shows a data tool interface with three tabs: 'Columns', 'Filters', and '? User Prompts'. The '? User Prompts' tab is selected and highlighted with a red box. Below the tabs, there is one user prompt condition: 'Customer - Activation Date' greater than or equal to '07/01/2024'. An orange arrow points to the 'Add Filter' button in the top right corner of the user prompt configuration area.

- Add filter(s) that will prompt the user to enter a value each time it is run so it is customizable.
- Use AND operators.

