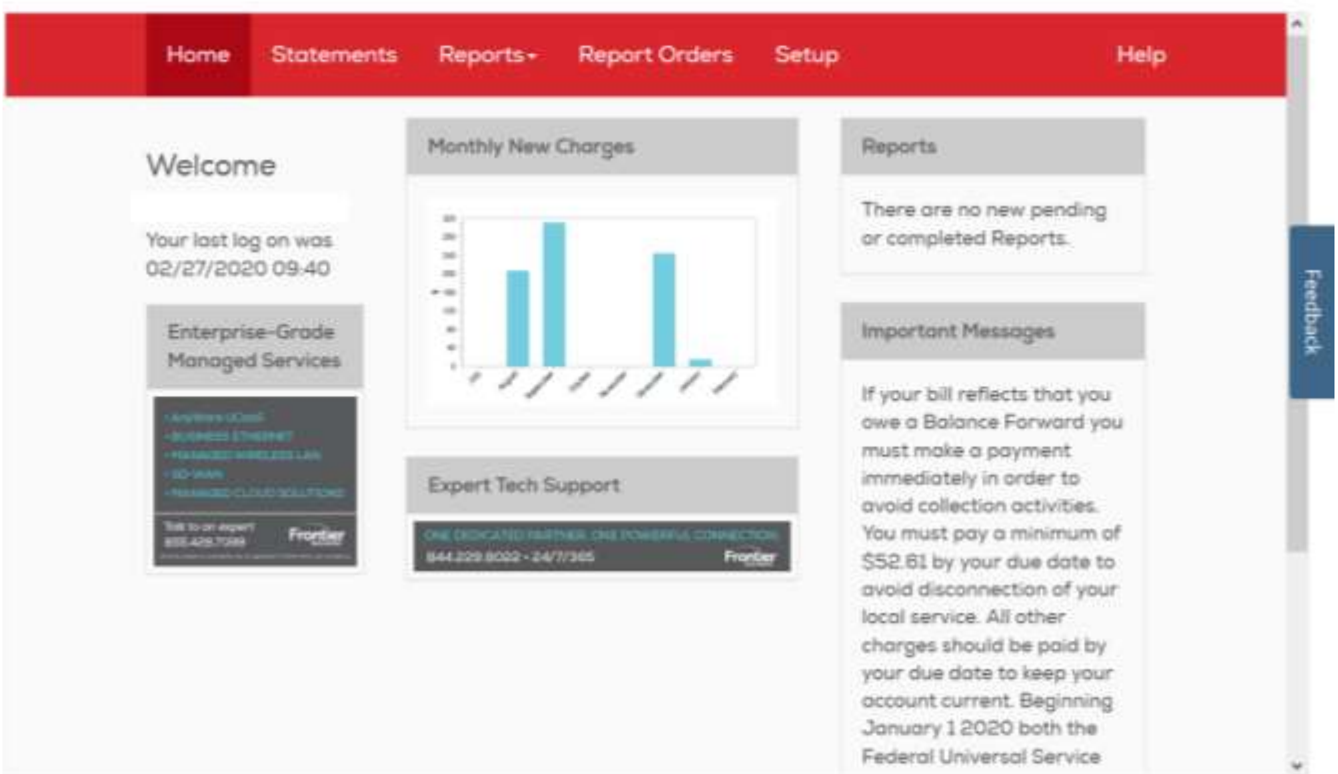
**Note: The following guide is subject to updates and changes from time to time and may not reflect subsequent portal changes immediately.**

## Enterprise Portal: Billing User Guide, Table of Contents

## Getting Started

**The Frontier Enterprise Portal with Billing** is a comprehensive online bill presentation tool that allows reporting and analysis; designed to provide users with insight into their communications billing and usage. By viewing your invoices online and running simple reports, one may easily analyse costs and usage to help run your business more efficiently.

It allows one to quickly view invoices and reports. With Premium Access, one may also create custom reports and assign descriptions to specific telephone numbers.



## Navigation

The main navigation bar lets you quickly access all the tools available in the application. To move from tab to tab, click on the red bar tabs with white letters.


| Tab Name | Description |
|---|---|
| **Home** | The home page contains a bar chart of month-over-month current spending, last log-in date, pending and completed reports overview, and mandatory regulatory messages. |
| **Statements** | The Statements page allows you to easily manage all your Frontier Communications invoices from one convenient location. You can compare invoices to previous months and group invoices by specific criteria. |
| **Reports** |   **Cost Allocation (Premium Access Only)**—Use an organizational hierarchy to allocate account and service charges by department or cost center in just seconds. |
| | **Summary Reports**—Summary reports give an overview of your telecommunications billing displayed as tables or graphs. Use default reports, or with Premium Access, create custom reports to meet your specific needs. |
| | **Detail Reports—**Detail reports contain individual data records that can include a variety of information including call usage, equipment, and other charges or credits. You can choose from several predefined reports or with Premium Access, create custom reports to meet your specific needs. |
| **Report Orders** |   After ordering a report, go to the Report Orders Tab to view all reports ordered and completed. |
| **Setup** | Setup is the Control Center of the application.<br>• Manage payment sources<br>• Set up account filters<br>• Establish mark-ups<br>• Add unique descriptions to commonly used numbers<br>Create hierarchies to allocate costs. |
| **Help** | The Help tab includes access to Frontier's Enterprise Portal Help Center. |

# Icons

## Toggle Full-Screen View

**On the Statements Tab and the Reports tabs**, look for the grey double-arrow open icon in the top right, next to the Export button. **Click to expand the column set.**


Click the closed icon to restore to the previous view.

Once you've opened the column set by clicking the arrow, you must close or you won't be able to navigate off the page.

## Edit, Order, & Delete in the Reports Tab

**Edit** (*the pencil*) is available in Premium Access only. Use to include or exclude columns.

**Order** (*the calendar*) allows filtering and recurring report delivery.

**Delete** (*the trash can***)** will delete the report. **This cannot be undone - Use with caution.**

# Helpful Tips

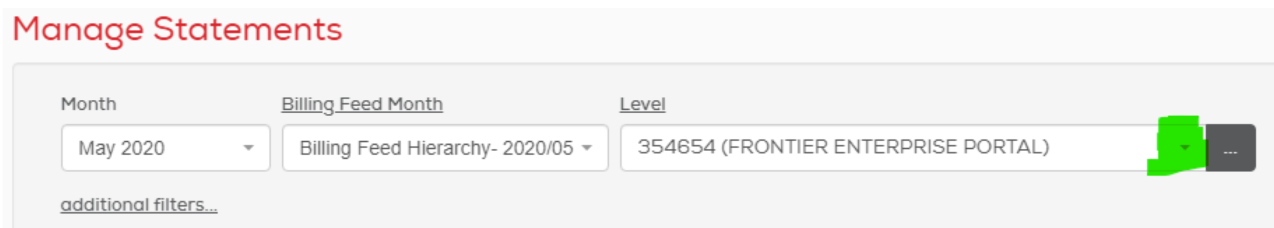
## Column Sorting

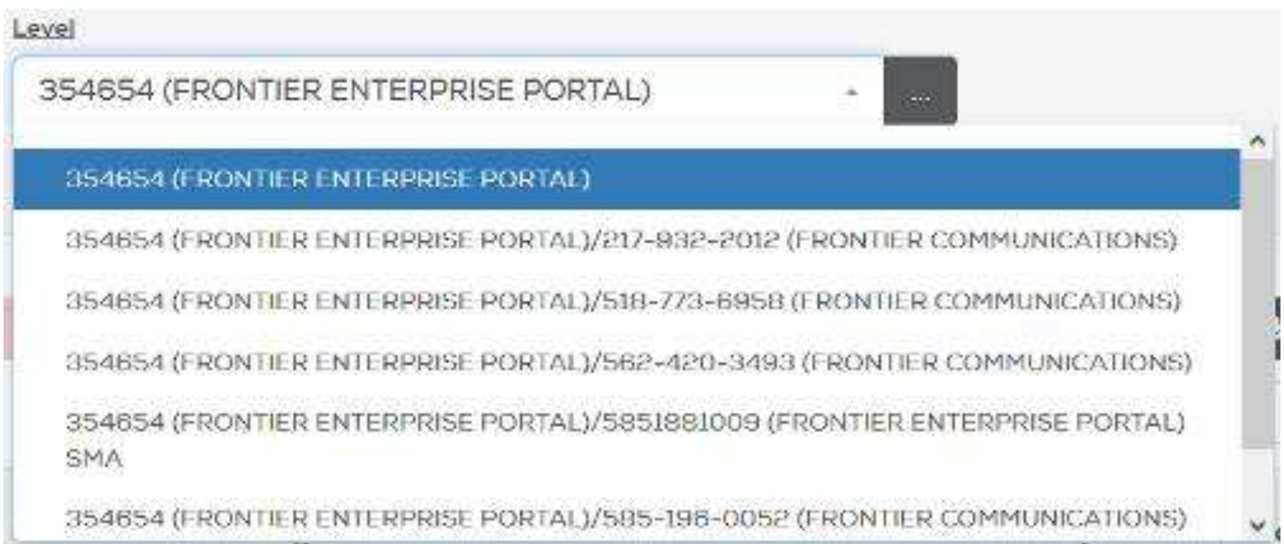
While viewing the Statements page (or Summary and Detail reports), you can click on any of the column headers to sort the information high to low, low to high, A – Z or Z – A, et.


## Using LEVELs

(Premium Access only)

Use the Level drop-down menu arrow on either the Statements, Summary, or Detail tabs to select a specific (account) BTN or Summary Master Account within your monthly billing hierarchy.

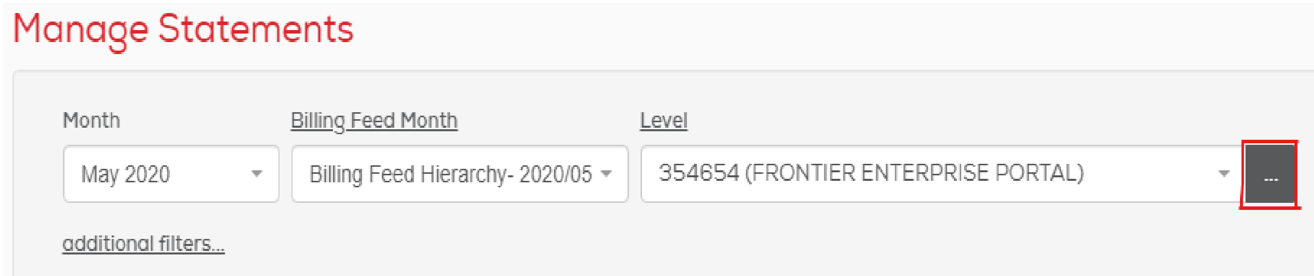


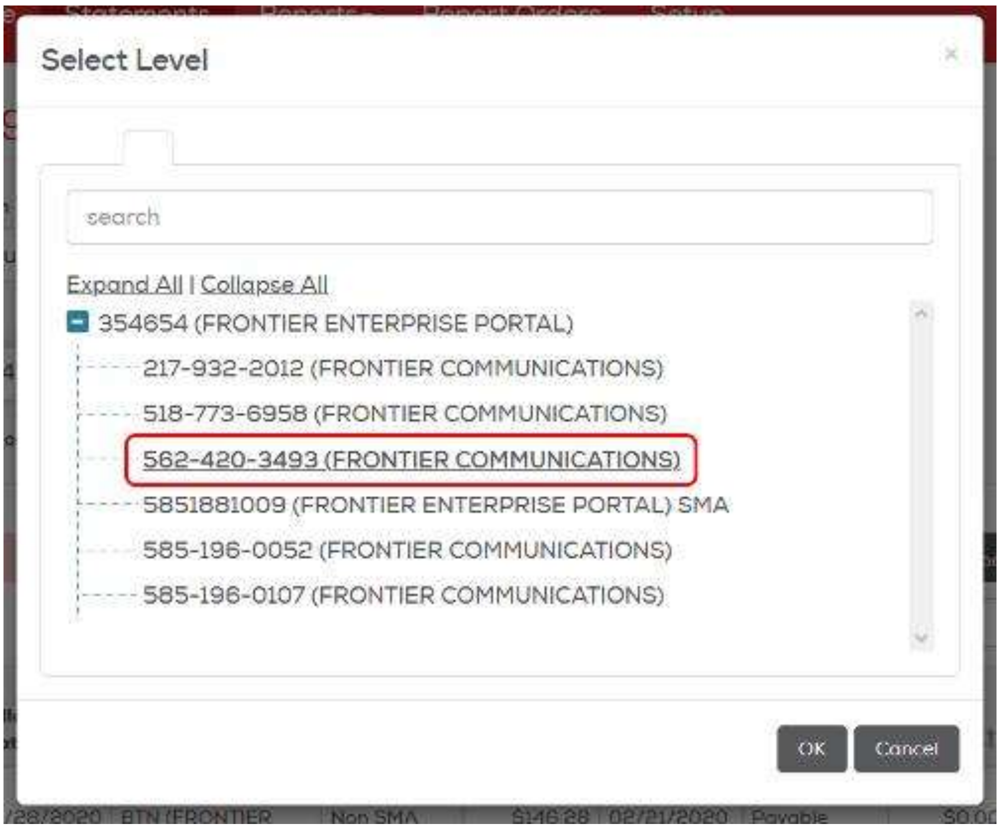




Click on the level to drill down on accounts billing directly to GAN (SMAs, BTNs).

For **larger accounts**:

1. Click the dark grey button with three dots
2. Click on an account
3. **Click OK**

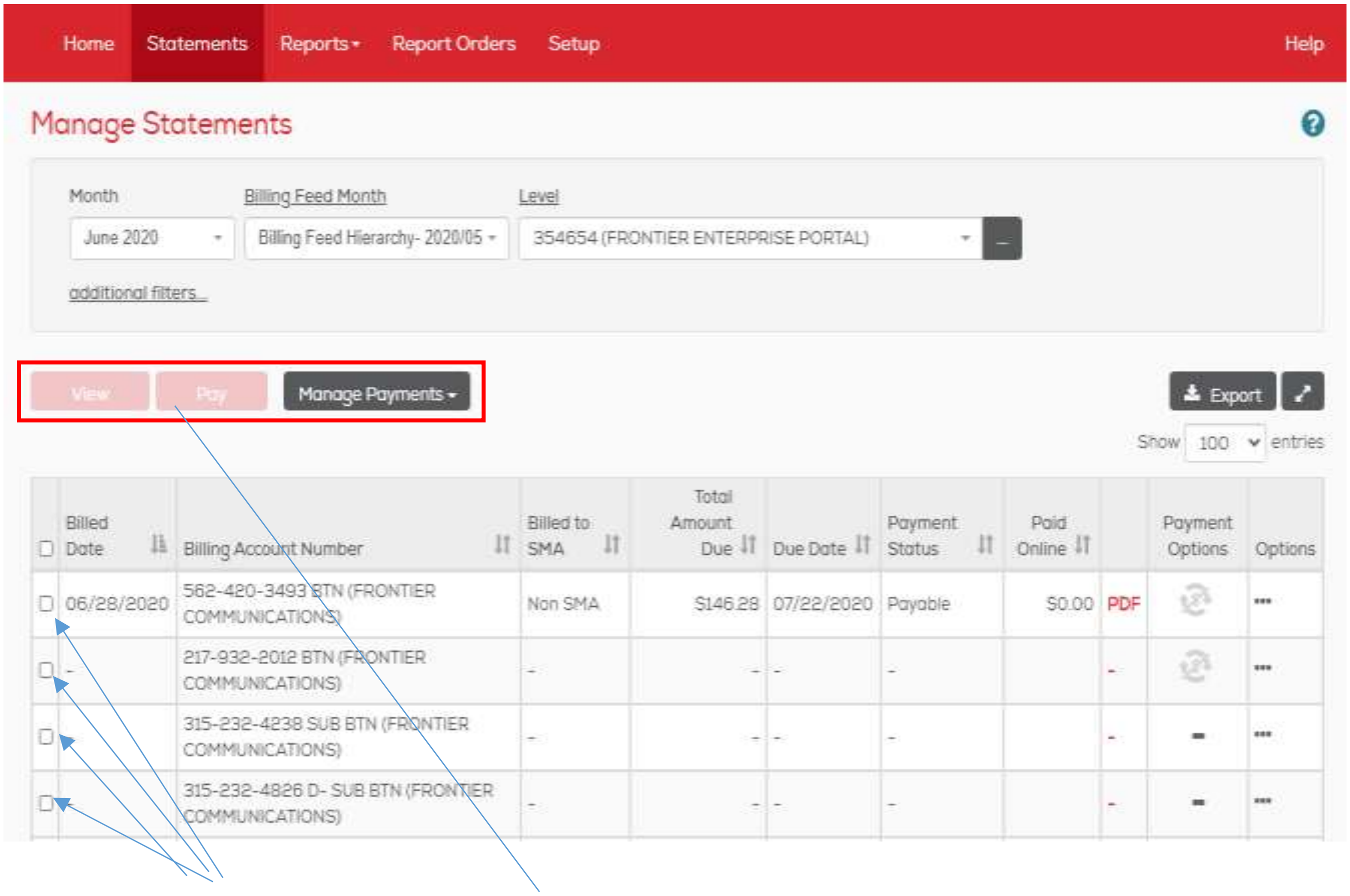

Manage Statements
Month
Billing Feed Month
Level
May 2020
Billing Feed Hierarchy- 2020/05
354654 (FRONTIER ENTERPRISE PORTAL)
...
additional filters...


Select Level
search
Expand All | Collapse All
354654 (FRONTIER ENTERPRISE PORTAL)
217-932-2012 (FRONTIER COMMUNICATIONS)
518-773-6958 (FRONTIER COMMUNICATIONS)
562-420-3493 (FRONTIER COMMUNICATIONS)
5851881009 (FRONTIER ENTERPRISE PORTAL) SMA
585-196-0052 (FRONTIER COMMUNICATIONS)
585-196-0107 (FRONTIER COMMUNICATIONS)
OK
Cancel

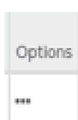
 

# The Statements Tab

The Statements tab is the key to viewing and easily manage all your Frontier Communications invoices from one convenient location. One may view a single invoice, consolidated invoices, compare monthly historical invoices, and group invoices by specific criteria.




Click the white checkbox(es) then the buttons above will light up to view/affect one or multiple statements at one time.

Click the three dots 

to view/affect only one statement.

## Overview Statement

| Header | Action |
|---|---|
| **Billed Date** | The date of an Accounts' billing cycle. |
| **Billing Account Number** | BTNs, sub BTNs and SMAs listed in order of billing cycle, then numerically by billing telephone number |
| **Billed to SMA** | • If a Billing Account Number is subordinate to a Summary Master Account (SMA), the SMA will appear in this column.<br>• If the Billing Account Number is a standalone BTN, this column will show Non SMA.<br>Sub BTN will have an SMA listed in the column<br>BTN will have Non SMA listed in the column<br>Billing Account Number / Billed to SMA<br>217-932-2012 BTN (FRONTIER COMMUNICATIONS) / Non SMA<br>315-232-4238 SUB BTN (FRONTIER COMMUNICATIONS) / 5851881009 |
| **Total Amount Due** | This amount represents previous balance PLUS current charges |
| **Due Date** | The date payment is due to not incur late charges |
| **Payment Status** | • Paid in Full<br>• Payable<br>• Partially Paid<br>• Autopay (will only appear 24 hours prior)<br>• Denied<br>• Scheduled (one-time payment only)<br>• N/A (Not Applicable) (payment required at SMA level) |
| **Paid Online** | Total paid online - payments processed via a transaction method other than in this pc will not appear in this payment view |
| **PDF** | TEXT formatted version of the invoice |
| **Payment Options** | AutoPay OFF<br>AutoPay ON |

| | |
|---|---|
| **Options** | Hover over the three dots for options to:<br>• Pay (the individual invoice)<br>• Manage Auto Pay (for the individual invoice)<br>• Manage Payment Sources (for the individual invoice)<br>• Pay by Mail (create & print a remittance slip)<br>• View Payments (for the individual invoice) |

## Viewing a Single Statement

1. Click the **Statements** Tab.
   TIP: The current month's data is the default view. The beginning of a month isn't going to show a full month's data because recent statements are in last's month's view.
2. Select account filters to select desired Month, and Level of account (GAN, SMA, or BTN).
3. Select the Billing Feed Month to match the Month Filter.
4. View the statement one of two ways:
   a. Hover over the statement and click on it
   b. Check the box to the left and click the red VIEW at the top.

      Either of these ways gets one to the same statement – the advantage to using #2 is one may choose multiple statements to view at one time.
5. Each statement allows for more detail by checking 'Expand Statement'.

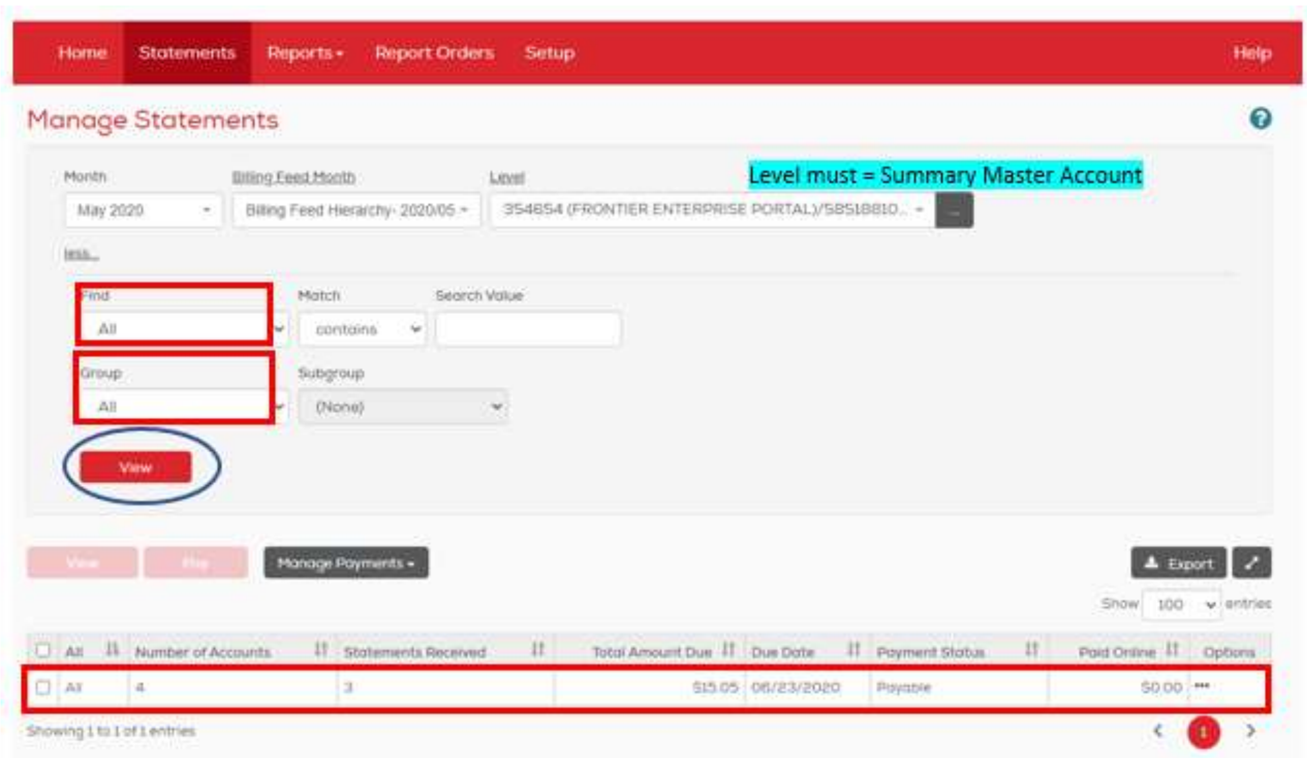

 

## Account Detail and Expand Statement for a Summary Master Account (SMA)

Filters should be set as follows:

- Open Additional Filters
- Level drop down** choose SMA (the level you choose should have SMA after the telephone number)
- Find = ALL
- Group = ALL
- Click VIEW

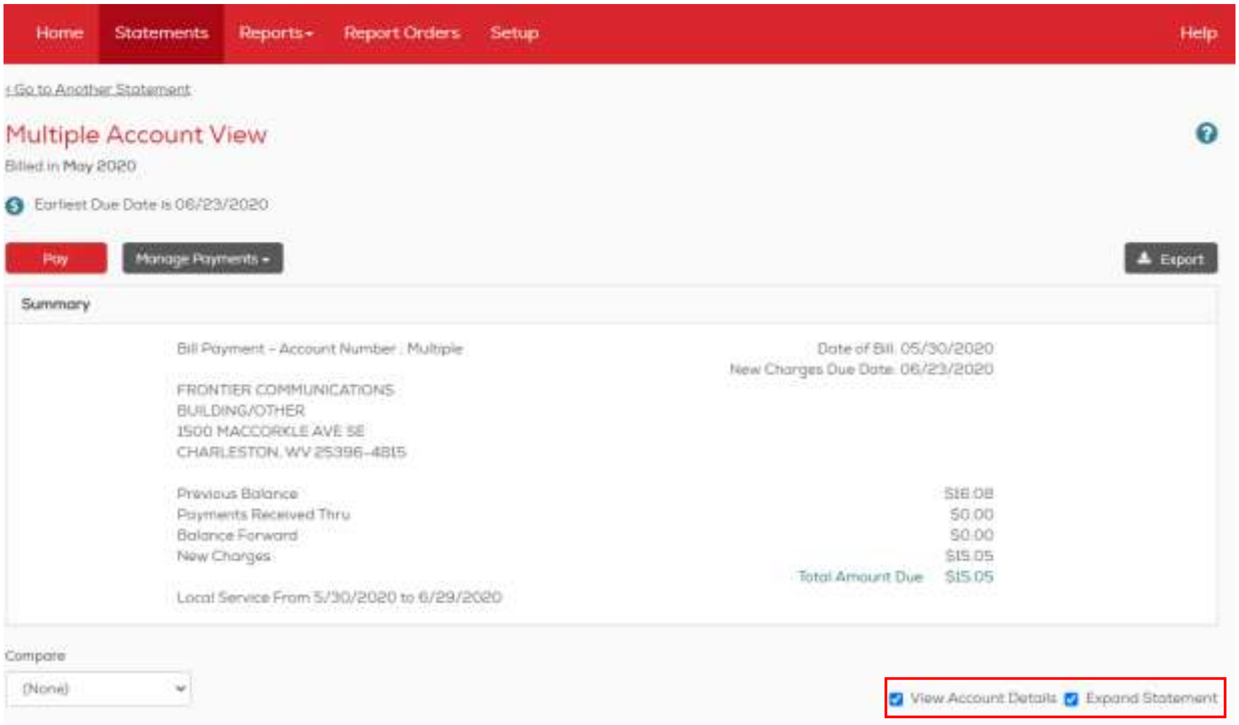
**SEE HELPFUL TIPS on LEVEL.




This example does not have many subordinate BTNs attached to the Summary Master Account. The line of data quantifies the statements associated, as well as the accounts. There may be $0 billing or disconnected accounts, which explains the discrepancy.

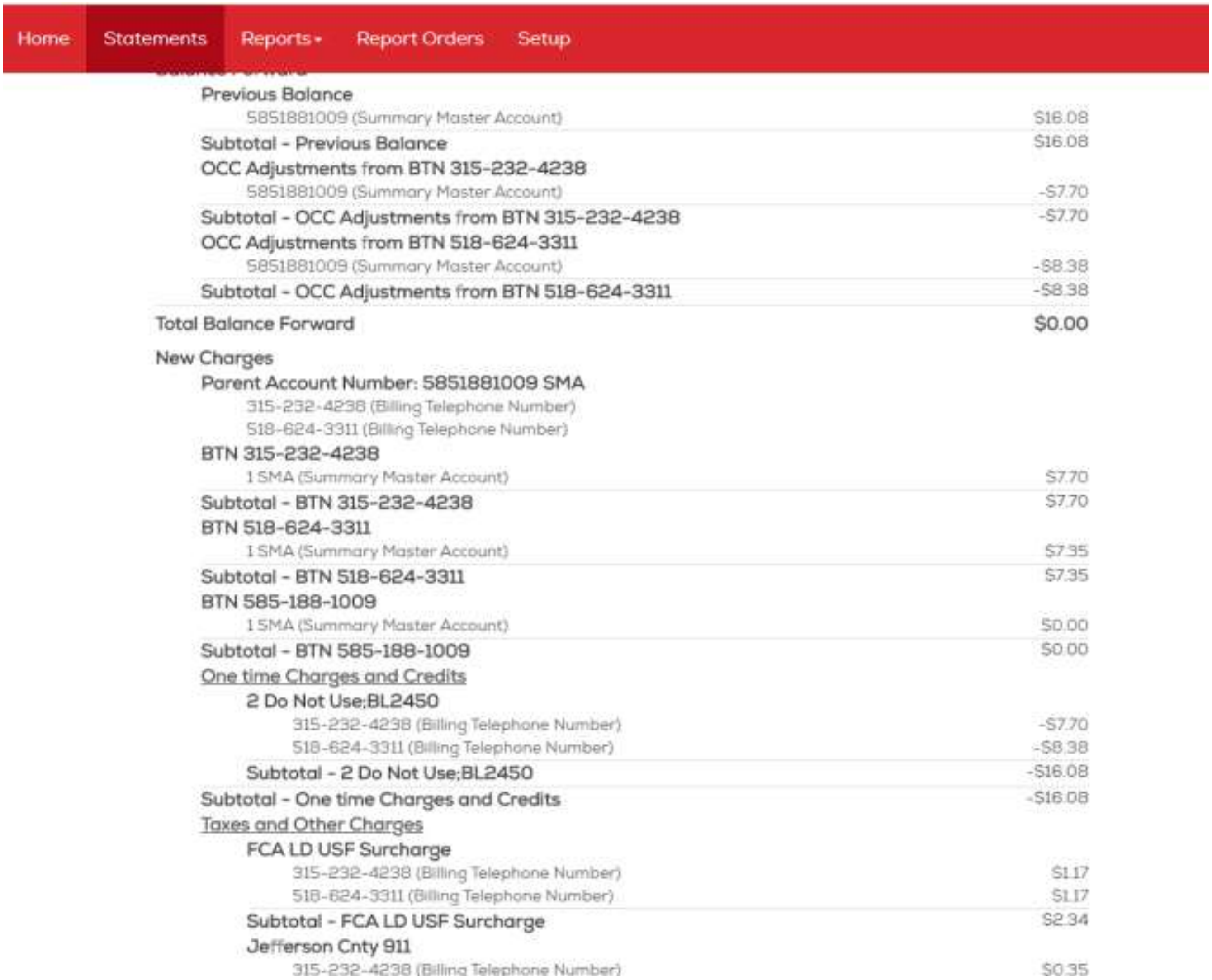
While viewing the statement–check boxes for Account Detail AND EXPAND STATEMENT



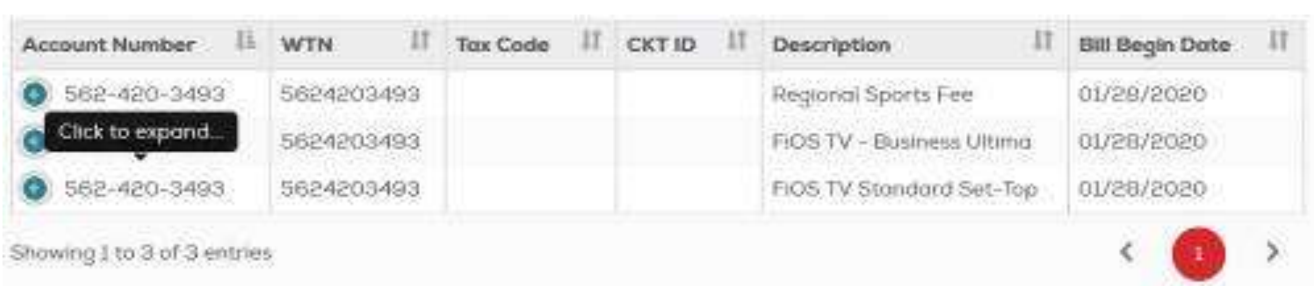

See the detail at BTN level for all subordinate to the SMA. This may now be exported in PDF or CSV file format.




## Summary Expands to Detail 'Hyperlinks'

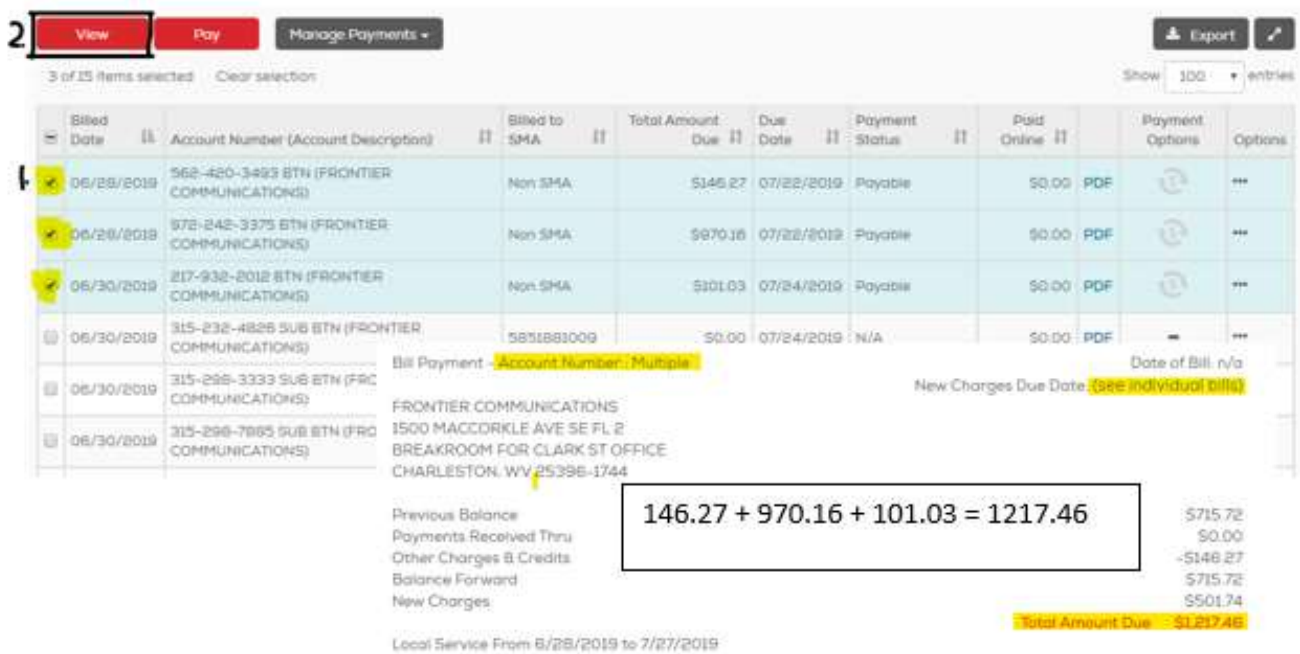
While viewing your invoices in the Statements tab or your Summary reports, you can click on the (+) icon to quickly access the associated detail data. This an alternate way to avoid the arrow icon if your screen isn't expanded. The arrow icon expands the entire page, the (+) expands for one row.



## Viewing a Consolidated Statement

Consolidate all or a group of statements to quickly see the total amount due.

1. While viewing a list of statements, check the boxes for the desired statements to see in a consolidated view.
2. Click **View Statement.**
3. Check **Expand Statement** and **View Account Details** to see additional details.
4. Click **View.**




## Viewing Additional Details: Basic Charges and Taxes

Once a statement has been expanded, hyperlinks can be chosen to reveal detailed information about sub-categories of the bill such as Basic Charges, etc.

## Viewing Additional Details: Circuit Identifier

Circuit Identifier can be selected to reveal:

- Account Number
- WTN
- Circuit ID
- DID/PRI
- SPID 1
- SPID 2/BPR

*this information must be entered in our main billing system to appear here

**Circuit Identifier**

2 /IPXD/380311/0/SN/ Click to open

2 /IPXD/380313/0/SN/

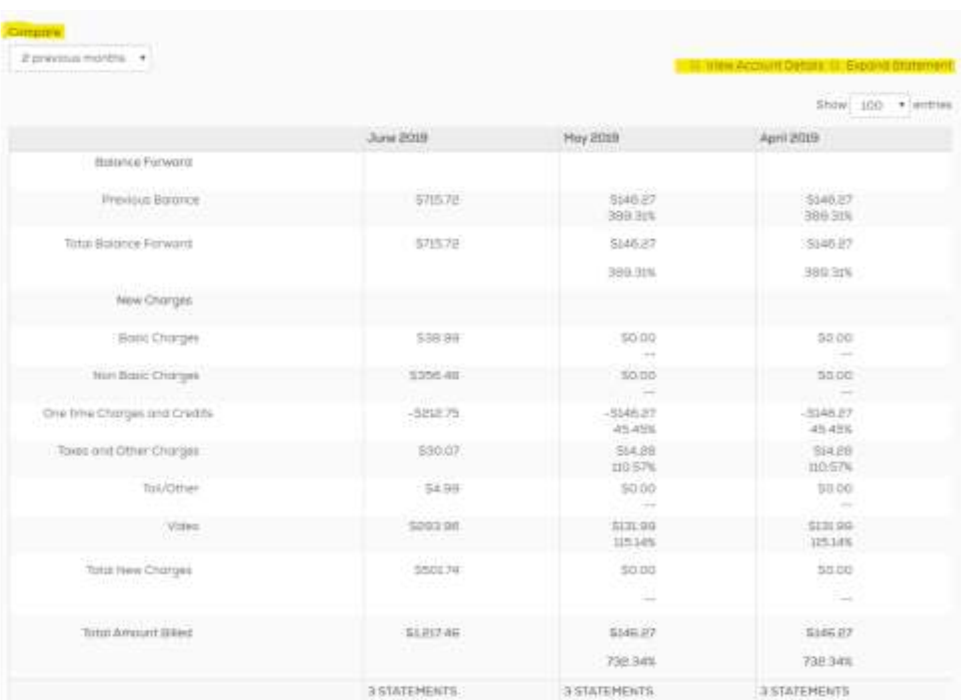
2 /IPXD/380319/0/SN/


+ more fields

## Comparing Statements

Compare your current statement to 12 months of historical statements to quickly identify unanticipated variances and analyze cost and usage trends.

While viewing a statement, click **Compare** and chose appropriate # of months for side by side per month comparison. (Only available for 13 months, depending on when your data started appearing in the portal.)




| | June 2019 | May 2019 | April 2019 |
|---|---|---|---|
| Balance Forward | | | |
| Previous Balance | $715.72 | $146.27 389.31% | $146.27 389.31% |
| Total Balance Forward | $715.72 | $146.27 389.31% | $146.27 389.31% |
| New Charges | | | |
| Basic Charges | $38.99 | $0.00 -- | $0.00 -- |
| Non Basic Charges | $356.48 | $0.00 -- | $0.00 -- |
| One time Charges and Credits | -$212.75 | -$146.27 45.45% | -$146.27 45.45% |
| Taxes and Other Charges | $30.07 | $14.28 110.57% | $14.28 110.57% |
| Toll/Other | $4.99 | $0.00 -- | $0.00 -- |
| Video | $283.98 | $131.99 115.14% | $131.99 115.14% |
| Total New Charges | $501.74 | $0.00 -- | $0.00 -- |
| Total Amount Billed | $1,217.46 | $146.27 732.34% | $146.27 732.34% |
| | 3 STATEMENTS | 3 STATEMENTS | 3 STATEMENTS |

## Grouping Statements

Quickly find statements that fall into a specific category (Day of Month Due, Payment Status, etc.).

**1.** Select Additi**onal Filters**

Slide 1

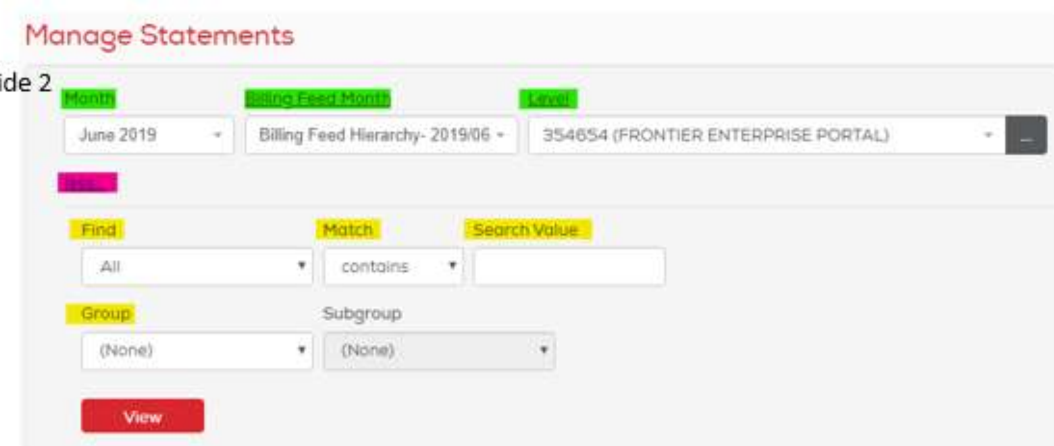

2. Click drop-down for **Find**

- **Account Number** **(*** very important *** — BTNs or sub BTNs MUST have dashes to be found 570-631-3800)**
- Account Description (Billing Account Name)
- Billed to SMA **Summary Master Accounts should not have dashes in the format (1231889999)**

Match = ‘Starts With’ is most common choice

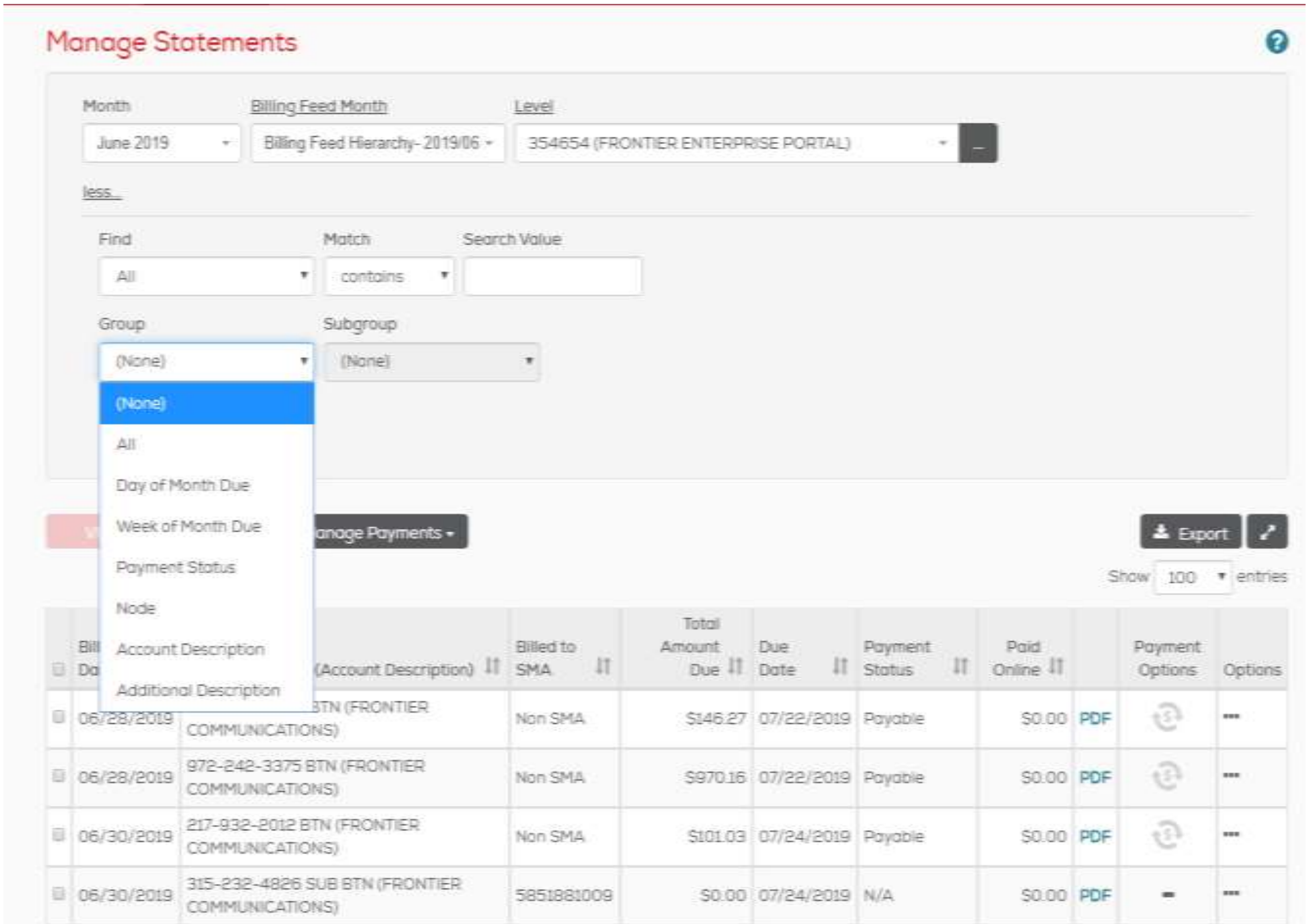
Search Value = use appropriate value (see Account Number & Billed to SMA above)

Slide 2




3. **Group** – allows for specific filtering of data based on:

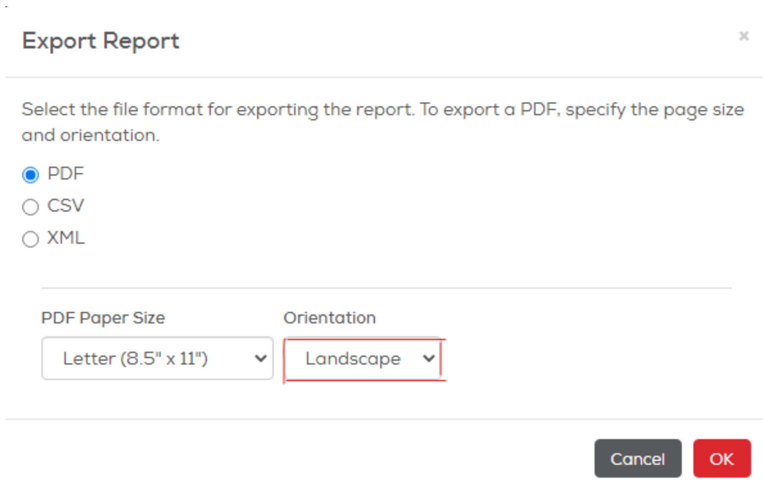
- None (default)
- All
- Day of Month Due
- Week of Month Due
- Payment Status
- Node
- Account Description 1 (see Set Up Tab for Acct Description 1)
- Account Description 2 (see Set Up Tab for Acct Description 2)


Manage Statements
Month
Billing Feed Month
Level
June 2019
Billing Feed Hierarchy- 2019/06
354654 (FRONTIER ENTERPRISE PORTAL)
less...
Find
Match
Search Value
All
contains
Group
Subgroup
(None)
(None)
(None)
All
Day of Month Due
Week of Month Due
Payment Status
Node
Account Description
Additional Description
anage Payments
Export
Show
100
entries
(Account Description)
Billed to SMA
Total Amount Due
Due Date
Payment Status
Paid Online
Payment Options
Options
06/28/2019
BTN (FRONTIER COMMUNICATIONS)
Non SMA
$146.27
07/22/2019
Payable
$0.00
PDF
06/28/2019
972-242-3375 BTN (FRONTIER COMMUNICATIONS)
Non SMA
$970.16
07/22/2019
Payable
$0.00
PDF
06/30/2019
217-932-2012 BTN (FRONTIER COMMUNICATIONS)
Non SMA
$101.03
07/24/2019
Payable
$0.00
PDF
06/30/2019
315-232-4826 SUB BTN (FRONTIER COMMUNICATIONS)
5851881009
$0.00
07/24/2019
N/A
$0.00
PDF

## Exporting and Printing Statements

1. **While viewing a statement**, click **Export**.
2. Select the file type.
3. For PDF, change orientation to Portrait for best experience.
4. Click **OK**.




Simple PDF, no detail (did not click EXPAND).

'Expanded detail' PDF.

| Balance Forward | New Charges | Total Amount Billed | Due Date |
|---|---|---|---|
| **$0.00** | **$0.00** | **N/A** | **02/23/2021** |

| | | |
|---|---|---|
| **Other Credit and Charges** | | |
| Adjustments Transferred to 3041893555 SMA | | $10.00 |
| **Total Other Credit and Charges on Account Level** | | **$10.00** |
| **New Charges** | | |
| Parent Account Number: 3041893555 SMA | | |
| **Total New Charges** | | **$0.00** |
| **Transferred Charges** | | |
| Amount Transferred to 3041893555 SMA | | -$10.00 |
| Toll/Other | | |
| 1 WATS-TollFree Common Line | $10.00 | |
| Subtotal - Toll/Other | | $10.00 |
| One time Charges and Credits | | |
| 1 Do Not Use;BL2450 | -$10.00 | |
| Subtotal - One time Charges and Credits | | -$10.00 |
| **Total New Charges** | | **$0.00** |

Choose PDF, CSV or XML file format and save or print for offline use. CSV format – no totals, just charges.

| Tier1 (summary) | Tier2 (more detail about charges) | Tier3 (the detail) | Amount |
|---|---|---|---|
| Other Credit and Charges | Adjustments Transferred to 3041893555 SMA | | $10.00 |
| New Charges | Parent Account Number: 3041893555 SMA | | |
| Transferred Charges | Amount Transferred to 3041893555 SMA | | ($10.00) |
| Transferred Charges | Toll/Other | 1 WATS-TollFree Common Line | $10.00 |
| Transferred Charges | One time Charges and Credits | 1 Do Not Use;BL2450 | ($10.00) |

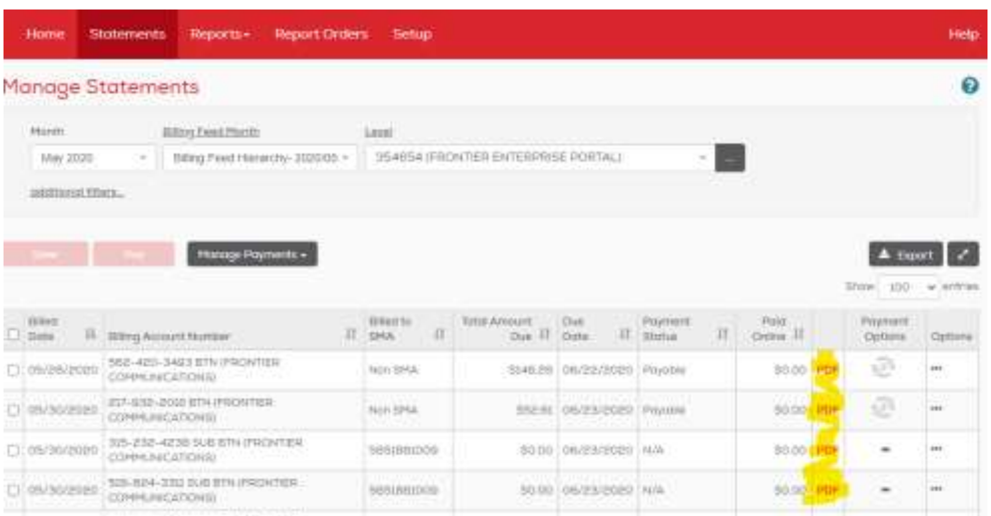
## Viewing a PDF Copy of the Paper Invoice

PDF statements are now available online.

The PDF is the same data as the paper invoice (which includes long distance detail, and the long-distance summary report) but in a different file format – without graphics and color. This PDF is a TXT file.

To view the PDF

- Click on **STATEMENTS** tab.
- Click the **RED "PDF" in third column from the right – indicated below.**




The document download will appear at the bottom of your screen. Double click to open.

Result: A PDF version of the invoice will display.

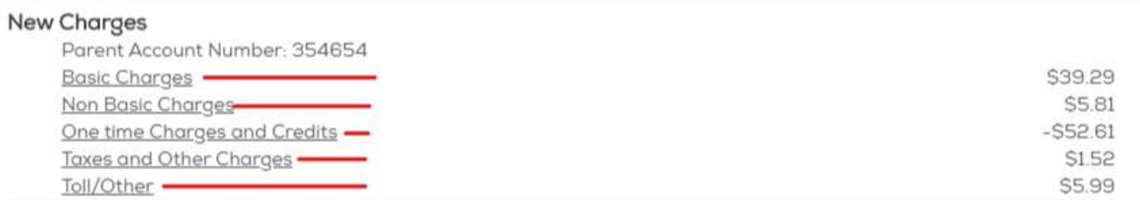
Note: Because of formatting challenges, there is white space between page and individual statements associated with **S**ummary **M**aster **A**ccounts, when viewing an SMA.

```
TEXT CODE:    ILBBB
PIN: 0723

                                                Date of Bill   1/30/21

                                        New Charges Due Date   2/23/21

     Account Number 217/932-2012             Total Amount Due          $41.95
         FRONTIER COMMUNICATIONS
         1500 MACCORKLE AVE SE                      Amount Paid
         CHARLESTON, WV  25396-1632

                               253961632  0
           655004217932201205011700000000000000041955
          www.frontier.com
       Business                                             1-877-387-3477

     Account Number 217/932-2012                    Date of Bill   1/30/21
       Previous Balance                                              41.95
       Payments Received Thru 1/30/21                                  .00
       Other Charges & Credits                                      -41.95
       Balance Forward                                                 .00
       New Charges                                                   41.95

                                            Total Amount Due        $41.95
   Detail of Other Charges & Credits
          Company Owned A/R Adjustment                              -41.95
                      CURRENT BILLING SUMMARY
    Local Service from  01/30/21  to  02/28/21
    Qty Description                     217/932-2012.0         Charge
    Basic Charges
        Business Line - Flat Rate                                    18.40
        Multi-Line Federal Subscriber Line Charge - Bus               9.20
        Acc Rec Chrg Multi-Ln Bus                                     3.00
        Other Charges-Detailed Below                                  8.33
        IL State 911 Surcharge                                        1.50
        IL Telecom Relay Surcharge                                     .02
    Total Basic Charges                                              40.45

    Non Basic Charges
        Frontier Roadwork Recovery Fee                                1.50
    Total Non Basic Charges                                           1.50
                                                 TOTAL               41.95
** ACCOUNT ACTIVITY **
    Qty  Description                 Order Number Effective Dates

      1 Intrastate Access Charge         AUTOCH  1/30                 8.33
        217/932-2012                            Subtotal              8.33
                                                  Subtotal            8.33
```

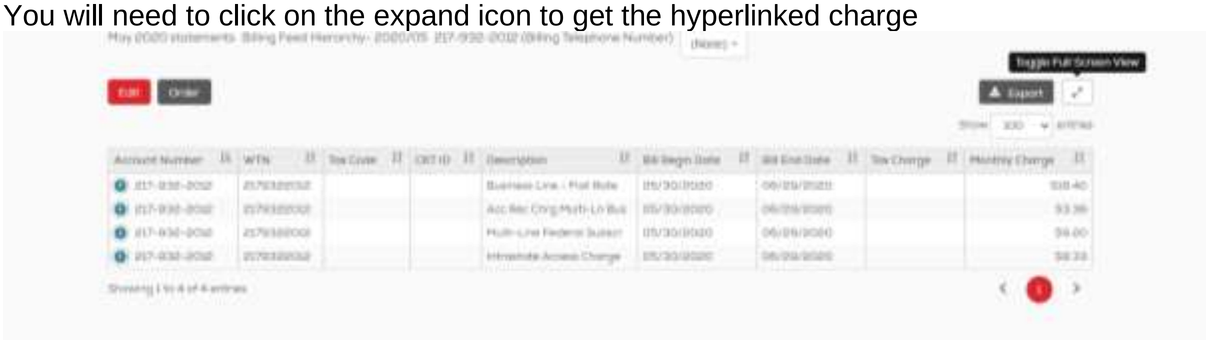
## Customer Disputes

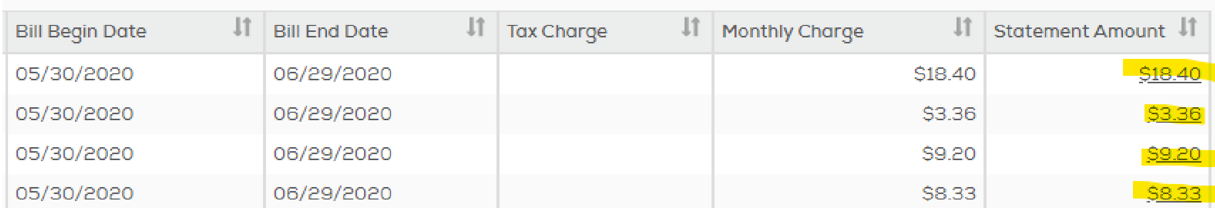
Disputes may now be placed online:

1. Click on a Statement
2. Select any of the underlined/hyperlinks to expand the detail.



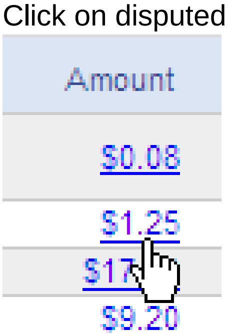

3. Once the detail appears-click on the hyperlink to dispute a charge
4. You will need to click on the expand icon to get the hyperlinked charge



| Bill Begin Date | Bill End Date | Tax Charge | Monthly Charge | Statement Amount |
|---|---|---|---|---|
| 05/30/2020 | 06/29/2020 | | $18.40 | $18.40 |
| 05/30/2020 | 06/29/2020 | | $3.36 | $3.36 |
| 05/30/2020 | 06/29/2020 | | $9.20 | $9.20 |
| 05/30/2020 | 06/29/2020 | | $8.33 | $8.33 |

5. Click on disputed charge amount:




6. Select a reason:

- Billing Inquiry
- Dispute a Charge
- Request a call Back

## Viewing Dispute Status

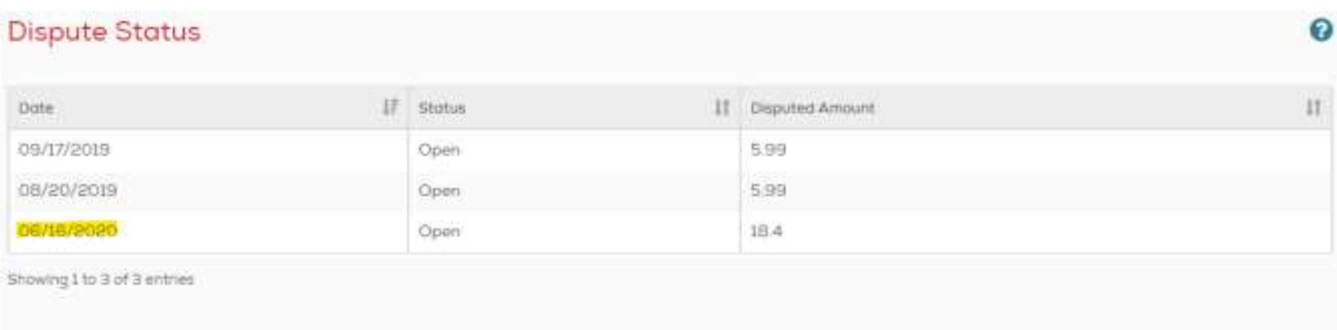

Please write a detailed description of dispute and click **Submit.**

To view **dispute status**, access the Setup tab.

From the Setup Tab scroll down to Payment Information section:

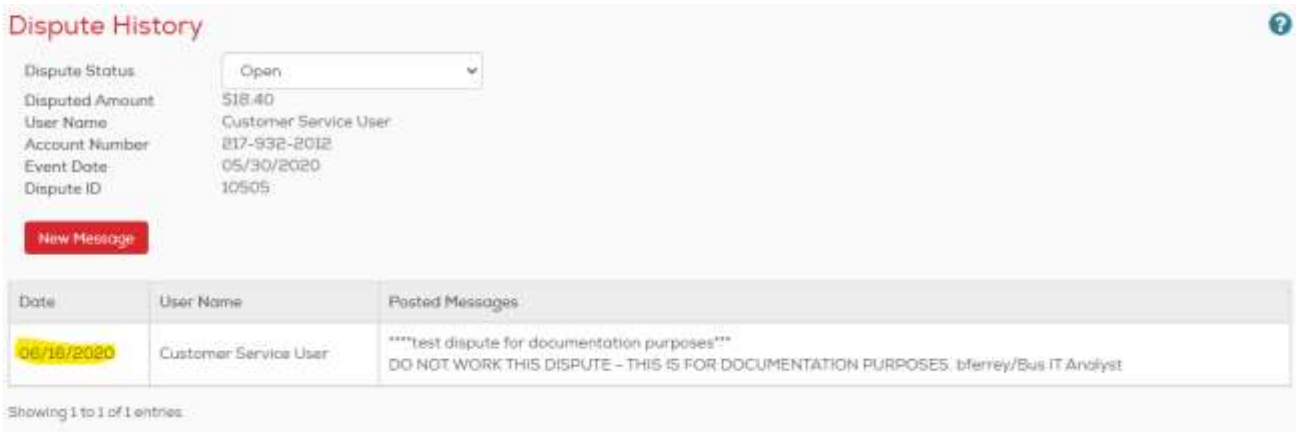
Click Dispute Status:


**Result:** any open disputes will display:

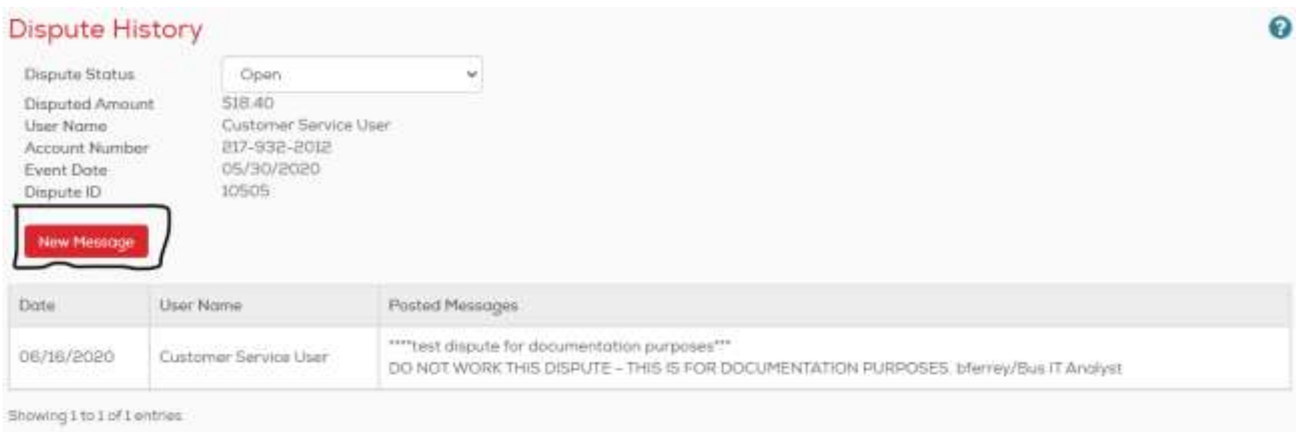


Hover over and click on the dispute you want to view or update

**Result:** Dispute History will display:




Click on **New Message** to add comments.




# Making a Payment

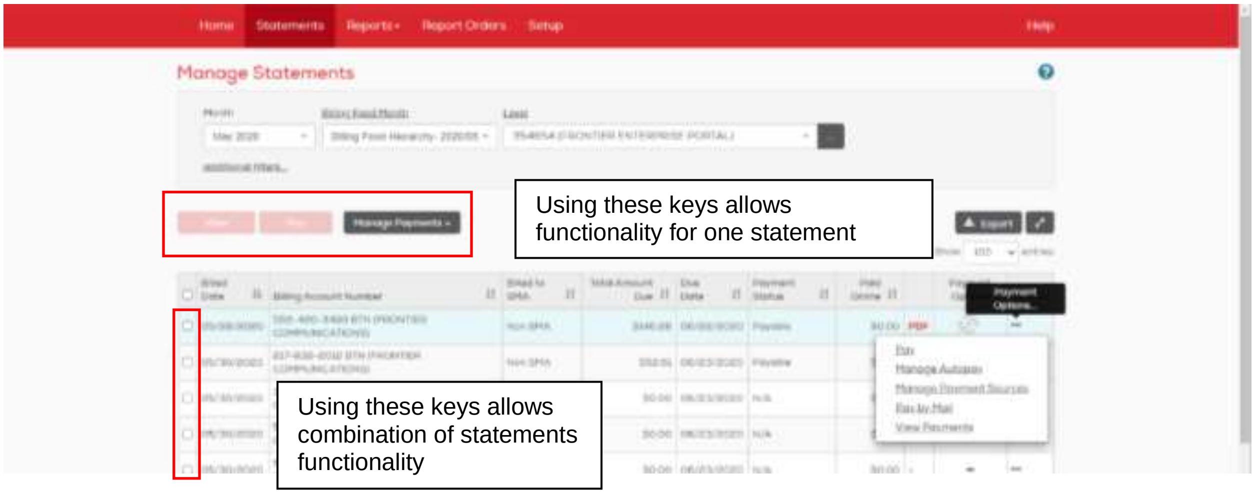
With the Payments functionality, you can make online payments via:

- Checking account
- Saving accounts
- Debit card
- Credit card

NOTE: Payments transaction offline from the Frontier Enterprise Portal (amounts OR payment status) are **not reflected** in the Enterprise Portal Billing application.

If a payment is made prior to the next month's bill cycle running, that payment will be evident on the billing statement of the following month.

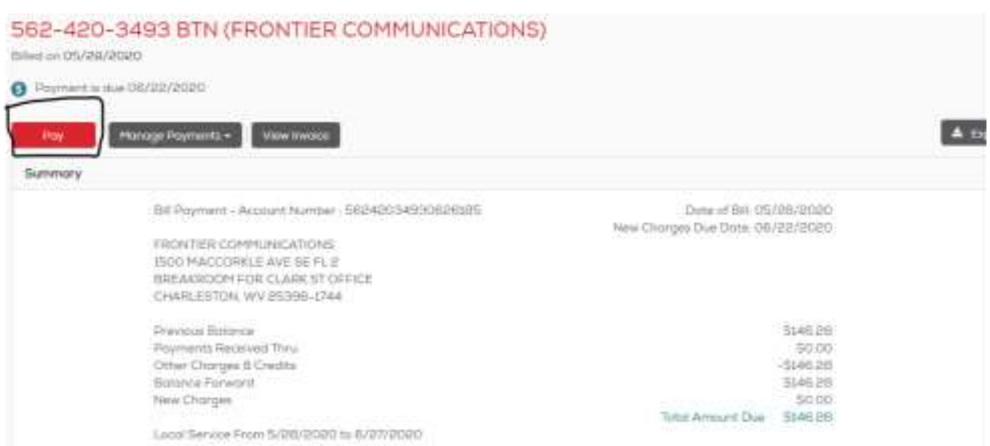
- Payments can be scheduled for a future date.
- Partial payments are accepted.
- Auto Pay is available. Please see Error! Reference source not found. below.



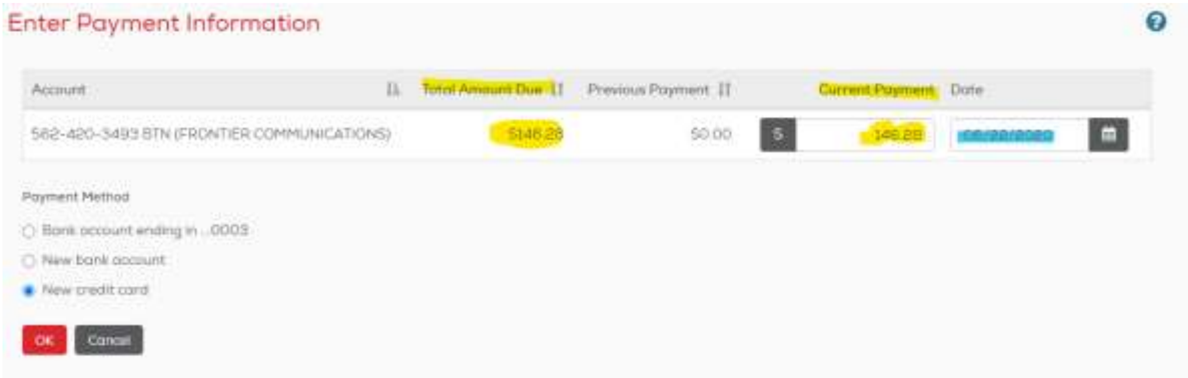

## Making a Payment on a Single BTN

**One-Time Payments** can be easily made online for one Billing Telephone Number (BTN) or several BTNs at one time if desired.

If a SUB BTN (part of a Summary Master Account,) you may not make a payment at the SUB BTN level.

| Step | Action |
|---|---|
| 1 | Choose **BTN** for desired payments. (if you select by checking the box all the way to the left, then the Pay will turn red.   If you choose to open the statement first, click on the statement to open, the Pay button is red by default.   |

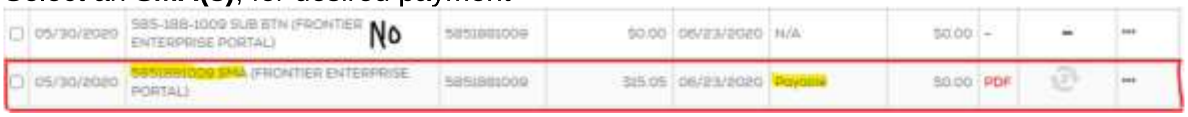
 

| | |
|---|---|
| 2 | Click Pay. |
| 3 | The amount to pay by default is ‘IN FULL’ unless you change the amount.<br>Enter the payment amount and payment date. **(The payment is TODAY if you don’t schedule the payment for a future date.)**<br> |
| 4 | Select NEW Bank Account, or NEW Credit Card. |
| 5 | Click **OK.** |
| 6 | Enter the required payment information.<br>**Eligible Credit Cards**<br>• VISA<br>• Mastercard<br>• American Express<br>• Discover<br>*MAX payment allowed $100,000/transaction<br>**Checking & Savings Accounts**<br>• Routing number<br>• Account number<br>*MAX payment allowed $1M ($1,000,000) |
| 7 | Click **OK**. |
| 8 | Review the payment details and accept the payment terms and conditions. |
| 9 | Click **Complete**. |
| 10 | A payment confirmation page will be displayed with a transaction number that can be used for future reference.<br>We recommend you either print the confirmation page or save the page to your personal online files.<br>Maximums:<br>• Credit Card maximum per transaction is one hundred thousand ($100,000).<br>• Bank Draft maximum per transaction is one million ($1,000,000). |

## Making an Online SMA Payment

Payments can be made easily online for a Summary Master Account (SMA) A summary master Account receives its own bill that summarizes all the child accounts.

1. Select an **SMA(s)**, for desired payment

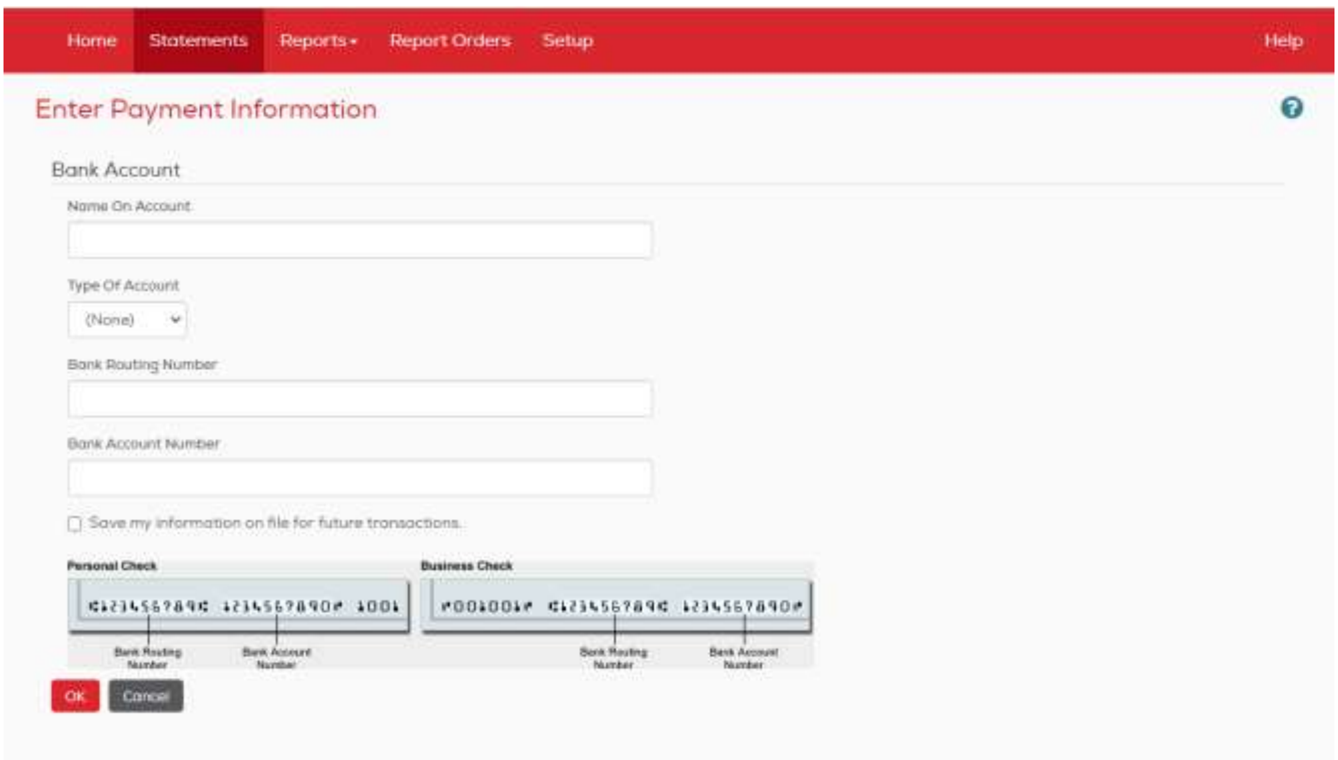



2. Click Pay – either after opening the statement, or after checking the box to the left of the statement row (see the bottom of page 26)
3. Enter the payment amount and payment date. **(The payment is in full, and the date is TODAY if you don't schedule the payment for a future date.)**

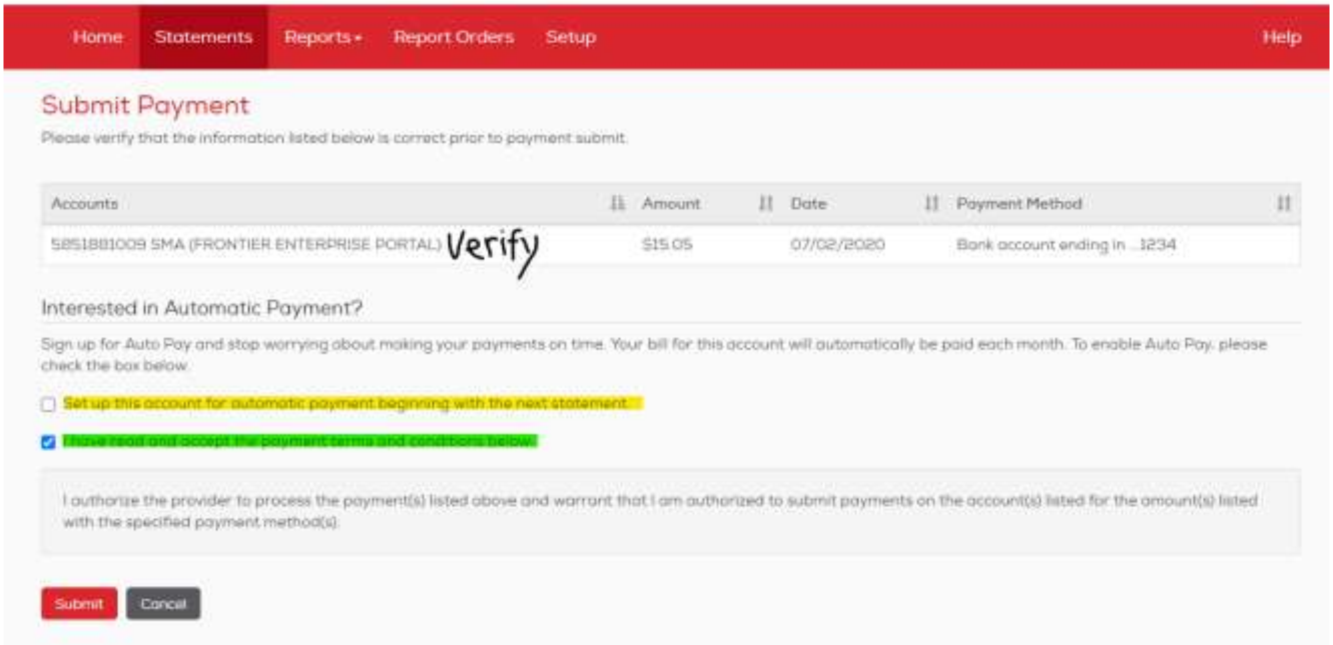
Follow the same steps as 'Making a Payment on a Single BTN' (page 25).

Credit Card maximum $100,000 per transaction.

Bank Draft maximum $1,000,000 per day.





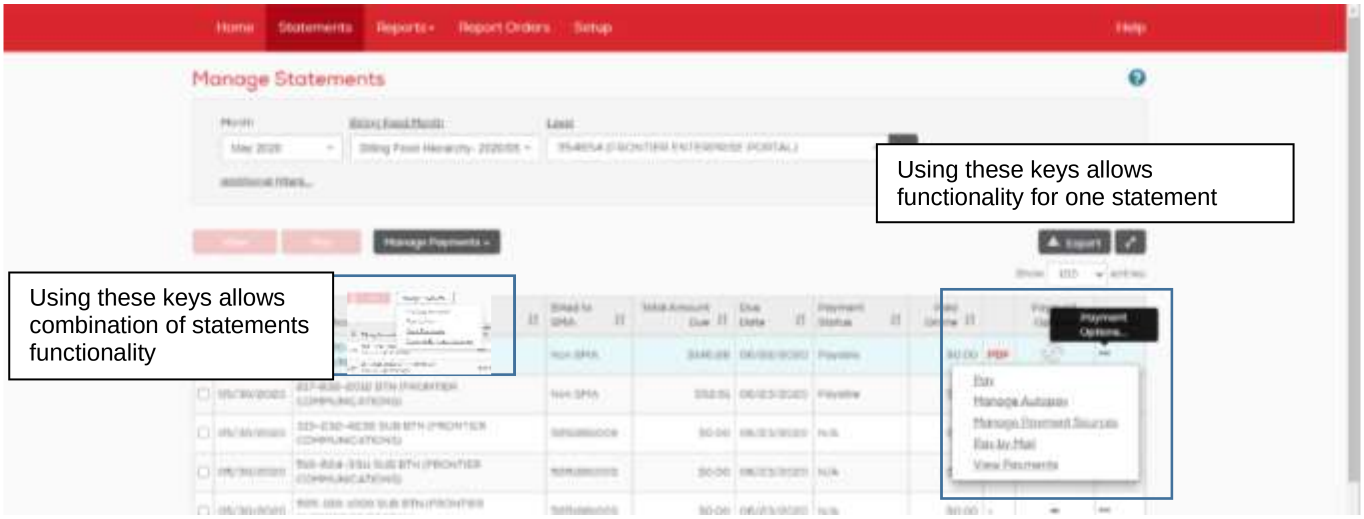


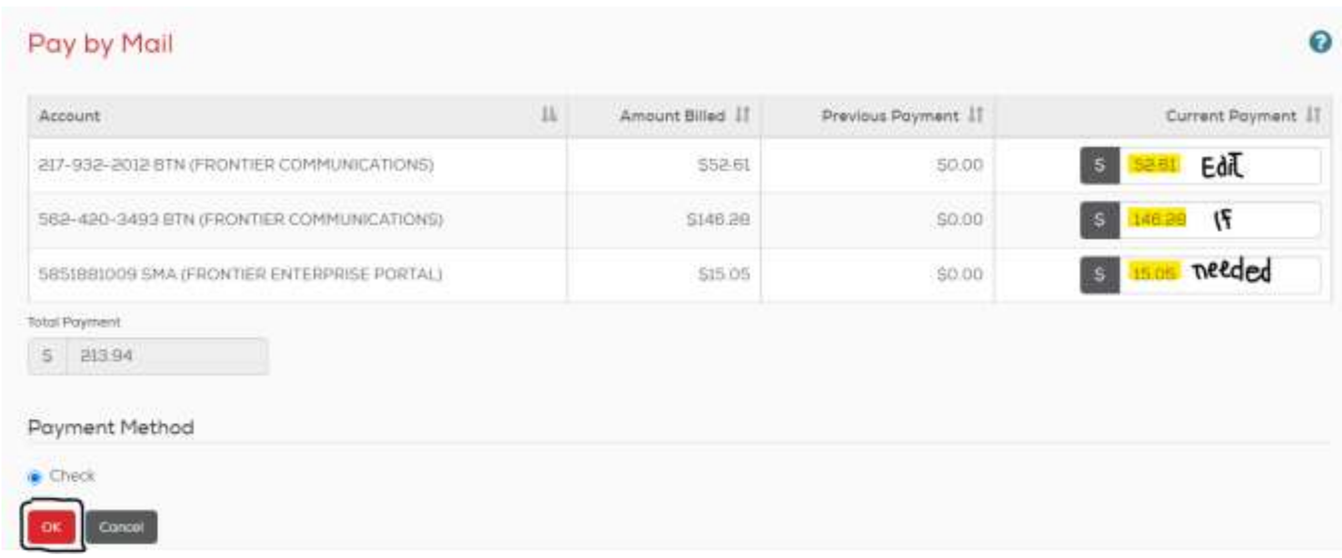
## Printing a Remittance Slip for an Offline Payment

Print a remittance slip with your account details and payment information to send a payment by mail.

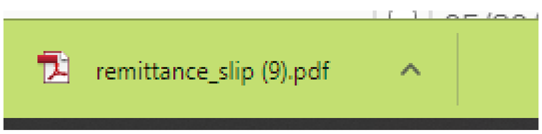
1. Select the account(s) on which one will make a payment.
2. Click **Manage Payment > Pay by Mail.**
3. Enter the desired payment amount.
4. Click **OK**.
5. A PDF remittance slip will be created and appear in a pop-up window of your download software. You may print it. Enclose the remit slip with a payment in an envelope and mail to Frontier Communications.

Most functions can be done at least one of two ways.




At the bottom of your screen…




Click to open this download.

Use your browser printing functions to print.

Customer Name: FRONTIER ENTERPRISE PORTAL
Payment Date: 06/25/2020
Payment Method: Check
Transaction Number: 218876
Billing Period: 05/30/2020 - 06/29/2020

To make a payment via mail, please PRINT this remittance slip and mail your payment with the slip to the address below.

| Payment Account Number | Bill Date | Due Date | Amount Billed | Current Payment |
|---|---|---|---|---|
| 21793220120501175 | 05/30/2020 | 06/23/2020 | $52.61 | $52.61 |
| 56242034930626185 | 05/28/2020 | 06/22/2020 | $146.28 | $146.28 |
| 58518810090620194 | 05/30/2020 | 06/23/2020 | $15.05 | $15.05 |

Amount Enclosed: $213.94

Please remit funds to:

Frontier Communications
P O Box 740407
Cincinnati OH 45274-0407

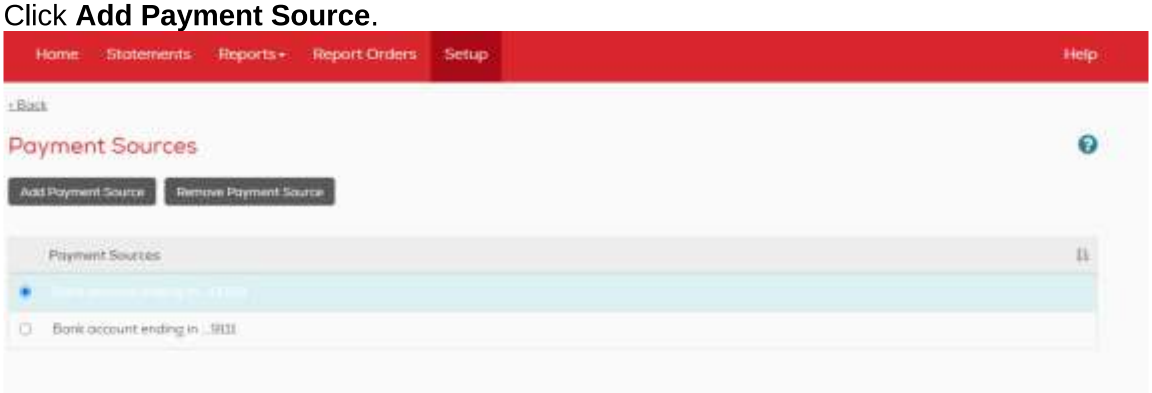
## Storing a Payment Source

Storing payment sources allows the user to quickly make payments each month.

Click Manage Payment Sources in either of the dropdowns (multiple statements by checking the boxes OR three dots to the very right of the statement on the Statements Tab.

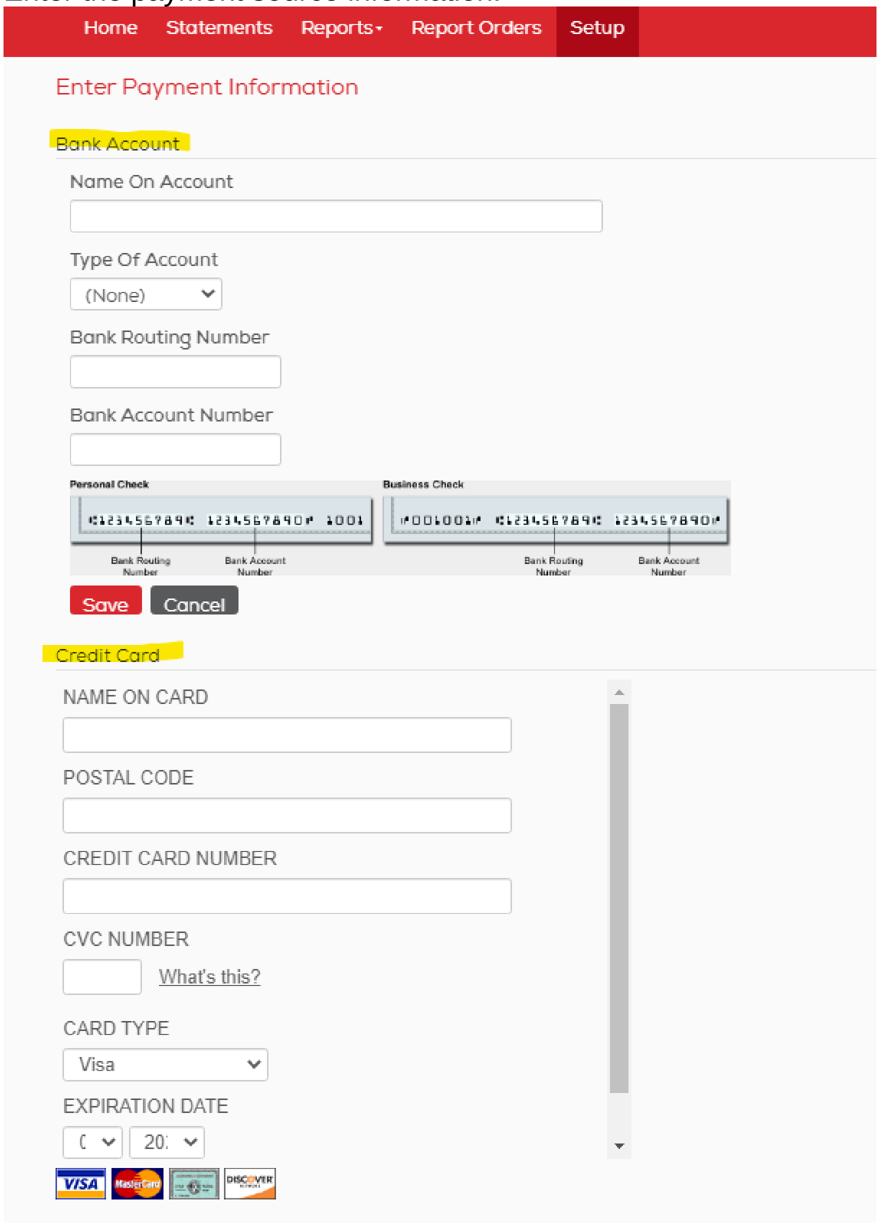
OR Click the **Setup** tab/Payment Sources.

1. Click **Manage Payment Sources** in either of the dropdowns (multiple statements by checking the boxes OR three dots to the very right of the statement on the Statements Tab.
2. Click **Payment Sources**.
3. Click **Add Payment Source**.



4. Enter the payment source information.




5. Click **Save**.

## Setting up Automatic Payments

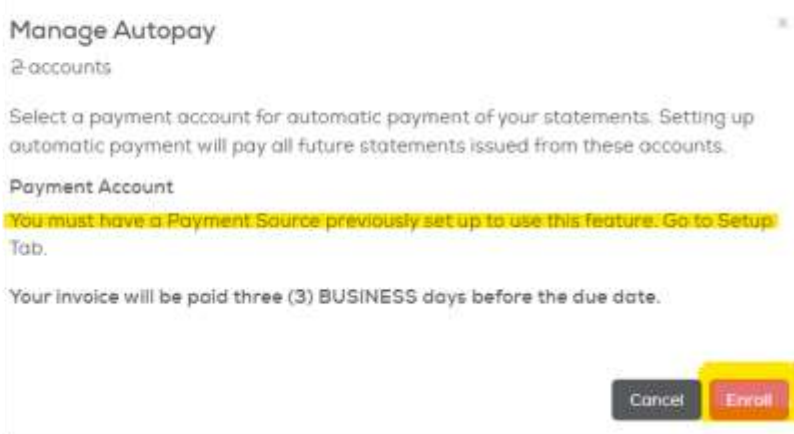
Automatic payment allows the user to reduce the time and resources required to make monthly ACH or Credit Card payments.

**Timing is critical in successful auto-payment**.

1. The Autopay functionality MUST be enabled prior to a bill cycle run for the Autopay to be triggered.
   EX: My bill is due 6/22/20. I turn on Autopay on 6/22/20. The 6/22 statement will NOT GET paid via Autopay because the bill cycle was already present prior to Autopay being turned on. The next cycle the Autopay will pay is the July 22nd statement.
2. Autopay is triggered and paid 3 full days prior to the due date of the statement.
3. Autopay can be turned off anytime by clicking the lit 'gold' Auto Pay icon.
4. If you turn the Autopay off, then turn it back on, the cycle of triggering the Autopay begins anew. See #1.
5. To stay current with your payments, sometimes a one-time payment is necessary before the Autopay triggers for payment of the following month's statement.

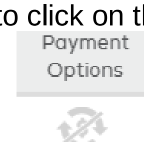
Turn Autopay by clicking the Autopay ICON (in red box below). It will turn from light grey to gold when enabled.


1. To enable Auto Pay, you must first create a payment source.

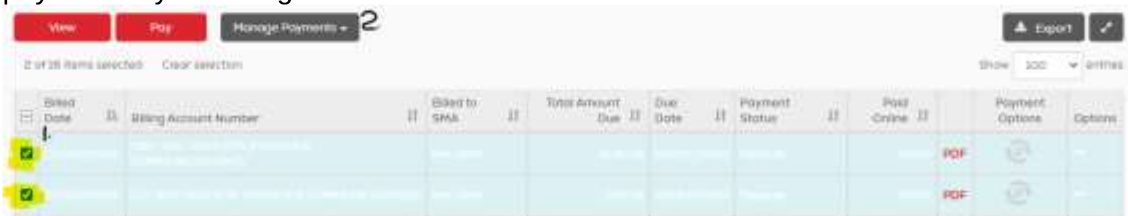



Not Lit

2. The easier way to enable AutoPay **on an individual account** is to click on the Autopay icon in second to last column (Payment Options) of the statements page.

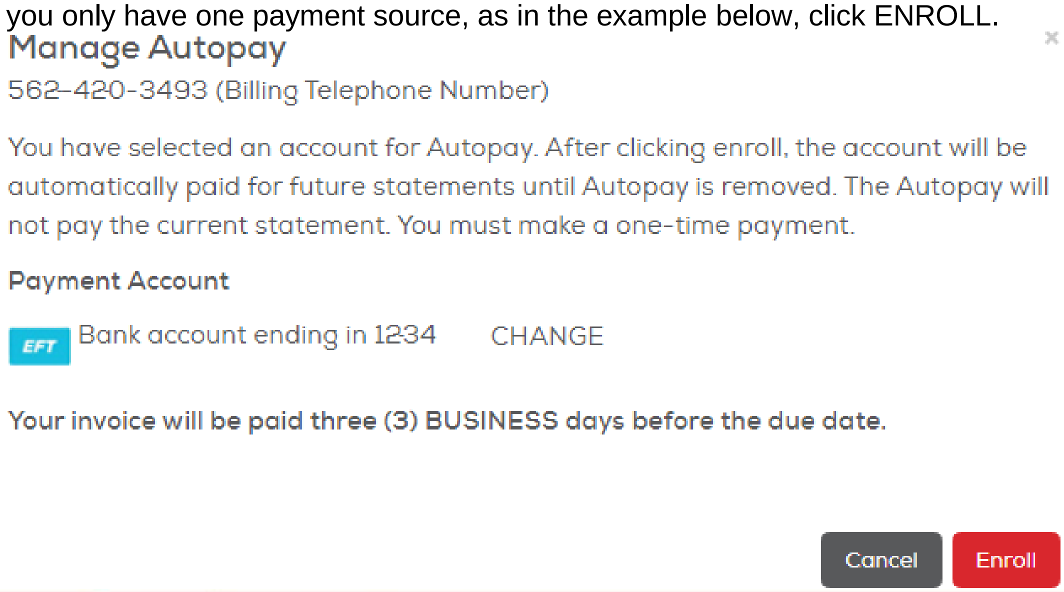


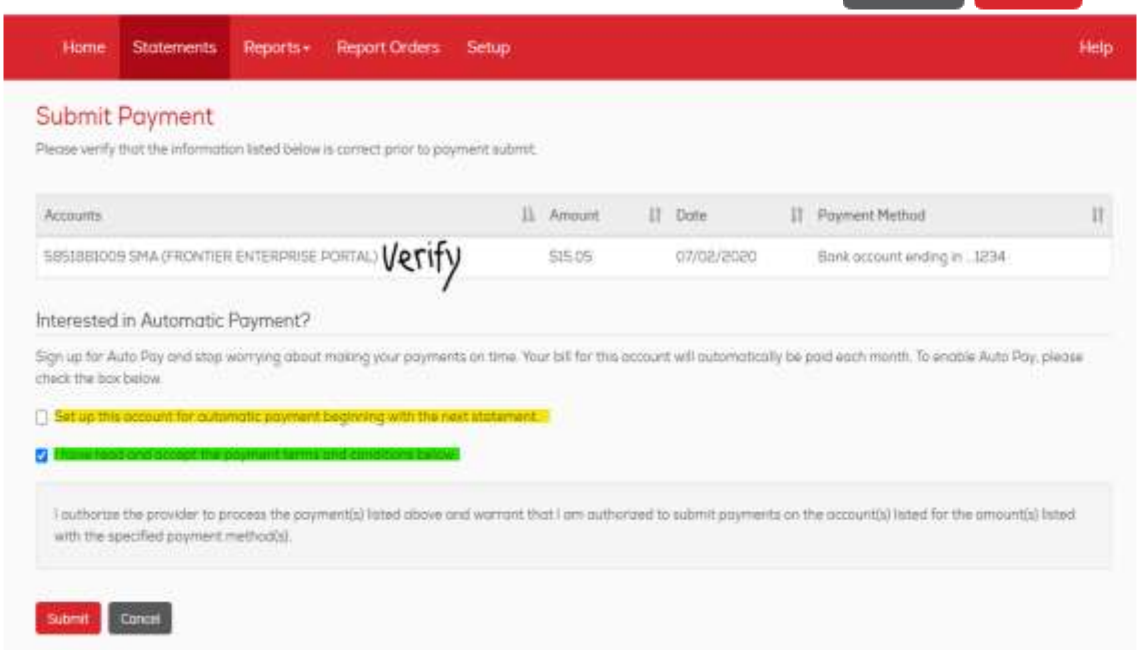

IF enabling Auto Pay **on more than one account**, select the accounts to set-up for automatic payments by checking the white box to the left of the statements.




3. Click **Manage Payments > Manage Autopay**.
4. If you have multiple payment sources, chose the source that best fits payment for your specified account.

   If you only have one payment source, as in the example below, click ENROLL.




Follow this same process for Credit Cards.

# Reports

Within the application, there are two main types of reports

1. Summary
2. Detail


As expected, the difference is the extent of the detail provided within the report

With PREMIUM access, each report (Summary & Detail) can be customized to exclude default columns or include additional columns not set in the default. See Edit the Report.

Each Report (Summary & Detail) can be viewed within the application, then exported; or ordered to be downloaded via an email. These reports can be one-time or reoccurring.

Each report has a specific function. Determine the reason for running a report, then find the report that best matches your reason.

Because **each report has a specified return of data**, where some elements of the statement are present, and some are not, don't expect the reports to always total to the same as other reports, or to the statement total because of the specified data returned in each report.

- Some reports are only available to Premium access users.

Report will not display if data is not available (example no circuit or long distance exists)

# View, Order and/or Edit Reports

## Ways to View a Standard Report

1. Click on the REPORTS tab to display dropdown as pictured above
2. Click on Summary OR Detail Report type.
3. **Click on the report title** to open the report within the application
   You may EXPORT the report that is being presented in the application if you'd like to see the data in a PDF or CSV file.

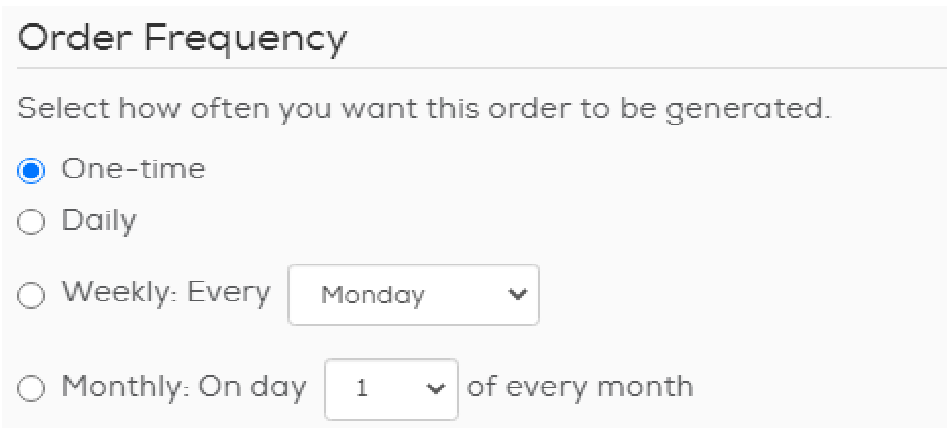
## Order a Report

Click on the Calendar icon to the right of any report to order a report.

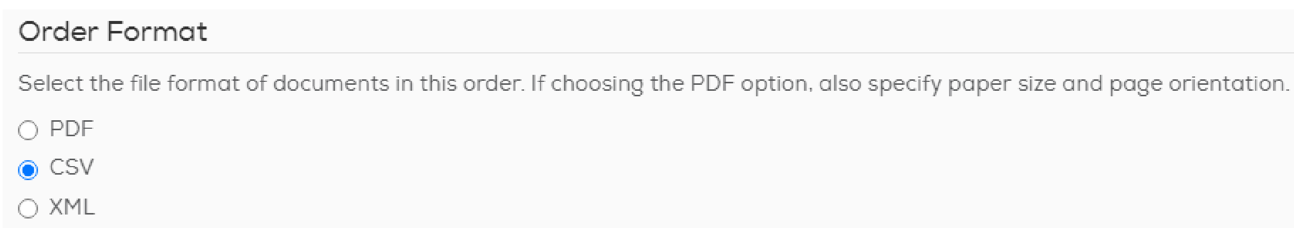
**Determine filters to define your search (defaults to current month and GAN)**


**(See Using Filters in Helpful Hints)**

**Frequency** of the report (defaults to one-time report).

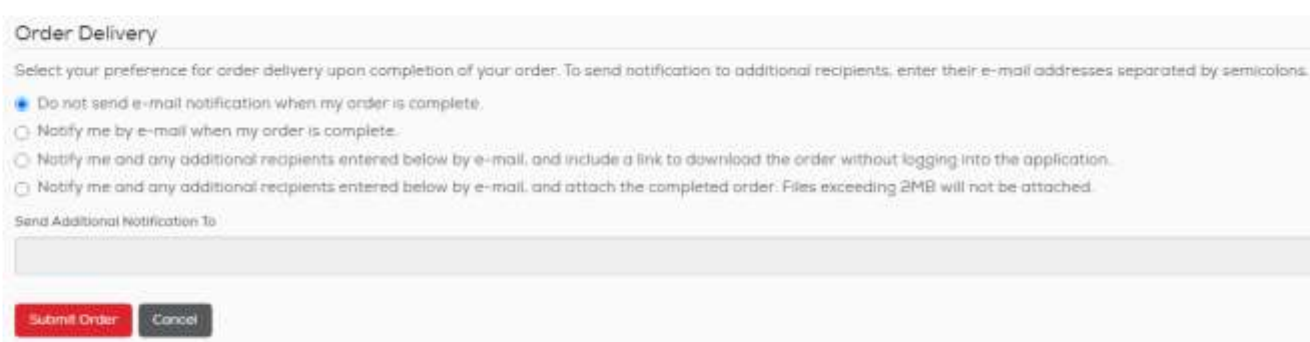



**Order Format** (defaults to CSV, easily converted to excel)




**Order Delivery** (the delivery defaults to ‘appearing in the application’ after one or more minutes-depending on the size of the report)

Each of the radio buttons delivers the report either to only the person logged in, or/and others specified.



- **Do not send e-mail.** If you choose this radio button, you will remain in the application, and waif for the report to be delivered within the application. It will still appear in a CSV format. This is often the fastest way to receive the data. This is typically not used if you are ordering with recurring frequency.
- **Notify me by email.** You will get an email advising you to open the application to view the report.
- **Notify me and any additional recipients entered below by email. Include a link.** You and those email addresses you type in the field at the bottom will receive an email containing a link that opens the report.
- **Notify me and any additional recipients entered below by email and attach the completed order.** The report will be an attachment in the email, as opposed to a link to click.

Type email addresses for additional recipients to receive the report separated by a semi-colon.

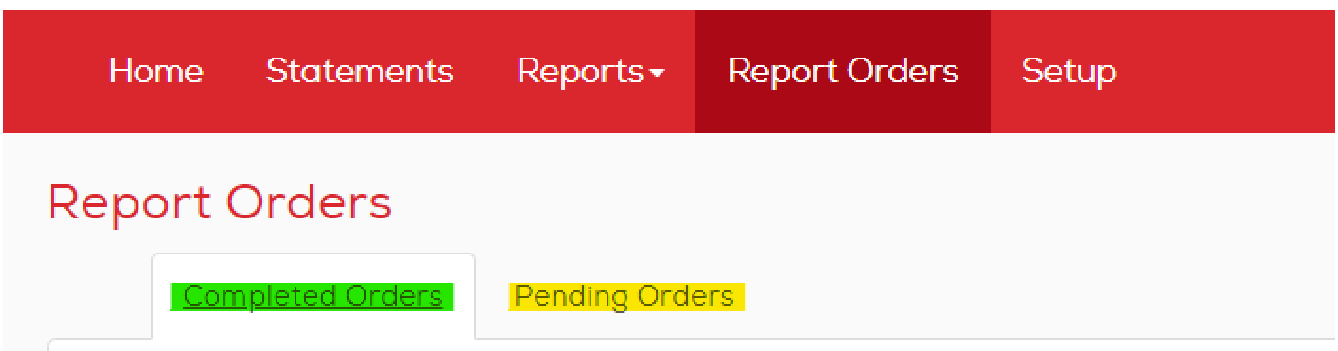

Click Submit Order and it will be placed on the Reports Orders Tab automatically.

## Report Orders Tab

After 30 seconds, click on Completed until your report appears.

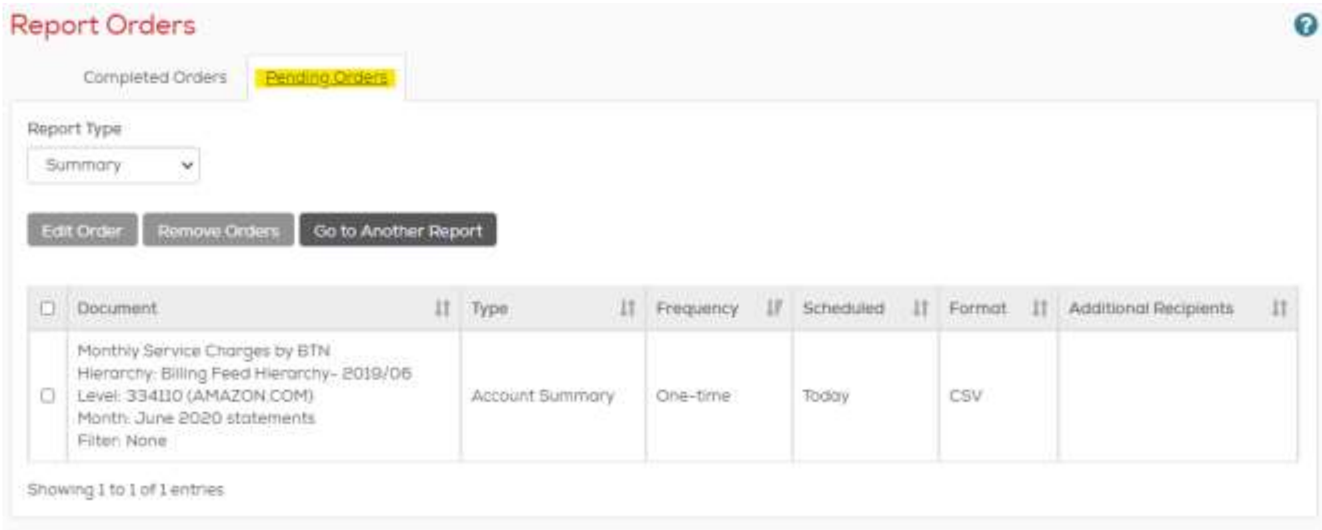
The Report Orders Tab is the control center for Reports AFTER one has been ORDERED. Only ordered reports will appear on this tab.

After a report has been ordered, the report appearing in the screen will be pending. Once the order has completed, it will disappear from pending and be moved over to completed. You must click on the Completed tab to open the report from there.

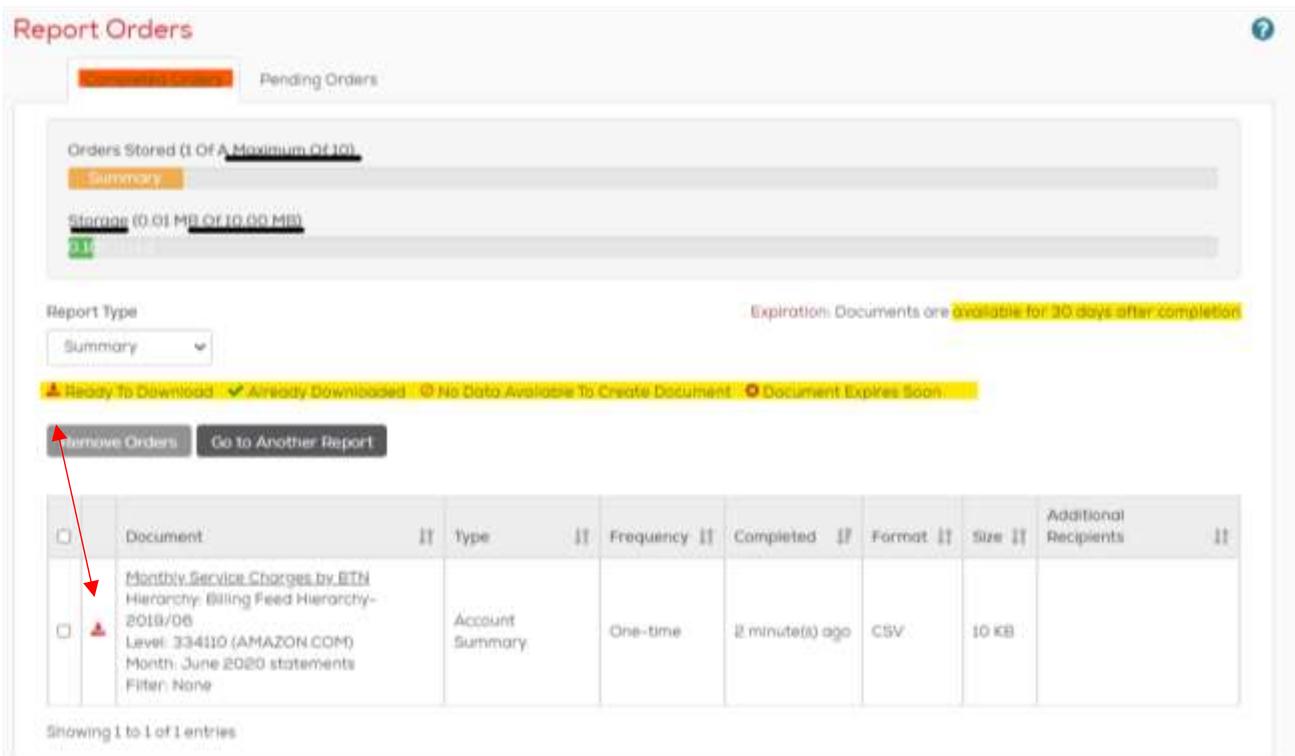



The report is sitting on the Pending Orders tab (highlighted in yellow).

Once the report has completed, it will move over to the completed tab automatically.  You may need to click between the two a few times until it moves over.




The same report on the Completed Orders Tab (highlighted in red/orange).




Note:

- Maximum reports (summary & detail combined) retained within the application = 10 (underlined in black)
- Maximum MB usage = 10 MB total (underlined in black)
- Reports available to view = 30 days (highlighted in yellow)
- Icons (highlighted in yellow) indicated report status

## Edit the Report

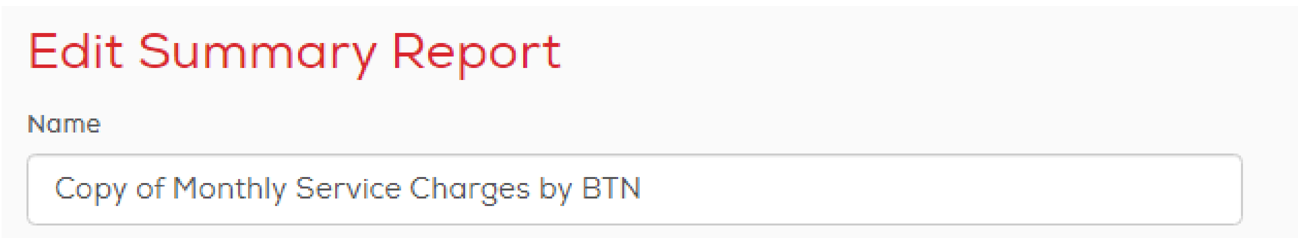
Editing the report allows you to either:

- create a new report from an existing report,
- change an existing report completely. Click on a report, and click edit, or the edit icon. You will be changing the report in it's entirely, and the old version of the report will disappear.

## Create a NEW Report (preferred)

Click New Report

Name the report (be specific to know which is yours after you create it).  This report can be shared or not with others.

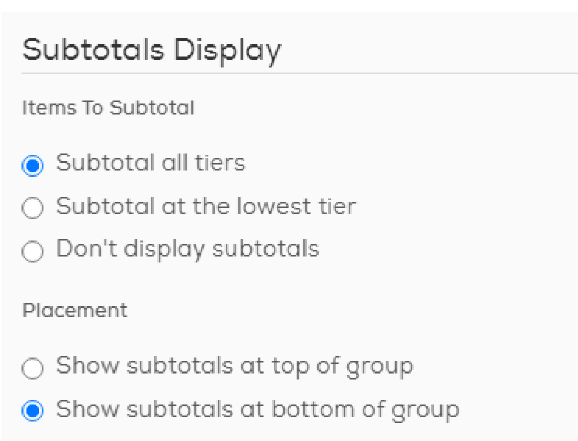



## Grouping

All the following groups of filters for grouping and subtotal display, default to the most logical selections. You may change to whatever best suits your report need.

Determine changes based on your need of the report


## Subtotals Display

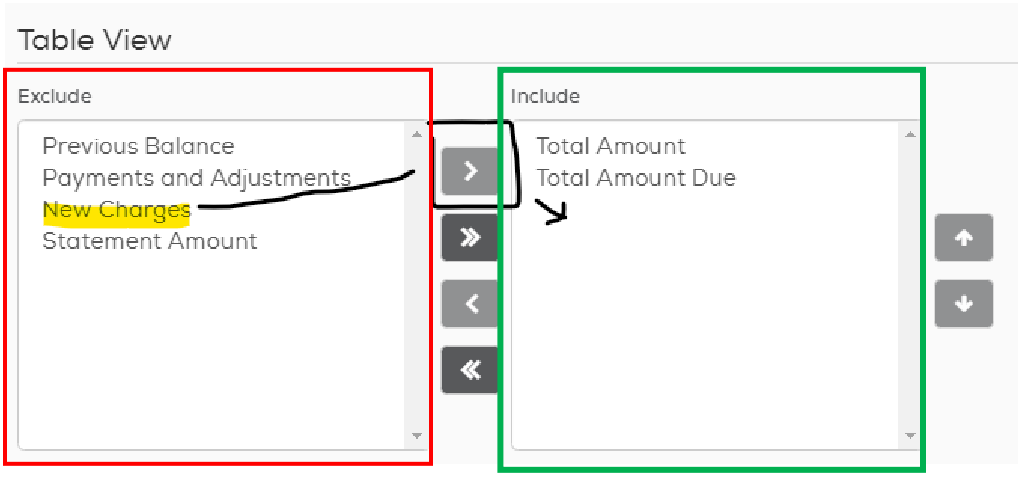


## Table View–Edit the Report

Each Report (Summary & Detail) has a different & unique default set of column headings. These are based on the type of report.

As you view the Table View representing the Columns:

- The Exclude box contains columns that will not appear in the report.
- The Include box contains columns that will appear when the report is run.




To **move a column from the Exclude to the Include** column

1. Highlight the column
2. Click the right facing arrow
3. The column is now in the include box

To **change the order** of the column from left to right in the report view

1. Highlight a column header in the include box
2. Click the up or down arrow
3. Top header in the list is far left
4. Bottom header in the list is far right

## Graph View

Each report can be transposed into a graph.

Hover over the icons at the top to see BAR, LINE or PIE.

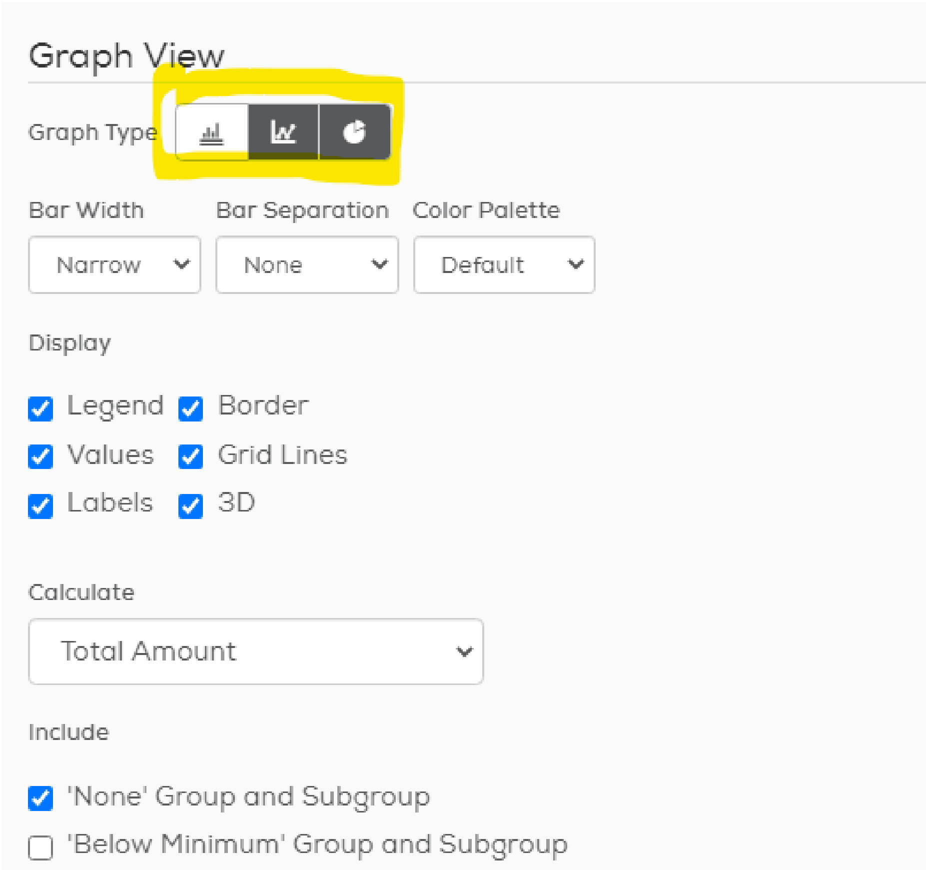
Format your graph with the Display choices.

The view below is the default view for each type graph.

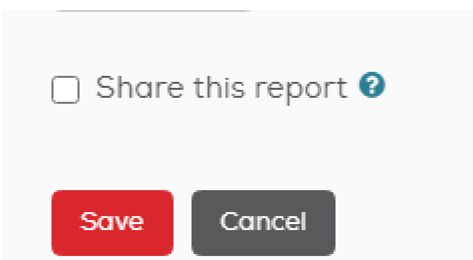
The Graph view section allows you to select whether the graph will be:

- Bar
- Line
- Pie graph



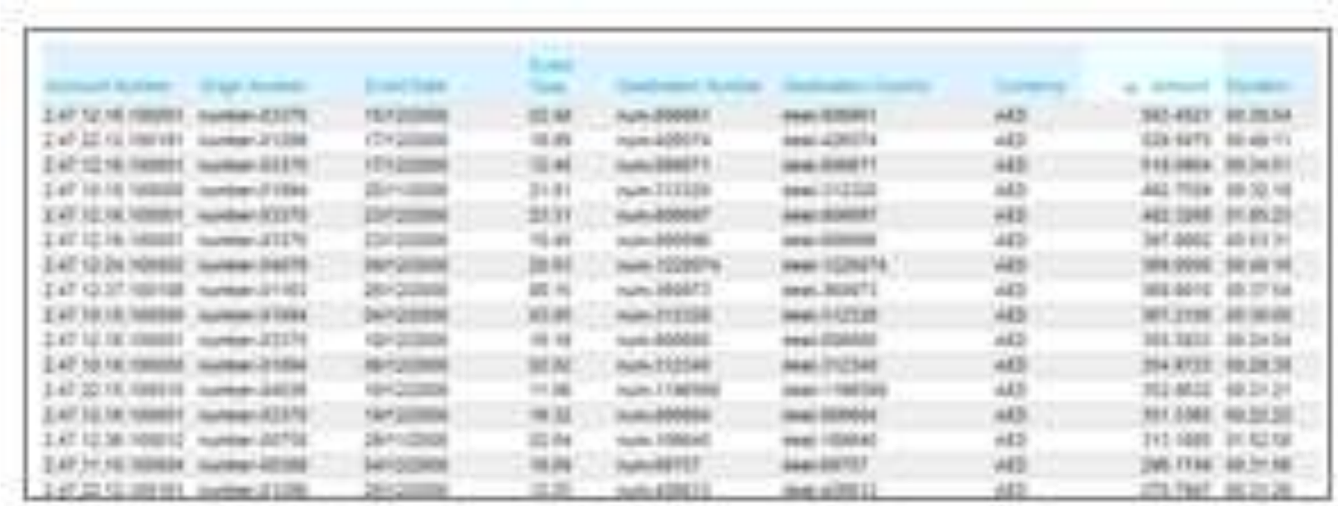

Choose to SHARE your newly created report with others in your team (that have access to the account) by checking the box.




Click **Save**.

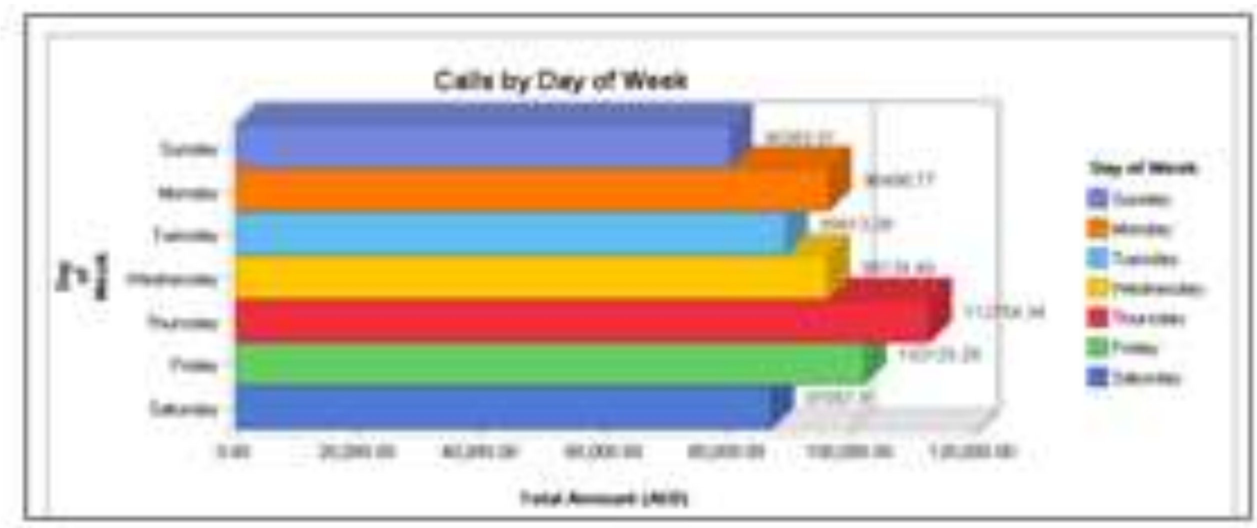
This will run the report and save the report to your list of reports on the Reports Tab.

Table view provides a one-page summary with totals and averages that you specify. Clicking a summary item will display the data associated with it.



## Graph View

Graph view depicts data as a bar, pie, line, or graph. Clicking a bar or pie segment will display the data associated with it.




**Tips about reports:**

Summary Reports display at high level. Each report row can be opened for more detail, but if the purpose is detail, use the DETAIL report tab to begin your report.

## List of Summary Reports

Here is a list of all available Summary reports:

| Report | Type | Brief Description - Includes Taxes/Surcharges |
|---|---|---|
| Monthly Service Charges by BTN | Account Summary | High level Acct Name/BTN with choice of 4 columns of billing data – Amts do include taxes |
| Monthly Service Charges by Circuit ID | Account Summary | Circuit ID identified with billing information only – Amts do include taxes |
| Monthly Service Charges by Service Address | Account Summary | Sorted by Account Name, then SERVICE address with BTN – Amts do include taxes |
| Summary Product by BTN | Account Summary | Currently same as Monthly service Charges by BTN |
| Total Amount Due by Billing Telephone Number (BTN) | Account Summary | Sorted by SMA 1st, then BTN with Account Name – like Monthly Service Charges by BTN – Amts do include taxes |
| Total Amount Due by Payment Account Number | Account Summary | Like Total Amt Due by BTN with exception sort is by service type (SMA or BTN) – Amts do include taxes |
| Customer Service Record Summary as of Last Bill ***some customers may have this report with a suffix of _1308. The reports are the same. We've eliminated a duplicate if you weren't using the _1308 during the time of our last software upgrade.** | Customer Service Record Summary | For CSR detail, use the DETAIL = CSR as of last bill. This report is high-level at BTN level. |
| Product Code by BTN | Charges | Intended for breakdown by product per BTN. This report does not include taxes & surcharges |
| Product Summary by Product Code | Charges | Sorted by Product code with an associated monthly charge – this report does not include taxes or surcharges |
| Summary Report by Previous Charges | Charges | Previous Month's billing charges – this report does not include taxes or surcharges |
| Summary-Products by WTN | Charges | Sorted by Account Name, then WTN. Billing charges/WTN. This report does not include taxes or surcharges |

| Report | Type | Brief Description - Includes Taxes/Surcharges |
|---|---|---|
| Summary of Charges by BTN (main Billing Telephone Number) | Summary Usage | Total Calls, Total Amount, Total Minutes sorted by BTN. This report does not include taxes or surcharges |
| Summary of Charges by Long Distance Provider | Summary Usage | Total Calls, Total Amount, Total Minutes sorted by LD Carrier. This report does not include taxes or surcharges |
| Summary of Charges by WTN (Working Telephone Number) | Summary Usage | Total Calls, Total Amount, Total Minutes sorted by WTN. This report does not include taxes or surcharges If a WTN is not listed, there was no usage. |
| *Call Summary | Summary Usage | If you have account codes on your LD calls, this report sorts by Acct Code, and lists total calls, total minutes & total amount. This report does not include taxes for surcharges |
| Call Summary by Jurisdiction | Summary Usage | Total Calls, Total minutes & total amount sorted by jurisdiction. Intralata, intrastate, interstate & intrastate. Other jurisdictions may be listed. This report does not include taxes or surcharges. |
| Calling Plan by BTN | Summary Usage | Sorted by BTN with Acct Name, then LD calling plan – lists total calls, total amount, & total minutes by plan. This report does not include taxes or surcharges. |
| Calling Plan by WTN | Summary Usage | Sorted by WTN with Acct Name, then LD calling plan – lists total calls, total amount, & total minutes by plan. This report does not include taxes or surcharges. |
| Calling Plan by Local | Summary Usage | Sorted by PIC code and calling plan. Total calls, total amount & total minutes per PIC code. This report does not include taxes or surcharges. |

## Removing or Deleting a Report (forever)

Removing a report (Premium access only):

If a report is removed, you will not be able to retrieve this report again without creating a new report.

1. Select the report you would like to remove.
2. Click Remove Order


# Detail Reports

## Overview

Like Summary Reports, Detail reports differ by the level of detail offered. Where summary reports are high level overviews, Detail reports provide information at the lowest level of the billing hierarchy, the Working Telephone Number, or WTN.

Detail reports are viewed, created, run, exported, ordered, and edited the same way as Summary reports. Please see this document for how to use Detail Reports.

## List of Detail Reports

Following is a table of all available Detail Reports.

Some reports are only available with Premium Access. If you don't see a report listed, you may have standard access to the application. You may request to upgrade to Premium at no cost if you need an additional report access.

Report will not display if data is not available (example no circuit or long distance exists) = No Report.

| Name of Report | Type | Description and some details of each DETAIL Report |
|---|---|---|
| Customer Service Record Detail as of Last Bill | Customer Service Record | Details at WTN level, of all billable MRCs including taxes & surcharges except those associated with tolls. The CSR includes billing & service address info. The total of charges will not equal the statement amount. This is one of 4 reports where the WTN description can be added by you. See Set Up tab. |
| Detailed Report by Previous Charges | Charges | Breakout by 'type of charge with description, begin/end cycle date and individual charge |
| Report-Charges by Line NO tax | Charges | intended Use: to easily identify quantities of charges. This report is one of 4 that allows the WTN Description field. See Set Up Tab<br><br>At WTN level with 'no service address info; monthly charges broken out by code & description with amt and bill cycle begin/end date. No taxes included. This report does not include toll detail charges. |
| Report-Charges by Line WITH tax | Charges | Same report as ''Report-Charges by Line No tax' except with taxes. This report does not include toll detail charges.<br><br>This report is one of 4 that allows the WTN Description field. See Set Up Tab |
| All 800 (TF) Call Detail | Usage | Set Filter at right top row (of filters) to 800 calls only. No data will appear if you don't have toll free service with Frontier. This report is only usage and doesn't include taxes and surcharges associated with tolls. |
| All LD Call Detail | Usage | This report can be set to include toll free or not, with the filters. This report is only usage and doesn't include taxes and surcharges associated with tolls. |

| | | |
|---|---|---|
| *Calling Data Local Usage | Usage | Local LD calls identified by WTN with To Number, length of call, time of call, and amt billed for call |
| *Carrier PIC Report | Usage | Identified Primary Interexchange Carrier and LPIC with code and carrier name by WTN with effective date |
| Sort- All Calls Over $2 | Usage | When LD costs were per minute, this report and the following 10 reports were developed to identify misuse of LD usage. With the onset of 'Blocks of Time' for a set fee, this report and the 10 below are not as pertinent as they once were.<br>If you choose this use this report, it will filter & list all calls that cost $2 or more. |
| Sort-All Calls Over $5 | Usage | This report will filter & list all calls that cost $2 or more. |
| Sort-All Calls Over 10 Minutes | Usage | This report will filter and list all calls more than 10 minutes time to aid in managing resources time. |
| Sort-All Calls Over 5 Minutes | Usage | This report will filter and list all calls more than 5 minutes time to aid in managing resources time. |
| Sort-by 800 Highest Minutes | Usage | Like the other usage reports, this report will filter and list TF (inbound) calls by highest time with pertinent FROM caller data. |
| Sort by Day of the Week | Usage | Aids in determining outbound usage by day of week |
| Sort by from City for 800 calls | Usage | Aids in determining from where TF calls are originating |
| Sort by from Number for 800 calls | Usage | Aids on determining FROM telephone numbers |
| Sort by Highest Minutes | Usage | Outbound calls sorted by length of call with associated WTN call data |
| Sort by Most Expensive Call | Usage | Outbound calls sorted by highest cost calls at top. |
| Sort by Time of Day | Usage | Aids in determining high call time of day – can include inbound and outbound depending on filters |
| Report – Circuit Detail | Circuit | One of 4 reports that allows for WTN description. Details billing info, and service address info. Additional information to describe the circuit details is available. Please ask your Customer Support group. |
| Billing Adjustments | Payments & Adjustments | Lists adjustments and/or payments by month. The filter allows for the different scenarios |
| Payment Details by BTN | Payments & Adjustments | Lists payments posted over a specific month sorted by BTN, with description of payment method. |

# Setup

## About Hierarchy

Please ignore the following sections:

- Tree Builder
- Edit Levels
- View Change History

These sections are not commonly used at the present. There is separate documentation for creating your own Billing Hierarchies. The process is time consuming and must be updated each month as the billing hierarchy changes in Frontier's billing system. It is not recommended to create your own billing hierarchy.

Frontier provides a total of thirteen (13) months of billing history. From the day your accounts get loaded into our portal via our billing system, (the first month) then forward for 13 months is your online history. The oldest month is will fall off as a new month gets added.

## Set Hierarchy

The Master Hierarchy is the CURRENT month (default) billing hierarchy.

If desired, multiple hierarchies can be created to experiment with different scenarios without affecting the Master Hierarchy. You can use an existing hierarchy as the starting point or create one from scratch. This would require the three sections to be ignored. Please ask your support folks for that documentation.

As this application has evolved, the need to change the active hierarchy has diminished over time. There is really no need to change the active hierarchy unless you intend to build a customer hierarchy. See above.

## Active Hierarchy

When you create a new hierarchy, it becomes the Active Hierarchy and any changes to nodes, account assignments, and service assignments will only affect that hierarchy.

When more than one hierarchy has been created, the Active Hierarchy is displayed on pages in the hierarchy section and in the reporting bar of summary and detail reports.

As the Account Administrative user or user assigned to the top node, you can easily change which hierarchy is the Active Hierarchy at any time.

## Setting the Active Hierarchy

The following steps are required when setting the active hierarchy (Premium access only).

1. Select the Hierarchy.
2. Click Set Active Hierarchy.
3. You won't be automatically directed to a different or past page. You must manually click there to move off the Hierarchy page.

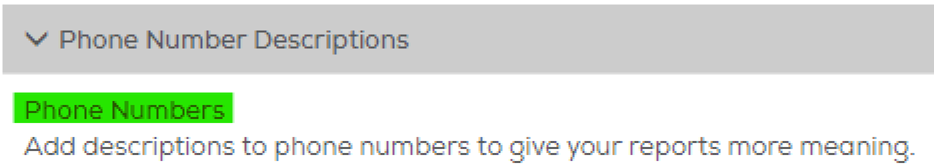
## Billing Feed Hierarchy

The Billing Feed Hierarchy is the Hierarchy which is systematically established from the Frontier Billing System EACH MONTH.

## Phone Number Descriptions

To add phone number descriptions:

1. Click on the Phone Numbers row.




2. Click the ? in the blue circle for detailed instructions.


# Tools

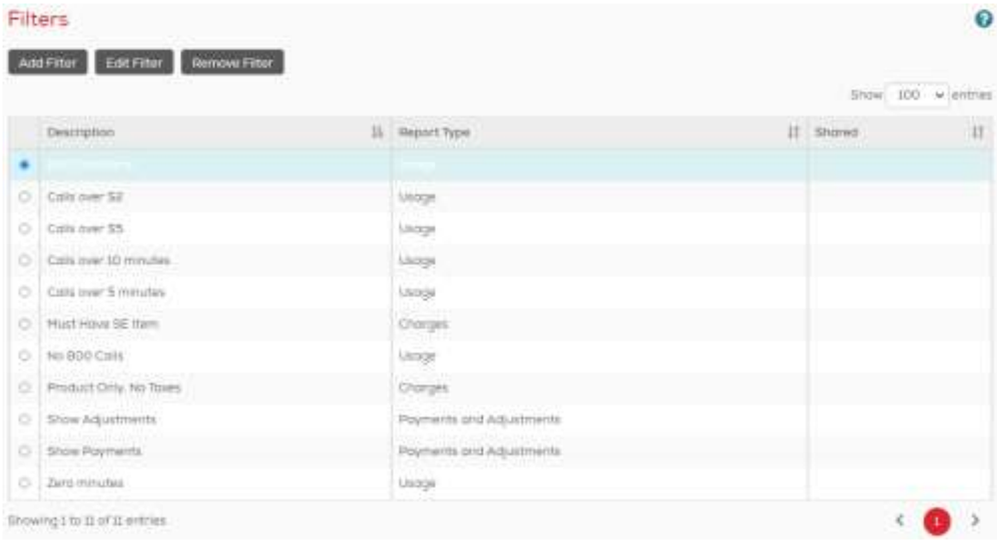
## Filters

Filters allow you to designate certain criteria by which to narrow the results of your reports. They are especially useful when filtering data to locate a specific group of calls (e.g. calls to clients, after-hours calls, calls made by branch offices.)

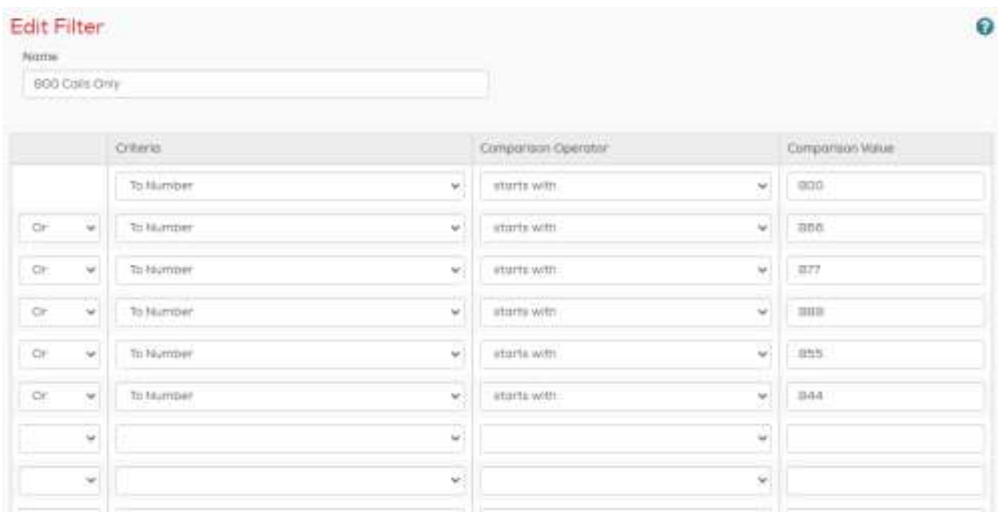
Filters are associated with a report type (e.g., Usage, Charges, etc.). A filter of one report type can only be used for a report of the same type.

Filters created here will appear in the Filter drop-down list within reports.




Although all the filters are useful, a most-often used filter, 800 (toll free) Call Only, will need to be updated as more TF telephone area codes are created for use.




1. Click the **Setup** tab.
2. Under Tools, click **Filters**.
3. Click Add Filter or Edit Filters.
4. Select the type of filter to create.
5. Click **OK**.
6. Enter an appropriate name in the Name text box.
7. Select the criteria to filter by from the Criteria drop-down list.
8. Enter a value (e.g., 1000, Day, Denver) in the Comparison Value text field.
9. If additional fields are required, select And/or from the beginning of each new line of filter criteria and repeat steps 3, 4, and 5.
10. Click **Save**.

## Mark Up

Mark Up allows you to add mark up to reports you make for clients and customers.

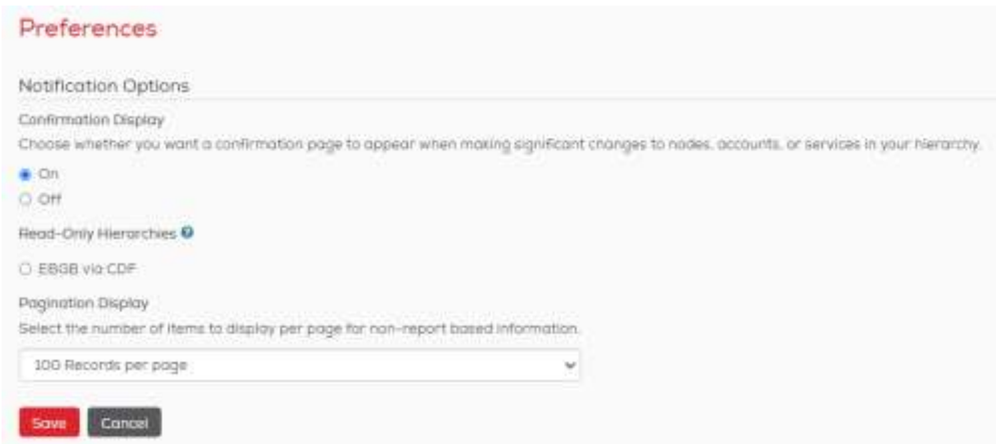
To select an existing mark up, select from the mark up dropdown list.

To define a new mark up or edit an existing mark up, click the mark up link and you will be directed to the mark up page.

## User Profile

### Preferences

Please leave these default settings as is or change to match below.

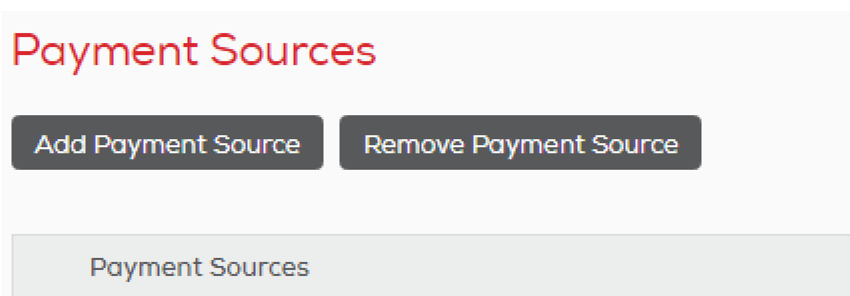



## Payment Information

### Payment Sources

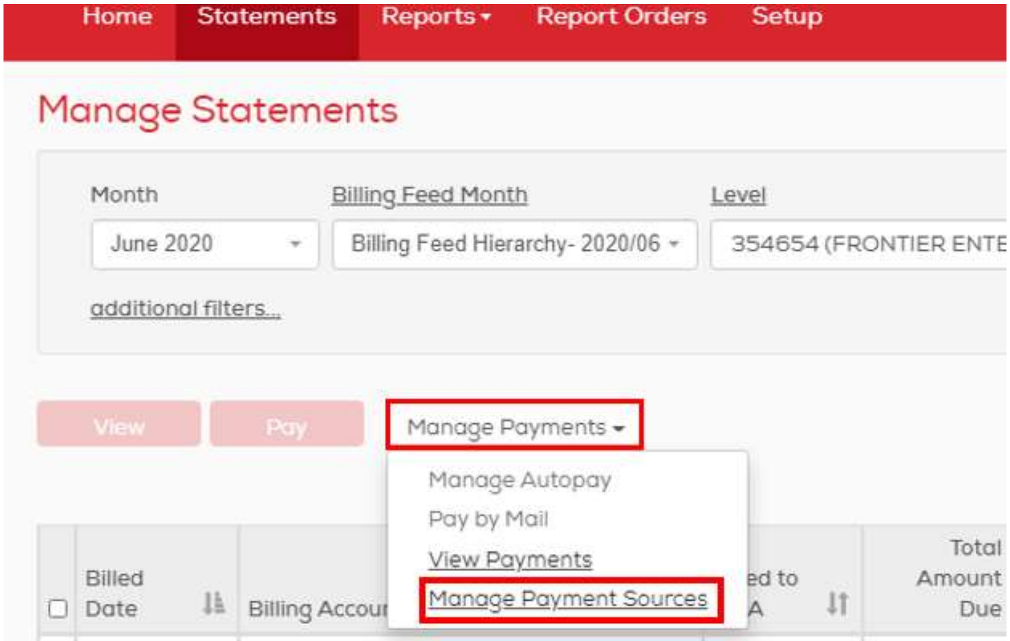
Add or Remove a Payment Source

Payment Sources may not be edited. Either Add or Remove. If your CC has expired. Please remove the old and ADD the new CC information.

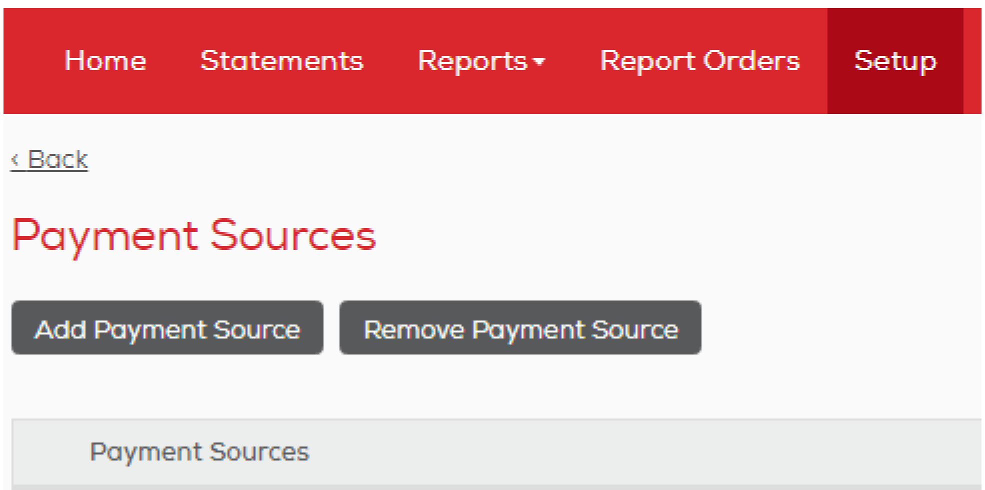



A list of Payment Sources (both CC and Bank Accounts) will follow below in your screen.

This Payment Source screen is the same screen you can access from the Statement Page when adding Payment Sources there.




After clicking on **Manage Payment Sources** above, you'll be directed to the **Setup Tab** below.




## Disputes

Disputes are entered from the Statements Tab. See

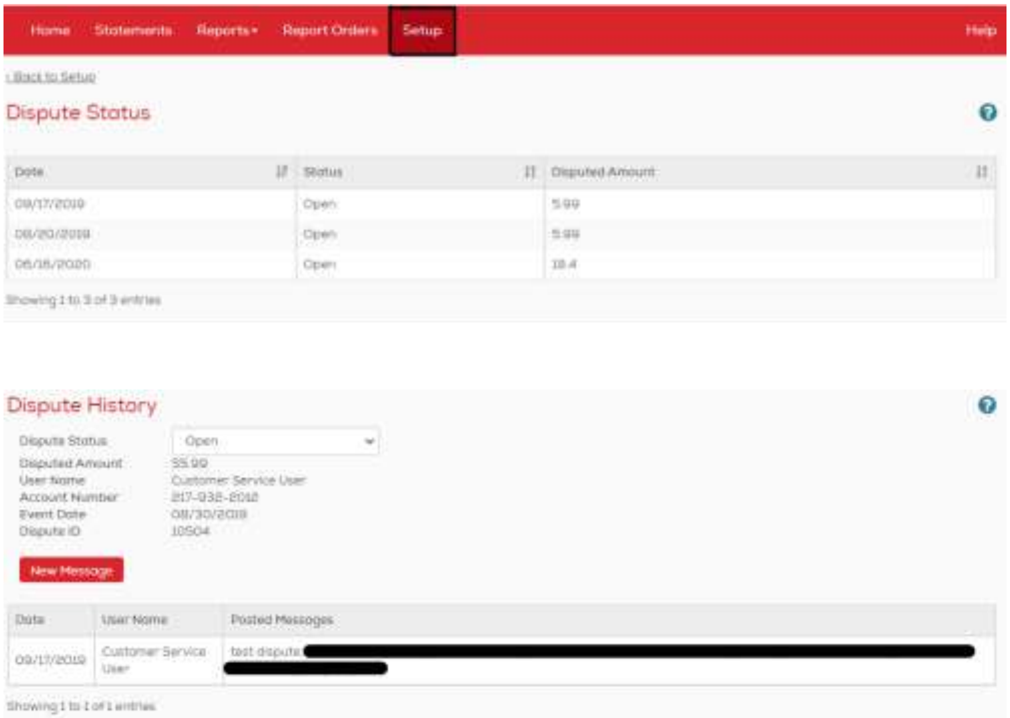
 

Customer Disputes.

Disputes are managed on the Dispute page or the Setup tab.

If you have a dispute opened, the status will appear here. You can update your dispute with additional information or questions.

Click on the dispute to review.




Click on **New Message** for request or update.

## Email Notifications

Enterprise Portal: Billing uses email notifications to communicate important messages, including the following:

| | |
|---|---|
| **Statements** | • First invoice ready (for new customers)<br>• New statement ready. One email per bill cycle |
| **Payments** | • CC payment accepted/ACH payment rejected<br>• CC payment confirmation<br>• ACH payment accepted/ACH payment rejected<br>• ACH notice of change |
| **Reports** | • Ordered reports available |
| **Disputes** | • Status Updates |

# Glossary

**Account**—Lines and services grouped together for billing. Accounts are usually billed monthly with a statement of invoice which details fixed costs and usage-based charged.

**Active Hierarchy**—when you create more than one hierarchy, the Active Hierarchy is the hierarchy that is currently selected for cost allocation and reporting. You can switch between hierarchies on the Set Hierarchy page in Setup.

**Branch**—A part of a hierarchy that includes a node, its children nodes, and all the accounts and services assigned to those nodes.

**BTN – Billing Telephone Number** – There are stand-alone BTNs and subordinate BTNs. A stand-alone BTN is payable and typically bills directly to a GAN. A subordinate BTN is not payable and is bills to an SMA (see GAN and SMA definitions below).

**Detail Report**—Detail reports contain individual data records that can include usage, equipment, and other charges or credits. View detail reports by clicking the Detail tab in the main navigation bar.

**Favorites**—You can add hierarchy nodes, accounts, or services to your Favorites so that it's easy to run reports at those levels each time you log in. Add Favorites on the Edit Levels page in Setup.

**Filter**—Filters allow you to designate certain criteria by which to narrow the results of your reports. They are especially useful for locating a specific group of calls such as calls to clients, after-hours calls, or calls made by branch offices. You define filters in Setup which can be used when running Summary and Detail reports.

**GAN – Global Account Number** – The highest level of Frontier's enterprise billing hierarchy. If you run reports or view statements at the combined GAN level, you are seeing all the account information you've designated to be added to your 'Customer Account'.

**GL Code**—A number used by accountants to identify expenses associated with a department. You can add a GL Code to each of the nodes in your hierarchy and use them for allocating costs and other reporting.

**Hierarchy**—A tree structure describing the relationship of your accounts and services to your divisions, departments, or cost centers. Hierarchies consist of individual nodes connected in parent-child relationships.

**Level**—A hierarchy gives you the ability to view reports at the node, account, or service level.

- Viewing at the node level returns all the data from that branch of the hierarchy. The data from the account or services assigned to that department and any departments under it will be returned.
- Viewing at the account level returns the data from all the services that belong to the account.
- Viewing at the service levels returns just the data from the selected service.

**Master Hierarchy**—A special hierarchy used to grant users specific access privileges to view only the accounts that belong to the branches of the hierarchy that you specify. If you have created only one hierarchy, it is by default the Master Hierarchy.

**Node**—A structural element of the hierarchy which represents a division, department, or cost center. Accounts and services are assigned to nodes so that you can allocate costs. Nodes are connected to each other in parent-child relationships which form a tree structure of your organization.

**Service**—A voice line, account code, fax line, pager, data circuit, or other recurring transmission of information. Services are grouped together and billed by account.

**SMA – Summary Master Account** – Also referred to a Master Summary account, both terms are the same designation of an aggregator of BTNs to afford a customer a way to pay many individual statements with one payment.

**Splitting Services**—A service can be split between two or more nodes to allocate a shared resource between different departments. You can split services from the Edit Levels page in Setup.

**Summary Report**—Summary reports give an overview of your telecommunications usage with totals and averages. View summary reports by clicking the Summary tab in the main navigation bar.

**Unassigned Node**—Before accounts and services have been assigned to a node of a hierarchy, they are assigned to the unassigned node.