rev.io

BEST PRACTICES
IN REV.IO BILLING

LORRIE BROWNE
DIRECTOR OF KNOWLEDGE MANAGEMENT

COMMISSION CUTOFF

COMMISSION CUTOFF

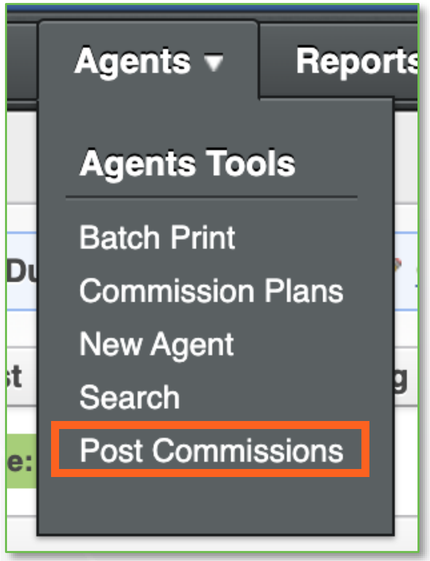
CREATE COMMISSION BATCHES FOR A SET DATE

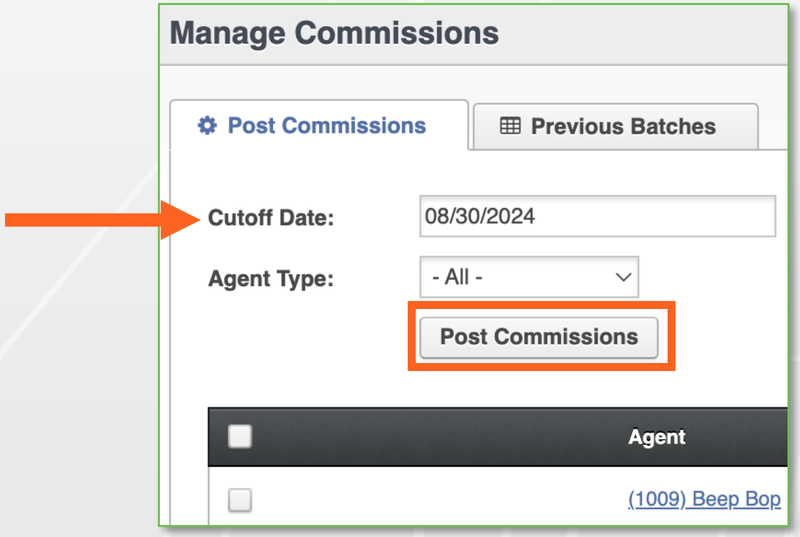
- Task batching was “real time"…if you wanted to cut off commission payouts at the end of the month, you had to log in as close to the end of the month as possible and run the jobs right then.
- Now you can log in at any time after the desired cutoff date and key in the date that you want to use as the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

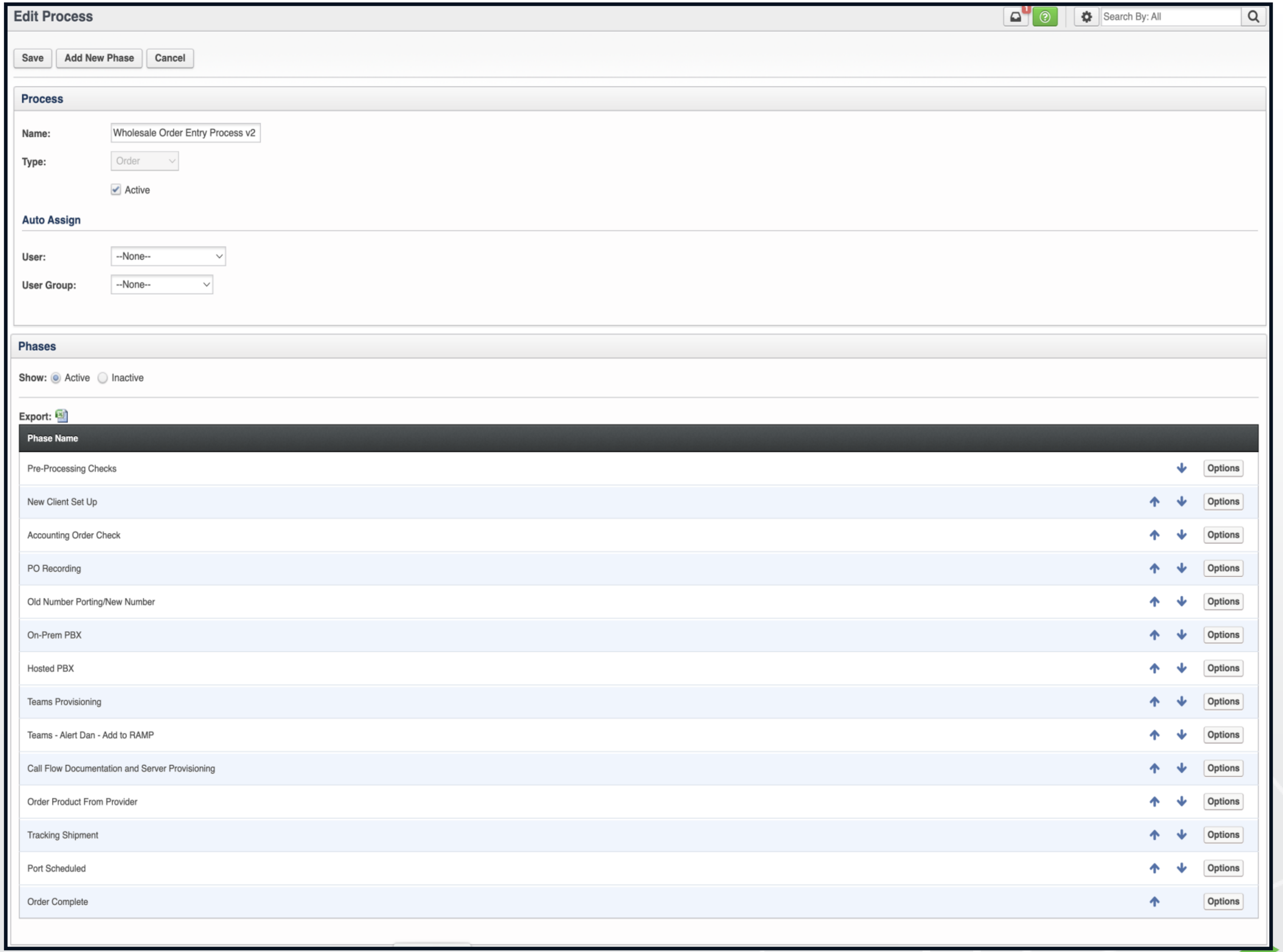
BE PROACTIVE ABOUT ELIMINATING MISTAKES AND OMISSIONS! BE SURE TO CHECK:

- 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.



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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		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 or	Cancel task when order i
		199	RAMP Server Button	Hit the Button	Deactivation	0	Do Nothing	Do Nothing	No	No	No	Yes
138	Server Decomissioning	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?

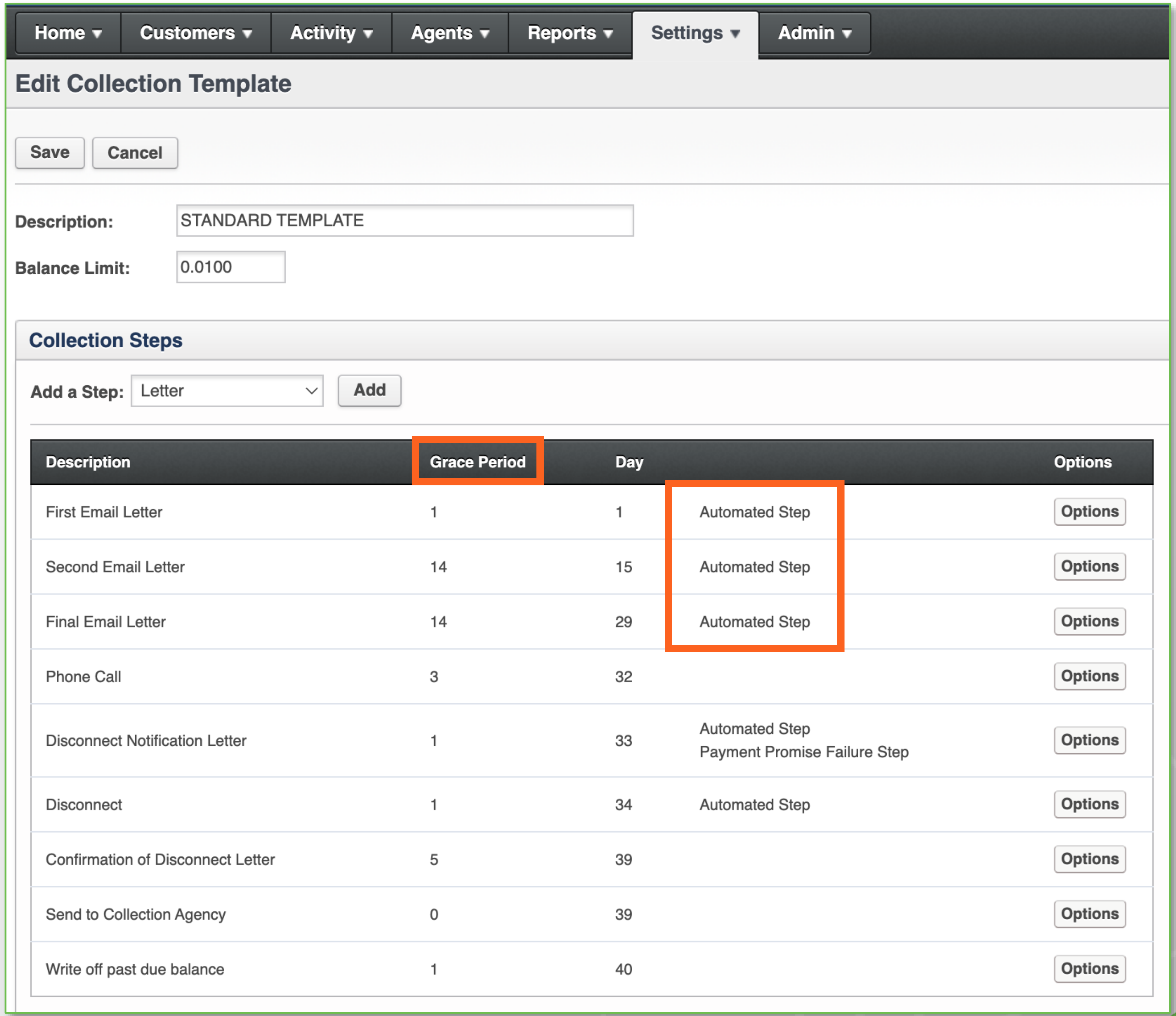
- Are you constantly getting “off track” with collections?
- Are you manually moving accounts to different collection steps?
- Are there times when you just wish it worked differently or had different timing?

MAKE SURE GRACE PERIODS WORK

GRACE PERIOD = DAYS SINCE THE LAST STEP

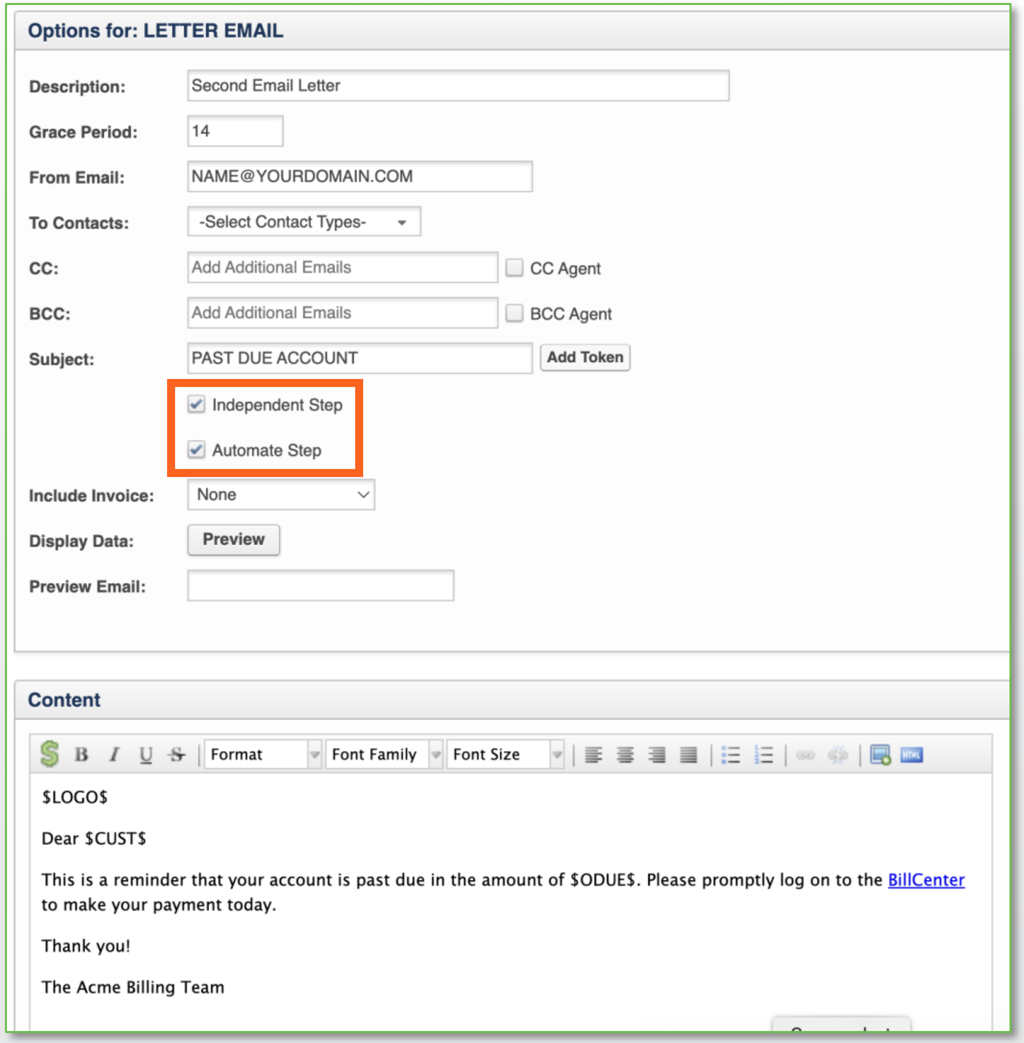
DAYS = DAYS SINCE DUE DATE

- 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.



INDEPENDENT STEPS KEEP YOU ON TRACK

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



- 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.

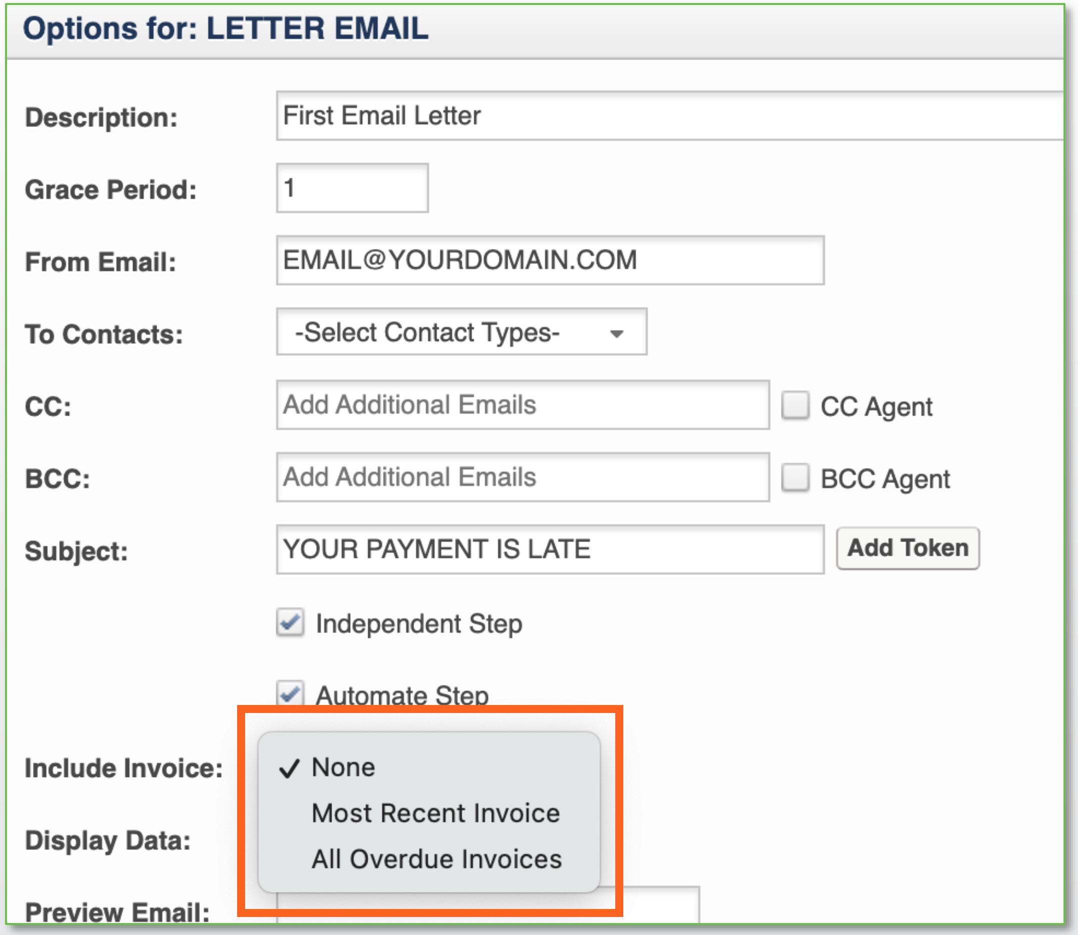
Collection Steps

Add a Step: Letter   Add

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	Closure Step	Options
Send to Collection Agency	0	39		Options
Write off past due balance	1	40		Options

INCLUDE BILLS WITH EMAIL NOTICES

OPTIONAL AND CONFIGURABLE



- **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

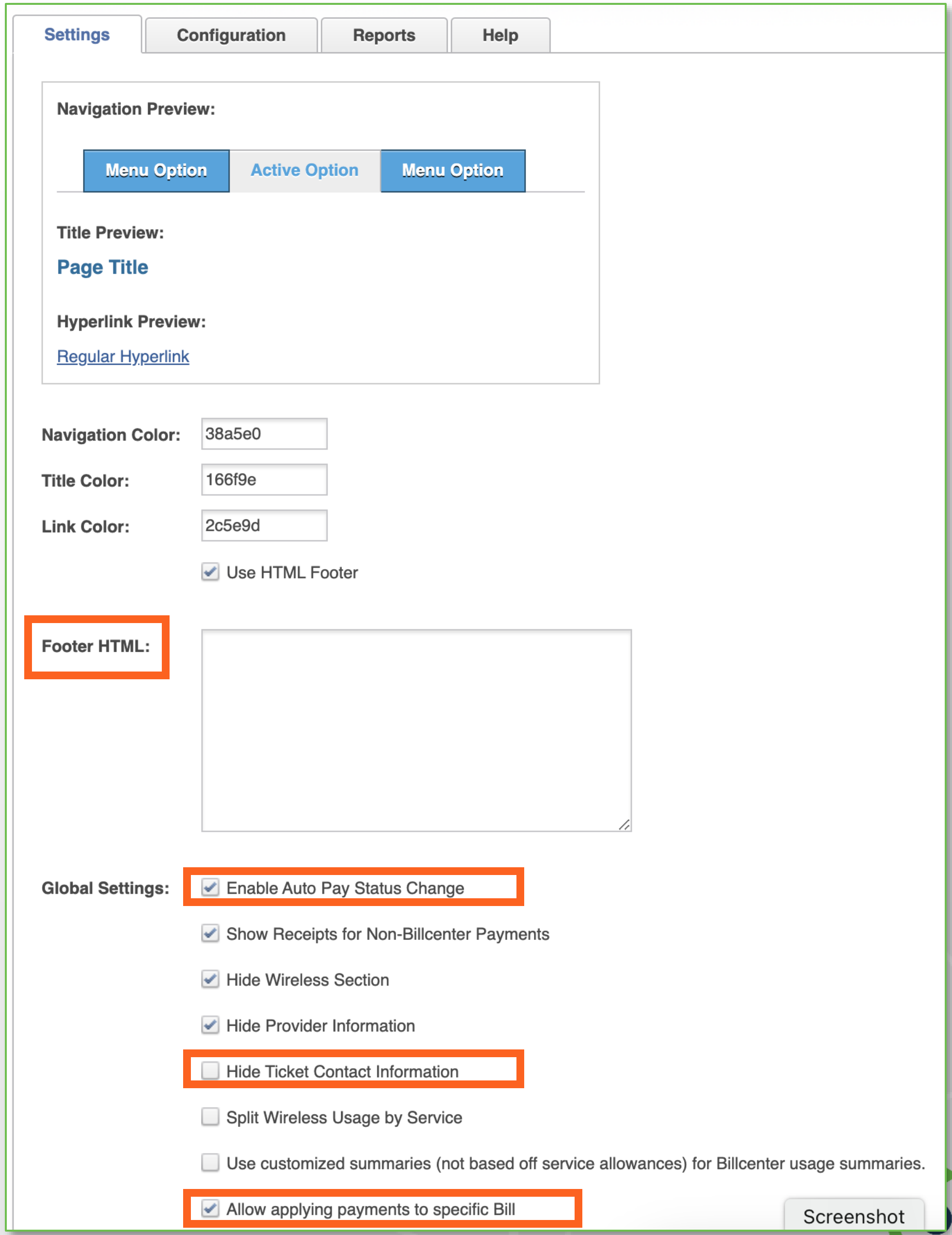
- We can add .wav files and have our IVR service make phone calls and/or send text messages automatically if you wish.
- There is a very small per-call charge if you opt to set this up.
- Contact Client Success if you wish to explore this option.

BILL CENTER

BILLCENTER TWEAKS

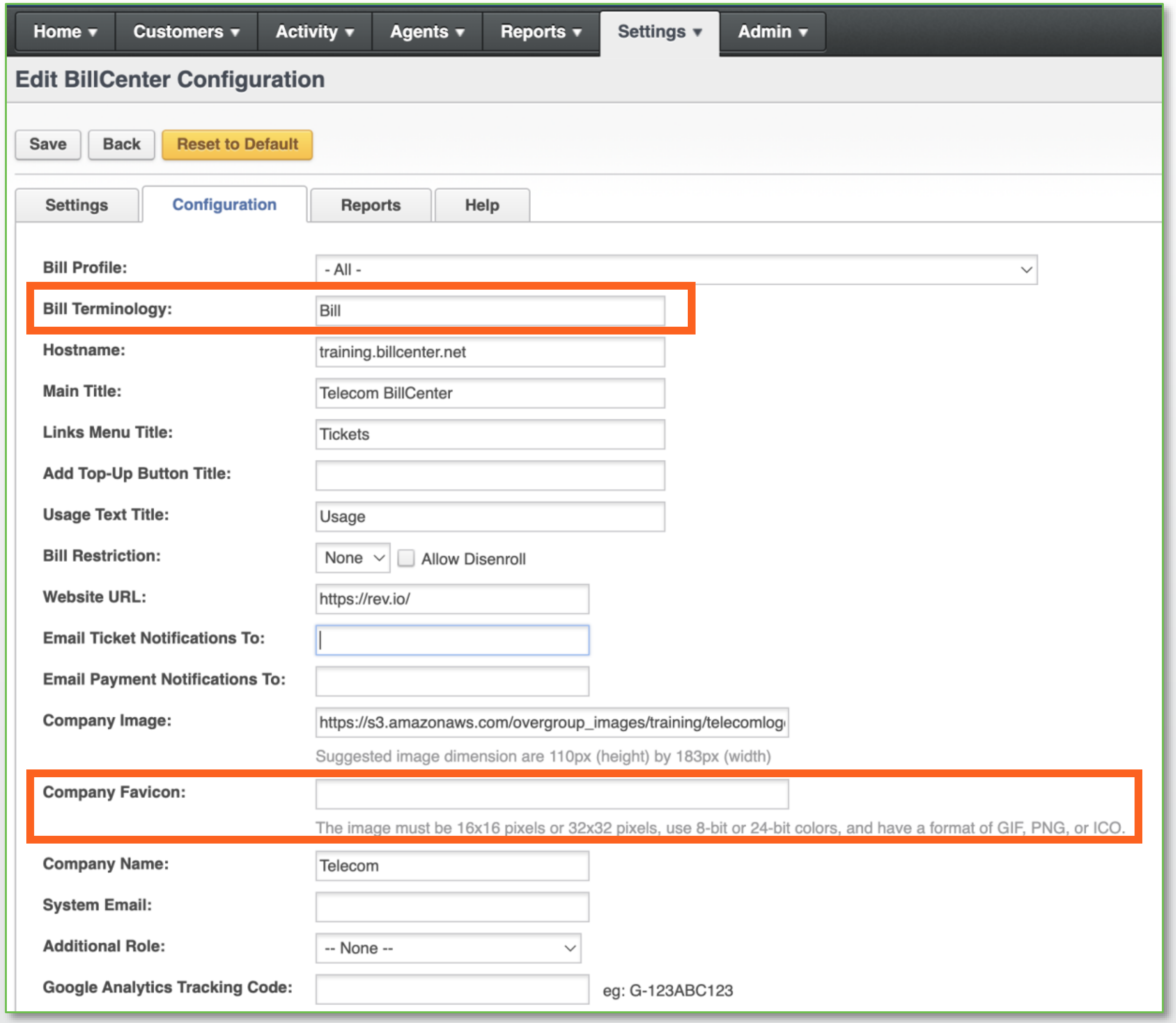
RANDOM SETTINGS TAB OPTIONS YOU MAY HAVE MISSED

- 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.*



BILLCENTER TWEAKS

RANDOM CONFIGURATION TAB OPTIONS YOU MAY HAVE MISSED



- 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.

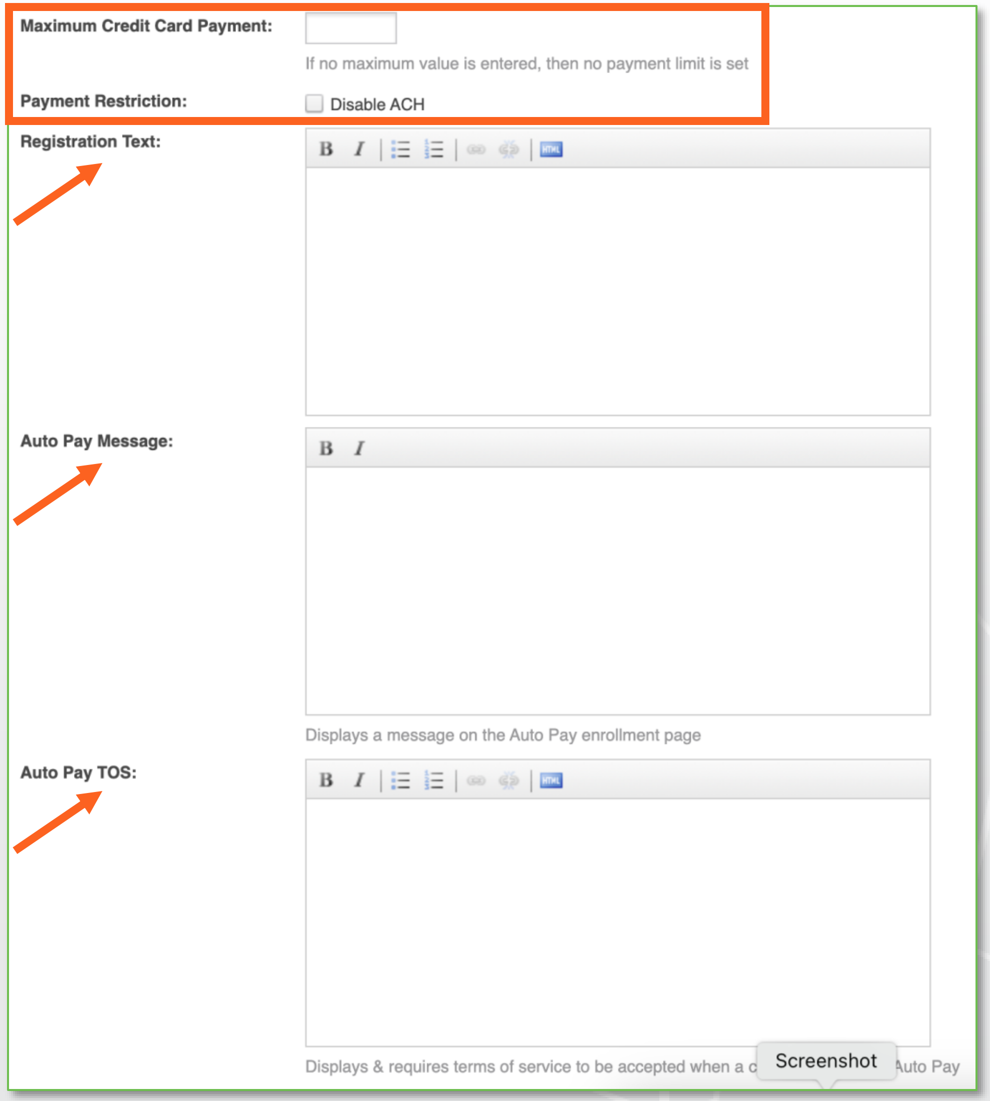
BILLCENTER TWEAKS

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.

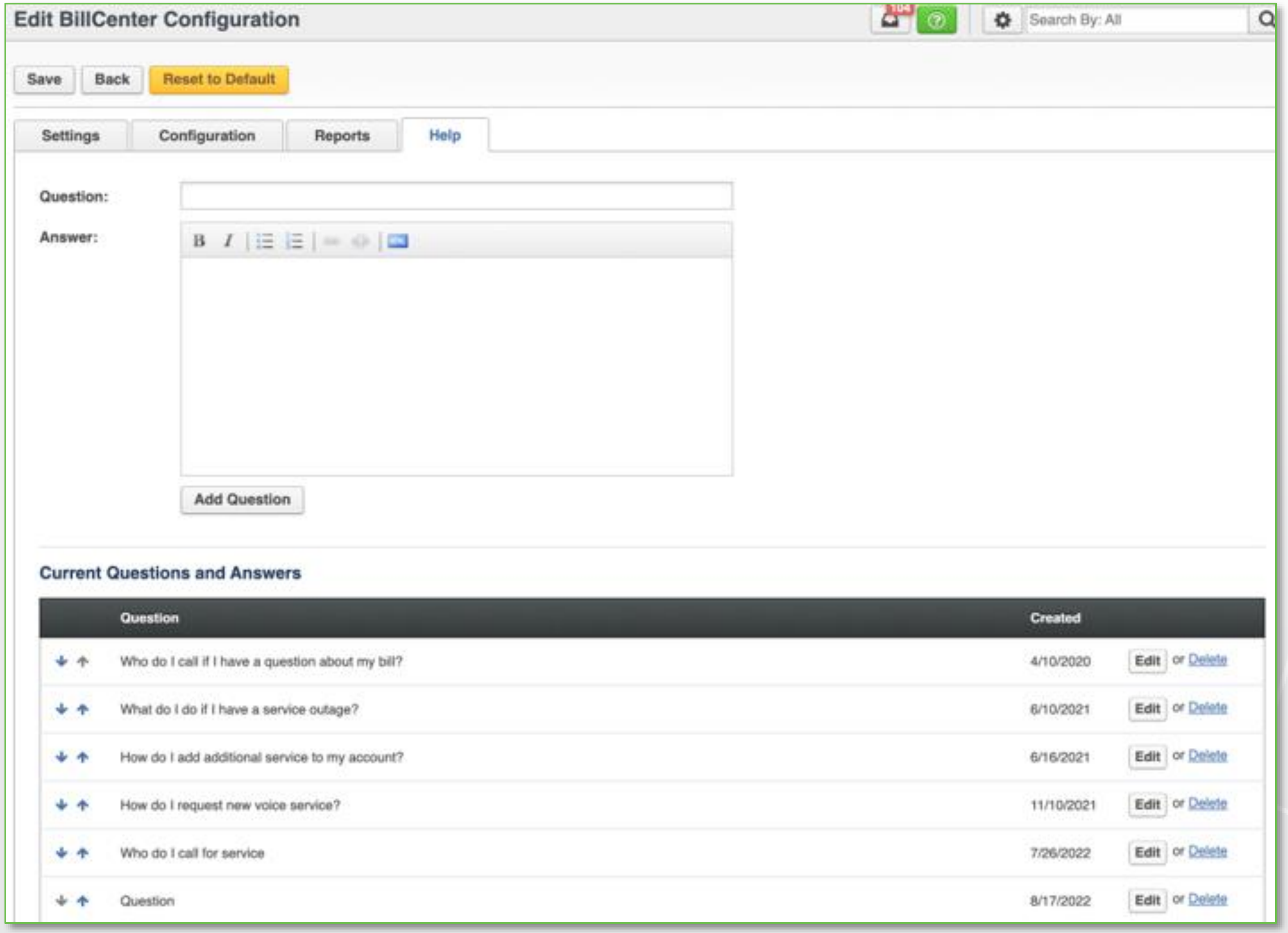
- Registration Text: Customize the messaging customers see when signing up for Bill Center access.

- 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.



BILLCENTER TWEAKS

CREATE A HELP CENTER FOR YOUR CUSTOMERS

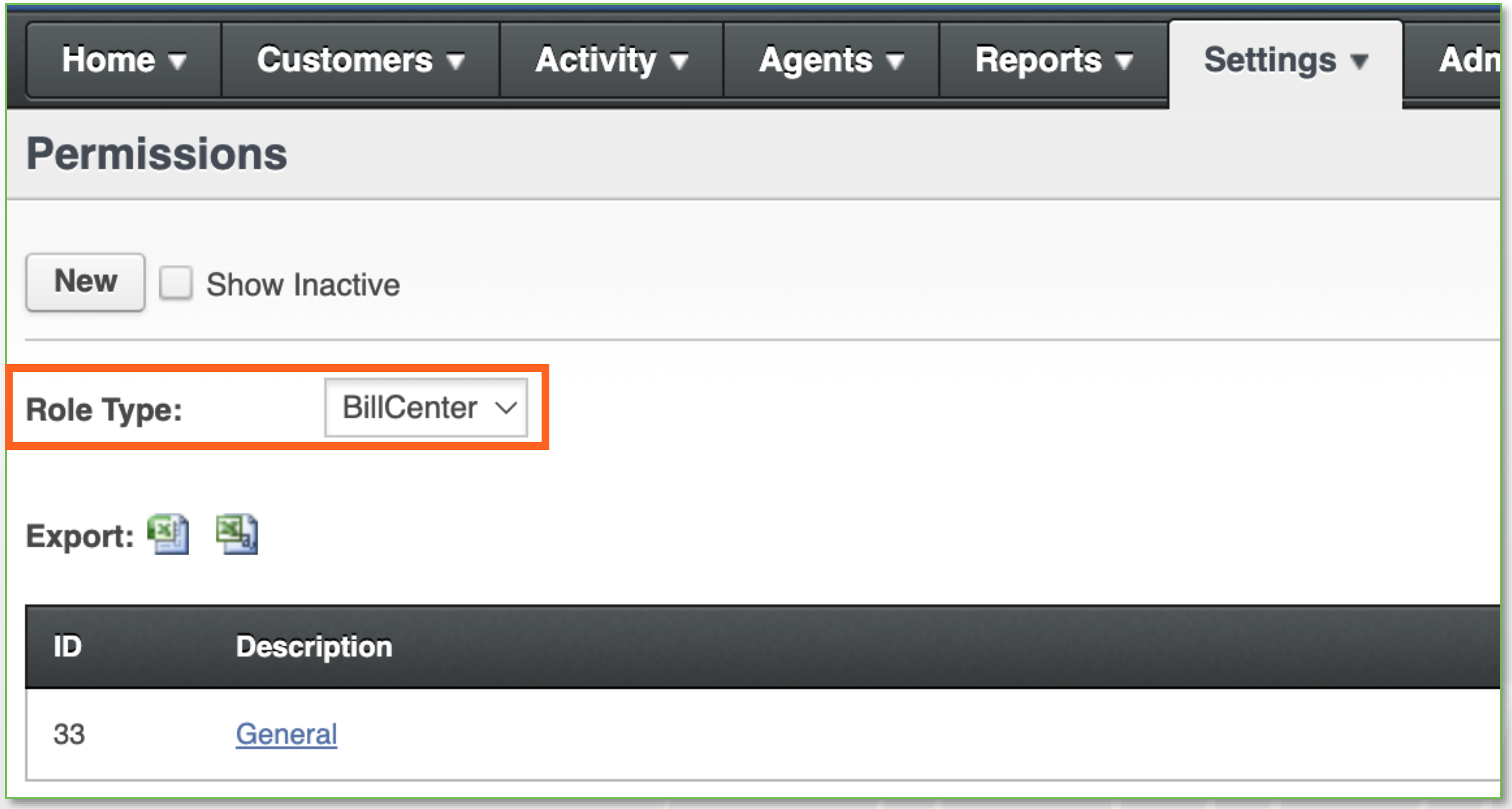


Do you often get questions from your customers about the same topics? Make your Bill Center a FAQ center for your customers to self-serve!

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.



BILL MESSAGES

PRETTIER BILL MESSAGES

USE XML TO MAKE YOUR MESSAGING LOOK NICER

Bill Profile messages can accept XML so that you can control what messages look like.

Default Message

Appears on all bills above the ACH/CC/regular message.

DEFAULT BP MESSAGE
We Simplify the Complex World of IT

At Training Communications our goal is to bring simplicity to your IT environment, ensure an always-on connection, and proactively manage every point in between.

<u>https://www.rev.io</u>

Customer Service Information

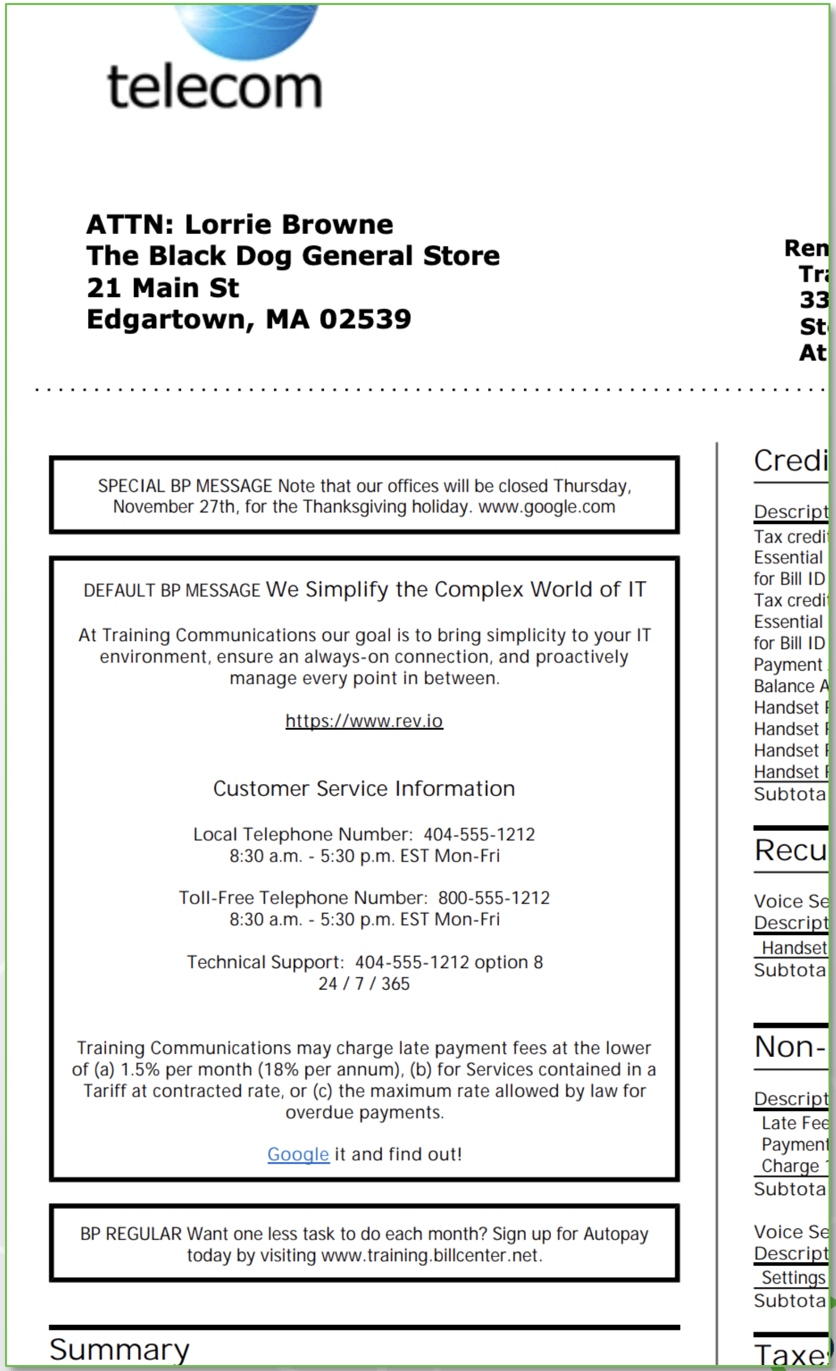
Local Telephone Number: 404-555-1212
8:30 a.m. - 5:30 p.m. EST Mon-Fri

Toll-Free Telephone Number: 800-555-1212
8:30 a.m. - 5:30 p.m. EST Mon-Fri

Technical Support: 404-555-1212 option 8
24 / 7 / 365

Training Communications may charge late payment fees at the lower of (a) 1.5% per month (18% per annum), (b) for Services contained in a Tariff at contracted rate, or (c) the maximum rate allowed by law for overdue payments.

Google it and find out!


telecom

ATTN: Lorrie Browne
The Black Dog General Store
21 Main St
Edgartown, MA 02539

SPECIAL BP MESSAGE Note that our offices will be closed Thursday, November 27th, for the Thanksgiving holiday. www.google.com

DEFAULT BP MESSAGE We Simplify the Complex World of IT

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Google it and find out!

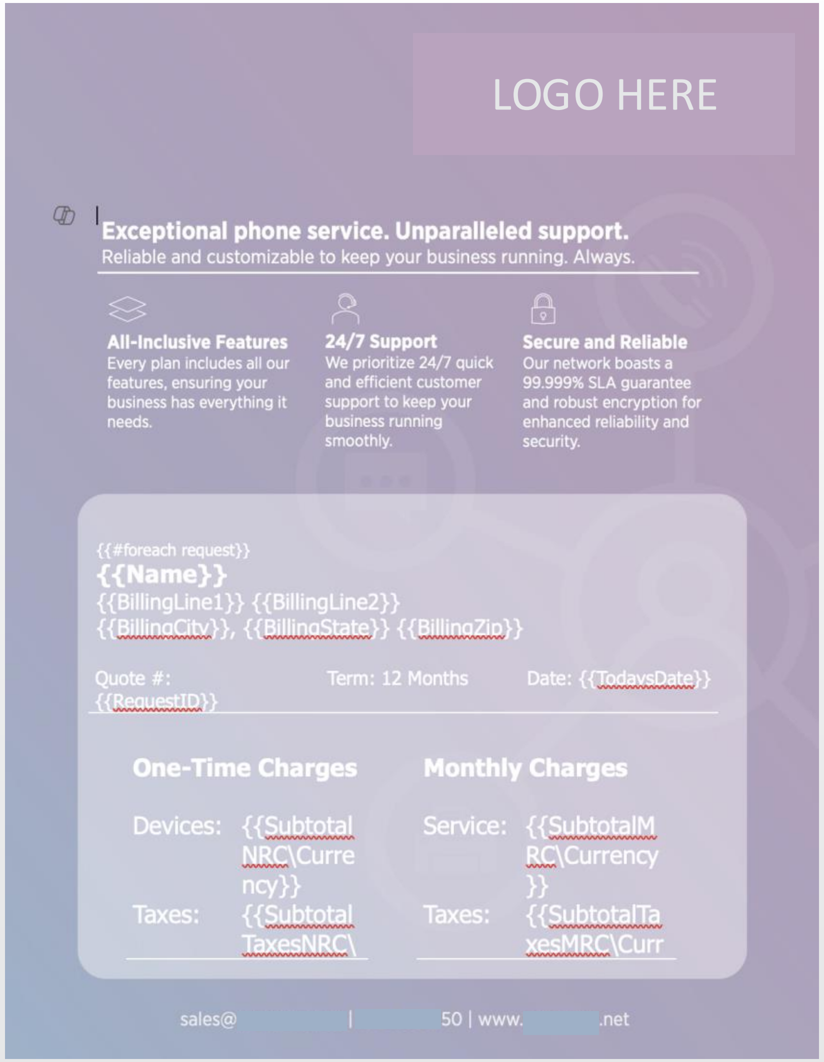
BP REGULAR Want one less task to do each month? Sign up for Autopay today by visiting www.training.billcenter.net.

Summary

REQUEST TEMPLATES

CUSTOMIZE REQUEST TEMPLATES

FOR CUSTOM BRANDED QUOTES USING MS WORD



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 t first notifying the end user of such limitations listed in Section 4 of the Ag ffirmatively acknowledg er has read and un Agreement, (2) Custom there is the possibi be able to contact em dialing 9-1-1 using e scenarios that have b ection 4, and (3) Customer understands that they must inform user vice o not able to contact emergency services by dialing 9-1-1 r 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.

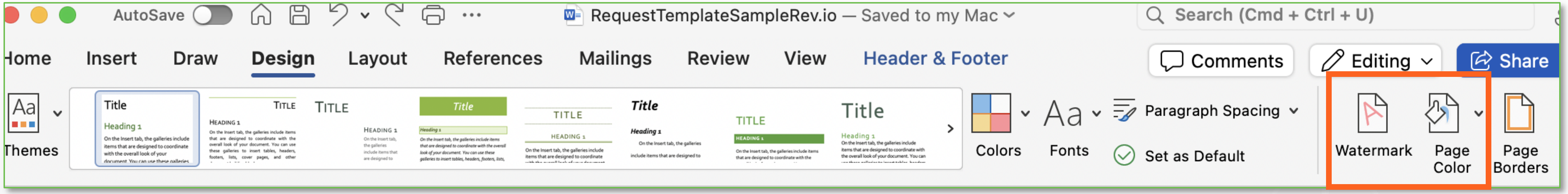
Representative Signature: ______________________________

Name: ______________________________

Date: ____________

MICROSOFT WORD MAIL MERGE

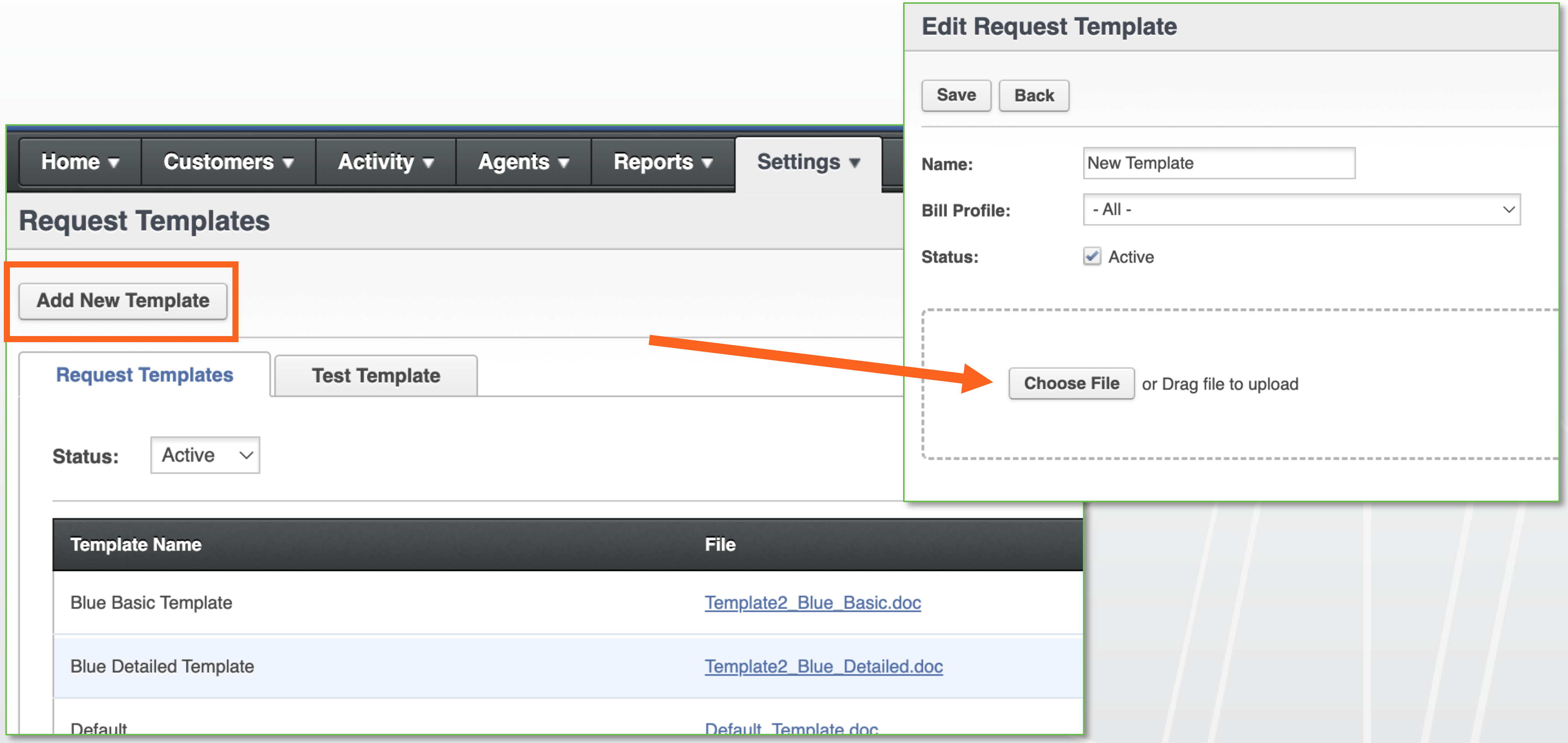
USING MICROSOFT WORD – GOOGLE IT OR PAY A COLLEGE STUDENT!



- 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

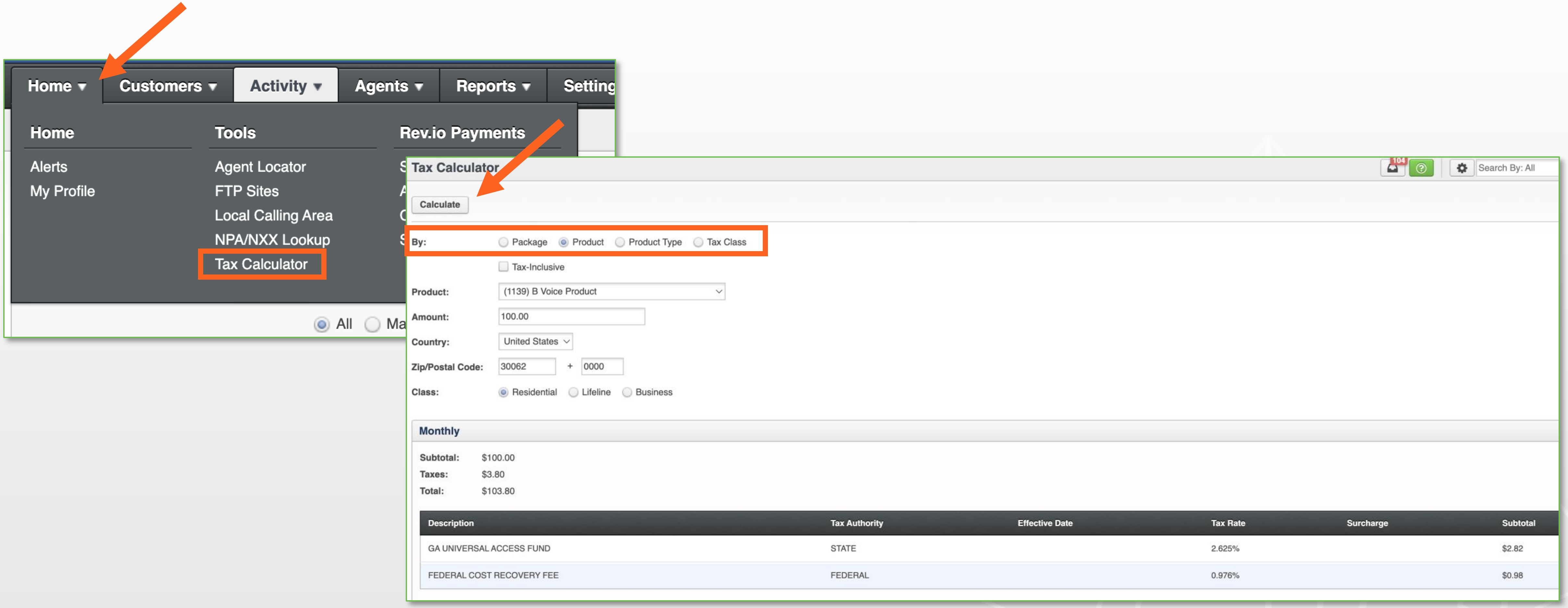
UPLOAD YOUR WORD DOCUMENT



TAX CALCULATOR

TAX CALCULATOR TOOL

KIND OF HIDDEN, BUT HANDY



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

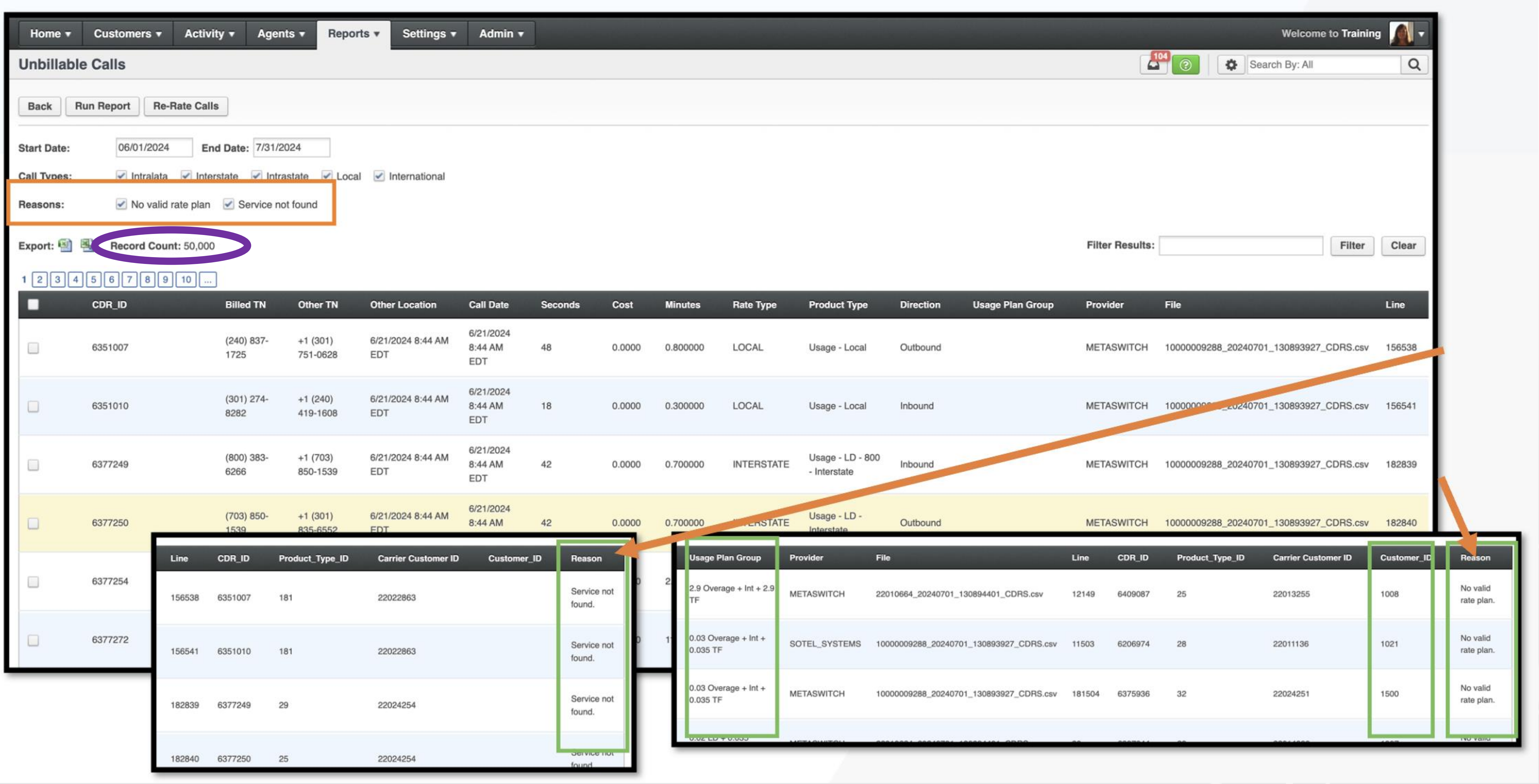
CALL MUST FIND A RATE ON THE SERVICE/CUSTOMER FOR THE TYPE OF CALL IT IS

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



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

Home ▾ | Customers ▾ | Activity ▾ | Agents ▾ | Reports ▾ | Settings ▾ | Admin ▾ | Welcome to Training

Unbillable Calls

104 | Search By: All

Back | Run Report | Re-Rate 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

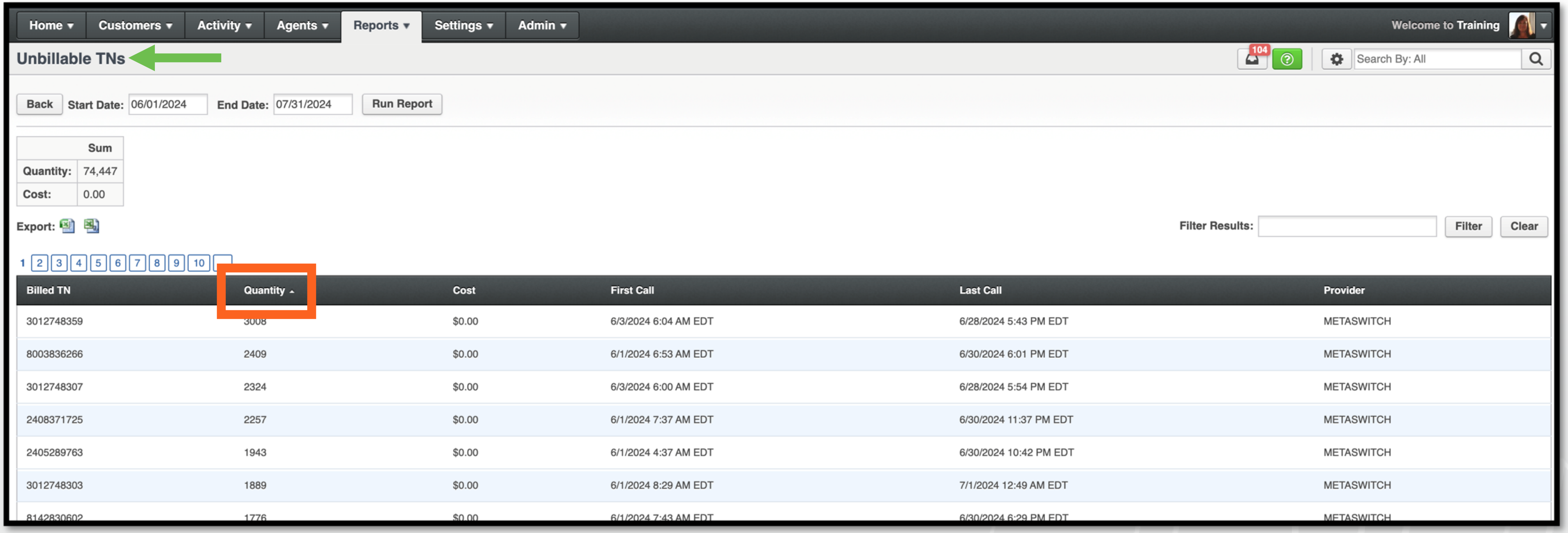
Export: **Record Count:** 178

Filter Results: Filter | Clear

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	4261	6641950	183	22013255	1008	No valid

UNBILLABLE TNs REPORT

USE TO FIND “SERVICE NOT FOUND” UNBILLABLE CALLS IN EASIER MANNER



AFTER CLEAN-UP, RE-RATE

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

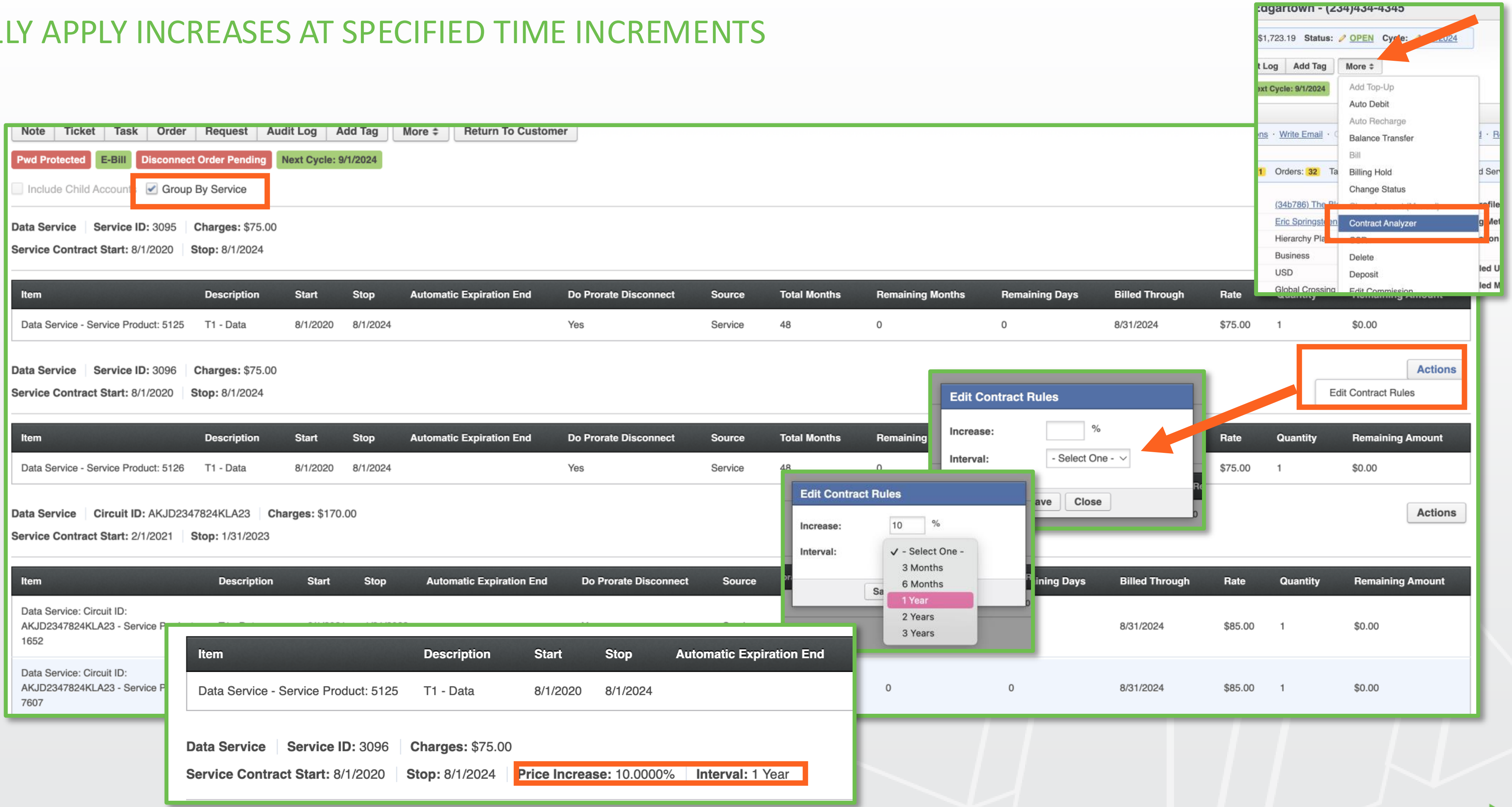
- Re-rate happens automatically overnight.
- From the Unbillable Calls Report, you can press the Re-Rate Calls button to re-rate.
- In a pinch, you can submit a ticket and have our team force a re-rate of calls.

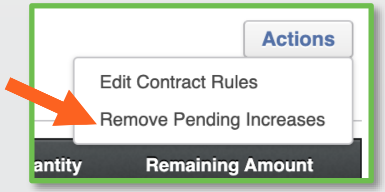
PRICING CHANGES

SERVICE CONTRACT PRICE INCREASES

AUTOMATICALLY APPLY INCREASES AT SPECIFIED TIME INCREMENTS

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



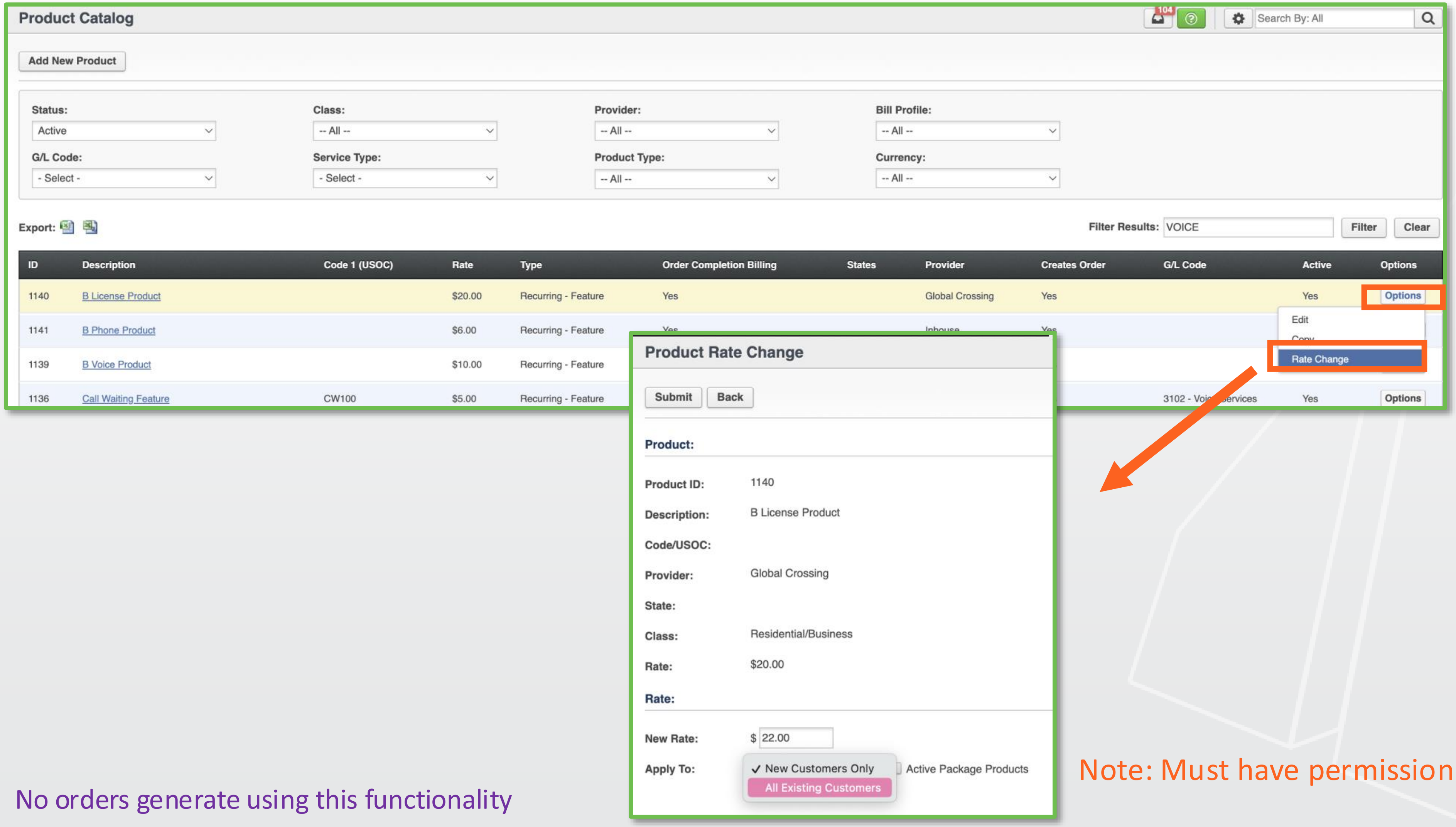


Note: No orders generate using this functionality

Note: Must have permission enabled for Contract Analyzer

GLOBAL PRODUCT RATE CHANGE

SETTINGS > PRODUCT CATALOG



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

Note: Must have permission enabled for change rates

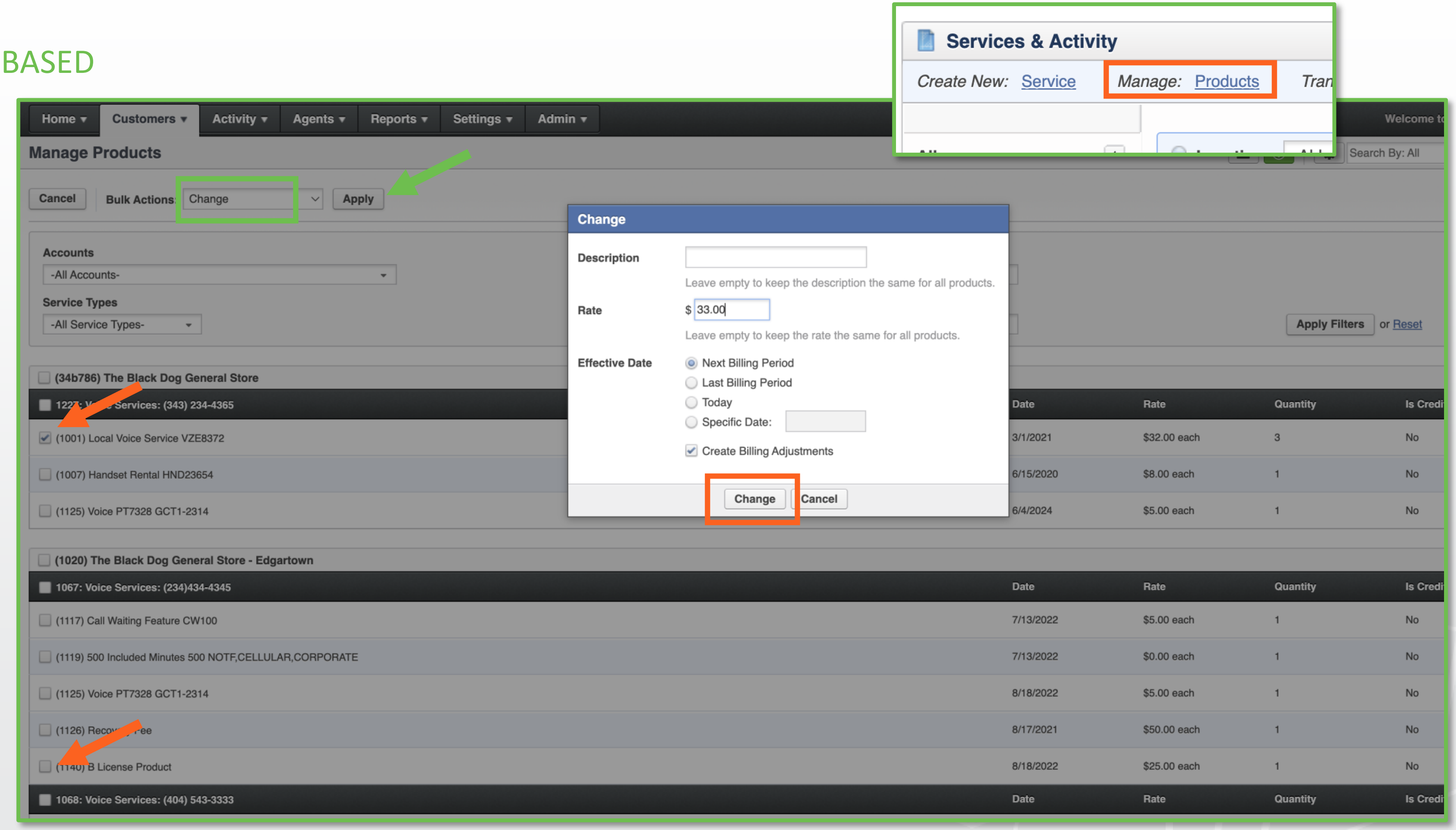
Note: No orders generate using this functionality

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.



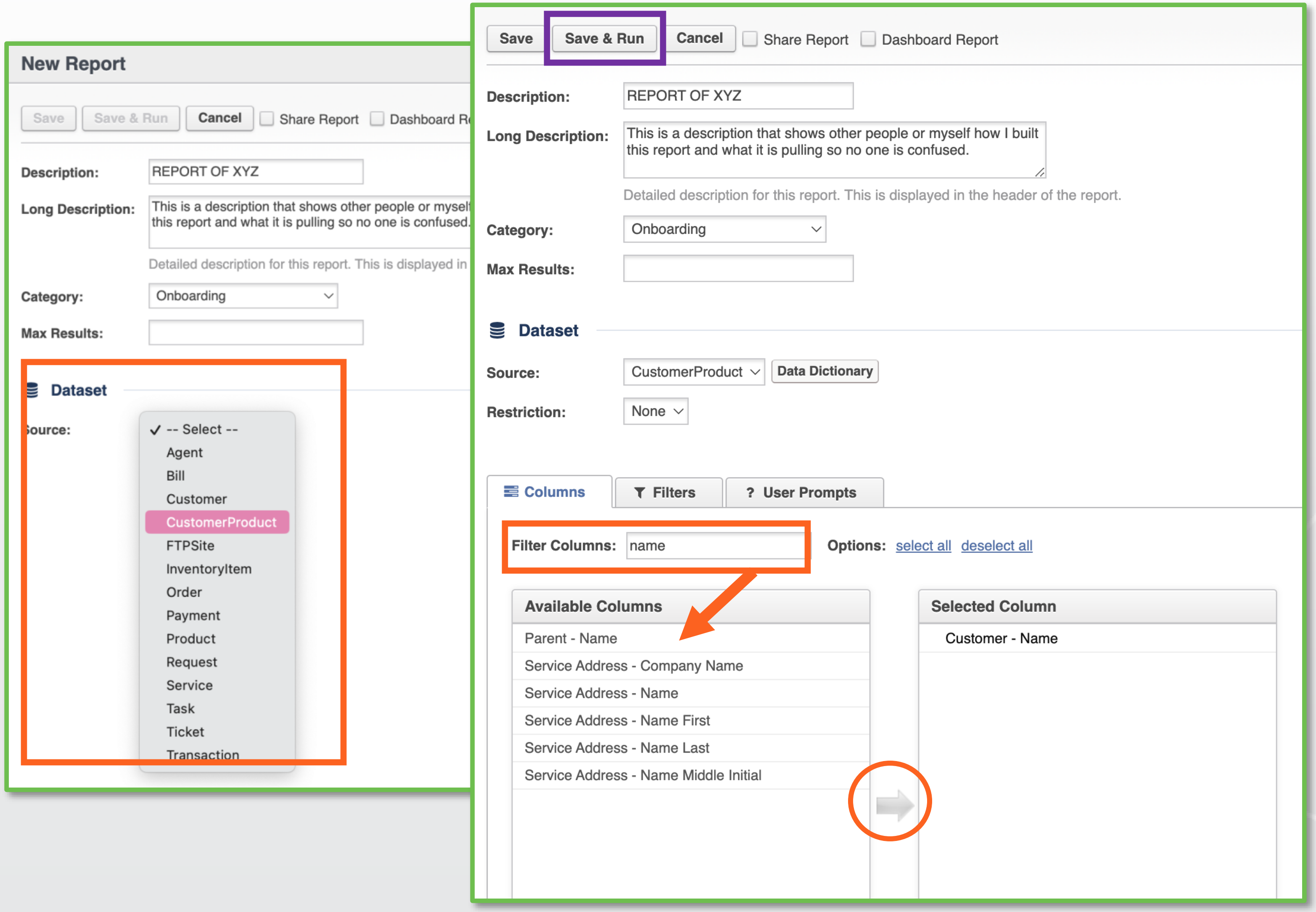
Note: No orders generate using this functionality

Note: Must have permission enabled for Manage Products

REPORT BUILDER

CREATE YOUR OWN REPORTS

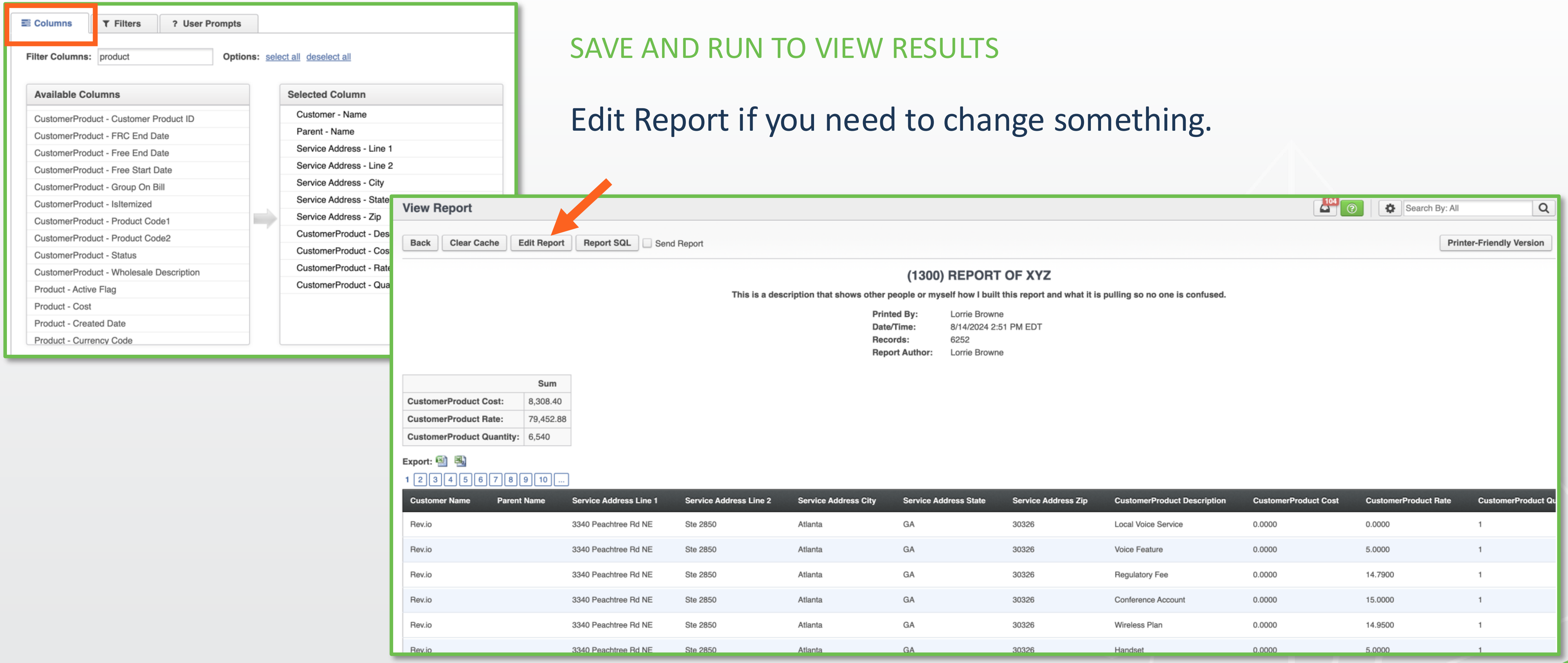
REPORTS > NEW REPORT



- 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

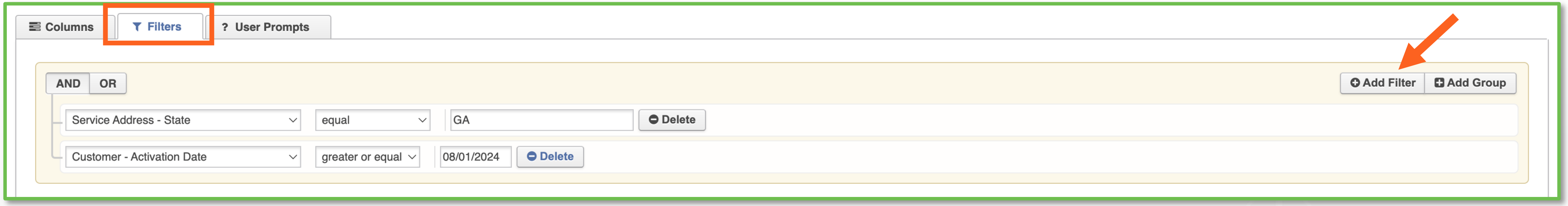
BUILD REPORT BY ADDING COLUMNS/FIELDS



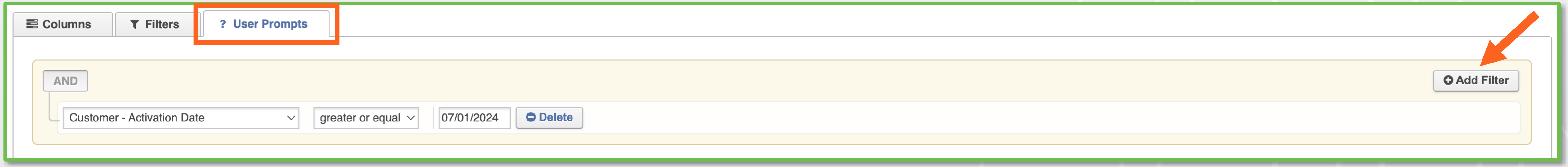
SAVE AND RUN TO VIEW RESULTS

Edit Report if you need to change something.

USE FILTERS AND/OR USER PROMPTS



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



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