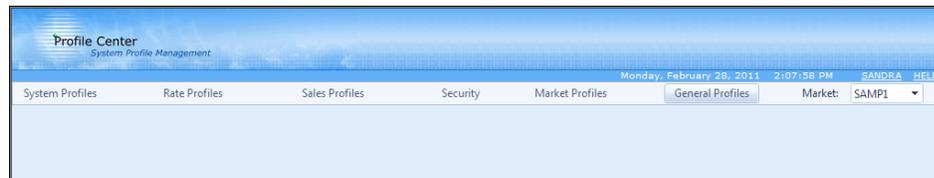


# Profile Center



## General Profiles



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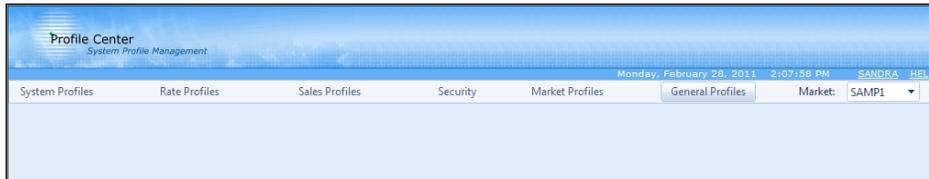
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## Profiles Center

This document describes the components of the **MARKET PROFILE** module found in the Profile Center.



The **PROFILE CENTER** is divided into six modules.

These six modules are used to create profile codes used throughout your database:

- The **SYSTEM PROFILES** module is used to create:
  1. Discounts and Non-Usage Charges
  2. Additional Profile Codes, such as Equipment, Features, Monthly Recurring Changes, and other Profiles that are used throughout the system
  3. Carrier Information codes
  4. And Track Financial Activity
- The **RATE PROFILES** module is used to create rate tables used to calculate:
  1. Terminating rates
  2. Recurring and Non-Recurring Fees
- The **SALES PROFILES** module is used to create:
  1. Codes representing your Sales Agents
  2. Commission Plans used during production to calculate commissions for your agents
  3. Reports that will assist in paying your agents commissions
- The **SECURITY PROFILES** module is used to create user ids and passwords for your users to access various areas of the system.
- The **MARKET PROFILES** module is used to setup default information used throughout your database. These items include:
  1. System wide messages
  2. State messages
  3. General Market Defaults
  4. Cycle End Dates
  5. Market Settlements
- The **GENERAL PROFILES** module is used to perform various tasks within the system.
-

## Common Profile Buttons

The following buttons are used throughout the Profile center.



The binoculars are used as the **SEARCH** button.



The eraser is used as the **CLEAR SEARCH CRITERIA** button.



The green circular plus is used as the **ADD** button.



The red circular white X is used as the **CLEAR ERROR MESSAGE** button that appears only when an error is encountered and trapped.



The small blue arrow right is used as the **SELECT** button in grids throughout System Profiles. Clicking this button only selects a row; clicking the blue underlined link-description to the right of the arrow does both a select and a go that displays detail for the selected summary record.



The small circular red circular white X is the used as the **DELETE** button in grids throughout System Profiles.



The large green check is used as the **OK** button on pages throughout the Profile Center.



The large red X is used as the **CANCEL** button on pages throughout the Profile Center.



The 'sign forbidden' is used as the 'No' button in popup message boxes where the question 'One or more data fields has changed. Do you wish to save these changes now?' is displayed.



The floppy disk is used as the **SAVE** button. This is the enabled image.



The grayed out floppy disk is used as the **SAVE** button to create a disabled appearance.



The two cylinders are used as the **DUPLICATE** selected Row button to create an exact duplicate of the item selected.



The add button is used where it's permissible to **ADD A NEW ROW** to a grid.

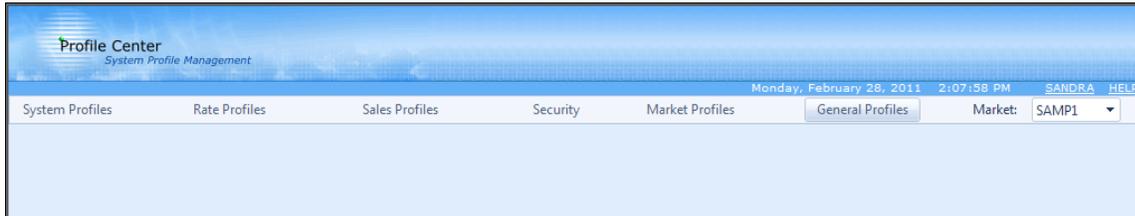
Icons used throughout the Profile Center include a tooltip or a short description specific to the button as you mouse over the item.



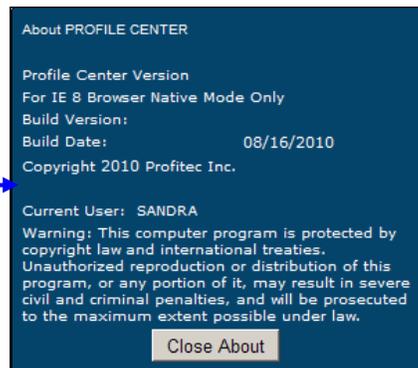


## Common Profile Center Features

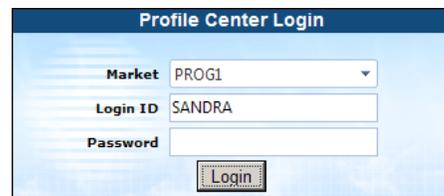
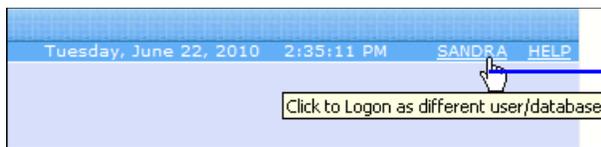
Many areas of the Profile Center include tooltips or short descriptions specific to the Profile Center as you mouse over items.



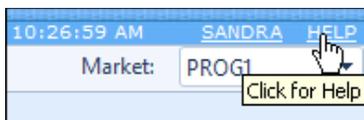
1. **MOUSING** over / **CLICKING** the words **PROFILE CENTER** in the Profile Center banner displays information about the Profile Center. Build Version as well as Build Date display.



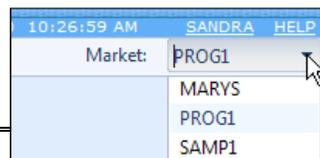
2. **MOUSING** over / **CLICKING** your **LOGIN NAME** is use to logon as a different user or change databases as shown below.



3. **MOUSING** over / **CLICKING HELP** displays the Profile Center Help menu. Each module in the Profile center includes a help document as seen below.

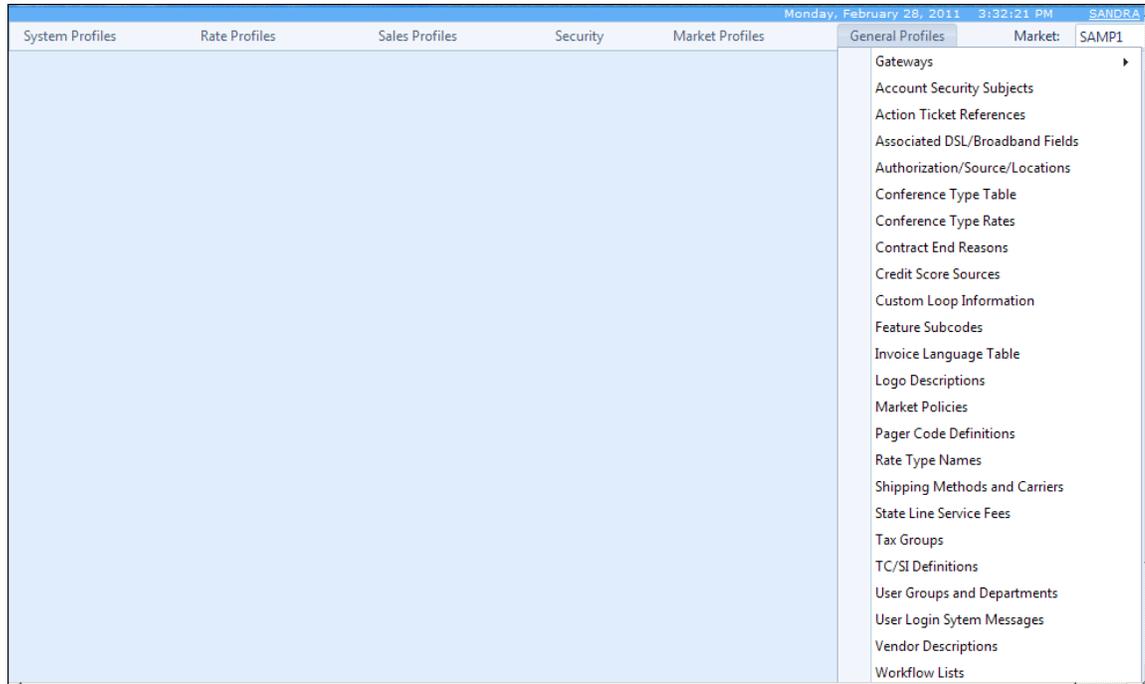


4. The down arrow next to the current Market is used to switch to another market within your database.





## General Profiles



### Gateways

The **GATEWAYS** section contains utilities to link OmniBill with the following third party vendors: PayPal/Authorize.net, StrikeIron, and MicroBilt. In order to use any of the Gateway utilities, you must have Master Rights and access to the Internet.

Only users with Master Rights to the OmniBill database will see the vendors listed in the Gateways section.



## Maintain Address Verification Parameters

The **ADDRESS VERIFICATION** utility is used to setup information in order to verify account address information entered into OmniBill. **STRIKEIRON**, which announced the acquisition of DesertSoft's Web Services operating unit in June 2006, is the third party vendor that verifies address information entered into OmniBill.

You must establish an account with **STRIKEIRON** to obtain access to the address verification database. Once you have established the account, **STRIKEIRON** supplies you with the necessary information to complete the Address Verification Parameters screen.

The Address verification process is used when:

- Adding new accounts
- Updating existing account addresses
- Processing ABLS (Account Bulk Load System)

Address verification for *existing addresses* is possible only if the user is given rights to access the pre-existing address validation service. The security setting **PRE-EXISTING ADDRESS VALIDATE** must be checked on a user's profile.

If a user is not given **PRE-EXISTING ADDRESS VALIDATE** rights, the **VERIFY\STANDARDIZE THIS ADDRESS** button does not display on the Address Information tab.



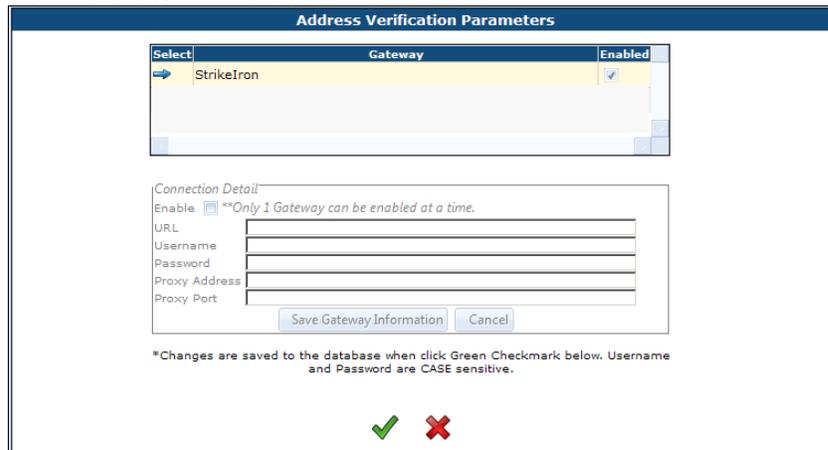
Because StrickIron assesses a cost each time an address is verified, this function should be reserved for a select group of users.

**SETTING UP THE STRIKEIRON ADDRESS VERIFICATION PARAMETERS SCREEN**

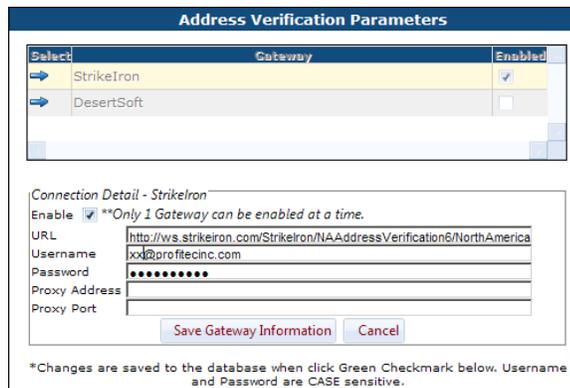
Action	Description
--------	-------------

1. Click **MAINTAIN ADDRESS VERIFICATION PARAMETERS** from the **GATEWAYS** option.

The **ADDRESS VERIFICATION PARAMETERS** screen displays. StrikeIron is the only gateway available to perform address verification.



2. Check the **BLUE ARROW** next to **STRIKEIORN** to enable the Connection Detail fields.
3. Click the **ENABLE** checkbox to enable address verification. If the **ENABLE** check box is not selected, address verification can not be performed.



4. Complete the **URL**, **USERNAME**, and **PASSWORD** supplied by StrikeIron. Username and Password are case sensitive.
5. Enter **PROXY ADDRESS** and **PORT** information if needed.
6. Click **SAVE GATEWAY INFORMATION** or **CANCEL** to ignore entries.
7. Click the **GREEN CHECKMARK** to save the information or the **RED X** to ignore the entries.



## Maintain Credit Score Parameters

The **MAINTAIN CREDIT SCORE PARAMETERS** screen is used to specify information that is needed to run credit reports.

You must contact the MicroBilt Corporation, the third party vendor used to run credit reports, to establish an account. Once you establish an account with MicroBilt, they supply the necessary software to install on each computer performing credit-reporting functions. Follow the instructions from MicroBilt when installing the software.

Customer credit information can be accessed and reviewed during the account **ADD** process. This credit information is used to decide whether or not an account is a good credit risk.

In order to *view credit reports*, users must have the **ALLOW CREDIT REPORT ACCESS** option checked on the **ADVANCED OPTIONS** tab in **SYSTEM SECURITY**. This option allows users to view:

- Credit reports during the account **ADD** process when using the **ADD WIZARD**
- Stored credit reports in an account by clicking the **CREDIT INFORMATION** button on the Customer Care toolbar.

MicroBilt provides the information used by the **CREDIT SCORE PARAMETERS** accessed from the **GATEWAYS** tab in **SYSTEM UTILITIES**.

Select	Gateway	Enabled
<input checked="" type="checkbox"/>	Microbilt	<input checked="" type="checkbox"/>

Connection Detail

Enable  **\*\*Only 1 Gateway can be enabled at a time.**

Host Name:

Member ID:

Password:

Proxy Address:

Review Password:

Bureau:

Product:

Default Score Card ID:

Port:

Score Card Range: High  Low

Save Gateway Information Cancel

\*Changes are saved to the database when click Green Checkmark below. Member ID and Password are CASE sensitive.



SETTING UP THE CREDIT SCORE PARAMETERS SCREEN

Action	Description
--------	-------------

1. Select **MAINTAIN CREDIT SCORE PARAMETERS** from the **GATEWAYS** options.

The **CREDIT SCORE PARAMETERS** screen displays. The **GATEWAY** defaults to MicroBilt. MicroBilt is the only Gateway available for performing credit checks.

2. Check the **BLUE ARROW** next to MicroBilt to **ENABLE** the Connection Detail fields.

3. Click the **ENABLE** Checkbox. If the **ENABLE** checkbox is not selected, Credit Checks can not be performed.

**NOTE:** When the **ENABLE** checkbox is selected, the **GET/UPDATE** button displays on the Account Credit/Settlement Detail screen accessed through OmniCare.



4. Use the Information supplied by MicroBilt to complete the **HOST NAME**, **MEMBER ID**, and **PASSWORD**.
5. Select one of three possible bureaus (TransUnioun, Equifax, or Experian) from the **BUREAU** selection list. *You must establish an account with the bureau you select.*



Action	Description
--------	-------------

The **PRODUCT** field defaults to **STANDARD CREDIT PROFILE** when a **BUREAU** is selected and should not be changed.

If your computers are behind a firewall, supply a **PROXY** address and **PORT** number.

6. Enter a **DEFAULT SCORE CARD ID**.

A **DEFAULT SCORE CARD ID**, such as Empirica, is obtained from the credit bureau. The **DEFAULT SCORE CARD ID** is used if multiple credit scorecards are returned. It is used for decision-making purposes. This is a required field and must be spelled correctly to avoid processing errors.

7. Enter a **HIGH** and **LOW** Review Range.

The values specified are used to decide which accounts are accepted and which are declined. Accounts that return a credit score value above but not inclusive of the **HIGH** value are automatically accepted. Accounts who return a credit score value below but not inclusive of the **LOW** value are automatically declined. Returned scorecard values that fall between the **HIGH** and **LOW** values require manual acceptance or rejection by a user who can supply the **REVIEW PASSWORD**.

8. Enter a **REVIEW PASSWORD**.

A Review Password is used to manually approve or decline an account whose credit score falls between the **HIGH** and **LOW** value range.

**NOTE:** The Review Password is database specific, not user specific.

9. Click **SAVE GATEWAY** Information or **CANCEL** to ignore changes.

10. Click the **GREEN CHECKMARK** to save the information or the **RED X** to ignore the changes.



## Maintain Credit/Debit Card and ACH Parameters

The **MAINTAIN CREDIT/DEBIT CARD AND ACH PARAMETERS** utility is used to setup information in order to process and/or validate **CREDIT CARDS** and process **ACH DEBIT** transactions. In October of 2005, **PAYPAL** announced a strategic alliance, which called for two companies **PAYPAL** and **VERISIGN** to collaborate on payment services and security initiatives for e-commerce.

Authorize.Net and VeriSign/PayPal are two payment Gateways that can be used to accept credit card or ACH debit transactions.

Refer to **SECTION 16 - TRANSACTION PROCESSING** for PayPal and Authorize.Net requirements.

### SETTING UP THE MAINTAIN CREDIT/DEBIT CARD AND ACH PARAMETERS

Action	Description
--------	-------------

1. Select **MAINTAIN CREDIT / DEBIT CARD AND ACH PARAMETERS** from the **GATEWAYS** option. The **MAINTAIN CREDIT / DEBIT CARD AND ACH PARAMETERS** screen displays. Two Gateways are available: VeriSign/PayPal and Authorize.Net

### SETTING UP VERISIGN/PAYPAL

2. Select the **BLUE ARROW** next to VeriSign/PayPal to **ENABLE** the Connection Detail fields.



Action	Description
--------	-------------

3. Check the **ENABLE** check box to enable the Gateway. If the **ENABLE** check box is not selected, you will not have the ability to process credit cards or ACH Debit transactions through VeriSign.

Once selected, enter a URL Address to VeriSign/PayPal, your Login and Password to access the VeriSign/PayPal gateway. This information is given to you when you establish your account with VeriSign/PayPal.

Once the **ENABLE** check box is selected, you must select the desired settlement method (Credit Card or ACH Debit, PayPal or Authorize.net) located in **MARKET PROFILES | MARKET SETTLEMENTS**. After the selection is made:

- The **CREDIT/CHECK CARD QUICK PAY** button appears on the Customer Account Information screen Individual credit cards or ACH debit transactions can be performed. Refer to Section 12 – Customer Care to process individual credit cards or ACH Debit transactions.
- The **TRANSACTION PROCESSING** module can be used to process multiple accounts using the process selected above: ACH Debit Transactions or **CREDIT CARD PROCESSING**.



### SETTING UP THE AUTHORIZE.NET GATEWAY

Select the **BLUE ARROW** next to **AUTHORIZE.NET** to setup the Authorize.Net Gateway. Once selected, you need to enter a URL Address to Authorize.Net, your Login and Password to access the Authorize.Net gateway. This information is given to you when you establish your account with Authorize.Net.



Five optional settings are included in this Gateway.

1. Use Address Validation – Select Use Address Validation checkbox if you purchased this option from Authorize.Net and wish to have your customer's address validated prior to acceptance.
2. Send Email Receipt – Select Send Email Receipt checkbox if you want your customer to receive an email receipt after a payment has been made on their behalf.
3. Force Test – Select Force Test checkbox when you are testing payments to Authorize.Net.
4. Email Header and 5. Footer Text – These two options can be used to add information to email receipts sent to your customer. A sample email from Authorize.Net is below based on their development site:

**NOTES ON EMAIL FROM AUTHORIZE.NET**

Some fields in the email receipt, such as From, Subject, and Merchant can be customized by you using your Transaction Profile option from your Authorize.Net account. If you have any questions about the email receipt, please contact Authorize.Net.



## General Profiles

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### SAMPLE EMAIL SENT TO CUSTOMER

From: DO NOT CHANGE DO NOT CHANGE [<mailto:lokesh@gmail.com>]  
Sent: Wednesday, April 08, 2009 10:15 AM  
To: May Bay  
Subject: Shared Developer Test Account Customer Receipt/Purchase Confirmation  
\*\*\*\*\* TEST MODE (Certification) \*\*\*\*\*  
**EMAIL HEADER** (Note: Information entered on the Authoirze.Net gateway screen.)  
===== GENERAL INFORMATION =====

Merchant : Shared Developer Test Account Date/Time : 08-Apr-2009  
08:14:41 AM Transaction ID : 0

===== ORDER INFORMATION =====

Invoice Number :  
Description : SAMP1  
Total : US \$7151.22  
Payment Method : MasterCard

===== BILLING INFORMATION =====

Customer ID : 10000283375  
First Name :  
Last Name :  
Company :  
Address : 100 MAIN ST  
City :  
State/Province :  
Zip/Postal Code : 064922230  
Country :  
Phone :  
Fax :  
Email : ss@profitecinc.com

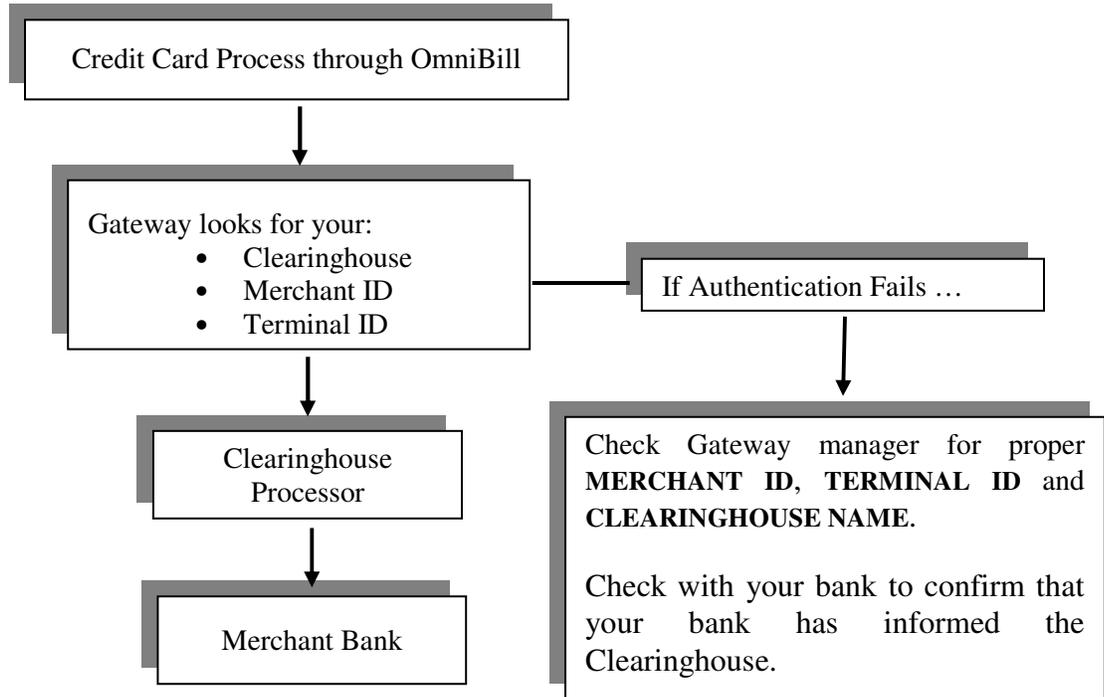
===== SHIPPING INFORMATION =====

First Name :  
Last Name :  
Company :  
Address :  
City :  
State/Province :  
Zip/Postal Code :  
Country :

**EMAIL FOOTER** (Note: Information entered on the Authoirze.Net gateway screen.)

**OVERVIEW – CREDIT CARD PAYMENT PROCESS**

When a customer makes a payment using a credit card, the VeriSign PayFlow Pro process is as follows:

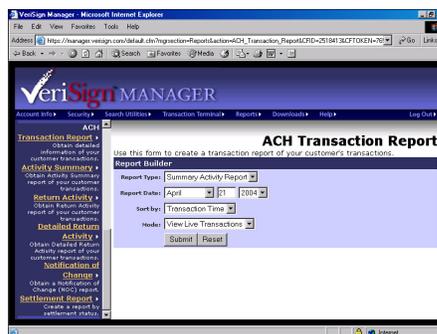


**ACH DEBIT INFORMATION**

Customers can settle their invoices using **ACH** (Automated Clearing House) **DEBIT** transactions.

*The ACH network is a nationwide, electronic payment and collection system. It is a method of transferring funds between banks and the Federal Reserve System. An ACH transaction electronically transfers funds between you and your customer by directly debiting (or crediting) a customer's bank account.*

**ACH DEBIT TRANSACTIONS** are **NOT** real-time transactions like credit card payments. It takes approximately 4 days for an ACH Debit transaction to be processed. OmniBill does not provide a status on ACH Debit transactions. The **VERISIGN/PAYPAL MANAGER** must be used to report on the success or failure of ACH Debit transactions.





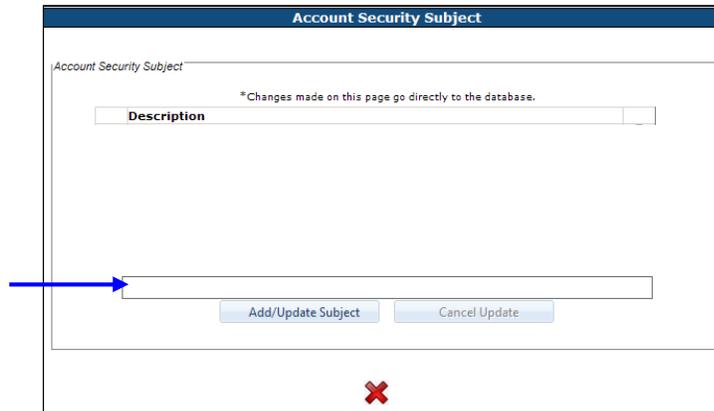
## Account Security Subjects

The ACCOUNT SECURITY SUBJECT utility is used to create topic questions for security purposes to further identify a contact on a customer account. Two fields appear in the AUTHORIZED CONTACTS area of the ADDRESSES tab in the customer account screen: SECURITY SUBJECT and SECURITY RESPONSE.

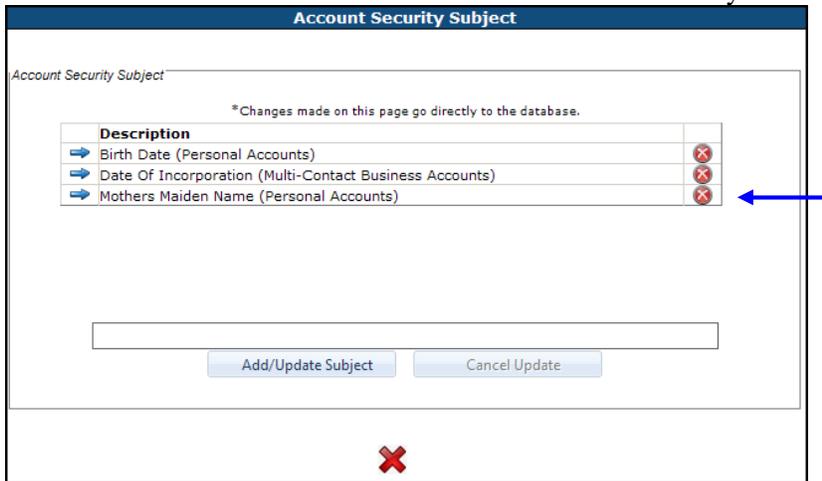
### CREATING SECURITY SUBJECTS

Action	Description
--------	-------------

1. Select ACCOUNT SECURITY SUBJECTS. The ACCOUNT SECURITY SUBJECT screen displays

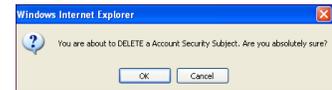


2. Enter a SECURITY SUBJECT in the field below the grid.
  3. Click ADD/UPDATE SUBJECT to commit the subject to the grid.
- NOTE:** Items are automatically saved once they are added to the grid.
4. Repeat these steps to add additional security subjects
  5. Click RED X at the bottom of the screen to exit the utility.



To DELETE an item:

1. Click the RED X corresponding to the item you wish to remove



2. Click OK to delete, CANCEL to ignore the request.

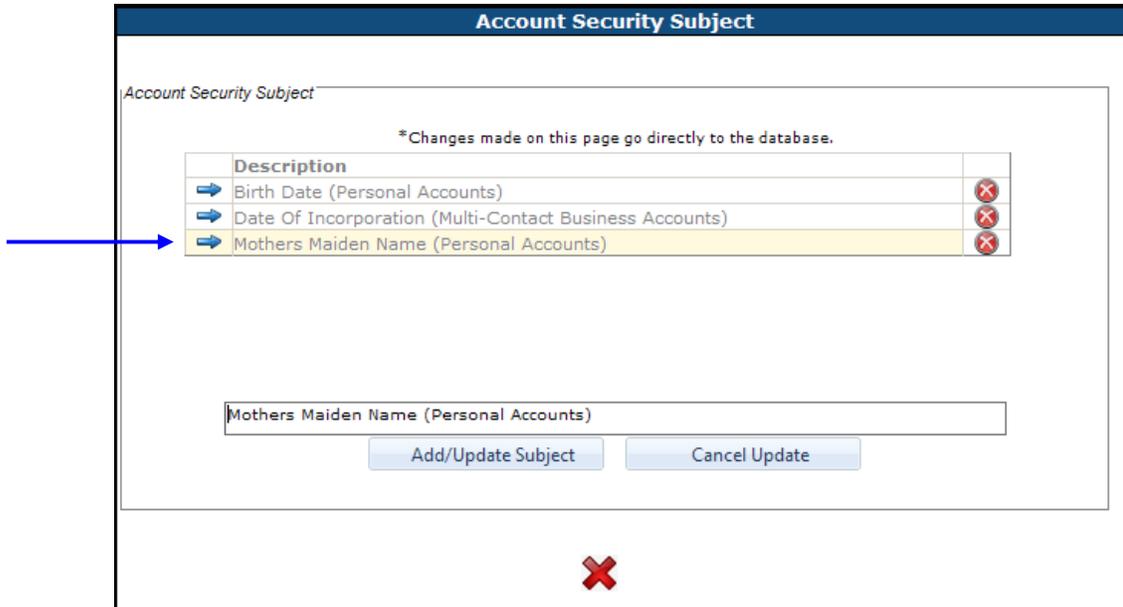


If the item you are trying to delete is added to a customer account, the code cannot be deleted and the following message displays:



**UPDATE EXISTING ACCOUNT SECURITY CODES:**

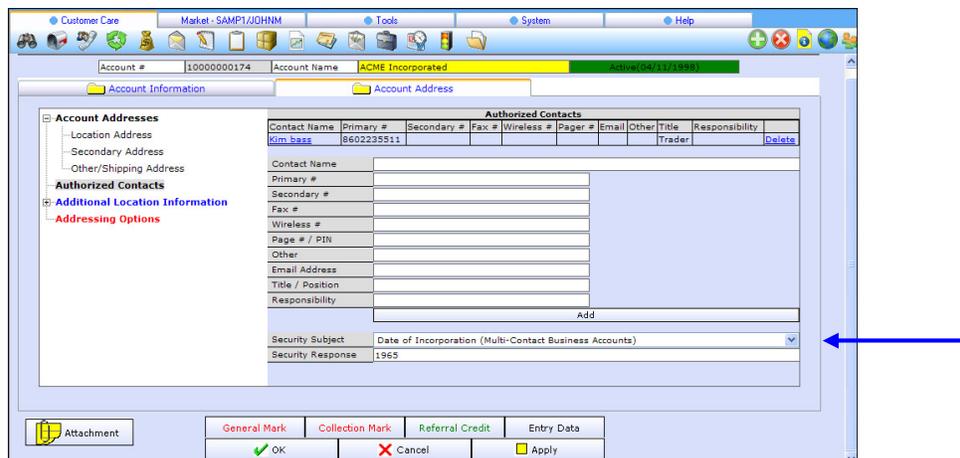
- 1. Click the **BLUE ARROW** to highlight the code you wish to edit.



- 2. Make changes and click **ADD/UPDATE SUBJECT**.

**CUSTOMER CARE**

The items added display in the **AUTHORIZED CONTACTS** area of the **ACCOUNT ADDRESS** tab by clicking the **SECURITY SUBJECT** drop down list.





## Action Ticket References

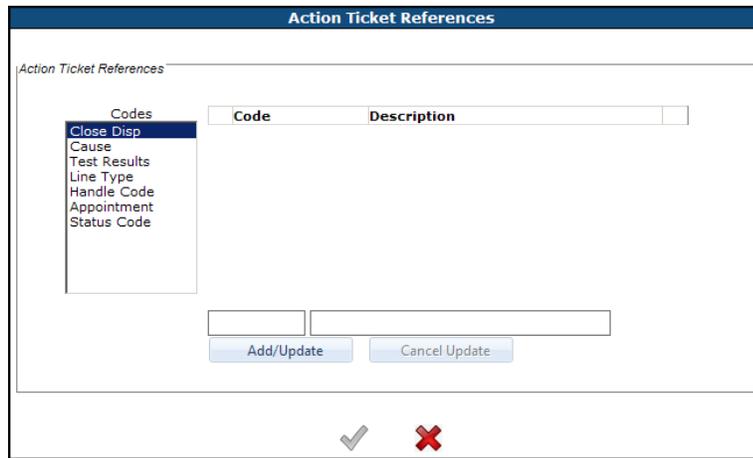
**ACTION TICKET REFERENCE CODES** help explain and define customer issues when using creating Action Tickets.

### CREATING ACTION TICKET REFERENCES

Action	Description
--------	-------------

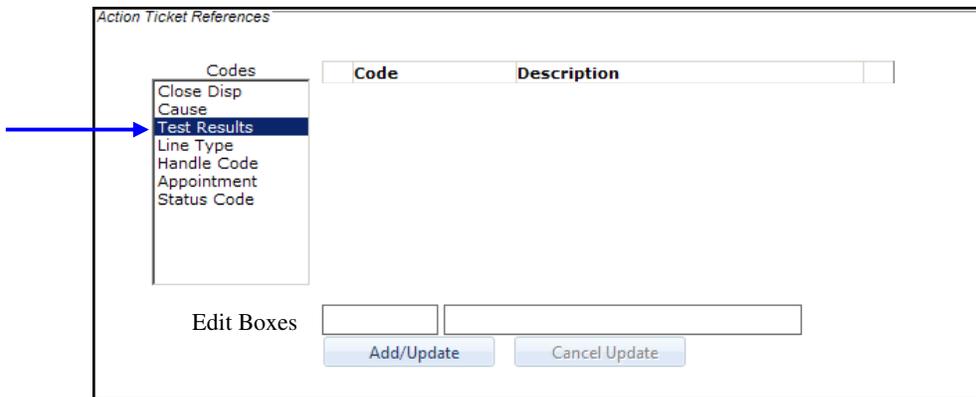
1. Select **ACTION TICKET REFERENCES**. The **ACTION TICKET REFERENCES** screen displays. The Code/Description grid is blank in a newly created database.

**SEVEN CATEGORIES OF ACTION TICKET REFERENCE CODES**



Seven categories of **ACTION TICKET CODES** can be defined and used when creating Action Tickets: **CLOSE DISPOSITION**, **CAUSE**, **TEST RESULTS**, **LINE TYPE**, **HANDLE CODE**, **APPOINTMENT**, and **STATUS**. Once created, the **ACTION TICKET REFERENCE CODES** can be selected when creating Action Tickets.

2. Click the **CODE** to define.

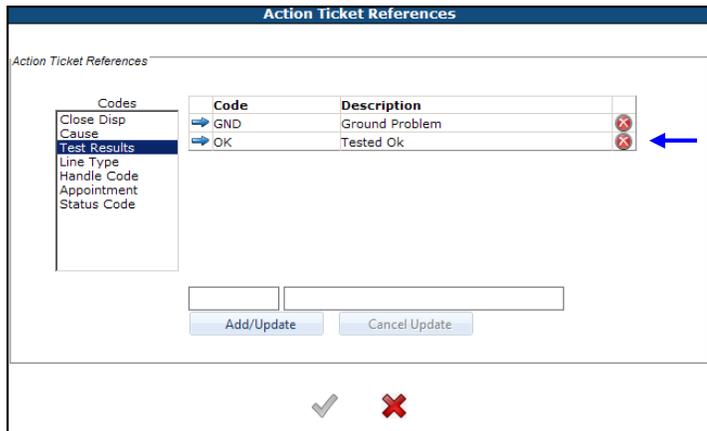




Action	Description
--------	-------------

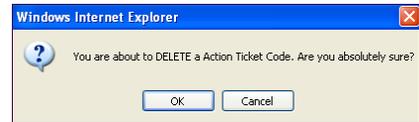
3. Enter a **CODE** and **DESCRIPTION** in the Edit Boxes.  
The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.  
The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.
4. Click **ADD/UPDATE** to commit to code and description to the grid.  
The Code and Description appear in the grid.

Repeat steps 3 and 4 to add multiple codes to the category selected. You cannot have duplicate codes within the same Code Category.



To delete an item:

1. Click the **RED X** corresponding to the item you wish to remove.
2. Click **OK** to continue or **CANCEL** to ignore the request.



The following message displays if the code is being referenced in your database:



Repeat steps 2 through 4 to define additional Codes.

5. Click the **CHECKMARK** to save and exit the screen. Click the **RED X** to exit the page without saving your changes.

These seven codes are available on the Action Ticket Detail screen.



# General Profiles

**Action Ticket Detail : 1000000174 - ACME Incorporated**

Ticket Number: 00000811 | Ticket Status: Open

**Open**

Originator: [Dropdown]  
CSR: SANDRA  
Date: 12/04/2009  
Time: 9:42 AM

**Current Assignment**

Group: TRBLCTITrouble Center  
Member: [Dropdown]  
Assigned By: SANDRA  
Assign Date: 12/04/2009  
Assign Time: 09:42 AM  
Note: [Text Area]  
Target Due Date: 12/05/2009  
Target Due Time: 12:00 PM  
Notify: jminervino@profitecinc.com

**Test**

CSR: [Dropdown]  
Date: [Text]  
Time: [Text]  
Results: [Text]

**Clear**

CSR: [Dropdown]  
Date: [Text]  
Time: 11:59 PM

**Close**

CSR: [Dropdown]  
Date: [Text]  
Time: 12:00 AM  
SAC: [Text]  
Disp: [Text]  
Cause: [Text]  
Callback: [Text]  
Status: [Text]

**Appointment**

Appointment: [Dropdown]  
Date: 12/09/2009  
Time: 9:44 AM

**Approval / Time & Material**

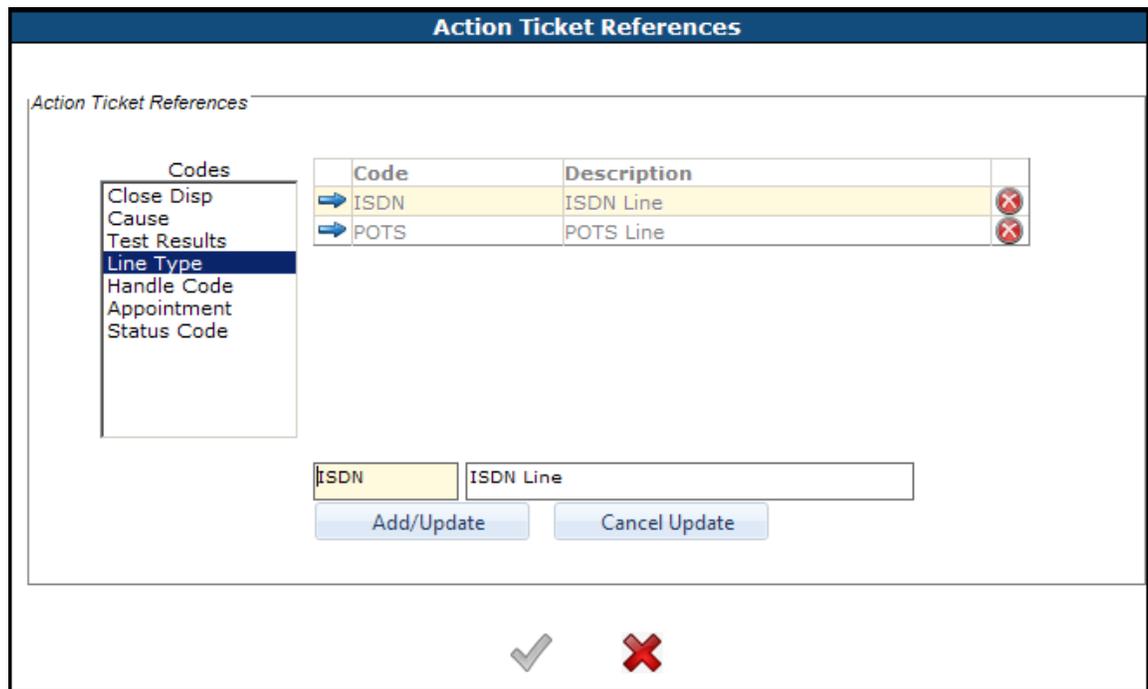
Approved: [Text]  
Approved By: [Text]  
Approved Date: [Text]

**Status**

Code	Description	Status	Date	Time
[Dropdown]	[Text]	[Text]	12/04/2009	09:42

**UPDATE EXISTING ACTION TICKET REFERENCES CODES:**

1. Click to highlight the **CODE** where the item is located.
2. Click the **BLUE ARROW** to highlight the **CODE** you wish to edit.



Code	Description
ISDN	ISDN Line
POTS	POTS Line

ISDN ISDN Line

Add/Update Cancel Update

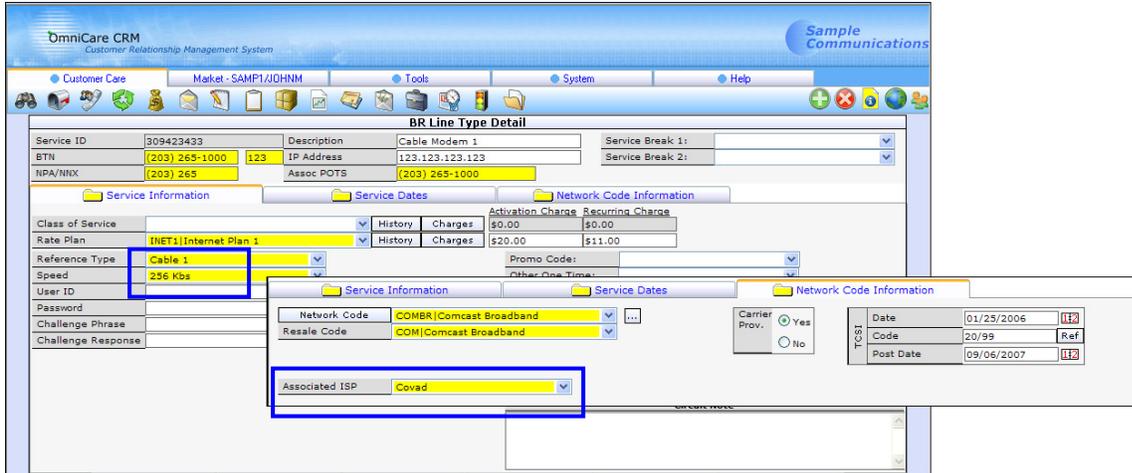
3. Make changes to the description and click **ADD/UPDATE**. The code cannot be changed.

**NOTE:** Click **CANCEL UPDATE** to ignore any changes.



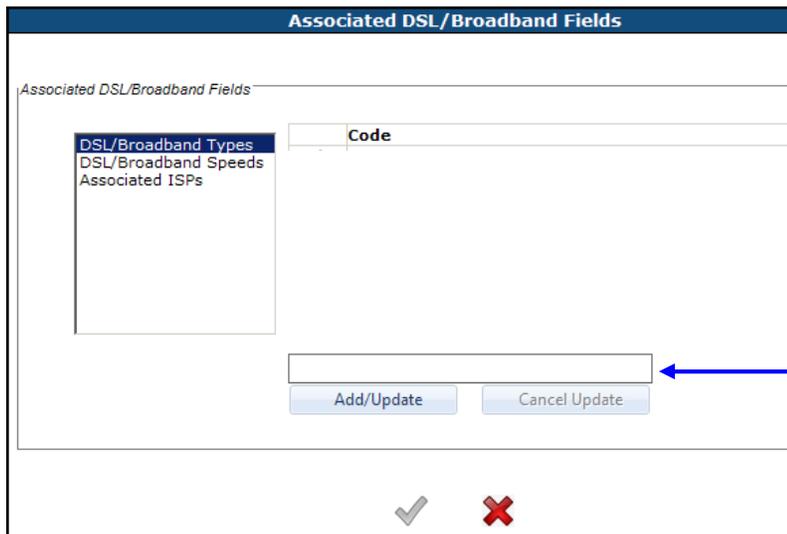
## Associated DSL/Broadband Fields

This utility handles the administration of **DSL (Digital Subscriber Line)** types sold, the line speed, and the associated ISPs for DSL service. Information entered and maintained here is available for selection on the **DS LINE TYPE DETAIL** screen.



Action	Description
--------	-------------

1. Select **MANAGE ASSOCIATED DSL/ BROADBAND FIELDS**. Three categories display: DSL/Broadband Types, DSL/Broadband Speeds, and Associated ISPs. The Code grid is blank if no DSL entries have been created.

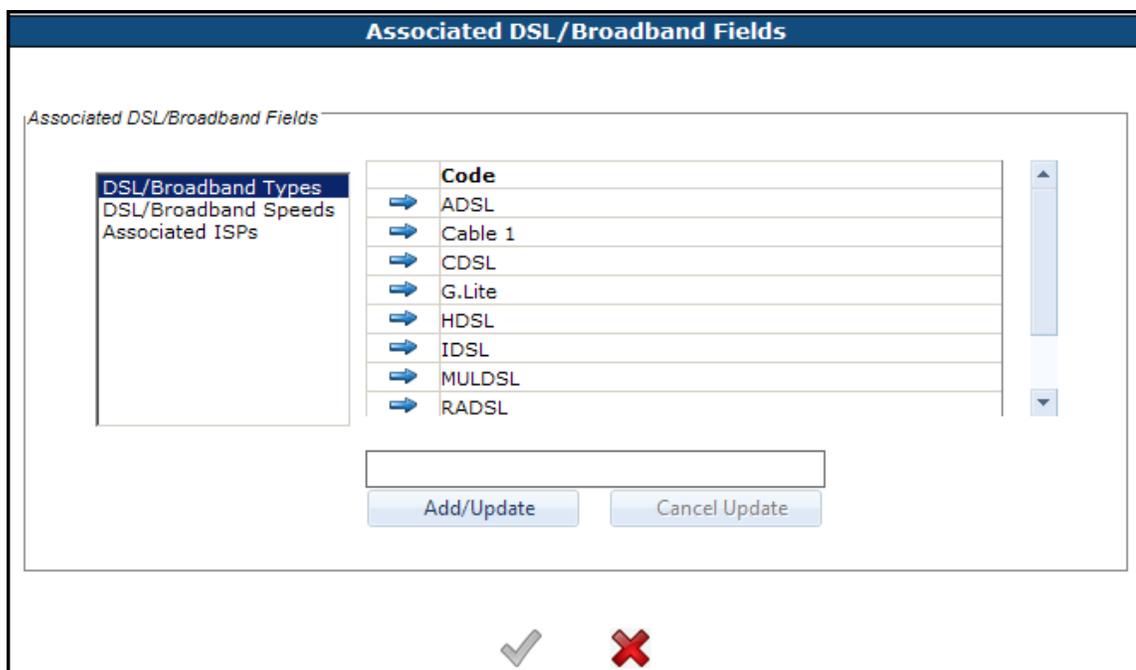


Edit Box

Action	Description
--------	-------------

2. Highlight one of the three categories and enter the appropriate information in the Edit Box.
3. Click **ADD/UPDATE** to commit the information to the grid.

Additional Codes can be created.



**Associated DSL/Broadband Fields**

Associated DSL/Broadband Fields

DSL/Broadband Types	Code
DSL/Broadband Speeds	ADSL
Associated ISPs	Cable 1
	CDSL
	G.Lite
	HDSL
	IDSL
	MULDSL
	RADSL

Add/Update Cancel Update

✓ ✗

4. Click **GREEN CHECKMARK** to save all entries made.

To create codes for DSL/Broadband Speeds or Associated ISPs tab, follow the above steps beginning with step 2.

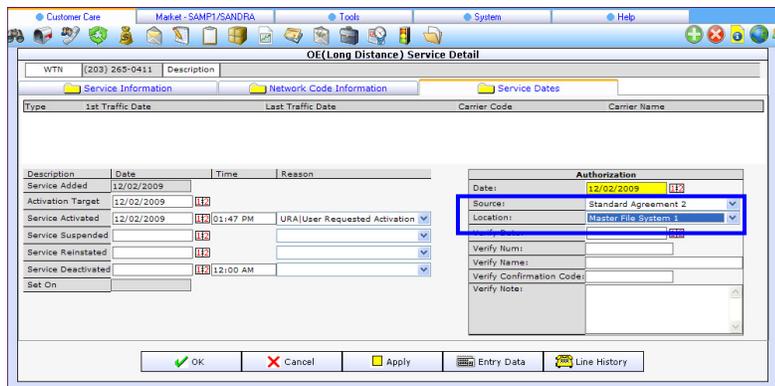


## Authorization Sources/Locations

The **AUTHORIZATION SOURCES/LOCATIONS** utility is used to create items found in the Source(s) and Location(s) drop down lists on Service Detail screen in the Customer Care Module. These items can be used when recording third-party verification information.

- The **SOURCE** is used to describe how a customer granted permission to assume service (phone, letter etc).
- The **LOCATION** is used to indicate where the customer's authorization form is currently stored.

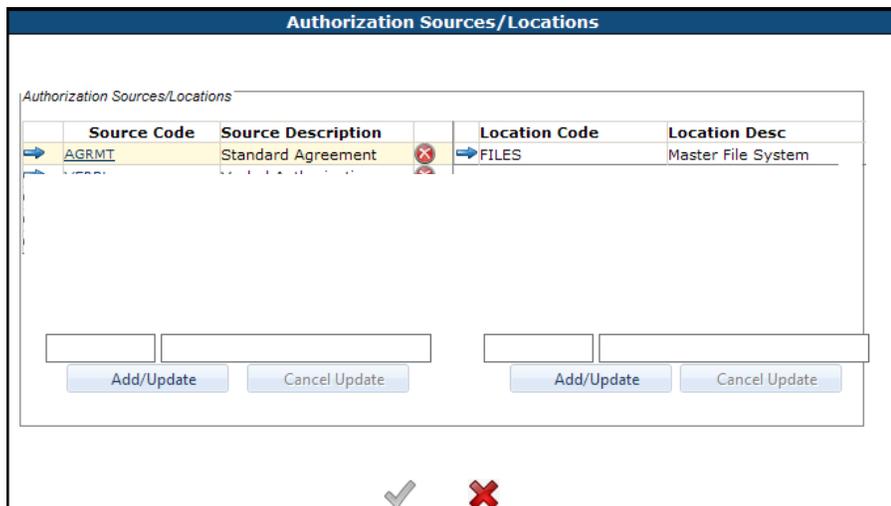
Customer Care location of items created in this utility.



Action	Description
--------	-------------

1. Select **AUTHORIZATION SOURCES/LOCATIONS**

The **AUTHORIZATION SOURCES/LOCATIONS MAINTENANCE UTILITY** screen displays. The screen is blank if codes have not been created.



Action	Description
--------	-------------

**COMPLETING AUTHORIZATION SOURCES**

1. Enter the **CODE** and **DESCRIPTION** in the Authorization Source Edit Boxes.

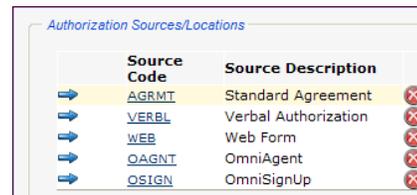
The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.

AGRMT	Standard Agreement
Add/Update	Cancel Update

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

2. Click **ADD/UPDATE** to commit the code and description to the grid.

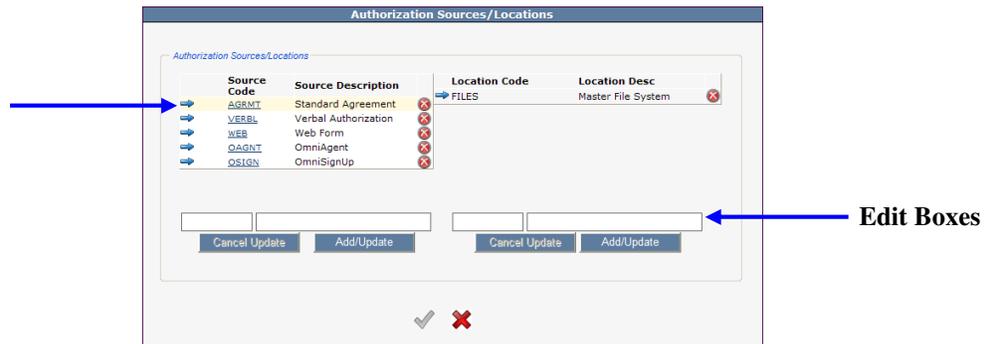
Additional **AUTHORIZATION SOURCE** codes can be created.



Source Code	Source Description
AGRMT	Standard Agreement
VERBL	Verbal Authorization
WEB	Web Form
OAGNT	OmniAgent
OSIGN	OmniSignUp

**CREATING AUTHORIZATION LOCATION(S)**

Each Source Code can have corresponding Location Codes.



1. Click the Blue Arrow to highlight the **AUTHORIZATION SOURCE** code you wish to add Locations to.

Files	MasterFile System
Add/Update	Cancel Update

2. Enter the **CODE** and **DESCRIPTION** in the Location Edit Boxes.

The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.

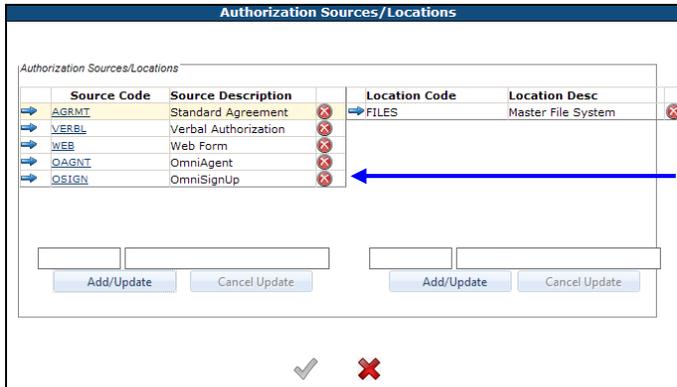
3. Click **ADD/UPDATE** to commit the code and description to the grid.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

Additional **LOCATION** codes can be created.



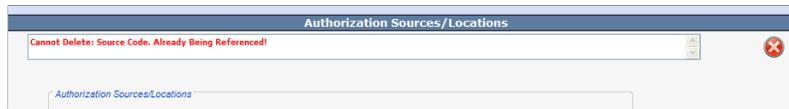
Action	Description
--------	-------------



Click to delete the **LOCATION CODE** from the grid.

Click to delete the **SOURCE CODE** from the grid. The **SOURCE** and all the associated **LOCATIONS** are deleted.

If the Code is being reference within OmniBill, the following message displays and you are unable to delete the code.



- Click the **CHECKMARK** to save your information. The **RED X** at the bottom of the screen is used to cancel all changes.

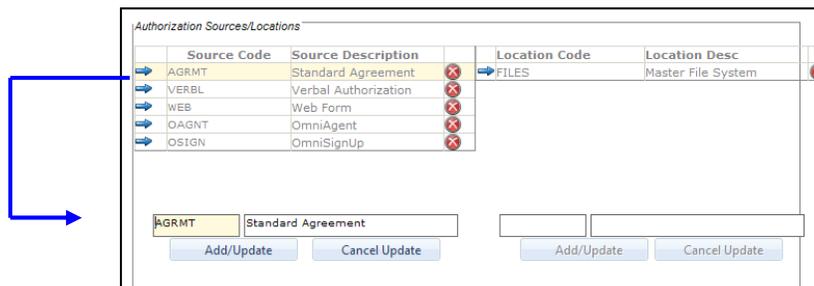
### UPDATING SOURCE LOCATION DESCRIPTIONS



Each **SOURCE CODE** is underlined, when clicked allows for editing the corresponding **SOURCE DESCRIPTION**.

- Click the **SOURCE CODE** to be edited. The description displays in the fields below the grid.

**NOTE:** The **CODE** in this section is underlined and is used to edit the description; the **BLUE ARROW** in this section is used to highlight the code and add a corresponding



- Make changes to the description and click **ADD/UPDATE**. Click **CANCEL UPDATE** to ignore any changes. The **CODE** cannot be changed.



### UPDATE LOCATION CODE DESCRIPTIONS

1. Click the **BLUE ARROW** next to the **LOCATION CODE** you wish to edit. The **DESCRIPTION** displays in the fields below the grid. The **BLUE ARROW** in this section is used to edit the description.

The screenshot shows a window titled "Authorization Sources/Locations". It contains a table with two columns: "Source Code" and "Source Description". Below the table are two forms for editing. A blue arrow points from the "FILES" location code in the table to the "FILES" form below.

Source Code	Source Description		Location Code	Location Desc	
AGRMT	Standard Agreement	⊗	FILES	Master File System	⊗
VERBL	Verbal Authorization	⊗			
WEB	Web Form	⊗			
OAGNT	OmniAgent	⊗			
OSIGN	OmniSignUp	⊗			

<input type="text"/>	<input type="text"/>	FILES	Master File System
----------------------	----------------------	-------	--------------------

Buttons: Add/Update, Cancel Update

2. Make changes to the description and click **ADD/UPDATE**. The code cannot be changed.
3. Click **CANCEL UPDATE** to ignore any changes.



## ***Conference Type Table***

When adding teleconferencing services to an account, Call Types Codes are defined that correspond to provider Call Types. The description for the Call Type Code prints on the customer invoice. Codes can be obtained from the Teleconferencing provider and should be reviewed with your Billing Analyst.

The **EDIT CONFERENCE TYPE TABLE** utility is used to define the types of Conference Calls and set default rate values for Teleconferencing Services.

### **RATING CONFERENCE CALLS**

Conference calls can be rated using one of four methods: Factor Source Percentage, CPM (Cost Per Minute) Recost, Flat Recost and Pass Through using the call detail records.

#### **1. FACTOR SOURCE PERCENTAGE**

The **FACTOR SOURCE PERCENTAGE** option is used to rate conference calls based on a percentage of the actual call record.

#### **2. CPM RECAST**

The **CPM RECAST** option is used to rate conference calls based on a specific dollar amount and the length of the call.

#### **3. FLAT RECAST**

The **FLAT RECAST** option is used to rate conference calls based on a flat dollar amount.

#### **4. N/A - PASS THROUGH**, which rates the conference call based on the rate value listed on the call record.



### DEFINING CONFERENCE TYPE CODES

Before creating rate values for conference calls, please check with your assigned Billing Analyst to confirm how production handles call detail records from your carrier.

Action	Description
--------	-------------

- |                                               |                                                              |
|-----------------------------------------------|--------------------------------------------------------------|
| 1. Select <b>EDIT CONFERENCE TYPE TABLE</b> . | The <b>CONFERENCE TYPE RATE MAINTENANCE</b> screen displays. |
|-----------------------------------------------|--------------------------------------------------------------|

Conference Type Rate Maintenance

*\*Changes made on this page go directly to the database.*

Code	Description	Sign	Default Rate Value	Default Rate Orientation
1	Meet Me	N/A	N/A	N/A
10	Hosting	N/A	N/A	N/A
2	Meet Me 800	N/A	N/A	N/A
3	Dial Out	N/A	N/A	N/A
4	Modem	N/A	N/A	N/A
5	Video	N/A	N/A	N/A
6	N/A	N/A	N/A	N/A
7	N/A	N/A	N/A	N/A

Code:  Description:  Sign:  +  - Rate:  Orient:

- |                                                                    |                                                                                                                           |
|--------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| 2. Enter a <b>CODE</b> and a <b>DESCRIPTION</b> in the Edit Boxes. | The <b>CODE</b> is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed. |
|--------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters and prints on the customer invoice.

- |                                                         |                                                                                                         |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| 4. Select a <b>SIGN</b> . Positive (+) or Negative (-). | The sign selected determines how the Rate Orientation selection is applied to the conference call rate. |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------|

The **DEFAULT RATE VALUE** and **DEFAULT RATE ORIENTATION** fields work in conjunction with each other. The **DEFAULT RATE ORIENTATION** field should be selected before entering the **DEFAULT RATE VALUE**.



Action	Description
--------	-------------

**DEFAULT RATE ORIENTATION** (optional)

The **RATE ORIENTATION** drop down list is used to define how the conference call is to be rated. Four types of orientations exist in the drop down list: **FACTOR SOURCE %**, **CPM** (Cost Per Minute) **RECAST**, **FLAT RECAST** and **N/A**.

**NOTE:** **N/A** is used to indicate rating performed strictly from the call records.

If conference calls are being rated by passing through the cost in call records, no selection is necessary.

5. Select a **RATE ORIENTATION** from the **DEFAULT RATE ORIENTATION** drop down list.

Code CFL1	Description Conf Leg 1	Sign <input checked="" type="radio"/> + <input type="radio"/> -	Rate .05	Orient CPM Recost
<input type="button" value="Add/Update"/>		<input type="button" value="Cancel Update"/>		

6. Enter a value in the **DEFAULT RATE VALUE** field.

- If **FACTOR SOURCE %** is selected, enter a value of 100 plus the amount of the increase. For example, to increase the cost on the existing call record by 2%, enter 102 as the Default Rate Value.
- If **CPM RECAST** is selected, enter a dollar value that represents the cost per minute for the conference call.
- If **FLAT RECAST** is selected, enter a dollar value that represents the cost of the conference call.
- **N/A** – Straight Pass through

7. Click **ADD/UPDATE**. The new entry is committed to the grid.

Conference Type Rate Maintenance				
* Changes made on this page go directly to the database.				
4	Modem	N/A	N/A	N/A
5	Video	N/A	N/A	N/A
6	N/A	N/A	N/A	N/A
7	N/A	N/A	N/A	N/A
8	N/A	N/A	N/A	N/A
9	N/A	N/A	N/A	N/A
CFL1	Conf Leg 1	+	0.0001	Flat Recost
CFL2	Conf Leg 2	+	10.0000	Flat Recost
CONF6	Fff	N/A	N/A	N/A

Code CFL1	Description Conf Leg 1	Sign <input checked="" type="radio"/> + <input type="radio"/> -	Rate .05	Orient CPM Recost
<input type="button" value="Add/Update"/>		<input type="button" value="Cancel Update"/>		

✘

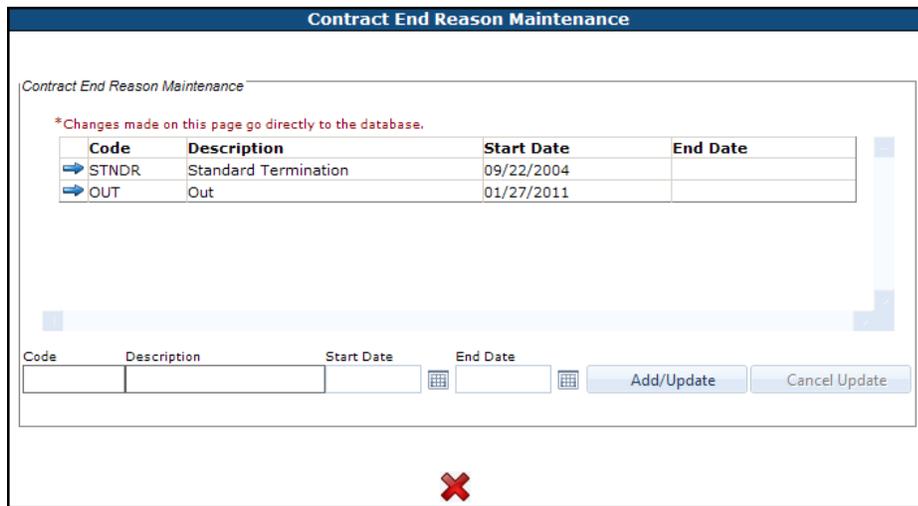
**NOTE:** Once a code has been created, it cannot be deleted. However, the Description, Rate Value, and /or Rate Orientation fields can be changed.

## Contract End Reasons

The **CONTRACT END REASON MAINTENANCE** utility is used to create **CONTRACT END REASON CODES** that are used to indicate why contracts have terminated. These codes are used in conjunction with the **CONTRACT DETAIL** screen in Special Features/Discounts.

Action	Description
--------	-------------

- Select **CONTRACT END REASONS**. The **CONTRACT END REASON MAINTENANCE** screen displays. The grid is empty if no reasons have been created.



The **CODE**, **DESCRIPTION**, and **START DATE** are required entries.

- Enter a **CODE**. The **CODE** can be a maximum of five characters. Once saved the code cannot be changed.
- Enter a **DESCRIPTION**. The **DESCRIPTION** is an explanation of the code. It can be a maximum of 30 characters.
- Enter a **START DATE**. The **START DATE** is the first date the code is available for assignment. Enter the Start Date or use the Calendar Icon to select the date.

The **END DATE** (optional) is the date the code is no longer available for assignment.

- Click **ADD/UPDATE** to add the information to the grid.



Action	Description
--------	-------------

Additional reason codes can be added.

6. Click the **RED X** to exit the screen.

**NOTE:** Once a code is added to the grid information is automatically saved.

**EDITING EXISTING CONTRACT INFORMATION**

- Click the Blue Arrow corresponding to the code you wish to edit.

**Contract End Reason Maintenance**

Contract End Reason Maintenance

\*Changes made on this page go directly to the database.

Code	Description	Start Date	End Date
STNDR	Standard Termination	09/22/2004	
OUT	Out	01/27/2011	
IN	In Like Flint	03/08/2011	

Code	Description	Start Date	End Date
IN	OmniAgent	3/8/2011	

Add/Update Cancel Update

**X**

- Make the changes and click **ADD/UPDATE** to commit the information to the grid. Click **CANCEL UPDATE** to ignore the update.

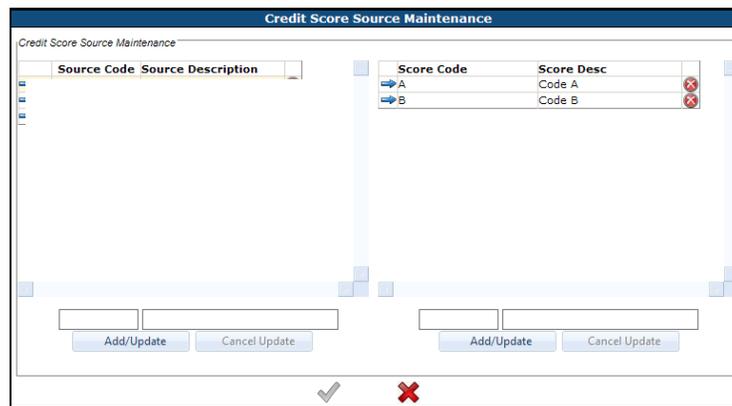
## Credit Score Sources

The **CREDIT SCORE SOURCE MAINTENANCE UTILITY** is used to create items used to manually enter Score Source and Credit Score information on a customer account.

Action	Description
--------	-------------

Select **CREDIT SCORE SOURCES**.

The **CREDIT SCORE SOURCE MAINTENANCE UTILITY** screen displays. The grids are blank if codes have not been created.



### COMPLETING A CREDIT SCORE SOURCE

1. Enter the **CODE** and **DESCRIPTION** in the Credit Score Source Edit Boxes.

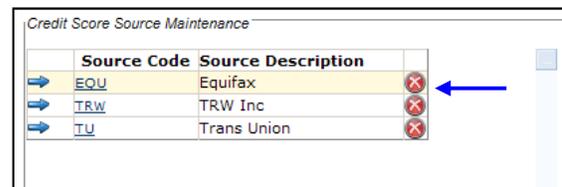
EQU	Equifax
<input type="button" value="Add/Update"/> <input type="button" value="Cancel Update"/>	

The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

2. Click **ADD/UPDATE** to commit the code and description to the grid.

Additional **CREDIT SCORE SOURCE** codes can be created.



Click the **RED X** to delete a code.



Action	Description
--------	-------------

**CREDIT SCORES** are associated with a **CREDIT SCORE SOURCE**.

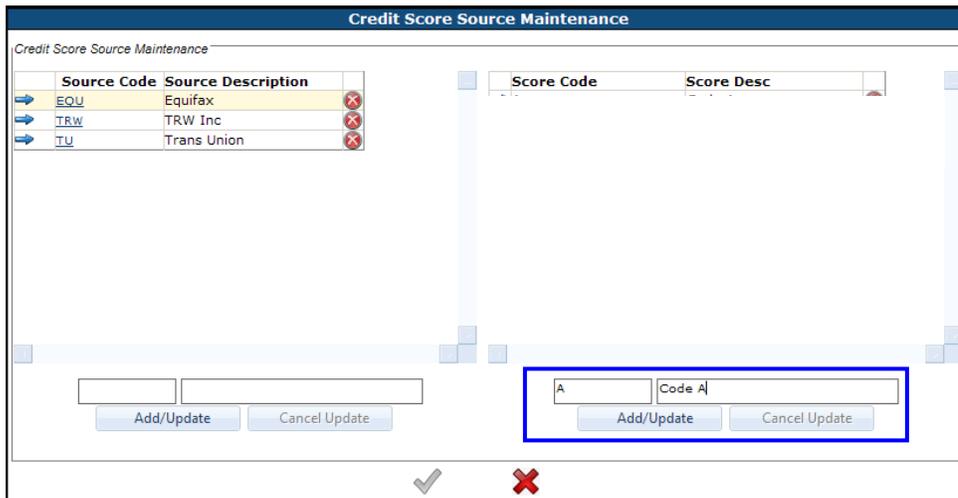
**CREATING CREDIT SCORE SOURCE CODES**

1. Click the **BLUE ARROW** to Highlight the **CREDIT SCORE SOURCE**.

2. Enter the **CODE** and **DESCRIPTION** in the Credit Scores (s) Edit Boxes.

The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.



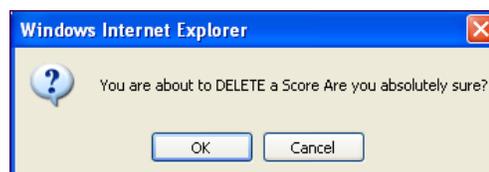
3. Click **ADD/UPDATE** to commit the code and description to the grid.

Additional **CREDIT SCORE** codes can be created.



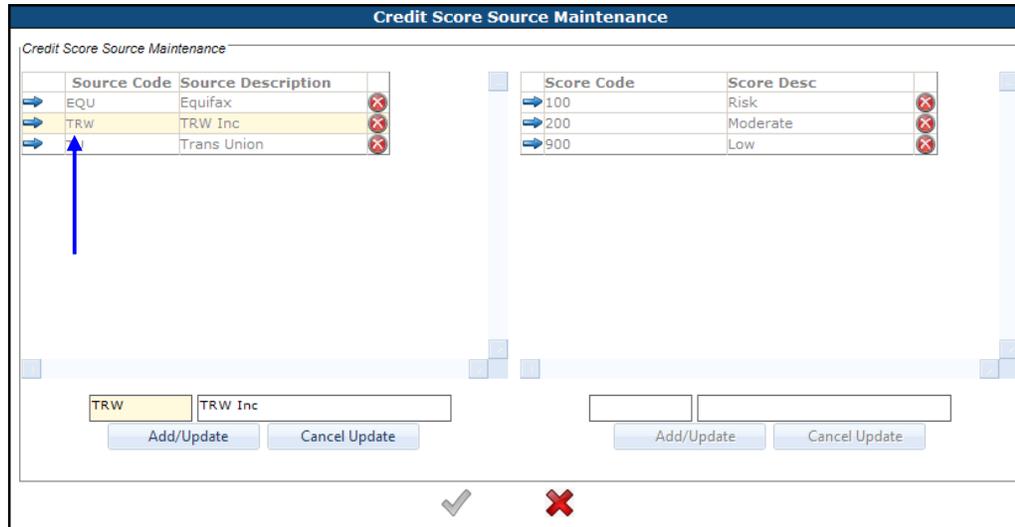
4. Click **GREEN CHECK MARK** to save your information.

To **DELETE** a **CREDIT SCORE** or **SOURCE CODE**, press the **RED X** corresponding to the code you wish to delete. The following message displays. Press **OK** to continue or **CANCEL** to ignore the request.



**UPDATE EXISTING SOURCE CODE DESCRIPTIONS**

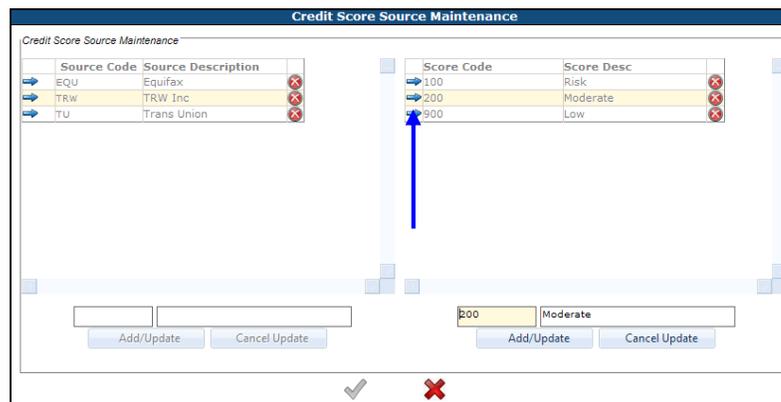
- Click the **CODE** to be edited. **NOTE:** The **CODE** in this section is underlined and is used to edit the description; the **BLUE ARROW** in this section is used to highlight the code and add a corresponding **SCORE CODES**. The description displays in the fields below the grid.



- Make changes and click **ADD/UPDATE**
- Click **CANCEL UPDATE** to ignore any changes.

**UPDATE SCORE CODE DESCRIPTIONS**

- Click the **BLUE ARROW** next to the **SCORE CODE** you wish to edit. The **DESCRIPTION** displays in the fields below the grid. The **BLUE ARROW** in this section is used to edit the description.



- Make changes and click **ADD/UPDATE**
- Click **CANCEL UPDATE** to ignore any changes.



### CUSTOMER CARE

The **SCORE SOURCE** and **CREDIT SCORE** are manually selected on the **ACCOUNT CREDIT/SETTLEMENT DATA** screen in the customer Care module using the drop down lists.

If using MicroBilt to run a credit report, the **SCORE SOURCE** and **CREDIT SCORE** fields fill in automatically after the **CREDIT REPORT GET/UPDATE BUTTON** is selected. However, the values that fill in are values generated by the credit check process, and are not the values that display in the drop down list created by the Credit Score Source Maintenance utility.

Account Credit/Settlement Detail	
Invoice Settlement Method	
ID	Description
1	Check/Cash
3	ACH Debit
2	Credit Card
Credit Type <input type="text"/>	
Social Security # <input type="text"/>	Date of Birth <input type="text" value="09/07/1963"/> Format: mm/dd/yyyy
Driver's License <input type="text"/>	State <input type="text"/>
Corporate Tax ID <input type="text"/>	
SIC <input type="text"/>	Industry Note <input type="text"/>
Other ID <input type="text"/>	ID Description <input type="text"/>
Credit Limit <input type="text" value="\$1,000.00"/>	<input type="checkbox"/> Unlimited
Total Deposit <input type="text" value="\$0.00"/>	<input type="button" value="Deposit Detail"/>
Credit Detail	
Credit Class <input type="text" value="STD - Standard Credit"/>	<input type="button" value="Credit Research"/>
Score Source <input type="text" value="TRW - TRW Inc"/>	<input type="button" value="Credit Report - Get/Update"/>
Credit Score <input type="text" value="100 - Risk"/>	
Score Date <input type="text"/>	
Review User <input type="text"/>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

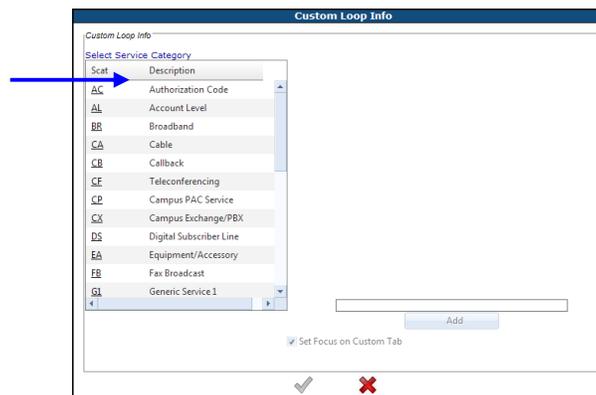
## Custom Loop Information

The **CUSTOM LOOP INFORMATION** utility is used to create custom fields that display on the Line/Loop Information screen. Custom fields can be defined for all subscribed service categories. Each field has a 40-character field limit.

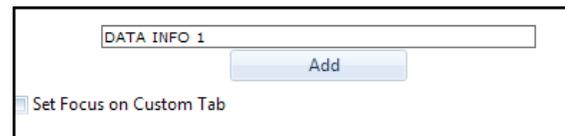
### CREATING CUSTOM LOOP INFORMATION

Action	Description
--------	-------------

1. Select **CUSTOM LOOP INFORMATION**. The **CUSTOMER LOOP INFO** screen displays.



2. Select a Service Category where the custom Line/Loop information will be created.
3. Enter the **CUSTOM LOOP FIELD NAME** in the Edit Box at the bottom of the screen.



4. Click **ADD/UPDATE** to commit the information to the grid. A maximum of 40 custom fields can be defined.

Continue adding field names as needed.

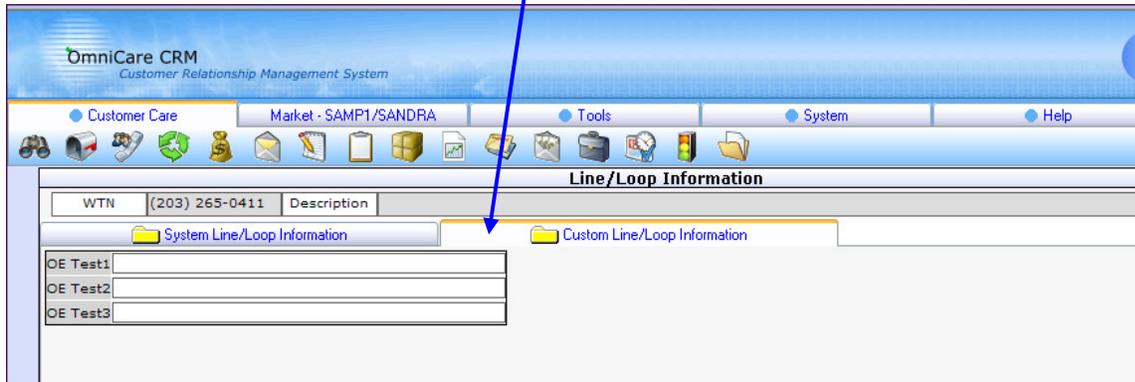
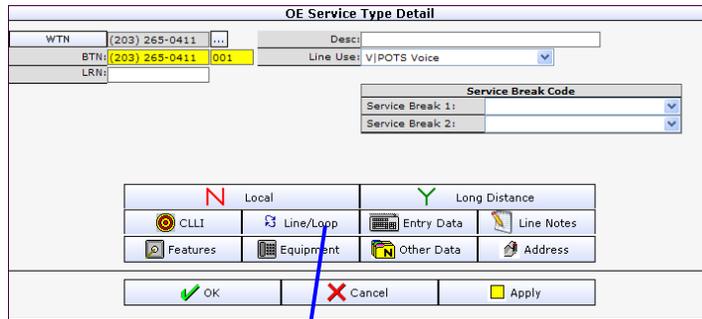
If **SET FOCUS ON CUSTOM TAB** is checked, selecting **LINE/LOOP INFORMATION** on the Service Detail screen displays the **CUSTOM LINE/LOOP INFORMATION** tab as the default tab.

5. Click **GREEN CHECKMARK** to save your information. Click the **RED X** to cancel.

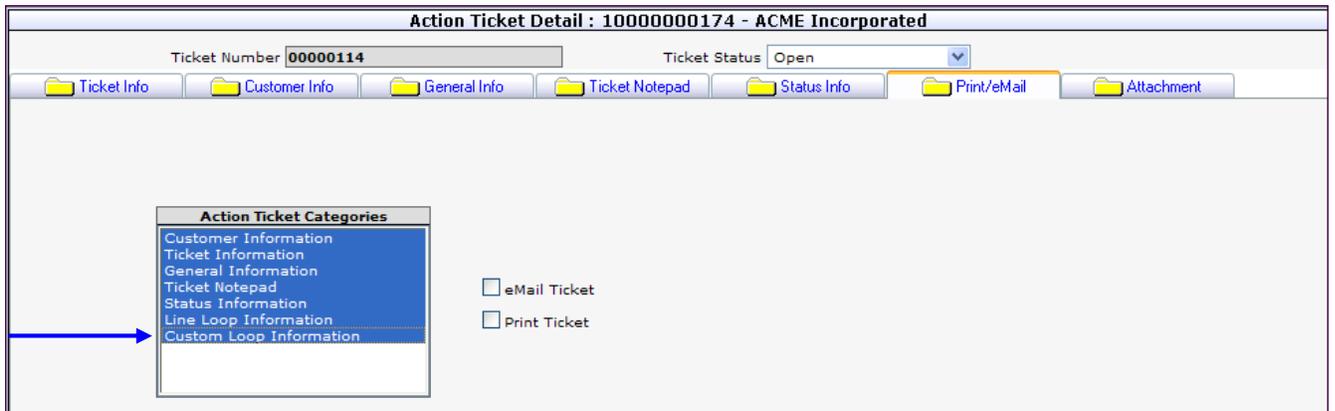


### OMNICARE

Custom Line Loop information is located on the Service Type Detail Screen. The **LINE/LOOP INFORMATION** screen is divided into two tabs: **SYSTEM LINE/LOOP INFORMATION** and **CUSTOM LINE/LOOP INFORMATION**.



Line Loop and Custom Loop Information can also be included when Printing or Emailing Action Tickets.





### Feature Subcodes

The **FEATURE SUBCODE** utility is used to create additional feature **Category Of Service (COS)** and feature **Term Agreement (TA)** codes. **COS** and **TA** codes are used when creating **Service Level Features/Recurring Charge Codes**. **REFER TO SECTION 9 – SYSTEM PROFILES – DISCOUNTS AND NON-USAGE CHARGES** for information on applying **COS** and **TA** codes to **Service Level Feature Codes**.

#### CREATING COS (CATEGORY OF SERVICE) CODES

**COS** Type codes act as filters when adding a **Feature Code** to a line.

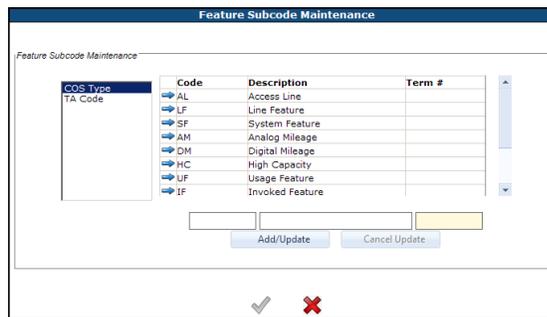
Action	Description
--------	-------------

1. Select **FEATURE SUBCODES**.

The **FEATURE SUBCODE MAINTENANCE** screen displays **COS TYPE** codes by default.

Ten **COS TYPE** codes ship with the database.

**EDIT BOXES**



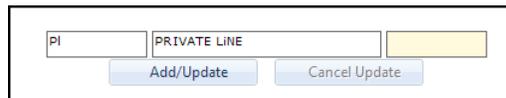
**NOTE:** The column labeled **TERM #** is available for **TA** Codes only.

2. Enter a **CODE** and **DESCRIPTION** in the Edit Boxes.

The **CODE** is an alphanumeric field that can be a maximum of six characters.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

**EDIT BOXES**



3. Click the **ADD/UPDATE** button to commit the code to the grid.

Additional **COS** codes can be created.

4. Click the **GREEN CHECKMARK** to save you entries. Click the **RED X** to cancel without saving.

#### EDITING COS DESCRIPTIONS

Click the **BLUE ARROW** next to the code to be changed. The **CODE** and **DESCRIPTION** display in the Edit Boxes. Only the **DESCRIPTION** can be edited for **SYSTEM DEFAULT CODES**. Click **Add/Update** to commit the change.

Both the **CODE** and **DESCRIPTION** can be edited for all **USER DEFINED CODES**.

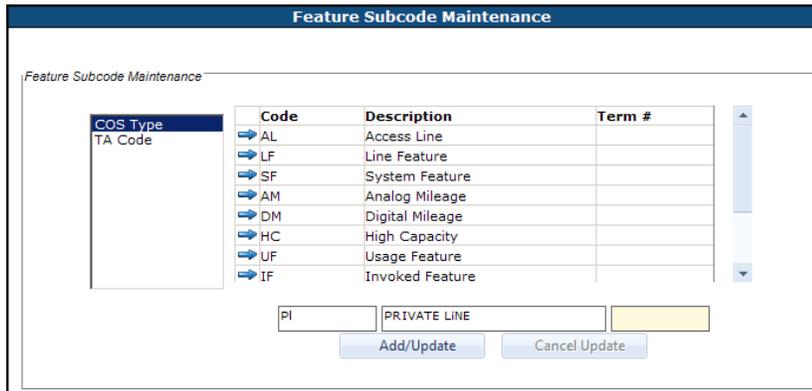


### CREATING TA (TERM AGREEMENT) CODES

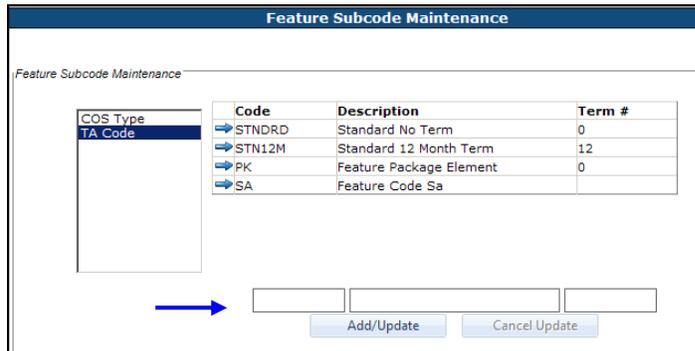
The Term Agreement code identifies the length of time a customer agrees to have a feature service on their line. It also acts as a filter when adding a Feature Code to a line.

Action	Description
--------	-------------

1. Select **FEATURE SUBCODE**. The **FEATURE SUBCODE MAINTENANCE** screen displays **COS TYPE** codes by default.



2. Click **TA CODE**. The **STNDRD** (Standard No Term) code displays. This is the default TA Code that ships with the database.



**EDIT BOXES**

3. Enter a **CODE**, **DESCRIPTION**, and the **TERM #** in the Edit Boxes. The **CODE** is an alphanumeric field that can be a maximum of six characters.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

The **TERM #** indicates how long the term agreement is and can be a maximum of three digits.



Action	Description
--------	-------------

PI	PRIVATE LINES	24
Add/Update		Cancel Update

4. Click the **ADD/UPDATE** button to commit the Code to the grid.

Additional **TA** codes can be created.

#### **EDITING TA CODES**

Click the **BLUE ARROW** next to the code to be changed. The **CODE**, **DESCRIPTION**, and **TERM AGREEMENT** display in the Edit Boxes. Only the **DESCRIPTION** and **TERM AGREEMENT** can be edited for the **SYSTEM DEFAULT CODE - STNDRD**. Click **ADD/UPDATE** to commit the changes to the grid.

**CODE**, **DESCRIPTION**, and **TERM AGREEMENT** can be edited for all **USER DEFINED CODES**.



### Invoice Language Table

The MAINTAIN INVOICE LANGUAGE TABLE utility is used to:

- Change text for **HEADERS, LABELS, or PHRASES** currently printing on invoices.
- Translate all **HEADERS, LABELS, or PHRASES** currently printing on invoices to a desired language.

The sample Remittance page below outlines examples of Headers, Labels, or Phrases that are changed using this utility.

<p>Sample Communications Corp 1 Barnes Park South Wallingford, CT 06492-1427</p> <p>JOHN MASTERSON 123 SOUTH MAIN STREET # 814 MEDIA, PA 23444-1234 1</p>	<table border="1"> <tr><th colspan="2">Invoice Information</th></tr> <tr><td>Invoice Date:</td><td>05/06/2004</td></tr> <tr><td>Account Number:</td><td>10000015917</td></tr> <tr><td>Invoice Number:</td><td>041210055</td></tr> <tr><td>Due Date:</td><td>05/16/2004</td></tr> <tr><td>Total Due:</td><td>\$125.42</td></tr> </table> <table border="1"> <tr><th colspan="2">Customer Service Information</th></tr> <tr><td>Questions About Your Statement</td><td>***1-800-555-1000***</td></tr> <tr><td>Problems With Any Service----</td><td>***1-800-555-2000***</td></tr> <tr><td>Our Fax Number-----</td><td>***1-800-555-9000***</td></tr> <tr><td>Our Web Site-----</td><td>***www.sample.com***</td></tr> <tr><td>Walk-In Payment Center-----</td><td>100 West Main Street Hartford, CT 06109</td></tr> </table>	Invoice Information		Invoice Date:	05/06/2004	Account Number:	10000015917	Invoice Number:	041210055	Due Date:	05/16/2004	Total Due:	\$125.42	Customer Service Information		Questions About Your Statement	***1-800-555-1000***	Problems With Any Service----	***1-800-555-2000***	Our Fax Number-----	***1-800-555-9000***	Our Web Site-----	***www.sample.com***	Walk-In Payment Center-----	100 West Main Street Hartford, CT 06109										
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Total Due:	\$125.42																																		
Customer Service Information																																			
Questions About Your Statement	***1-800-555-1000***																																		
Problems With Any Service----	***1-800-555-2000***																																		
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Walk-In Payment Center-----	100 West Main Street Hartford, CT 06109																																		
<table border="1"> <tr><th colspan="2">Summary of Charges</th></tr> <tr><td colspan="2"><b>Account History</b></td></tr> <tr><td>Previous Balance</td><td>\$765.28</td></tr> <tr><td>Payments Applied</td><td>\$765.28CR</td></tr> <tr><td>Credits and Adjustments</td><td>\$ .00</td></tr> <tr><td>Late Charges</td><td>\$ .00</td></tr> <tr><td><b>Past Due Balance</b></td><td><b>\$ .00</b></td></tr> <tr><td colspan="2"><b>Current Charges</b></td></tr> <tr><td>Services</td><td>\$20.50</td></tr> <tr><td>Credits and Adjustments</td><td>\$97.00</td></tr> <tr><td>Discounts</td><td>\$2.56CR</td></tr> <tr><td>Taxes and Surcharges</td><td>\$10.48</td></tr> <tr><td><b>Total New Charges</b></td><td><b>\$125.42</b></td></tr> </table>	Summary of Charges		<b>Account History</b>		Previous Balance	\$765.28	Payments Applied	\$765.28CR	Credits and Adjustments	\$ .00	Late Charges	\$ .00	<b>Past Due Balance</b>	<b>\$ .00</b>	<b>Current Charges</b>		Services	\$20.50	Credits and Adjustments	\$97.00	Discounts	\$2.56CR	Taxes and Surcharges	\$10.48	<b>Total New Charges</b>	<b>\$125.42</b>	<table border="1"> <tr><th colspan="2">Remarks Section</th></tr> <tr><td colspan="2">Thank you for using Sample Communications. Our goal is to provide you with the best communications products and services at competitive prices.</td></tr> <tr><td colspan="2">Watch this space each month for important NEWS and special offers.</td></tr> <tr><td colspan="2">Thank You For Choosing Sample Communications!</td></tr> </table>	Remarks Section		Thank you for using Sample Communications. Our goal is to provide you with the best communications products and services at competitive prices.		Watch this space each month for important NEWS and special offers.		Thank You For Choosing Sample Communications!	
Summary of Charges																																			
<b>Account History</b>																																			
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Payments Applied	\$765.28CR																																		
Credits and Adjustments	\$ .00																																		
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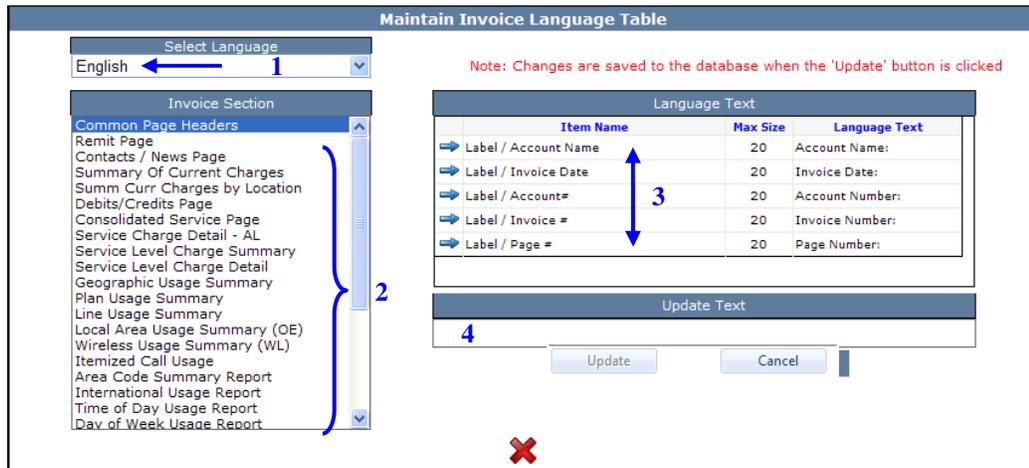
**CHANGING DEFAULT TEXT ON CUSTOMER INVOICES**

Action	Description
--------	-------------

- |                                                                                         |                                                                                                                     |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> <li>Select <b>INVOICE LANGUAGE TABLE</b>.</li> </ol> | <p>The <b>MAINTAIN INVOICE LANGUAGE TABLE</b> screen displays. <b>ENGLISH</b> is the default language selected.</p> |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|

The screen is divided into four area:

- Select Language.
- Invoice Section Grid.
- Text Grid.
- Update Text.

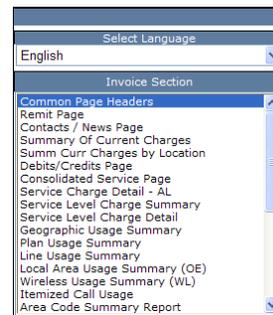


**SELECT LANGUAGE**

- Select one of seven languages from the drop down list. English is selected as the default language.

**INVOICE SECTION GRID**

The **INVOICE SECTION** grid lists all available sections (or pages) of a customer’s invoice.





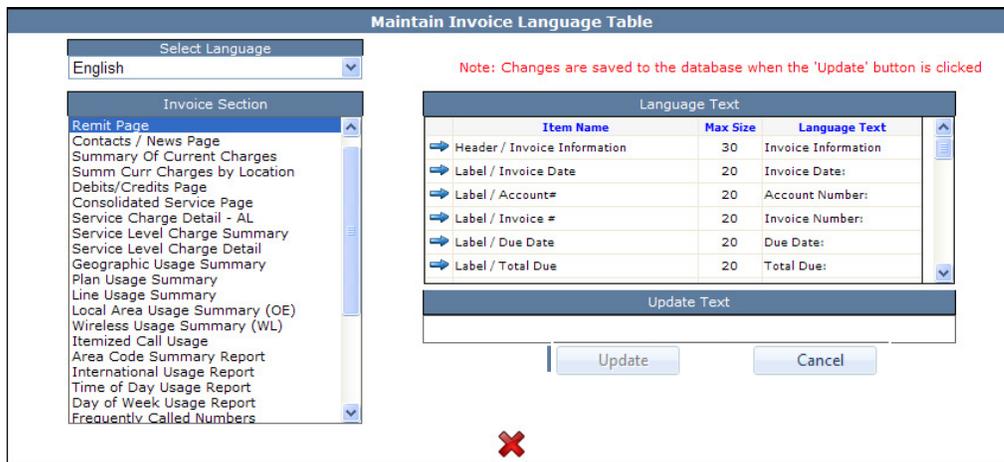
Action	Description
--------	-------------

**TEXT GRID**

Highlighting an **INVOICE SECTION** displays Labels, Headers, or Phrases that appear on a customer invoice associated with the section selected. Three columns display: Item Name, Max Size, and Language Text.

- **ITEM NAME** lists Headers, Labels, or Phrases, as they currently exist on the default invoice. *Each ITEM NAME can be found on a Default English Invoice.*
- **MAX SIZE** is the maximum number of characters for the **LANGUAGE TEXT** field.
- **LANGUAGE TEXT** is the Header, Label, or Phrase that prints on the customer invoice.

Highlighting **REMIT PAGE** displays a grid of all the Headers, Labels, and Phrases found on the Remittance page of the invoice. If English is selected, the **LANGUAGE TEXT** column is filled in.



3. Highlight an **ITEM** from the **INVOICE SELECTION GRID**.

**NOTE:** If you select a language other than English, the **LANGUAGE TEXT** column is blank.

**CHANGING OR ADDING LANGUAGE TEXT**

4. Click the **BLUE ARROW** next to the **ITEM NAME** that you wish to change. The **EXISTING LANGUAGE TEXT** displays in the **UPDATE TEXT** field. The field is blank if you selected a language other than English.



Action	Description
--------	-------------

Note: Changes are saved to the database when the 'Update' button is clicked

Information	Language Text
Header / Summary of Charges	25 Summary of Charges
Sub Header / Account History	25 Account History
Label / Previous Balance	26 Previous Balance
Label / Payments Applied	26 Payments Applied
Label / Credits and Debits	26 Credits and Debits
Label / Past Due Balance	22 Past Due Balance
Label / Credit Balance	22 Credit Balance

Update Text

Summary of Charges

Update Cancel hcel

5. Enter the text, as you want it to appear on the invoice.
6. Click **UPDATE**. The **LANGUAGE TEXT** field is updated.

**NOTE:**

*If you have selected a language other than English, you must update all fields in all Invoice Sections. If a LANGUAGE TEXT field is blank, that **HEADER, LABEL, or PHRASE** will be blank on the customer invoice.*

7. Changes are committed to the database when the update button is clicked.
8. Click the **RED X** exit the utility.

Contact your assigned Billing Analyst or the OmniBill Help Desk for additional details on printing invoices in languages other than English.

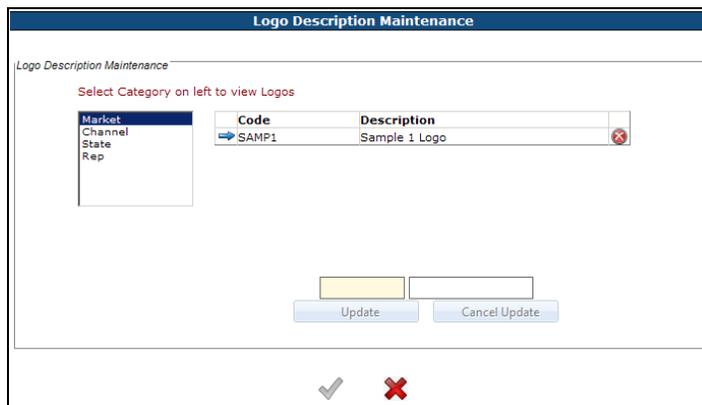


## Logo Descriptions

The **LOGO DESCRIPTIONS** utility can be used to associate various logos with Market, State, Sales and CSR's. This area must be coordinated with your assigned Billing Analyst.

Action	Description
--------	-------------

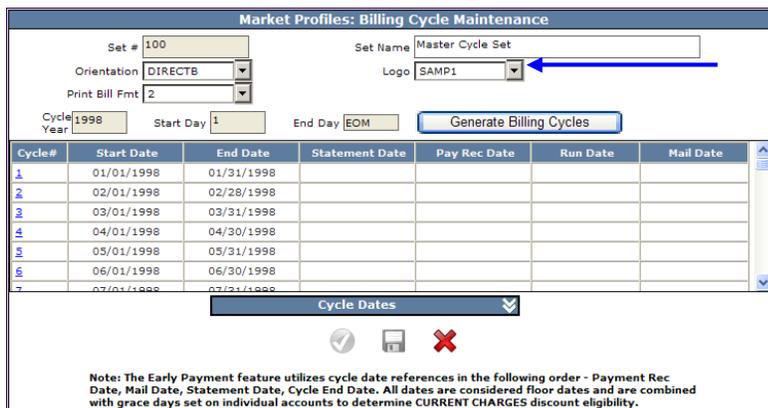
1. Select **LOGO DESCRIPTIONS**. **MARKET** is the default selection



Contact your Assigned Bill Analyst to have appropriate **MARKET** codes populate in the screen above.

2. Select **BLUE RECORD SELECTOR** next to the **CODE** to add a description. The Code represents your 5 letter Market ID.
3. Click **UPDATE** to commit the description to the grid

**NOTE:** The **MARKET** codes created display in **THE MARKET PROFILES – BILLING CYCLE** Maintenance screen as a selection.



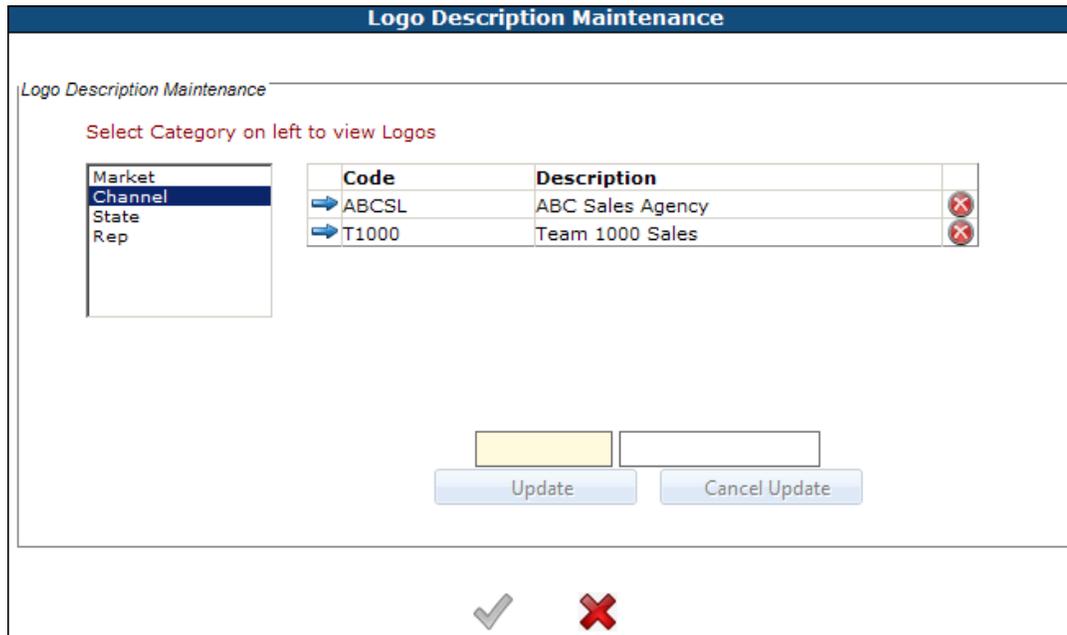


Action	Description
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Each Sales Agent can have specific information/messages display on customer invoices where they are the Master Channel on record. These items include: The Main Logo, Mailer Remit Address, Coupon Remit Address, Contact Points, and Invoice Messages.

1. Select **CHANNEL** from the Logo Description Maintenance screen. The below screen displays.

You must give your assigned Billing Analyst a **CHANNEL CODE** and **DESCRIPTION** prior to setting this information up in OmniBill. If you are using assigned Logos, the code will need to be verified with our Xerox Printing Department. Once the codes have been setup, the codes need to be associated with the agent. Refer to the Sales Profile document for information on assigning the codes to the agents.



2. Click the Record Selector for the **CHANNEL CODE** to add information for. The following screen displays.



Action	Description
--------	-------------

**Channel Logo Detail**

Channel Logo Detail

Logo Code : ABCSL      Description : ABC Sales Agency

Override Main Market Logo : No

Mailer Remit Address : 1 Barnes Park South | Wallingford | CT

Coupon Remit Address : 1 Barnes Park South | Wallingford | CT

Label	Contact Points Data 1	Data 2

Mailer Message   Remit Message   Invoice Message   Page Trailer Message

HELP ME TRAILER MESS

✓   ✗

Information is added as follows

**Channel Logo Detail**

Channel Logo Detail

Logo Code : ABCSL      Description : ABC Sales Agency

Override Main Market Logo : No

Mailer Remit Address : Sample Communications

Coupon Remit Address : Sample Communications

From Market Profiles – Market Associated Address

Label	Contact Points Data 1	Data 2
5 Lines x 30 characters	5 Lines x 20 characters each	5 Lines x 20 characters each

Mailer Message   Remit Message   Invoice Message   Page Trailer Message

Mailer Message	15 Lines x 70 Characters each
Remit Message	6 Lines x 60 Characters each
Invoice Message	5 Lines x 70 Characters each
Page Trailer Message	1 line x 60 Characters



Action	Description
3.	The <b>OVERRIDE MAIN MARKET LOGO</b> dropdown list is a Yes/No field. Select <b>YES</b> to override the Main Logo with the Sales Agent logo.
4.	The <b>MAILER REMIT ADDRESS</b> dropdown list includes all addresses created in the Market Profiles module – Market Associated Address.
5.	The <b>COUPON REMIT ADDRESS</b> dropdown list includes all addresses created in the Market Profiles module - Market Associated Address.
6.	The <b>CONTACT POINTS, MAILER MESSAGE, REMIT MESSAGE, INVOICE MESSAGE, AND PAGE TRAILER MESSAGE</b> can all be entered following the rules listed above.

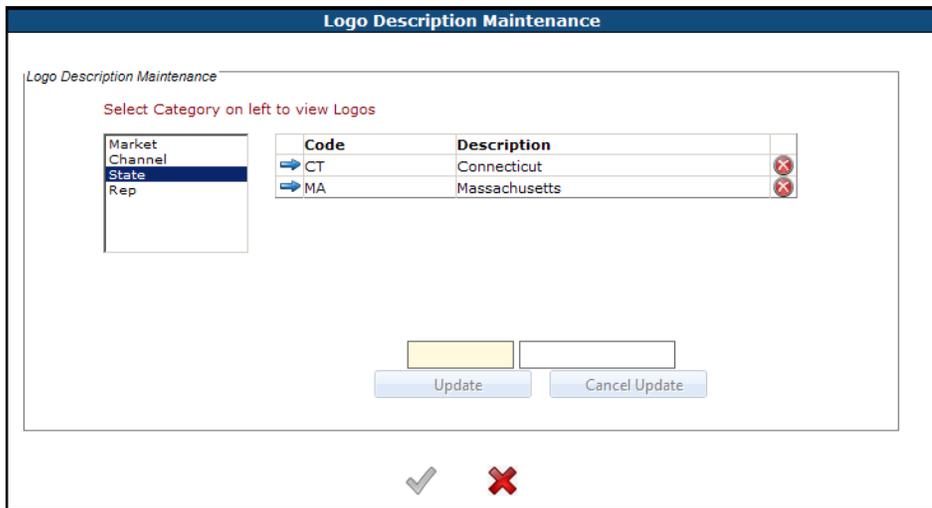


Action	Description
--------	-------------

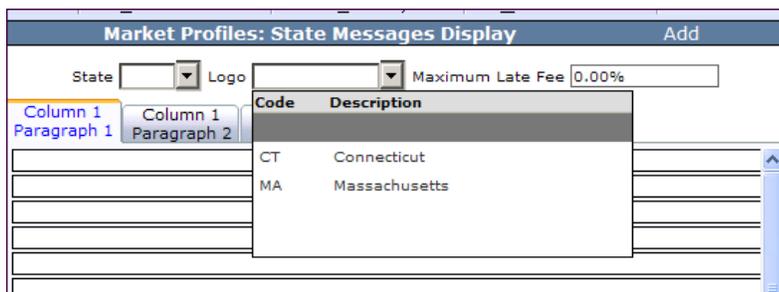
**CREATING A STATE SPECIFIC LOGO**

Contact your Assigned Bill Analyst to have appropriate **STATE** codes populate in the screen below.

1. Select **STATE** The following screen displays
2. Select the **BLUE RECORD SELECTOR** next to the **STATE CODE** to add a description.
3. Click **UPDATE** to commit the description to the Grid



**NOTE:** The **STATE** codes display in the **MARKET PROFILES – STATE MESSAGE** screen as a selection.



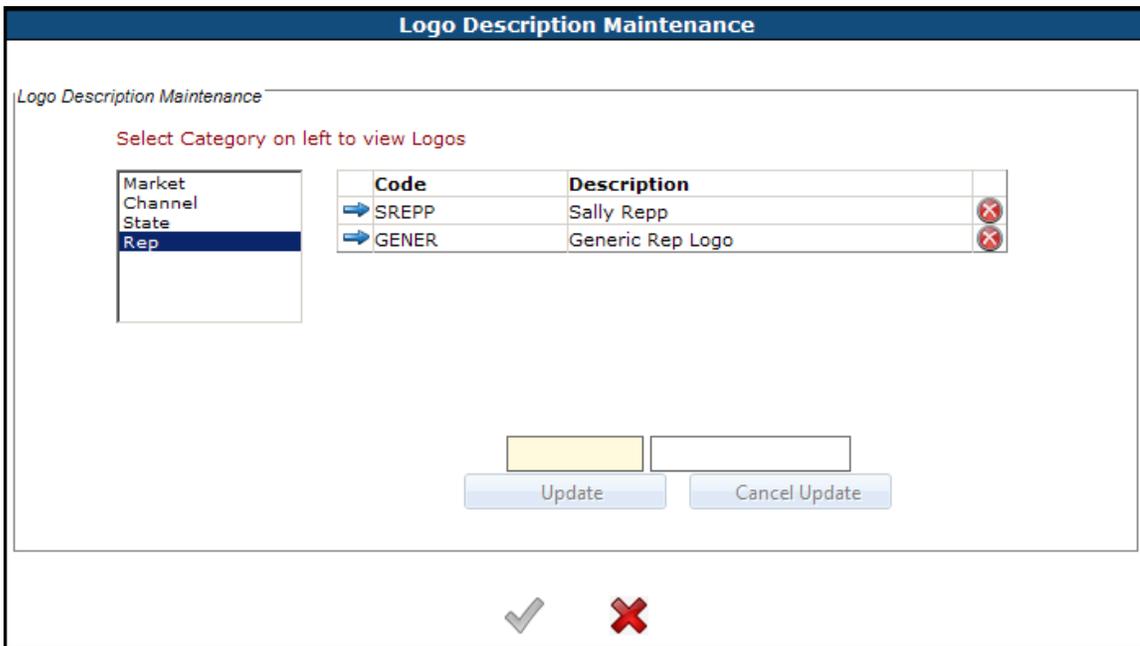


Action	Description
--------	-------------

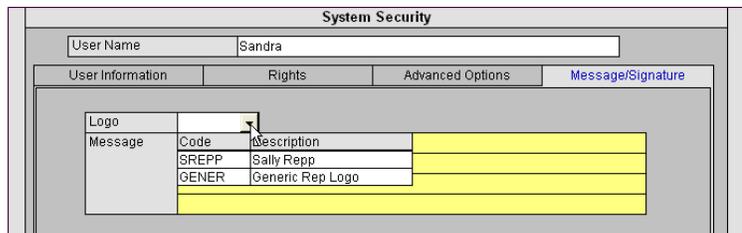
**CREATING A REP SPECIFIC LOGO**

Contact your Assigned Bill Analyst to have appropriate REP codes (CSRs) populate in the screen below.

1. Select **REP**. The following screen displays
2. Select the **BLUE RECORD SELECTOR** next to the **REP CODE** to add a description.
3. Click **UPDATE** to commit the description to the Grid



**NOTE:** The **REP** codes displays in the System Security Module –as a selection specific to a user’s security profile.





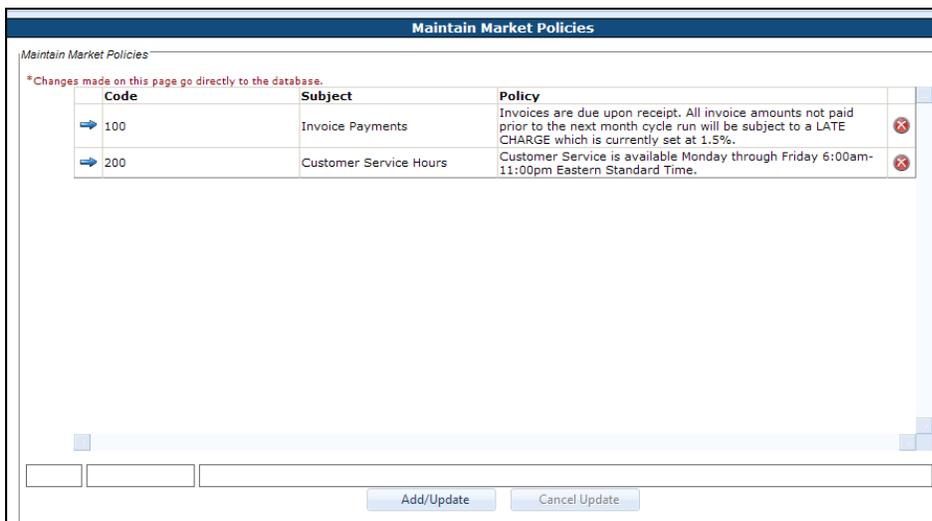
## Market Policies

The **MARKET POLICIES** utility is used to create, store, and maintain market policies within OmniCare that can be viewed by all users.

### CREATING MARKET POLICIES

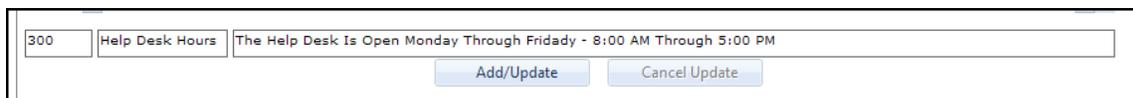
Action	Description
--------	-------------

1. Select **MARKET POLICIES**. The **POLICIES** screen displays. The grid is blank if no policies have been created.



To **DELETE** a Policy Code click the **RED X** next to the policy you wish to delete.

2. Enter a **POLICY CODE**, **POLICY SUBJECT**, and the **POLICY TEXT** in the Edit Boxes below the grid.  
 The **POLICY CODE** is alphanumeric and a maximum of four characters.  
 The **POLICY SUBJECT** is alphanumeric and a maximum of 30 characters.  
 There is no spell check functionality.



2. Click **ADD/UPDATE** to commit the policy to the grid.

Additions or changes are saved as they are committed to the grid.

The same steps can be repeated to add multiple policies to the database.



**UPDATE EXISTING MARKET POLICIES:**

1. Click the **BLUE ARROW** to highlight the code and description you wish to edit.
2. Make changes as needed.
3. Click **ADD/UPDATE** to update the code.

**VIEWING POLICES**

Select **VIEW POLICES** from OmniCare's **TOOLS** menu. The policies display.

OmniCare CRM  
Customer Relationship Management System

Sample Communications

Customer Care | Market - SAMP1/JOHNM | Tools | System | Help

[Logon as Different User](#) | [Access Login Console](#) | [Access Reminder/Due Status](#) | [Enter Collection Call Session](#) | [View Policies](#) | [Exit](#)

Policy Code	Policy Subject	Policy Code	Policy Subject
100	Invoice Payments	100	Invoice Payments
200	Customer Service Hours		
1	Policies		

Invoices are due upon receipt. All invoice amounts not paid prior to the next month cycle run will be subject to a LATE CHARGE which is currently set at 1.5%

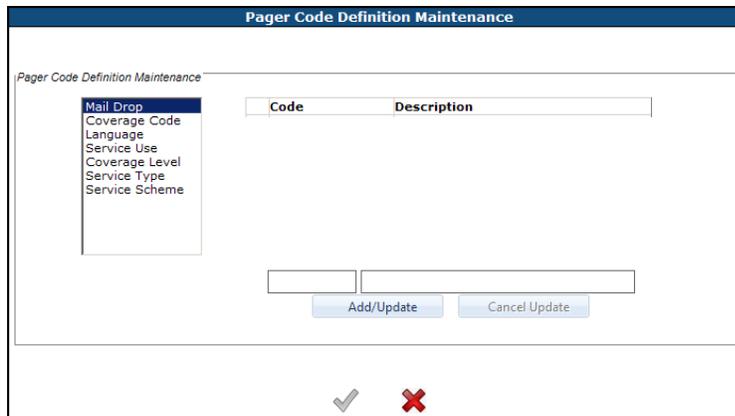


## Pager Code Definitions

The **PAGER CODE DEFINITIONS** utility is used to create specific characteristics that define **PAGER** service and are used on the **PG LINE TYPE DETAIL** screen in Customer Care.

Action	Description
--------	-------------

1. Select **PAGER CODE DEFINITIONS**. The **PAGER CODES DEFINITION MAINTENANCE** screen displays. **SEVEN** options are available. The grids are empty if no values have been created.



Each option corresponds to a field on the **PG LINE TYPE DETAIL** screen when adding pager service to a customer account.

To create values, click on the appropriate option.

2. Click in the **EDIT BOX** and enter the **CODE** and the **DESCRIPTION**.

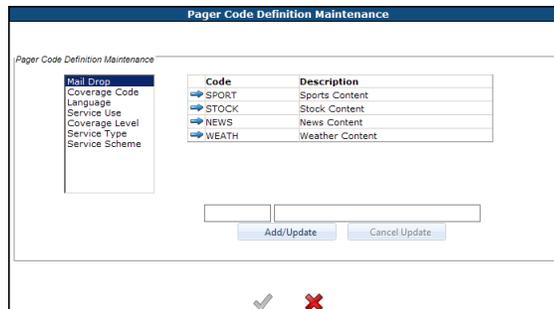
The **CODE** is an alphanumeric code that can be a maximum of five characters.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

3. Click/**ADD UPDATE**.

The **CODE** and **DESCRIPTION** are committed to the grid.

The **CODE** and **DESCRIPTION** are required fields.





Action	Description
--------	-------------

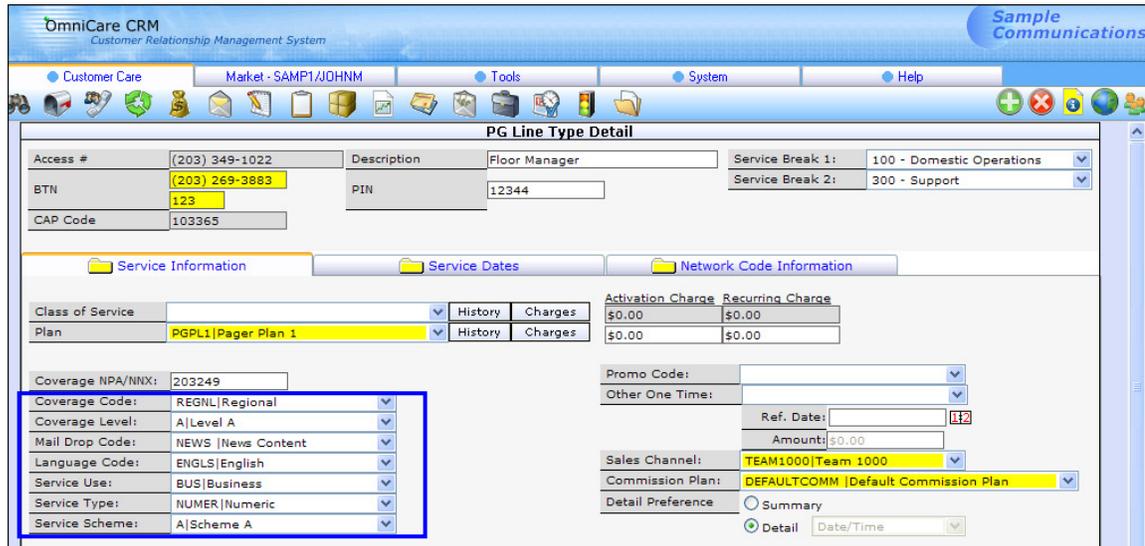
Continue adding values as needed.

- |                                                |                                               |
|------------------------------------------------|-----------------------------------------------|
| 4. Click <b>GREEN CHECKMARK</b> when finished. | Click the <b>RED X</b> to ignore all changes. |
|------------------------------------------------|-----------------------------------------------|

**EDITING EXISTING DESCRIPTIONS**

1. Click the **BLUE ARROW** to highlight the description to be edited.
2. Make the necessary changes.
3. Click **ADD/UPDATE** to commit the changes to the grid.

The **PG LINE TYPE DETAIL** screen contains seven drop down lists that describe the Pager service assigned a customer account. The values in each drop down list are created in the Pager Code Definition Maintenance utility. If no codes are created, the drop down list is empty.





## Rate Type Names

The **RATE TYPE NAMES** utility is used:

- Change the **DESCRIPTION** of the OmniBill Rate Type codes. Changing the description in this utility changes the rate type descriptions that display on OmniBill screens, reports, and customer invoices.
- Specify which rate types (RLRN 01, Intrastate-IntraLata, Interstate, etc) are to be exempt from Federal Excise Taxes (FET).

Action	Description
--------	-------------

1. Select **RATE TYPE NAMES**. The **MANAGE RATE TYPE NAMES** screen displays listing all rate types within the system.

**Manage Rate Type Names**

Manage Rate Type Names

\*Changes made on this page go directly to the database.  
 \*Rate Type List verbiage is utilized across several areas of Omnibill: Listings within Omnibill system forms, Reports, End user billing statement. Please consider these ramifications when altering Rate Type Names.

Code	Description	FET Exempt?
Local01	Local RLRN 01	No
Local02	Local RLRN 02	No
Local03	Local RLRN 03	No
Local04	Local RLRN 04	No
Local05	Local RLRN 05	No
Local06	Local RLRN 06	No
Local07	Local RLRN 07	No
Local08	Local RLRN 08	No
Local09	Local RLRN 09	No
Local10	Local RLRN 10	No
Local11	Local RLRN 11	No
Local12	Local RLRN 12	No
Local13	Local RLRN 13	No
Local14	Local RLRN 14	No
Local15	Local RLRN 15	No

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

Update RateType    Cancel Update

✖

**NOTE:** Changes are automatically saved when entered into the grid. The Red X exits the screen.



Action	Description
--------	-------------

**UPDATING THE RATE TYPE DESCRIPTION.**

- 2. Click the **BLUE ARROW** next to the Rate Type code to change the description. The **DESCRIPTION** displays in the Edit Box.  
The Code cannot be changed.

The screenshot shows a form with three main components: a text box containing 'IntraST', a larger text box containing 'Intrastate - Intralata', and a dropdown menu on the right showing 'No'. Below these are two buttons: 'Update RateType' and 'Cancel Update'.

- 3. Type in your new description.
- 4. Click **UPDATE RATE TYPE**. The new description is committed to the grid.

Click **CANCEL UPDATE** if you do not want the new description committed to the grid.

Continue making changes as needed.

Changes are automatically saved as they are committed to the grid.

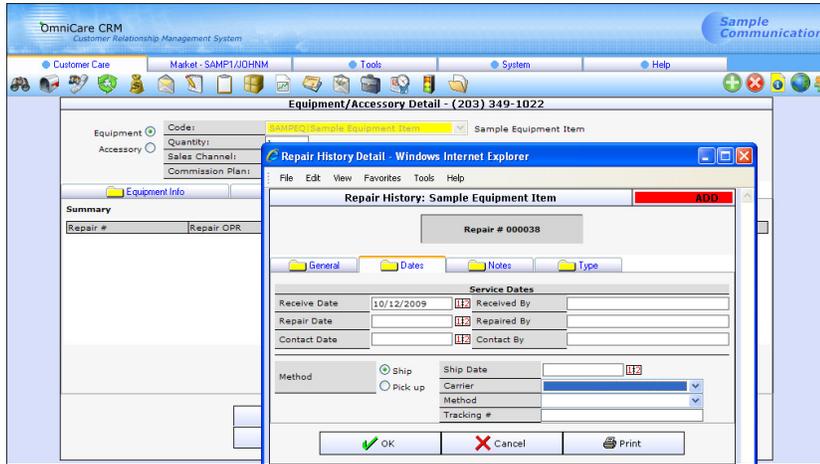
- 5. Click **RED X** to exit the utility.

Note: When updating a description, please be patient. There may be a slight delay in displaying or updating the Rate Type in your database.



## Shipping Methods and Carriers

This utility is used to create values used to identify the carriers used for shipping and the shipping methods available for each carrier. These values can be used on the **REPAIR HISTORY** screen accessed from the **EA (Equipment/Accessory) LINE TYPE DETAIL** screen.

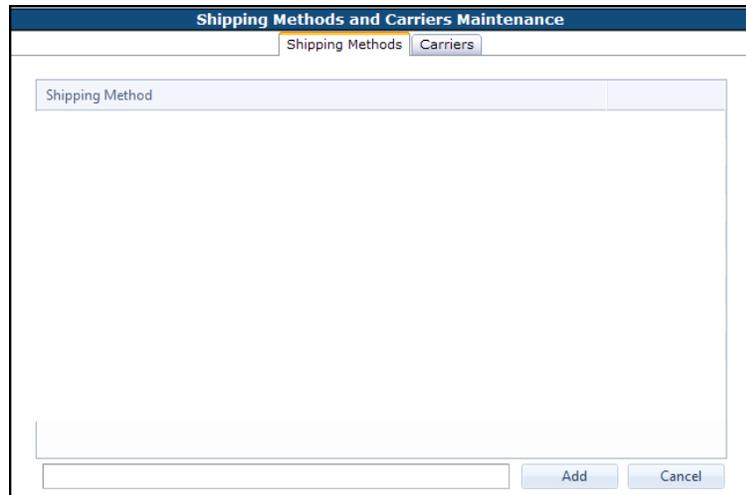


### CREATING THE SHIPPING METHOD

Action	Description
--------	-------------

1. Select **SHIPPING METHODS AND CARRIERS**.

The **SHIPPING METHODS AND CARRIER MAINTENANCE** screen displays.



**EDIT BOX**

2. Enter a **SHIPPING METHOD** in the Edit box.

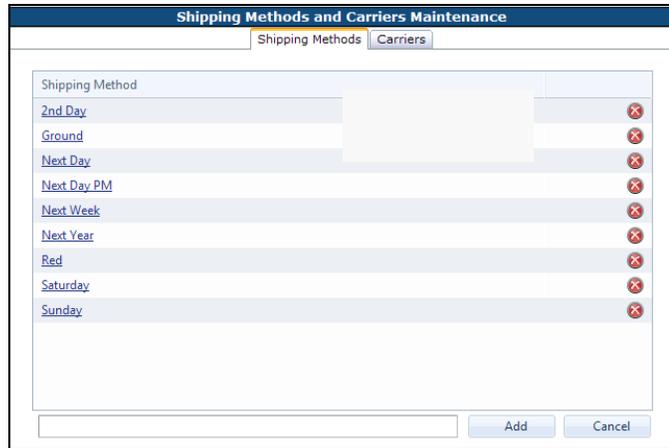
The **CODE** is an alphanumeric field that can be a maximum of five characters.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

Action	Description
--------	-------------

3. Click **ADD** to commit the Code and Description to the grid.

Additional shipping methods can be created.

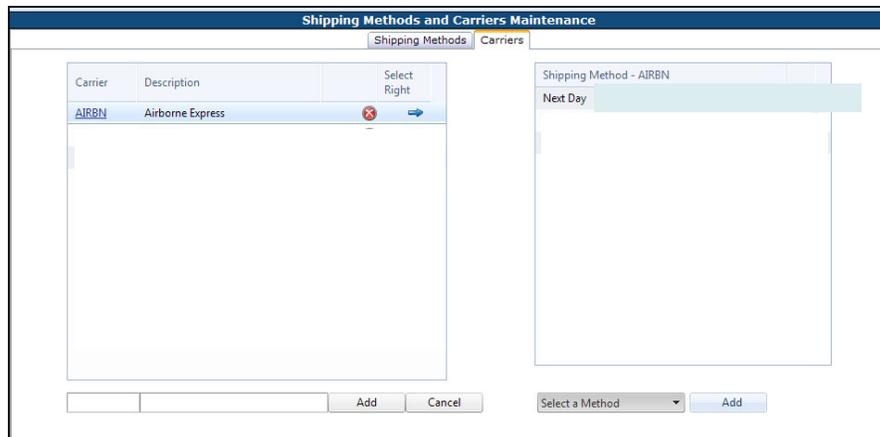


**CREATING CARRIERS and ASSOCIATING DEFINED SHIPPING METHOD**

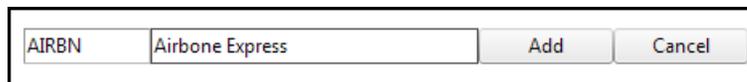
Shipping Methods are associated with a Carrier.

1. Select the **CARRIES** tab.

The following two grids display, which allow you to create carriers and associate shipping methods.



2. Enter the **CARRIER CODE** and **DESCRIPTION** in the Edit Boxes.



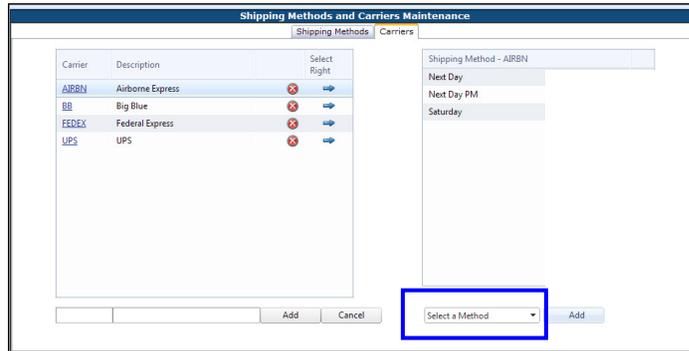


Action	Description
--------	-------------

3. Click **ADD** to commit the carrier to the grid. Additional Carriers can be created

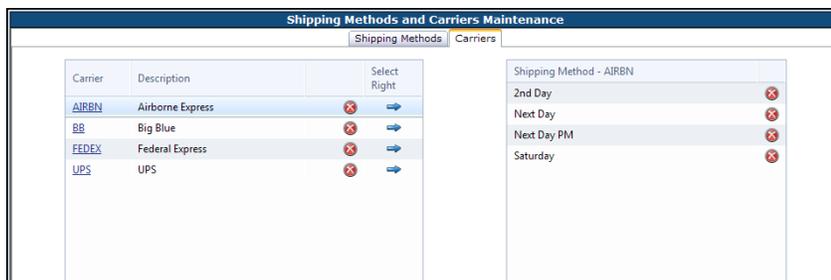
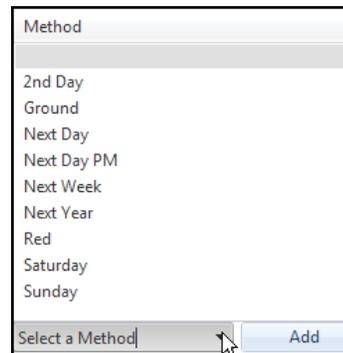
Click the **CODE** to edit the description.

Click the **RED X** to remove the code.



### ASSOCIATING A SHIPPING METHOD

1. Click the **BLUE ARROW** next to the Carrier you wish to associate a Shipping Method to.
2. Click the arrow next to the **SELECT A METHOD** to display the list of Methods created.
3. Select a method and click **ADD**.





Action	Description
--------	-------------

### State Line Service Fees

The **MANAGE STATE LINE SERVICE FEES** utility is used to create **PICC** (Primary Interexchange Carrier Charge) fees and Line fees that are State, Service Category, Account Orientation, and Line Type specific. Once the table is created, it can be attached to a Master Group. Attaching the State Line Service Fees table to the Master Group allows additional line fees, if applicable, to be charged on lines where the Master Group is assigned.

**Master Group Code Detail**

Master Group Code: DIME1 Lock-out: None Assign Start: 07/09/1999  
 Master Group Name: Dime Anytime Plan Assign End: / /

Effective Dates: 07/09/1999 Comments: In-Service Date

Initial				Ongoing			
Fee Name	Sign	Fee	Bill Cyc	Sign	Fee	Bill Cyc	Waive
Per Line Installation Fee	+	\$10.00	One Time	1	+	\$3.00	N
Per Line Fee	+	\$5.00	Monthly	99	+	\$0.00	N
Super Saver Misc Line Fee	+	\$4.00	Monthly	99	+	\$0.00	N
Plan Group Fee	+	\$3.00	Monthly	99	+	\$0.00	N
Super Saver Plan Misc Fee	+	\$2.00	Monthly	99	+	\$0.00	N
Business Single Line PICC	+	\$0.50	Monthly	99	+	\$0.00	N
Business Multi Line PICC	+	\$3.00	Monthly	99	+	\$0.00	N
Residence Single Line PICC	+	\$0.00	Monthly	99	+	\$0.00	N

Assoc State Line Svc Fee Table: [Dropdown] Waive flagged fees over: \$0.00 usage basis

### CREATING A STATE LINE SERVICE FEE

Action	Description
--------	-------------

- Select **MANAGE STATE LINE SERVICE FEES**. The **MANAGE STATE LINE SERVICE FEES** screen appears. The grid is empty if no tables have been created.

**Manage State Line Fees Summary**

Code	Description	Start Date	End Date
SITB1	State Fee Table 1	08/30/1999	

- Click the **PLUS** sign. The **MANAGE STATE LINE SERVICE FEES DETAIL** screen displays.



Action	Description
--------	-------------

3. Enter a **CODE** and a **DESCRIPTION**.

The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

**ASSIGN DATES**

The **ASSIGN START** date is the first date the State Line Service Fee Table is available for assignment. It defaults with the current date and can be changed.

The **ASSIGN END** date is the date the State Line Service Fee Table is no longer available for assignment. The **ASSIGN END** date does not affect any Master Group currently assigned the table.

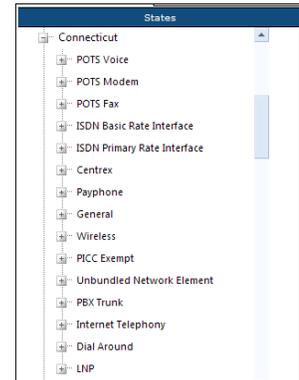
The **MANAGE STATE LINE SERVICE FEES** table is divided into three sections: States, Fees, and Service Categories.

Action	Description
--------	-------------

**STATES**

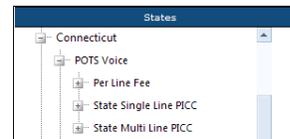
- Expand the folder of the **STATE** you are defining line fees for by clicking the plus (+) sign next to the state abbreviation.

The folder expands to reveal 15 system generated line types.



- Expand the folder of the **LINE TYPE** you are defining line fees for.

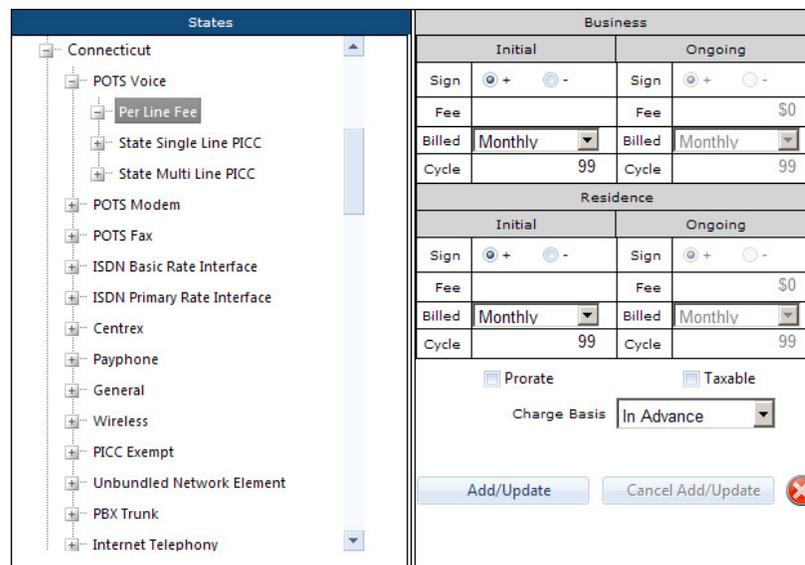
The folder expands to reveal 3 fees.



- Highlight the **FEE NAME**.

The Fee structure becomes available.

**NOTE:** Clicking on the plus sign next to the fee name does not display the fee structure.



Business			
Initial		Ongoing	
Sign	<input checked="" type="radio"/> + <input type="radio"/> -	Sign	<input checked="" type="radio"/> + <input type="radio"/> -
Fee		Fee	\$0
Billed	Monthly	Billed	Monthly
Cycle	99	Cycle	99
Residence			
Initial		Ongoing	
Sign	<input checked="" type="radio"/> + <input type="radio"/> -	Sign	<input checked="" type="radio"/> + <input type="radio"/> -
Fee		Fee	\$0
Billed	Monthly	Billed	Monthly
Cycle	99	Cycle	99
<input type="checkbox"/> Prorate		<input type="checkbox"/> Taxable	
Charge Basis: In Advance			
Add/Update		Cancel Add/Update	



Action	Description
--------	-------------

Fees can be created for **BUSINESS** and/or **RESIDENCE** lines. The following steps apply to both line orientations.

4. Define the **INITIAL FEE** structure:
  - The **SIGN** defaults to positive (+), but can be changed.
  - Enter the **FEE** amount.
  - The **BILLED** interval drop down defaults to **MONTHLY**, but can be changed.
  - The **CYCLE** defaults to **99**, unlimited cycles, but can be changed. If the number of cycles changes, the **ONGOING FEE** structure becomes active and can be defined.

Business					
Initial			Ongoing		
Sign	<input checked="" type="radio"/> +	<input type="radio"/> -	Sign	<input checked="" type="radio"/> +	<input type="radio"/> -
Fee	\$2.00		Fee	1	
Billed	Monthly		Billed	Monthly	
Cycle	5		Cycle	99	
Residence					

The Fees default with the following settings: **PRORATE**, **TAXABLE** and a charge basis **IN ADVANCE**, but can be changed.

5. Click **ADD/UPDATE** to commit the fee to the table or click **CANCEL/ADD UPDATE** to cancel adding the fee to the table.

Action	Description
--------	-------------

Once the fee is added to the table, the **STATES** list becomes active and the **FEE NAME** text turns red. Additional Fees can be added to the selected state or other states by following the above steps.



**SERVICE CATEGORIES TAB**

1. Highlight the **SERVICE CATEGORIES** the **STATE LINE SERVICE FEES TABLE** code can be applied to.

The line fees defined in the table are only applied to Service Categories highlighted in this list.



2. Click **GREEN CHECKMARK** to save the table.

Once the State Service Line Fees table is created, it can be applied to any Master Group.



## Tax Groups

A default set of six tax groups Federal, State, County/City/Local, USF, Wireless Roamer, and Other ship with the OmniBill database. The system ships with all the tax type codes assigned to one of the six default groups.

The **TAX GROUPS** utility can be used to reassign tax type codes to new groups, select a tax category that the group will display in, and create an unlimited number of custom tax groups. The custom tax groups are used by Production to present tax detail on the **SERVICE CHARGE DETAIL** page of the billing invoice.

**NOTE: TAX GROUPS ARE ONLY UTILIZED FOR THE PHYSICAL STATEMENT IMAGE.** The service detail and service detail reports display the tax detail.

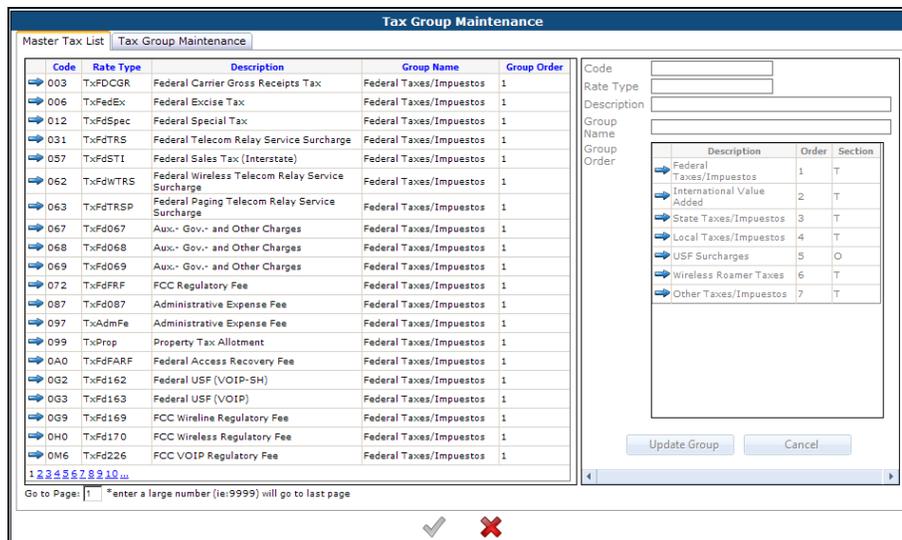
### CHANGING TAX TYPE CODE GROUP ASSIGNMENTS

Action	Description
--------	-------------

1. Select **TAX GROUPS**.

The **TAX GROUPING** utility screen displays. Two tabs are included on the screen: Master

The **MASTER TAX LIST** tab defaults and displays the Group Tax Codes. Changes to the individual assignment of a tax type code to a tax group can be done on the **MASTER TAX LIST Tax List and Tax Group Maintenance**



2. Click the **BLUE ARROW** next to a tax type code where you wish to change the group. The Group Order options display beneath the grid of Rate types.



Action	Description
--------	-------------

Tax Group Maintenance

Code	Rate Type	Description	Group Name	Group Order
003	TxFDCGR	Federal Carrier Gross Receipts Tax	Federal Taxes/Impuestos	1
006	TxFedEx	Federal Excise Tax	Federal Taxes/Impuestos	1
012	TxFdSpec	Federal Special Tax	Federal Taxes/Impuestos	1
031	TxFDTRS	Federal Telecom Relay Service Surcharge	Federal Taxes/Impuestos	1
057	TxFdSTI	Federal Sales Tax (Interstate)	Federal Taxes/Impuestos	1
062	TxFdWTRS	Federal Wireless Telecom Relay Service Surcharge	Federal Taxes/Impuestos	1
063	TxFdTRSP	Federal Paging Telecom Relay Service Surcharge	Federal Taxes/Impuestos	1
067	TxFd067	Aux.- Gov.- and Other Charges	Federal Taxes/Impuestos	1
068	TxFd068	Aux.- Gov.- and Other Charges	Federal Taxes/Impuestos	1
069	TxFd069	Aux.- Gov.- and Other Charges	Federal Taxes/Impuestos	1
072	TxFdFRF	FCC Regulatory Fee	Federal Taxes/Impuestos	1
087	TxFd087	Administrative Expense Fee	Federal Taxes/Impuestos	1
097	TxAdmFe	Administrative Expense Fee	Federal Taxes/Impuestos	1
099	TxProp	Property Tax Allotment	Federal Taxes/Impuestos	1
0A0	TxFdFARF	Federal Access Recovery Fee	Federal Taxes/Impuestos	1
0G2	TxFd162	Federal USF (VOIP-SH)	Federal Taxes/Impuestos	1
0G3	TxFd163	Federal USF (VOIP)	Federal Taxes/Impuestos	1
0G9	TxFd169	FCC Wireline Regulatory Fee	Federal Taxes/Impuestos	1
0H0	TxFd170	FCC Wireless Regulatory Fee	Federal Taxes/Impuestos	1
0M6	TxFd226	FCC VOIP Regulatory Fee	Federal Taxes/Impuestos	1

Code: 087  
 Rate Type: TxFd087  
 Description: Administrative Expense Fee  
 Group Name: Federal Taxes/Impuestos

Description	Order	Section
Federal Taxes/Impuestos	1	T
International Value Added	2	T
State Taxes/Impuestos	3	T
Local Taxes/Impuestos	4	T
USF Surcharges	5	O
Wireless Roamer Taxes	6	T
Other Taxes/Impuestos	7	T

Go to Page: 1 \*Enter a large number (ie:9999) will go to last page

This grid is used to select the tax group you wish to select.

3. Click the **BLUE ARROW** for the group you wish to select.

Code: 087  
 Rate Type: TxFd087  
 Description: Administrative Expense Fee  
 Group Name: Other Taxes/Impuestos

Description	Order	Section
Federal Taxes/Impuestos	1	T
International Value Added	2	T
State Taxes/Impuestos	3	T
Local Taxes/Impuestos	4	T
USF Surcharges	5	O
Wireless Roamer Taxes	6	T
Other Taxes/Impuestos	7	T

4. Click **UPDATE GROUP** to commit the change to the grid. The group has been changed.

5. Click **CHECKMARK** to save the changes made to the Tax Groups. Select the **RED X** to cancel all changes.



### CREATING NEW TAX GROUPS

When selecting the Tax Group Maintenance Utility, the **MASTER TAX LIST** tab displays first showing the Groups the tax type codes are assigned to. The **TAX GROUP MAINTENANCE** tab is used to create new Tax Groups, delete Tax Groups from the list, and select the Invoice Section the group is to display in.

Action	Description
--------	-------------

1. Click the **TAX GROUP MAINTENANCE** tab.

2. Enter a new Tax Group **DESCRIPTION**. The **DESCRIPTION** can be alphanumeric and up to 30 characters in length.
3. Enter a **GROUP ORDER** value in the space next to the description. The **GROUP ORDER** value is numeric and can be a maximum 10 characters.

**IMAGE SELECTION:** This column is used to determine which category Taxes or Surcharges the group displays on the invoice. Selecting **T** will display the amount in the **TAXES** category; selecting **O** will display the amount in the **SURCHARGE** category.

4. Select the Image Section.
5. Click **ADD** to commit the new **TAX GROUP** to the grid.
6. Click the **GREEN CHECKMARK** to save the new Tax Group(s). Click the **RED X** to discard all changes.



Once the changes are saved, tax type codes can be assigned to the new Tax Group created.

Refer to the above section **CHANGING TAX TYPE CODE GROUP ASSIGNMENTS** for information on changing Tax Type codes.

A message appears if you attempt to add **TAX TYPE CODES** to the new tax group before the information is saved first.





### DELETING A TAX GROUP AND MOVING TAX TYPE CODES

When deleting a Tax Group, you must move any existing Tax Type Codes in that group to a new group. For example: If you want to delete the Recovery Fees group 8, you will be asked to move the **RATE TYPE 097** to an existing group.

The below steps outline that process.

Action	Description
--------	-------------

1. Click the **TAX GROUP MAINTENANCE** tab.

Tax Group Description	Order On Bill	Image Section
Federal Taxes/Impuestos	1	T
International Value Added	2	T
State Taxes/Impuestos	3	T
Local Taxes/Impuestos	4	T
USF Surcharges	5	O
Wireless Roamer Taxes	6	T
Other Taxes/Impuestos	7	T
Administration	8	O

**\*\*CHANGES MADE TO GROUPS ARE DIRECTLY TO DATABASE. TAX TYPES WILL BE REFRESHED.**

Description:   
Order On Bill:   
Image Section:   
Taxes  
Other Fees

**\*\*For Delete you must select a new group to move current tax types**  
New Group:  Move/Delete

2. Click the Blue Arrow next to the **TAX GROUP** you are deleting. The **TAX GROUP** appears in the **EDIT BOX** below the grid

**\*\*CHANGES MADE TO GROUPS ARE DIRECTLY TO DATABASE. TAX TYPES WILL BE REFRESHED.**

Description: Administration  
Order On Bill: 8  
Image Section: Taxes  
Other Fees

**\*\*For Delete you must select a new group to move current tax types**  
New Group: Federal Taxes/Impuestos Move/Delete

✓ ✗



Action	Description
--------	-------------

To delete a **TAX GROUP**, the tax type codes in the group must first be assigned to a new Order on Bill and a New Group. The system will not allow the tax group to be deleted if the tax type codes have not been reassigned.

3. Select the new **ORDER ON BILL** and **NEW GROUP** description.

**\*\*CHANGES MADE TO GROUPS ARE DIRECTLY TO DATABASE. TAX TYPES WILL BE REFRESHED.**

Description	Administration	
Order On Bill	8	<input type="button" value="Update"/>
Image Section	<ul style="list-style-type: none"><li>Taxes</li><li><b>Other Fees</b></li></ul>	<input type="button" value="Cancel"/>
<b>**For Delete you must select a new group to move current tax types</b>		
New Group	Federal Taxes/Impuestos ←	<input type="button" value="Move/Delete"/>

Tax group the tax type codes are being moved to.

✔ ✘

3. Click **MOVE/DELETE** to delete the selected **TAX GROUP** and **MOVE** the tax items.
4. To see the changes, click the **GREEN CHECKMARK**, which will save the changes and then reenter the utility.



### TC/SI Definitions

The TC/SI (Transaction Code/Status Indicator) DEFINITION MAINTENANCE utility is used to define CARE (Customer Access Record Exchange) STATUS CODES (TC/SI) that are received from carriers during the provisioning process. Once codes are defined, this utility can serve as a:

- TC/SI reference on any line.
- Filter during the carrier file import process.
- Automatic line service date assignment tool.

Action	Description
--------	-------------

- |                              |                                                |
|------------------------------|------------------------------------------------|
| 1. Select TC/SI DEFINITIONS. | The TC/SI UTILITY MAINTENANCE screen displays. |
|------------------------------|------------------------------------------------|

The utility includes five options: Activate, Suspend, Reinstate, Deactivate, and Other. The first four options are blank until TC/SI codes are defined. The OTHER option includes one predefined code – 9999. Adding codes in the Activate, Suspend, Reinstate or Deactivate and will perform the corresponding action.

The screenshot shows the 'TC/SI Utility Maintenance' window. At the top, there is a title bar and a checkbox labeled 'Use Grid for Master Reference for Carrier\* Care Status Import'. Below this is a dropdown menu with the following options: Activate, Suspend, Reinstate, Deactivate, and Other. To the right of the menu is a table with the following columns: 'Trans Cd', 'Status Ind', 'Description', and 'Care Set'. Below the table are three empty input fields and a dropdown menu set to 'Yes'. At the bottom of the window are two buttons: 'Add/Update' and 'Cancel Update'. At the very bottom, there is a status bar with a grey checkmark icon and a red 'X' icon.



Action	Description
--------	-------------

The **USE BELOW GRID FOR MASTER REFERENCE** checkbox, if checked, indicates that you want the **TC/SI CODES UPDATED** and/or **ACTIVATION DATES** to automatically fill in on Line Service Detail screens during the CARE import process.

*When using the grid as reference only, the checkbox must be left unchecked.*

2. Select the **APPROPRIATE ACTION** that corresponds to the TC/SI code you are creating.

If you want **SERVICE DATES** to automatically fill in during the CARE file import process, the TC/SI code must exist on the appropriate action tab (Activate, Suspend, Reinstate, or Deactivate). TC/SI codes entered in the **OTHER** tab *do not affect the date fields* on lines.

During the CARE import process, the system will do the following:

- Compare the TC/SI codes in the CARE import file to the codes in the TC/SI Maintenance Utility grid.
- Determine which service date (if any) field fills in if a match is found, (Activate, Suspend, Deactivate, Reinstate, or Other)
- Assign the **POST DATE** from the TC/SI code to the appropriate Service Date on the line.

3. Enter the **TRANS CD (TC)**, **STATUS IND (SI)**, and **DESCRIPTION** in the Edit Boxes at the bottom of the screen. The **TRANS CD (TC)** and **STATUS IND (SI)** are the codes received from the carrier. Each code is a maximum of two digits.

The **DESCRIPTION** is an explanation of the code and can be a maximum of 30 characters.



Action	Description
--------	-------------

**CARE SET**

The **CARE SET** value (Yes/No) indicates whether or not the CARE import process will overlay existing TC/SI codes on the line.

The **CARE SET** value functions if the **USE BELOW GRID FOR MASTER REFERENCE** checkbox is selected.

- Selecting **YES** will overlay existing TC/SI codes on the Service Detail tab. The Care Set value defaults to **YES** on the Activate, Suspend, Reinstate or Deactivate tabs.
- Selecting **NO** will not overlay existing codes with codes from the CARE file.

5. Select a **CARE SET** value from the drop down list. This is a required field.

6. Click the **ADD/UPDATE** button. The code is committed to the grid. Selecting **CANCEL/ UPDATE** cancels your entry.

The screenshot shows the 'TC/SI Utility Maintenance' window. At the top, there is a checkbox labeled 'Use Grid for Master Reference for Carrier\* Care Status Import' which is checked. Below this is a list of actions: Activate, Suspend, Reinstate, Deactivate, and Other. The main area contains a table with the following data:

Trans Cd	Status Ind	Description	Care Set
01	01	Subscr Order WTN And All Terms	Yes
01	02	Subscr Order This Term Only	Yes
01	05	Subscr Order This WTN Only	Yes
21		Subscription Order Rejected	Yes
23		Customer Information Changes	Yes
24		Customer Listing	Yes
25		Response To Req For Line Info	Yes
26		Req For Line Info Rejected	Yes

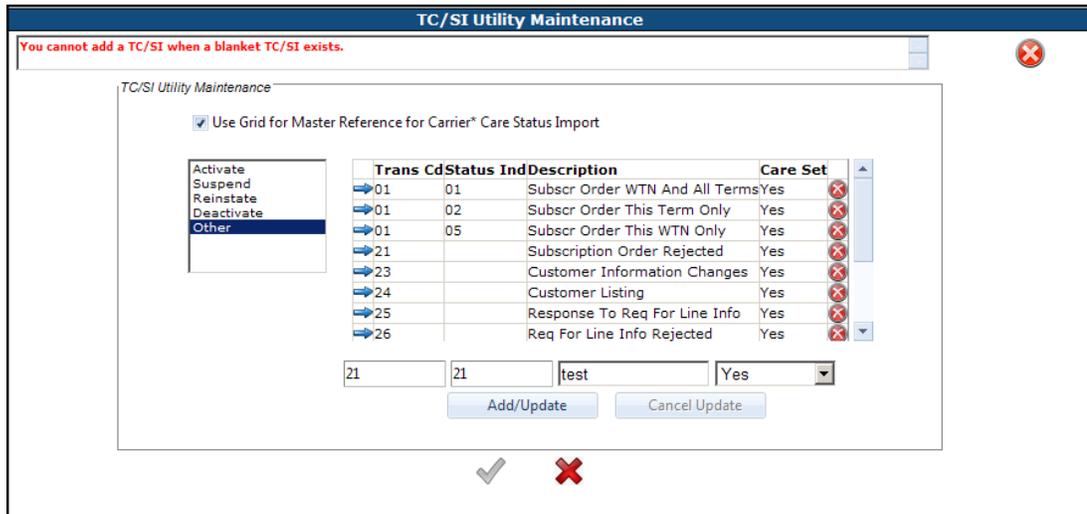
Below the table, there are three empty input fields and a dropdown menu currently set to 'Yes'. At the bottom of the window are two buttons: 'Add/Update' and 'Cancel Update'. At the very bottom of the screenshot are a checkmark icon and a red 'X' icon.

**NOTE:** When the checkbox is checked, incoming CARE records with TC/SI codes not defined in the grid will not be processed. These records will be sent to a reject file located in a directory defined within Market Profiles – Product Paths

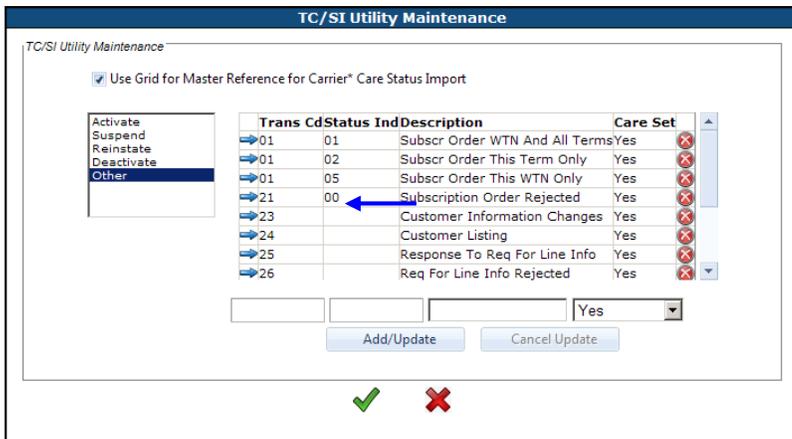


A code cannot appear on multiple tabs. When entering a transaction code (TC) *without* a status indicator (SI), the blank status indicator acts as a wildcard. Additional transaction codes identified by the same number are not accepted by the system. **Transaction Codes (TC) can only exist multiple times if they are further defined with a Status Indicator (SI).** To enter additional transaction codes, the first transaction code must have a status indicator.

*Example:* A TC 21 already exists, but no SI code is associated. Adding a 21/22 TCSI code won't be accepted by the system. The existing TC 21 includes all TCSI codes that begin with TC 21.



To enter additional TC 21 codes, the first TC 21 code must have a Status Indicator as seen below.



TCSI codes from the CARE import process will overlay user-defined codes.



### DEACTIVATING LINES USING THE TC/SI DEFINITION MAINTENANCE UTILITY

When using the TC/SI Definition Maintenance utility to deactivate lines, one of the following scenarios must exist on the Service Network Code Information tab of the Service Detail screen:

All four Network Codes must be the same on the Service Detail screen.

OE(Long Distance) Service Detail										
WTN		(203) 265-3064	Description	Rollover						
Service Information			Network Code Information			Service Dates				
Provisioning TCSI Carrier Ref										
	Network Code/Resale Code	Disp.	Trunk Group #	ACNA	CIC	Carrier	LEC	Date	Code	Post Date
Intralata Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 01/99	10/20/2005 113
	ALN Global Crossing									
Interlata Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 01/01	10/20/2005 113
	ALN Global Crossing									
Interstate Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 20/99	10/20/2005 113
	ALN Global Crossing									
Internat'l Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	09/05/2006	113 01/01	08/01/2005 113
	ALN Global Crossing									

As long as the **NONET NETWORK** code (default Network Code provided in OmniBill) is used in combination with **ONE OTHER** Network Code the utility will deactivate the line.

OE(Long Distance) Service Detail										
WTN		(203) 265-3064	Description	Rollover						
Service Information			Network Code Information			Service Dates				
Provisioning TCSI Carrier Ref										
	Network Code/Resale Code	Disp.	Trunk Group #	ACNA	CIC	Carrier	LEC	Date	Code	Post Date
Intralata Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 01/99	10/20/2005 113
	ALN Global Crossing									
Interlata Net Info	NONET No Associated Network	Off Net				No	No	02/15/2010	113 99/99	02/15/2010 113
	NO No Resale Code									
Interstate Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 20/99	10/20/2005 113
	ALN Global Crossing									
Internat'l Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	09/05/2006	113 01/01	08/01/2005 113
	ALN Global Crossing									

If more than one Network Code exists, (NONET is not one of them) then the utility will not deactivate the line.

OE(Long Distance) Service Detail										
WTN		(203) 265-3064	Description	Rollover						
Service Information			Network Code Information			Service Dates				
Provisioning TCSI Carrier Ref										
	Network Code/Resale Code	Disp.	Trunk Group #	ACNA	CIC	Carrier	LEC	Date	Code	Post Date
Intralata Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 01/99	10/20/2005 113
	ALN Global Crossing									
Interlata Net Info	LCINT Qwest Network	Off Net		LCI	9001	Yes	No	02/15/2010	113 99/99	02/15/2010 113
	QWSI Qwest Long Distance									
Interstate Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	10/20/2005	113 20/99	10/20/2005 113
	ALN Global Crossing									
Internat'l Net Info	ALLNT Global Crossing Network	Off Net		ALN	0234	Yes	Yes	09/05/2006	113 01/01	08/01/2005 113
	ALN Global Crossing									



If the **TC/SI DEFINITION MAINTENANCE** Utility is being used as the Master Reference, lines activated or deactivated as a result of the CARE Import process display system default reason codes. **LINE ACTIVATIONS** are posted as **GRA (GRid Activation)** and **LINE DEACTIVATIONS** are posted as **GRD (GRid Deactivation)** on the lines Service Detail screen.

The screenshot shows the 'TC/SI Utility Maintenance' window. A dropdown menu is open, listing 'Activate', 'Suspend', 'Reinstate', 'Deactivate', and 'Other'. The 'Activate' option is selected. Below the menu, a 'Trans Cd' field contains '20'. A 'Description' field contains 'OE(Long Distance) Service Detail'. A 'Care Set' field is empty. A table displays service information:

Type	St Traffic Date	Last Traffic Date	Carrier Code	Carrier Name
InterST	02/02/1998	10/28/2007	146	* ALLNET 185 *
LongDA	02/12/1998	10/26/2007	146	* ALLNET 185 *

Below the table, there is a grid for service details:

Description	Date	Time	Reason
Service Added	04/13/1998		
Activation Target	04/23/1998		
Service Activated	02/02/1998	12:01 AM	GRA TCSI Grid Activation
Service Suspended			

At the bottom, there are 'Add/Update' and 'Cancel Update' buttons. A 'Yes' dropdown is also visible. A checkmark and a red X icon are at the bottom center.

The two **ACTIVATE/DEACTIVATE** reason codes are displayed in the **ACTIVATE/ DEACTIVATE REASONS SUMMARY** grid found in System Profiles.

**NOTE:** When a CARE file is imported, the **GRA** and **GRD ACTIVATE/DEACTIVATE CODES** will only overwrite existing reason codes if they have **URA** and **URD** as the current reason code. This prevents writing over any other pre-set reason codes entered by the user.



## User Groups/Departments

The **MANAGE USER GROUPS/DEPARTMENTS** utility is used to create **USER GROUPS**, which are used when assigning Action Tickets. A **USER GROUP** is a required field when creating Action Tickets and when creating a user’s security profile.

Action	Description
--------	-------------

- |                                             |                                                                                                                                             |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Select <b>USER GROUPS /DEPARTMENTS</b> . | The <b>MANAGE USER GROUP DEPARTMENT</b> screen displays with the default code <b>SYSTEM – SYSTEM GROUP</b> , which comes with the database. |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|

- |                                                                              |                                                                                                                                              |
|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| 2. Create a <b>CODE</b> and a <b>DESCRIPTION</b> in the Edit Boxes provided. | The <b>CODE</b> is an alphanumeric field that can be a maximum of six characters. Once the code is created, it cannot be changed.            |
|                                                                              | The <b>DESCRIPTION</b> is an explanation of the code that can be a maximum of 30 characters. Both fields are required to complete the group. |
| 3. Enter a group <b>EMAIL</b> address.                                       | This address is used to send an email to the specified group. The email address can be a maximum of 50 characters.                           |

### ASSIGNED START DATE

The **ASSIGN START DATE** is the first date the User Group Code is available for assignment. It is recommended to use an Assign Start Date even though it is not required.



Action	Description
--------	-------------

**ASSIGN END DATE**

The **ASSIGN END DATE** is the date the User Group Code is no longer available for assignment. The Assign End date does not affect any profile currently using this code.

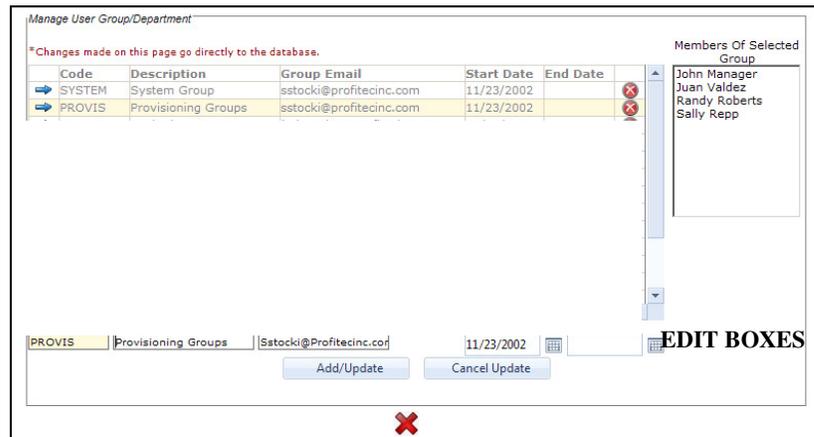
4. Click **ADD/UPDATE** to commit the code to the grid.



**UPDATING AN EXISTING CODE**

1. Click on the **BLUE ARROW** to select a code for updating. The record displays in the Edit Boxes at the bottom of the screen.

Note: The selected group displays members of the group in the Members of Selected Group grid.



This grid displays members of the highlighted code.

2. Make changes in the Edit Boxes. The code cannot be changed once saved.
3. Click **ADD/UPDATE** to commit the changes to the grid.

**DELETING EXISTING GROUPS**

Click the **RED X** next to a group you wish to delete. If a group has members, the group cannot be deleted.



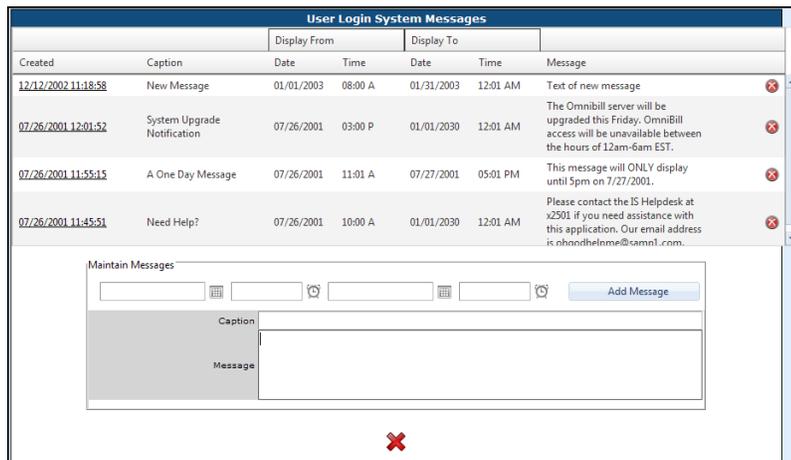
## User Login System Messages

The **USER LOGIN SYSTEM MESSAGES** utility is used to create and maintain messages that display on the **LOGIN CONSOLE** at system startup for users who are given the Show Login Console Right in System Security.

### CREATING LOGIN CONSOLE MESSAGES

Action	Description
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1. Select **USER LOGIN SYSTEM MESSAGES**. The **USER LOGIN SYSTEM MESSAGES** screen displays. The grid is blank if no messages are created.



### ADDING A MESSAGE

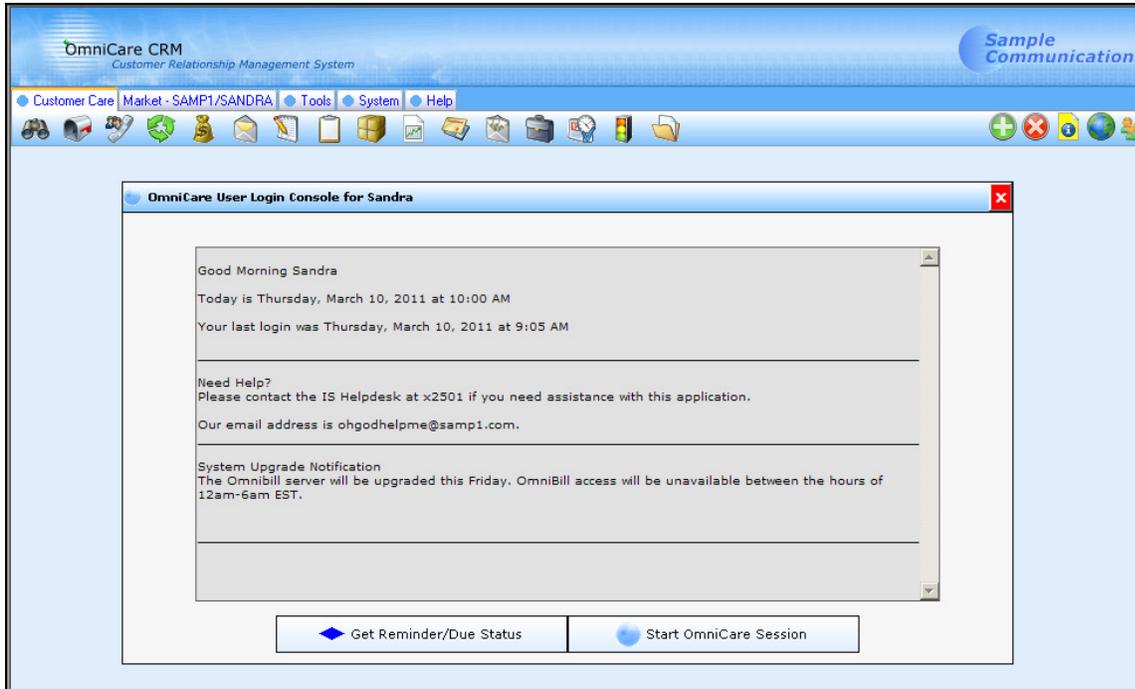
2. Enter the **DISPLAY FROM DATE, TIME** and **DISPLAY TO DATE** and **TIME**. The **DISPLAY FROM DATE** is the first date the Message displays on the Login Console. This is a required field.  
  
The **DISPLAY TO DATE** is the last date the Message displays on the Login Console. This is not a required field.
3. Enter a **CAPTION** and a **MESSAGE**. There is no spell check capability in this utility.
4. Click **ADD MESSAGE**.





## General Profiles

When accessing OmniCare, the messages display to all users with a login profile that includes the System Security - **SHOW LOGIN CONSOLE** right.



Users with the **SHOW LOGIN CONSOLE** right can also view the Login Console messages anytime while in OmniCare by selecting **TOOLS | ACCESS LOGIN CONSOLE**



Refer to **SYSTEM SECURITY** for information on granting user rights.



## Vendor Descriptions

The **VENDOR DESCRIPTION MAINTENANCE** utility is used to create vendor codes that can be used when assigning Action Tickets to customer accounts.

Action	Description
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1. Select **VENDOR DESCRIPTIONS**. The **VENDOR DESCRIPTION MAINTENANCE** screen displays. If no codes have been created the grid is blank.

2. Enter a **CODE** and **DESCRIPTION** in the Edit Boxes. The **CODE** is an alphanumeric field that can be a maximum of five characters. Once saved the code cannot be changed.  
  
The **DESCRIPTION** is an explanation of the code. It can be a maximum of 30 characters.
3. Click **ADD/UPDATE** to commit to the grid. The **CODE** and **DESCRIPTION** are added to the grid.



Action	Description
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Reference Vendor Description

Reference Vendor Description

\*Changes made on this page go directly to the database.

Code	Description	
→ NYNEX	Nynex	✖
→ SNET	SNET	✖
→ VERIZ	Verizon	✖
→ PRFTC	Profitec	✖

✖

4. Click **RED X** to exit the utility. Codes and descriptions are automatically saved.

To **EDIT** an existing Vendor Code **DESCRIPTION**, click the **BLUE ARROW** next to the code you wish to update. The edit box becomes available. Make the description changes and press **ADD UPDATE** to commit the changes to the grid. The code cannot be changed.

To **DELETE** a Vendor Code, click the red x next to the code you wish to delete. If the code is in use, the code cannot be deleted and the following message displays.

**Reference Vendor Description**

**Cannot Delete: Vendor Description Already Being Referenced**

The Vendor Codes are selected in the Vendor field on the **TICKET INFO** tab of the Action Ticket.

**Action Ticket Detail : 1000000174 - ACME Incorporated** ADD

Ticket Number: 00000812    Ticket Status: Open

Ticket Type	Work	Priority	0	Essential Service	Essential Service
Service Type	OE Outbound Switched Access	Pin Pos			
Action Code	STNDR Standard Action	Jack		HML	Term
Line Number	(203) 265-0411	P.O. #			
Line Type		Vendor			
Line Status		Conf. #			
Equip/Acc		Resp. Ind.			
Line Feature		Negotiator			
Assoc. Severity		Remedy			
Handle Code		Chronic			
All CPE		Recent S.O.			
All Sessions					
Access Ref.#					

Non-Billable   
 Billable



## Workflow Lists

**WORKFLOW LIST CODES** are used with Action Tickets and include Individuals or Groups responsible for completing a task.

Workflow List Codes are used to:

1. Identify a task to be completed.
2. Determine Individuals or Groups responsible for completing various phases of a task.
3. Define workday parameters for Individuals or Groups in the Workflow List.

When Action Tickets include a Workflow List Code, Action Tickets must be assigned to Individuals or Groups in the exact order the task is to be completed.

By defining workday parameters for Individuals or Groups, the status of the Individual or Group currently assigned the Action Ticket is tracked. The assignee status can be defined as Not Overdue, Due Today, or Overdue.

### CREATING WORKFLOW LIST CODES

Action	Description
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1. Click **MANAGE WORKFLOW LIST** from the Reference option. The **MANAGE WORKFLOW LIST** screen displays.



Action	Description
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**CREATING WORKFLOW LIST CODES**

EDIT BOXES

3. Enter a **CODE** and **DESCRIPTION** in the Edit Boxes.

The **CODE** is an alphanumeric field that can be a maximum of seven characters. Once saved the code cannot be changed.

The **DESCRIPTION** is an explanation of the code that can be a maximum of 30 characters.

4. Enter the **START DATE**.

The **START DATE** is the first date the **WORKFLOW CODE** is available for assignment. The code will not be available if a date is not entered.

**END DATE**

The **END DATE** is the date the **LIST CODE** is no longer available for assignment. The End Date does not affect any profile currently using this code.

5. Click **ADD/UPDATE** to commit the Code to the grid.

**NOTES:**

- To edit a Code's Description, Start Date or add an End Date to a code, **CLICK THE CODE**. Information is displayed in the Edit Boxes. Make changes; click **UPDATE** to add changes or **CANCEL** to ignore the changes.

- The **BLUE ARROW** is used to add Workflow (users/groups) to a code, which is explained in the next section.

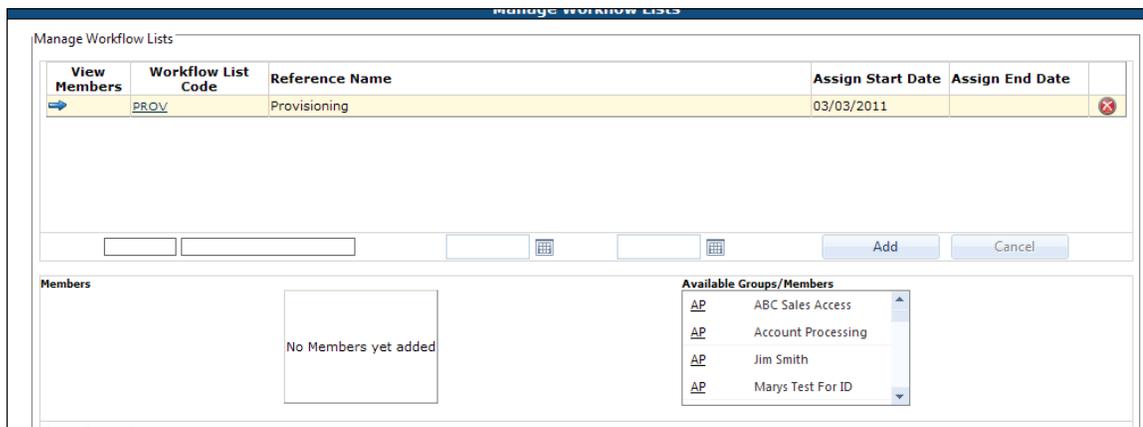


**ADDING GROUPS OR MEMBERS TO A WORKFLOW LIST CODE**

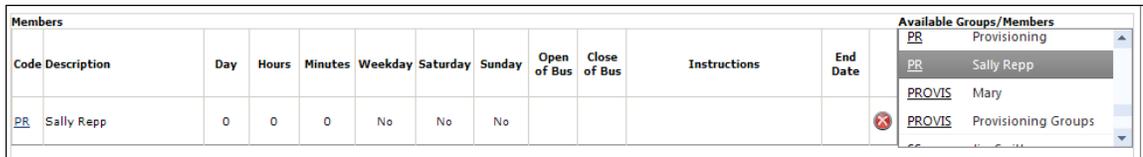
In order to associate users or workflow to a List Code, Individuals or Groups must be selected from the **NON MEMBERS** grid. The order Individuals or Groups are selected is *very* important because Action Tickets are assigned to Individuals or Groups in the order they appear in the grid.

Action	Description
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1. Click the Blue Arrow next to the **CODE** you wish to add Users to.



2. Click a User or a Group from the **AVAILABLE GROUPS/MEMBERS** grid that you wish to add to your list. The User or Group is added to the left hand side of the screen.





**DEFINING TIME MANAGEMENT PARAMETERS FOR EACH MEMBER**

In order to track the status of Individuals or Groups assigned the Action Ticket, each Member or Group must have Time Management information added.

Entering the workday parameters for each individual assigned the Action Ticket allows the status of the Individual or Group to be tracked within an assigned ticket. A ticket status can be defined as Not Overdue, Due Today, or Overdue. If you do not want to track the status of individuals, you do not need to complete the Time Management areas.

Action	Description
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1. Click the **BLUE ARROW** next to the Individual or Group you wish to add Time Management to. The **GROUP DESCRIPTION** displays in the **MEMBER** field.

2. Enter the number of **DAYS, HOURS, and/or MINUTES** allotted to the selected Individual or Group to complete his or her phase of the task.
3. Select the appropriate days of the week (**WEEKDAY, SATURDAY, and/or SUNDAY**) the selected Individual or Group is available to work on his or her phase of the task.

**INSTRUCTIONS** (optional) can be entered if applicable and reviewed on the Action Ticket. The notes field defaults to N/A.



Action	Description
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4. Click **UPDATE**

5. Click the **GREEN CHECK MARK** to save the information.

Click the **BLUE ARROW** to review all members of a Workflow list.