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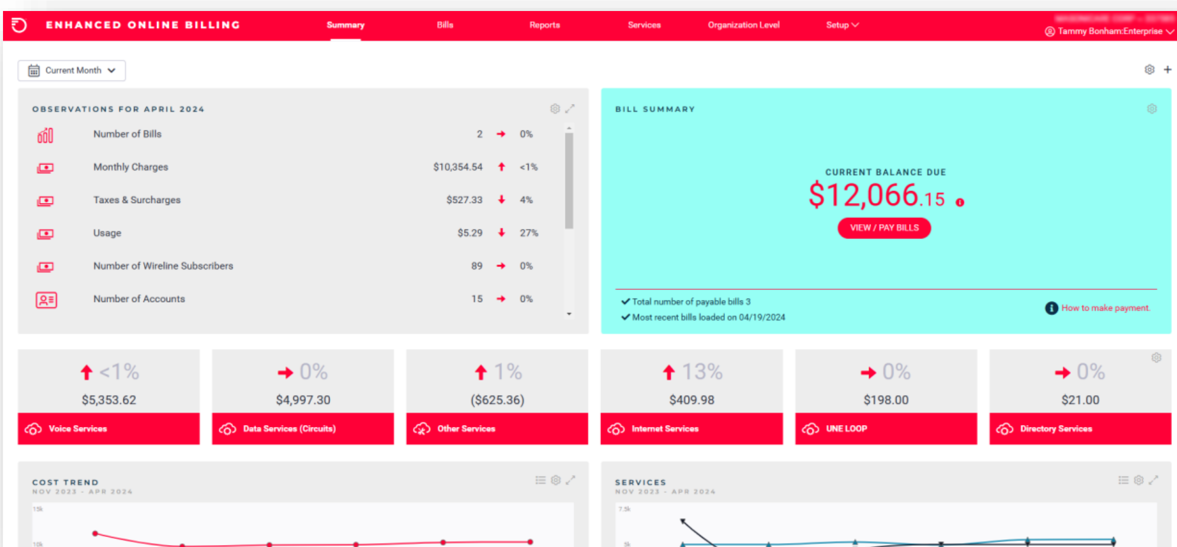
Enhanced Online Billing

Enterprise Admin User's Guide



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Getting Started as an Enterprise Admin

Enhanced Online Billing allows the monitoring and analysis of billing data for commercial customers. Commercial functionality allows you to view data and analytics across your enterprise and customize the reports you view and how you receive them. Enhanced Online Billing contains two user levels, Admin & Analyst. This guide focuses on Operator Admin-level functionality.

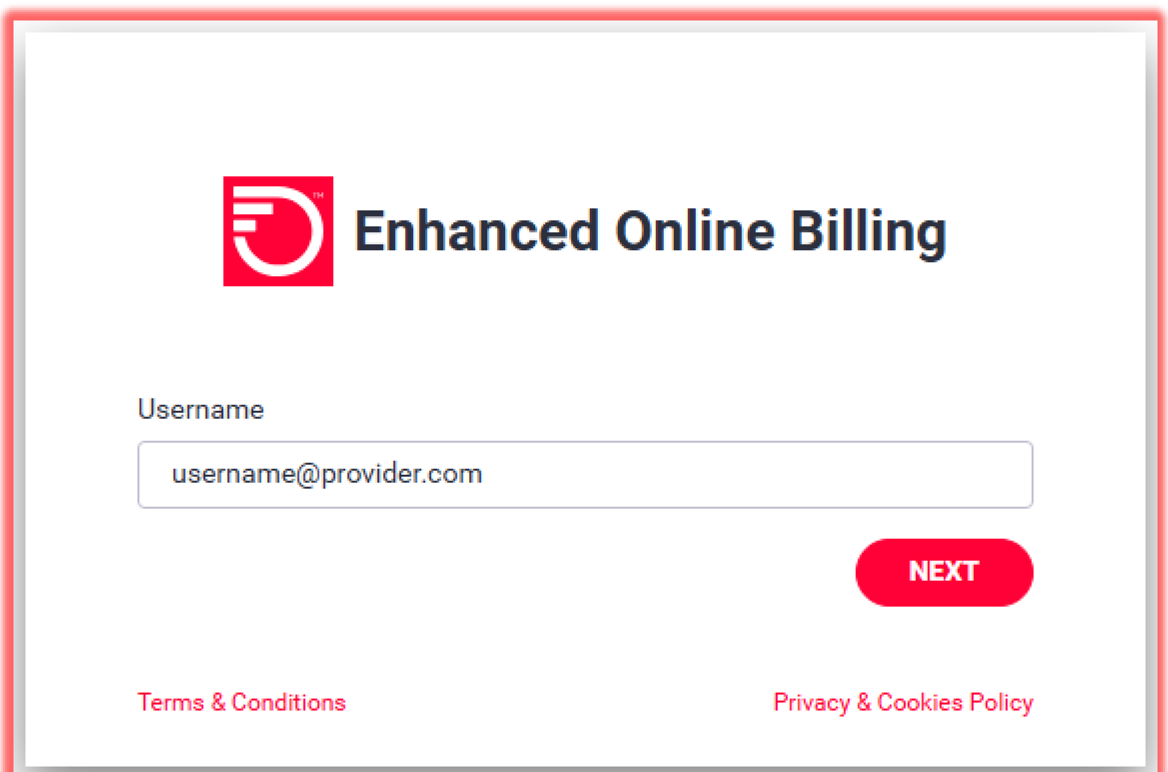
You can view and report on all enterprise levels in your account as an Enterprise Admin user. You can also create, delete and edit all additional users.

Enhanced Online Billing is highly customizable. The functionality described and application images displayed in this guide reflect a general demonstration version of Enhanced Online Billing. The user interface you see varies depending on the level of customization applied to your application.

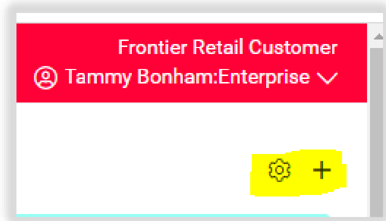
Logging On to Enhanced Online Billing

Log in from https://enhancedonlinebilling.frontier.com, type your **Operator Admin** username (username@provider.com), then click **NEXT** and enter your password.

Type your **password**, and then click **LOGIN**. Or click **Reset** my password to reset your Operator Admin password.



User Toolbar



The user toolbar allows you to do the following:

- Configure your dashboard.
- Establish your user first name and last name.
- Set a new password.
- Enable bill notification by email.
- Log off of your profile.
- Access support materials.

Establish Your Username, Password and Notification Preferences

- ➢ Click the arrow next to your username
- ➢ Click Edit Profile to establish your username, password, and notification preferences.
- ➢ Click **Save** when you are finished.

Configure the Dashboard

Click the **Gear** icon to display a list of options to configure your dashboard. The following options are available:

- **Edit Dashboard**
- **Reset Dashboard**
- **Setup Observations**
- Click **Edit Dashboard** to place the application in **Edit** mode. Refer to the following section for more on editing your dashboard.
- Click **Reset Dashboard** to revert your dashboard to Enhanced Online Billing's default settings (e.g., if you remove a widget you wish to restore).
- Click **Setup Observations** to configure the **OBSERVATIONS FOR <Month Year> widget** that displays categorized analytics about billing and usage for your enterprise accounts.
- Click the **Plus** button next to the **Gear** icon to add any available report widgets that do not already appear on your dashboard.

Editing Dashboard Widgets

You can edit existing widgets on your dashboard:

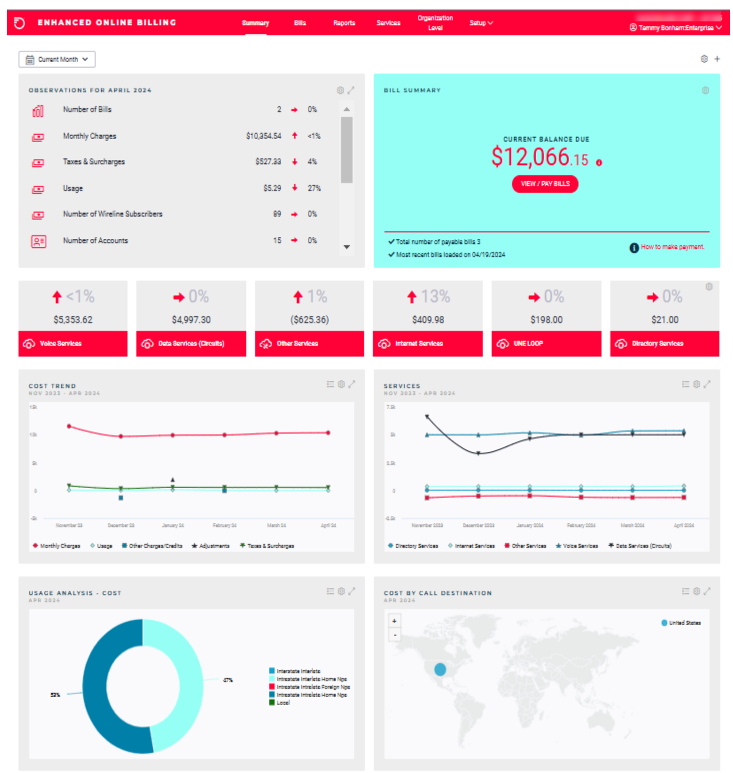
- Click **Edit Dashboard**. A settings gear and **X** appear in the upper-right corner of each existing widget on your dashboard.
- Click the **X** to delete widgets from your dashboard, if desired.
- Drag widgets to new locations on your dashboard, if desired.
- Click **Save Dashboard** under **Dashboard Settings** when you have configured your dashboard to your liking.
- Click **Reset Dashboard** to revert your dashboard to Interactive Bill's default settings (e.g., if you remove a widget you wish to restore).
- To exit out of editing your dashboard without saving changes, click the **Summary** tab to refresh the page.

Summary Tab (Dashboard)

Note: The dashboard is configurable. Your dashboard may look different than the examples shown. You can configure your dashboard to suit your business needs.

The Summary tab provides high-level information about billing and usage across your enterprise. You can configure this dashboard to include widgets with various data and analytics.

Common widgets include:



SUMMARY TAB

BILL SUMMARY – Displays a summarized view of your enterprise bill and allows you to make a payment.

OBSERVATIONS FOR (Month Year) – Displays billing and usage observations about your enterprise bill for the current month.

COST TREND – Displays costs broken down by month.

SERVICES - Displays costs broken down by service type.

USAGE ANALYSIS – Displays usage percentages broken down by category.

COST BY CALL DESTINATION - Displays geographical data of billable calls.

FAVORITE REPORTS – Displays the reports you designate as favorites.

Displaying and Configuring Data

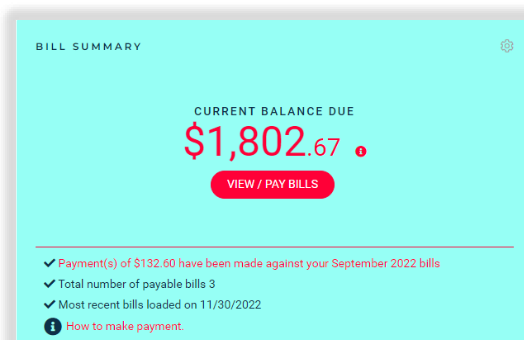
Throughout the application, you can alter how to display data and configure the data you see using some standard features:

- ➢ Use arrows to maximize and minimize widgets for improved viewing
- ➢ Use the **Gear** icon to configure what you view.
- ➢ Rest the pointer on widget content for high-level information.
- ➢ Click on widget content to drill down to details.

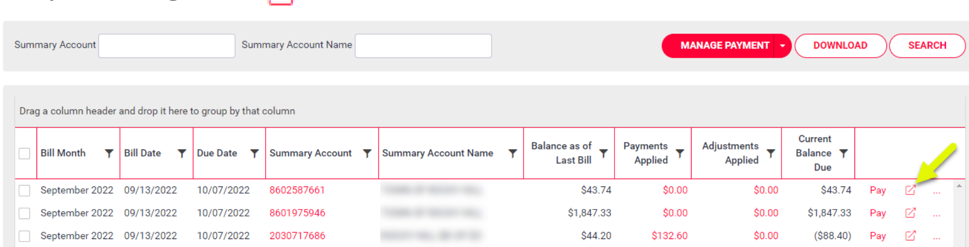
Bill Summary Widget

The Bill Summary widget appears on the Summary tab. It contains the following information:

- Current enterprise bill amount before taxes and the tax amount
- Balance forward
- Current enterprise bill amount, including taxes
- Total balance as of the current date, including taxes
- Total number of bills for the current month
- Date the bills were loaded
- Ability to make a payment



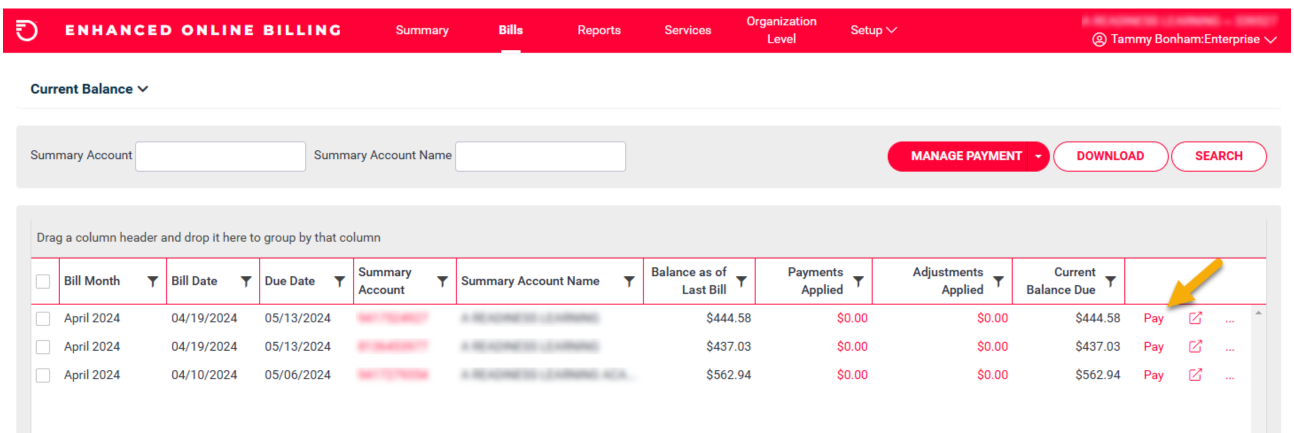
Click the **View/Pay Bills** icon in the center to navigate to the complete, detailed bill.
You can download and view the charges as a PDF by clicking the icon



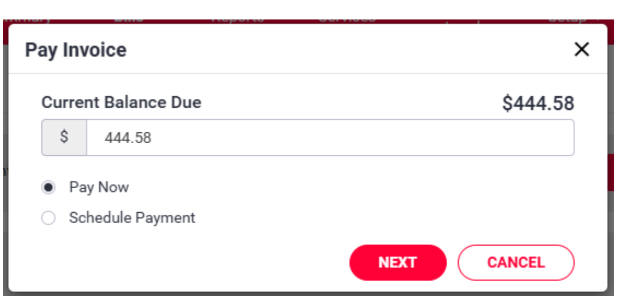
Make a One Time Payment

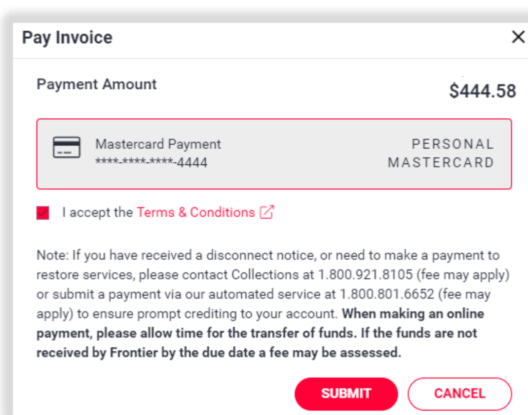
Complete the following steps to make a payment:

- Click **VIEW/PAY BILLS** in the **Bill Summary** widget. The Bills tab will open. Select the bill you want to pay by clicking on **Pay**



- Select **Pay Now** or **Schedule Payment** in the future.
- Complete the payment fields.
- Click **Next**
- Accept the **Terms & Conditions**
- **Submit**





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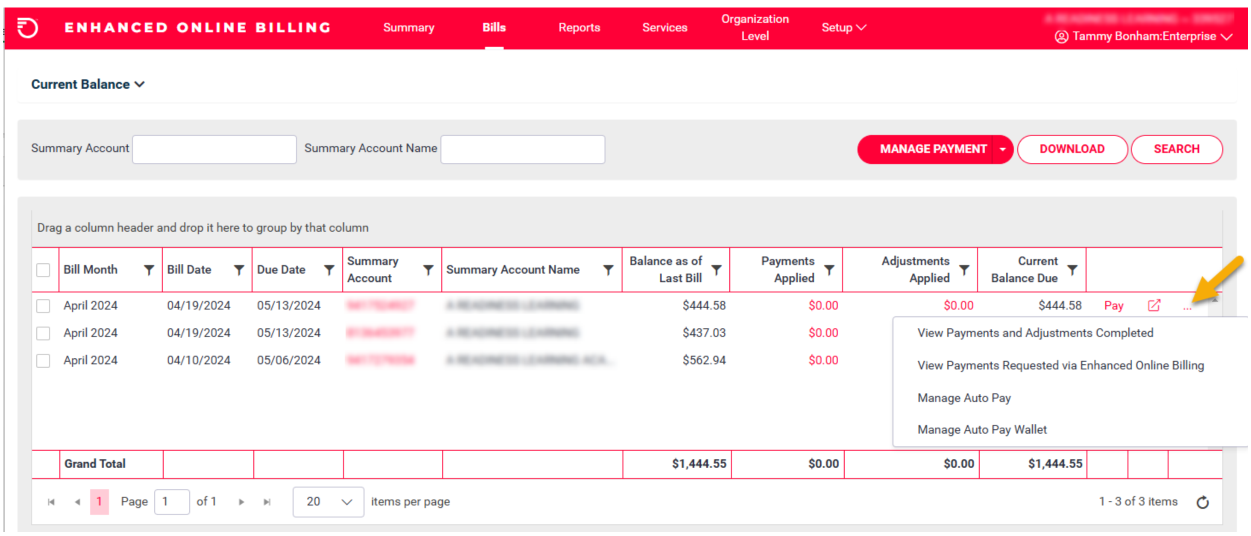
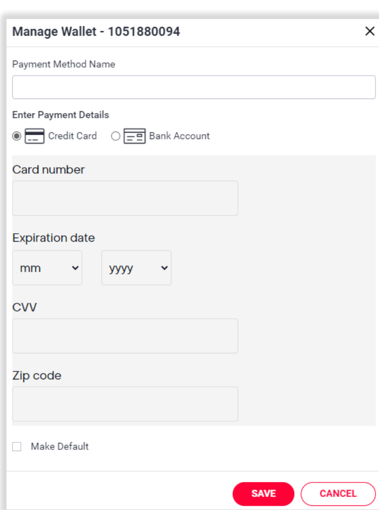
Setting Up and Managing Auto Pay

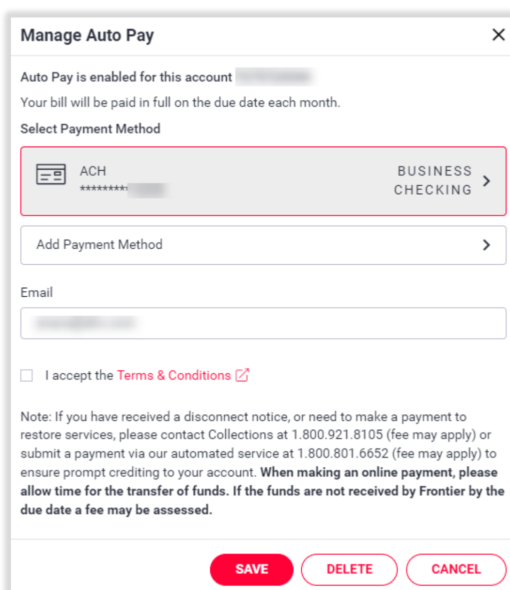
Complete the following steps to set up Auto Payment (This must be done for each account level individually)

- From the **Current Balance** screen, click **…** on the line (account) you want to set auto pay up on.



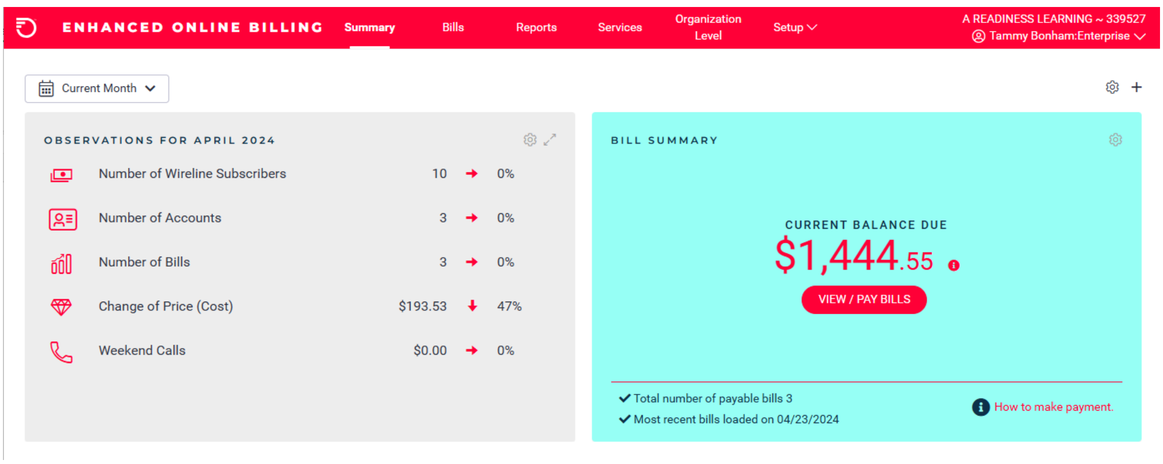
- Select **Manage Auto Pay Wallet** to set up the payment source.
- Select **Manage Auto Pay** to set up the auto payments.
- Accept the **Terms & Conditions**
- **SAVE**





OBSERVATIONS Widget

The **OBSERVATIONS** widget displays categorized analytics about billing and usage for your enterprise accounts for the date range selected.



Configuring the Observations Widget

- Click the **Gear** icon in the upper-right corner of the **OBSERVATIONS FOR** widget to configure the observations to display. The **Edit settings** dialog box appears.
- Use the checkboxes on the far left to select which subjects appear in the **OBSERVATIONS FOR** widget.
- Use **KPI** (key performance indicators) checkboxes to select which analytics you want to appear as cards directly below the **BILL SUMMARY**, provided space is available.
- Use the **Pin** check boxes to prioritize key performance indicators (KPIs), even if the value is small. Values appear from largest to smallest across the row at the bottom of the **OBSERVATIONS FOR** widget.
- Some observations allow you to add parameters, such as a value threshold, to determine when an observation qualifies to appear. Type that threshold value in the **Value** column when available. A report displaying expensive calls would display only calls that met that cost threshold.
- Click **OK** to save your settings.

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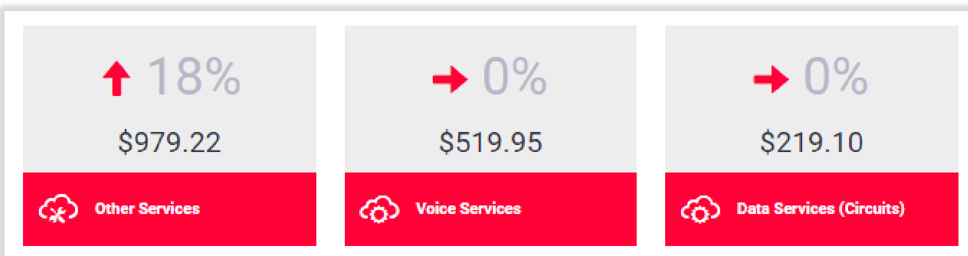
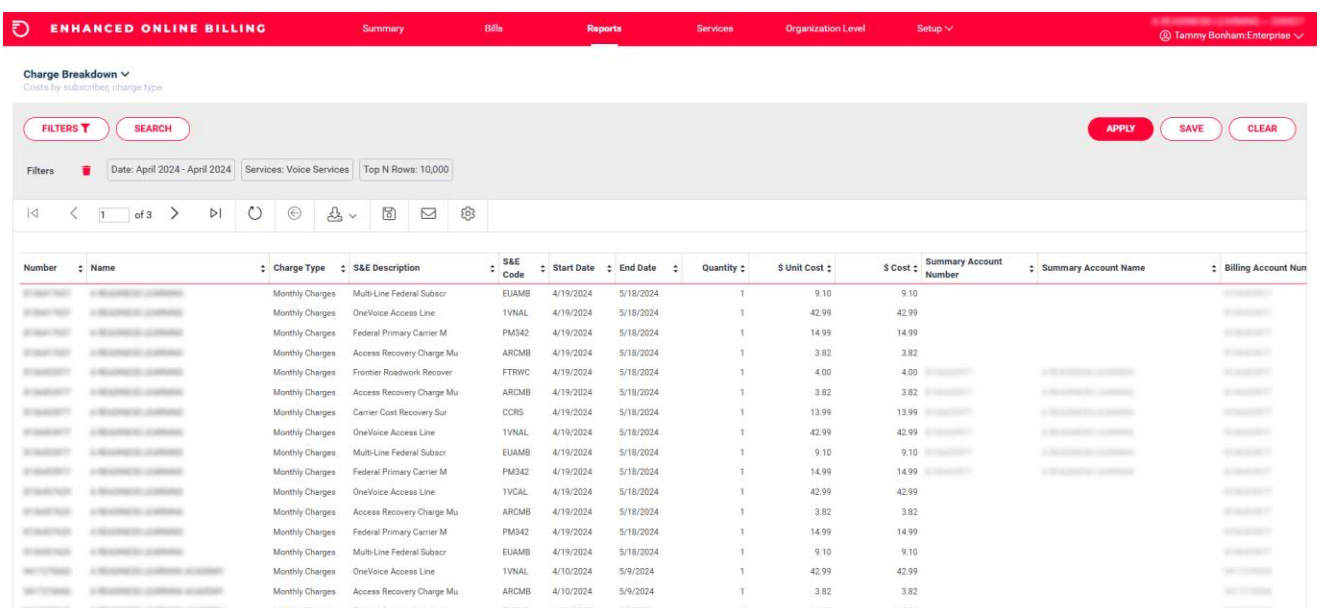
- ➢ On the **OBSERVATIONS FOR** window, rest the pointer on an observation card to view summarized information.
- ➢ Click the red title bar on any observation card to navigate to complete report details on the **Reports** tab.





Number	Name	Charge Type	S&E Description	S&E Code	Start Date	End Date	Quantity	$ Unit Cost	$ Cost	Summary Account Number	Summary Account Name	Billing Account Num
		Monthly Charges	Multi-Line Federal Subscr	EUAMB	4/19/2024	5/18/2024	1	9.10	9.10			
		Monthly Charges	OneVoice Access Line	1VNAL	4/19/2024	5/18/2024	1	42.99	42.99			
		Monthly Charges	Federal Primary Carrier M	PM342	4/19/2024	5/18/2024	1	14.99	14.99			
		Monthly Charges	Access Recovery Charge Mu	ARCMB	4/19/2024	5/18/2024	1	3.82	3.82			
		Monthly Charges	Frontier Roadwork Recover	FTRWC	4/19/2024	5/18/2024	1	4.00	4.00			
		Monthly Charges	Access Recovery Charge Mu	ARCMB	4/19/2024	5/18/2024	1	3.82	3.82			
		Monthly Charges	Carrier Cost Recovery Sur	CCRS	4/19/2024	5/18/2024	1	13.99	13.99			
		Monthly Charges	OneVoice Access Line	1VNAL	4/19/2024	5/18/2024	1	42.99	42.99			
		Monthly Charges	Multi-Line Federal Subscr	EUAMB	4/19/2024	5/18/2024	1	9.10	9.10			
		Monthly Charges	Federal Primary Carrier M	PM342	4/19/2024	5/18/2024	1	14.99	14.99			
		Monthly Charges	OneVoice Access Line	1VCAL	4/19/2024	5/18/2024	1	42.99	42.99			
		Monthly Charges	Access Recovery Charge Mu	ARCMB	4/19/2024	5/18/2024	1	3.82	3.82			
		Monthly Charges	Federal Primary Carrier M	PM342	4/19/2024	5/18/2024	1	14.99	14.99			
		Monthly Charges	Multi-Line Federal Subscr	EUAMB	4/19/2024	5/18/2024	1	9.10	9.10			
		Monthly Charges	OneVoice Access Line	1VNAL	4/10/2024	5/9/2024	1	42.99	42.99			
		Monthly Charges	Access Recovery Charge Mu	ARCMB	4/10/2024	5/9/2024	1	3.82	3.82			
		Monthly Charges	Federal Primary Carrier M	PM342	4/10/2024	5/9/2024	1	14.99	14.99			

Favorite Reports

You can designate a report as a favorite to open it from the **FAVORITE REPORTS** widget on your **Summary Dashboard**. Designating a report as a favorite also allows you to receive the report in email according to your specifications.

Click **SAVE** on the **Filter toolbar**. The **Save Report** dialog box appears.

Type a name for the report. If you want to receive the report by email, select **Deliver** this report, and choose a delivery format.

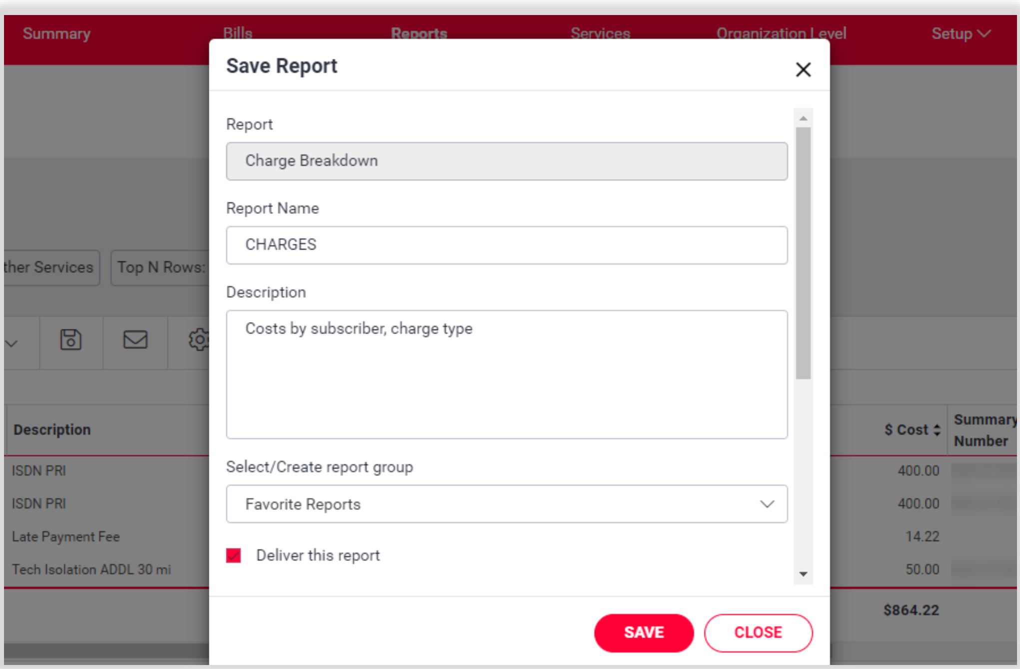
Select **Compress** if you want to compress the file size.

Select **Suppress empty report** to cancel delivery of a report with no data.

Select **Password** if you wish to establish a password required to access the report.

Select **Customize email settings** to determine email recipients, subject content, and body content.

Click **SAVE**. The report appears in your **FAVORITE REPORTS** widget and is emailed to the specified recipients.



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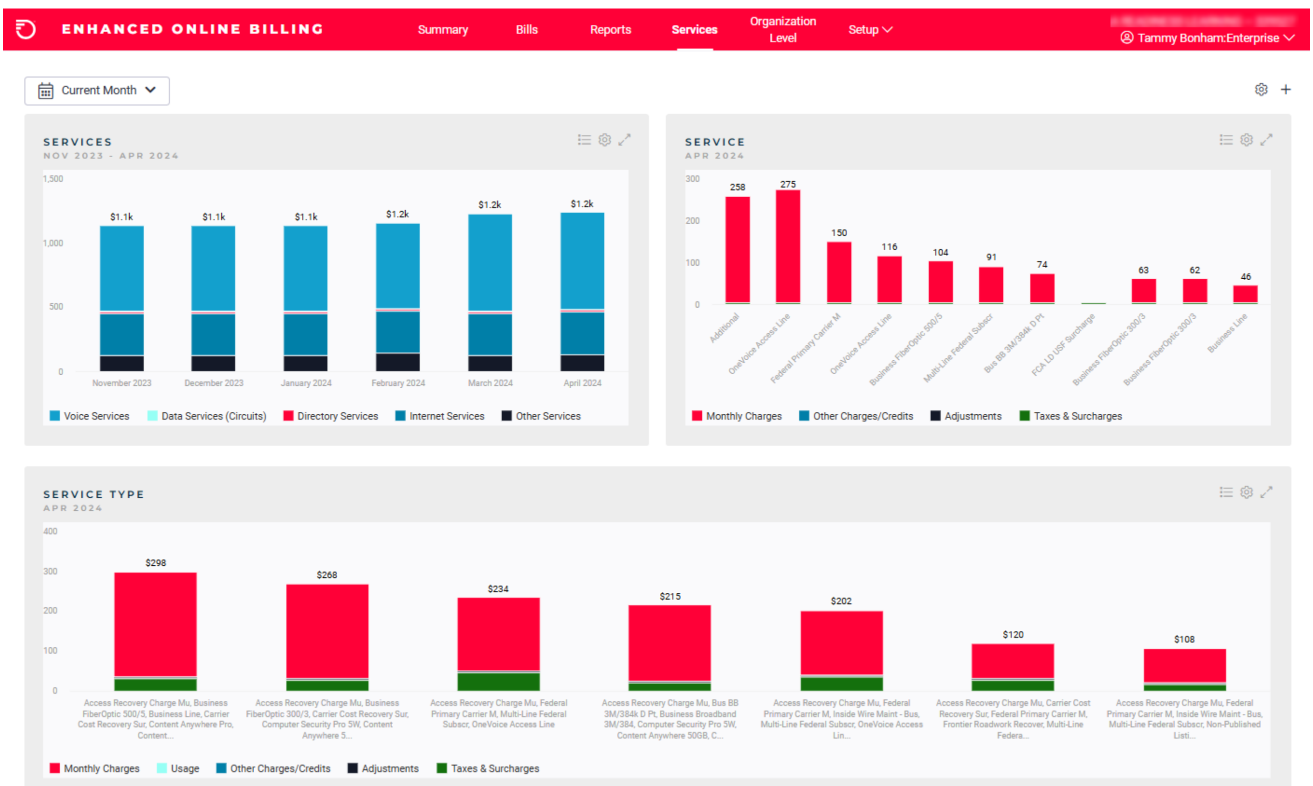
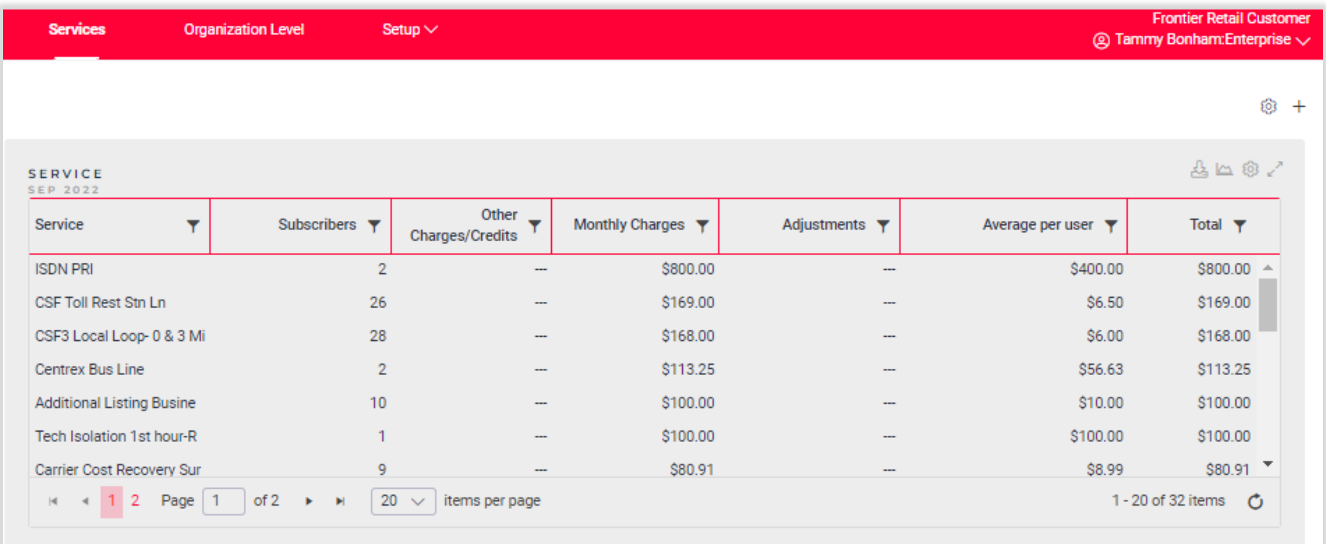
Services Tab

The **Services** tab provides information about services affecting your bill. Select a billing month for which you want to view billing data. Enhanced Online Billing displays a bar graph with summarized information.



Click the View tabular data icon in the upper right corner of a widget to display its data in list format.



Service	Subscribers	Other Charges/Credits	Monthly Charges	Adjustments	Average per user	Total
ISDN PRI	2	---	$800.00	---	$400.00	$800.00
CSF Toll Rest Stn Ln	26	---	$169.00	---	$6.50	$169.00
CSF3 Local Loop- 0 & 3 Mi	28	---	$168.00	---	$6.00	$168.00
Centrex Bus Line	2	---	$113.25	---	$56.63	$113.25
Additional Listing Busine	10	---	$100.00	---	$10.00	$100.00
Tech Isolation 1st hour-R	1	---	$100.00	---	$100.00	$100.00
Carrier Cost Recovery Sur	9	---	$80.91	---	$8.99	$80.91

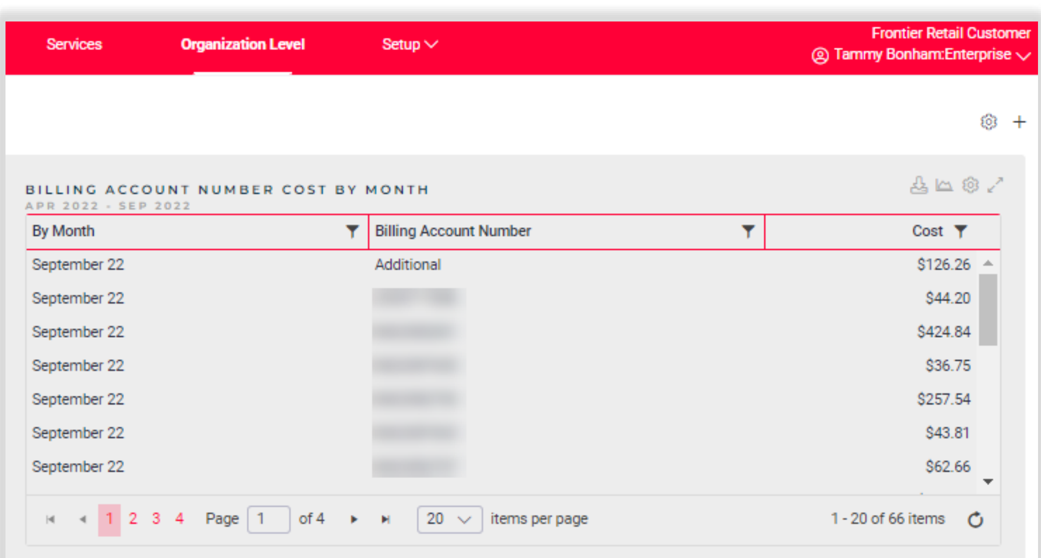
1 2 Page 1 of 2 20 items per page 1 - 20 of 32 items

Organizational Level Tab

The **Organizational Level** tab provides information about the billing impact of organizations across your enterprise.

Select a billing month for which you want to view billing data from the list in the upper left corner of the page. Enhanced Online Billing displays a bar graph with summarized information.

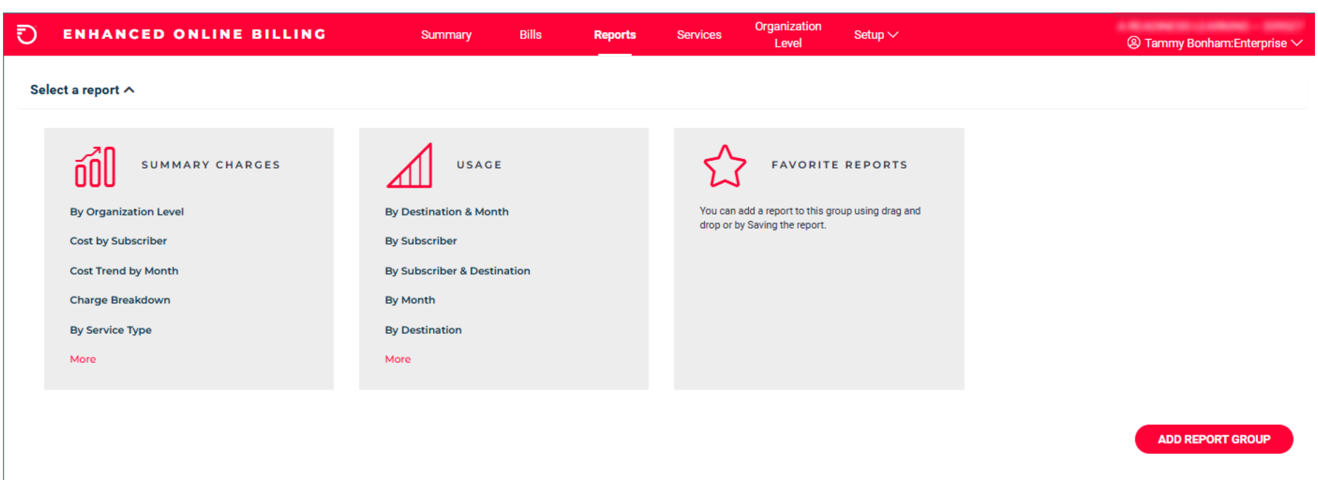
Click the **View tabular data** icon in the upper right corner of a widget to display its data in list format.



Reports Tab

The **Reports** tab gives you access to all reports in the application. These reports appear grouped in categories.

- In each report category, you can click **More** or **Less** to display additional or fewer reports for the category.
- You can drag and drop reports you frequently use to the **FAVORITE REPORTS*** category.
- You can create your report group by clicking **ADD REPORT GROUP**. The new report group appears at the bottom of the page.
- Click the **Gear** icon in the upper-right corner of the report category to edit the category, or click the X to delete the category.
- Report data displays when you click a report.

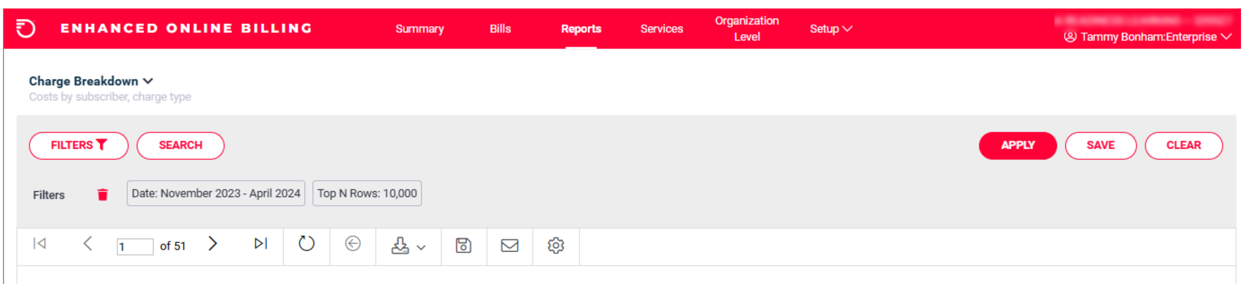


*Favorite Reports are specific to user profiles. When creating/saving a report here, it is only viewable to the user who created/saved it.

Use Lists in Enhanced Online Billing

You can use filters and other functionality to navigate better and manipulate the report data you view.

You can do the following on the Filter toolbar:

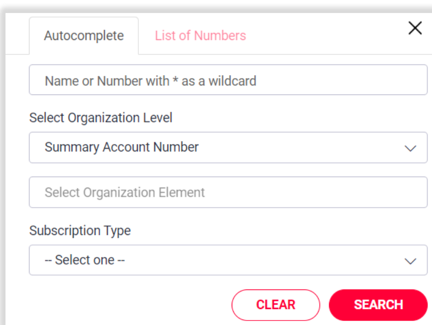


- ➢ Click **FILTERS** to view optional filters you can apply to report data to narrow your results.
- ➢ Select a filter from the list (not shown). You can select additional criteria from the filter list to narrow your results.
- ➢ Click **APPLY** to filter the report data according to your selection(s).
- ➢ Click **CLEAR** to clear all filters and display all report data.
- ➢ Click **SAVE** to designate the report as a favorite.

Click SEARCH to open a dialog box to assist with narrowing your search. You can search in the following ways:

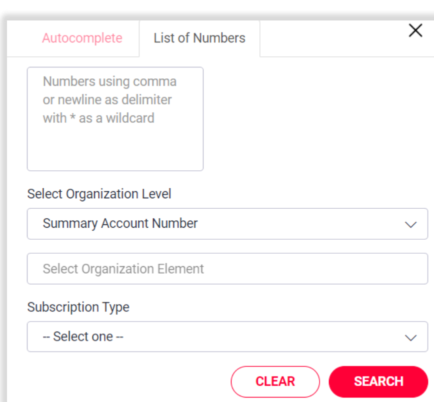
Click Search > Autocomplete

- You can use auto-complete to suggest names and numbers as you type.
- You can use an * symbol as a wildcard character.
- Enhanced Online Billing also provides relevant filters by which you can search content in the report list.



Click Search > List of Numbers

- You can enter a list of numbers for which to search.
- You can use an * symbol as a wildcard character.
- Enhanced Online Billing also provides relevant filters by which you can search content in the report list.



You can do the following on the **Report List** toolbar:

- **First Page, Previous Page,<insert page number>, Next Page, Last Page** – Use arrows to navigate to the first, previous, next, and last pages. Or enter a specific page number.
- **Refresh** – Refresh the page.
- **Go back to the parent report** – Use the back arrow to return to the parent report. If you drill down to more detail using a link, you can return to the original report at its highest level.
- **Export** – Export the report in Word, Excel, or PDF formats.
- **Save** – Save the report. See Favorite Reports.
- **Email** – Email the report. You can add recipients by email address, choose a delivery format, compress the data, and establish a password to view the report.
- **Settings** – Choose which columns appear on the report. Use toggles to turn columns on and off to view only the data you wish to see.
- **Up/down arrows next to column names** – Sort in ascending or descending order alphabetically or numerically. Click the **Refresh** icon to revert the report and columns to the original display.
- **Links** – Drill down for more detail. You can use the **Go back to the parent report** icon to return to the original report.

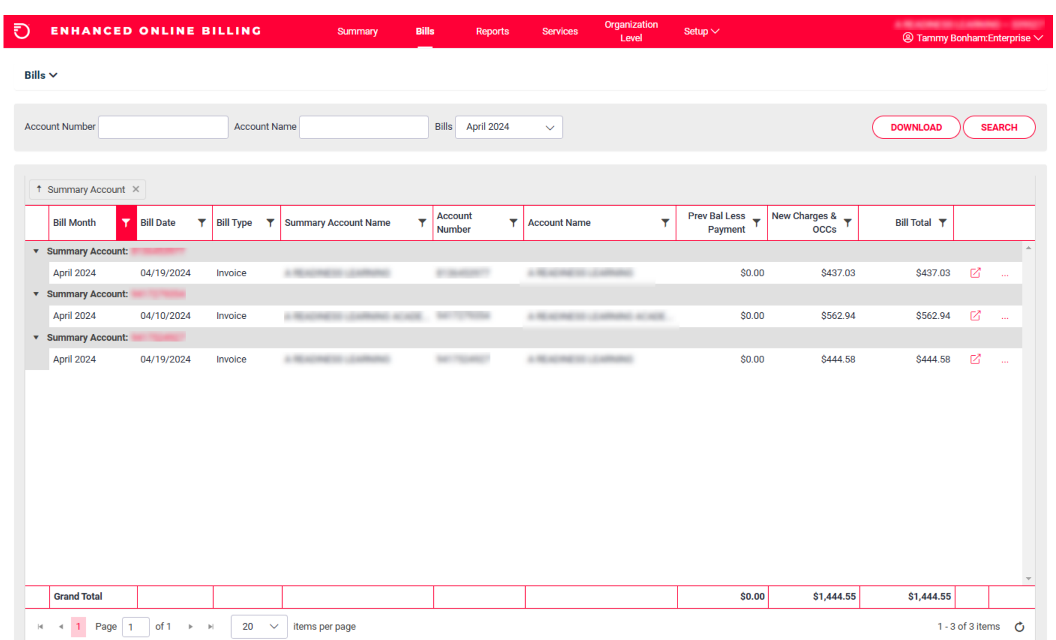
Bills Tab

Use the **Bills** tab to access each bill comprising the total bill for your enterprise. Click the Bills menu to display the **Bills List, Payment Allocation**, and **Payments** pages.

- **Bills List** (default) – Search and display current or previous bills.
- **Payment Allocation** – Make a total payment or pay individual invoices and view payment summary information.
- **Payments** – View payments you have made for selected accounts and months.

Bills List

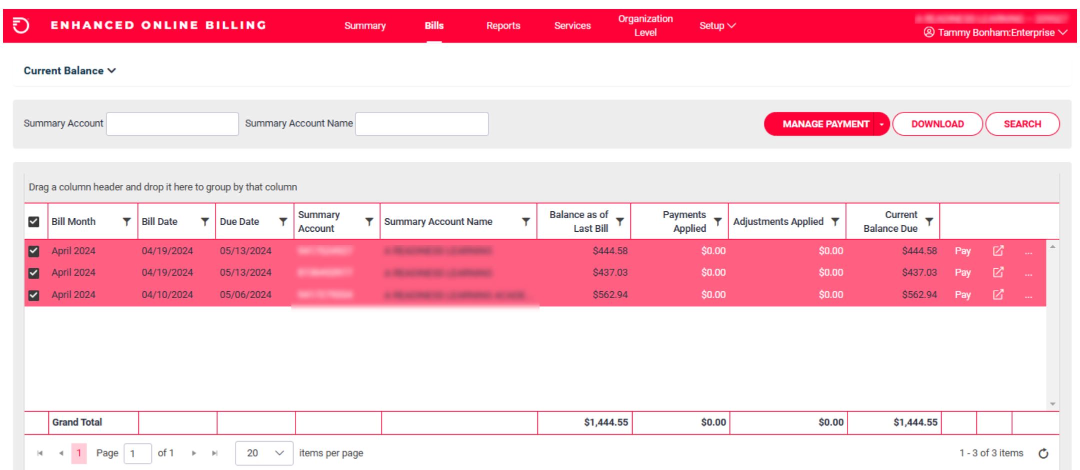
- Use the **Bills List** to search and display current or previous bills.
- You can search for bills by account number, name, and billing month. Enter data and click **SEARCH**.
- To return to the full display, clear the search fields, and click **SEARCH**.
- You can apply filters to each column to narrow your results.
- You can download a bill as a PDF or view the bill in the application. When you view a bill, you have options to print or download it.



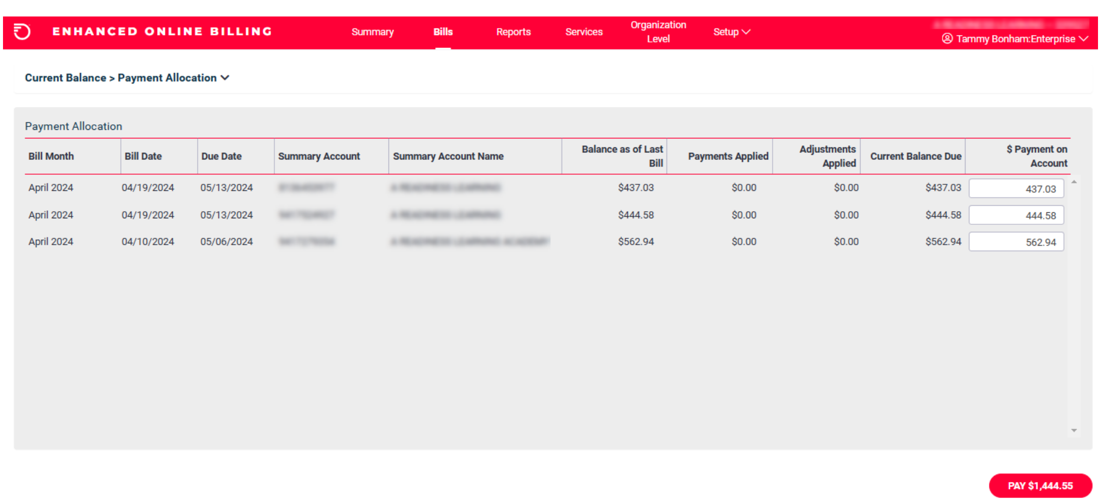
Pay Bills

From the Bills tab, choose Current Balance from the drop-down in the upper left corner. The Current Balance on the **Bills** tab allows you to make bill payments. You can pay in full, pay only the largest bills, pay only the smallest bills, evenly pay bills, or manually pay bills.

- You can pay individual bills by clicking on **Pay** on the right side of the screen
- To pay on multiple accounts, place a checkmark in the box next to the bill(s) to select for payment.
- Click **Manage Payment**
- Click **Pay Selected Bills**



- You can adjust payment amounts as needed
- Click **PAY**



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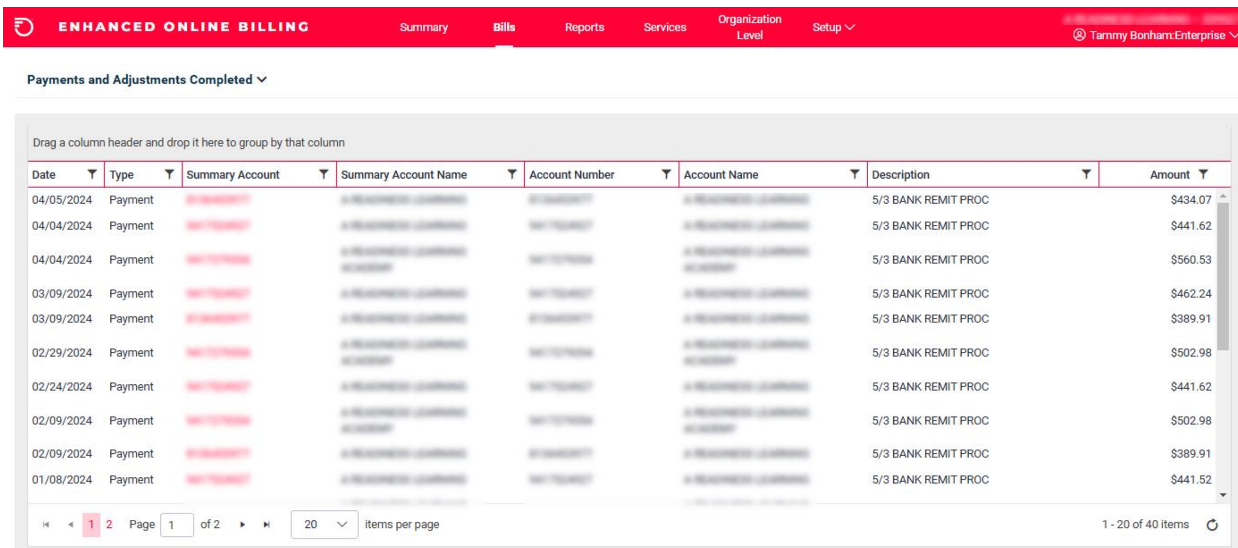
Payments

The **Payments** area on the Bills tab allows you to view payments made. You can search by account name, account number, or invoice number for any month.



Item	Description
Payment Date	Identifies the date the payment was made.
Payment	Identifies the payment amount.
Created By	Identifies the person that made the payment.
Status	Identifies the payment status.

Setup Tab

The **Setup** tab contains the following options:

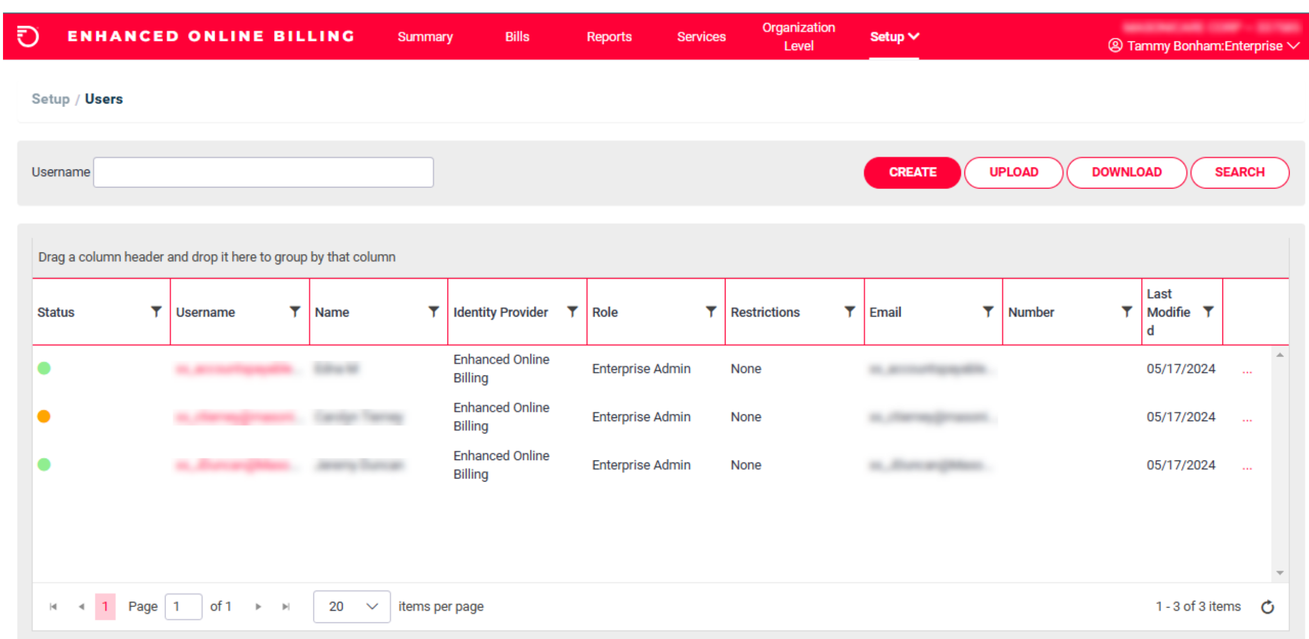
People – Create and manage users.

Data – Download billing files and previously delivered reports and manage delivered data.

Directory – View organization levels in your enterprise.

People

You use the **People** option on the **Setup** tab to create new users and manage existing users in your organization.

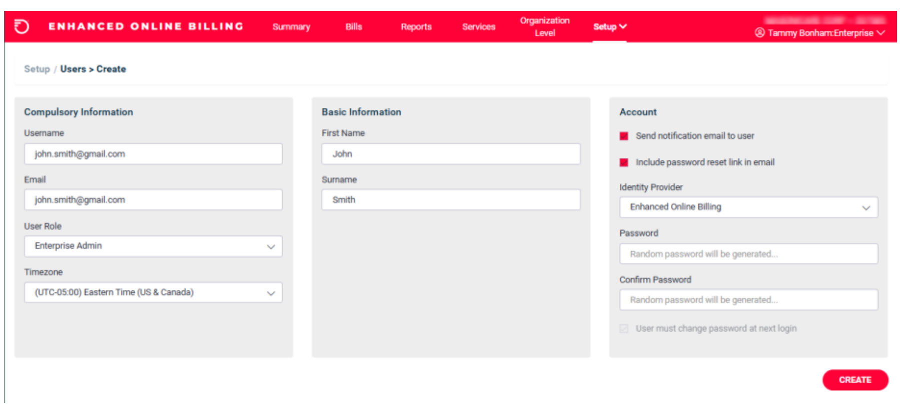


Create a User

You can create **users** in Enhanced Online Billing.

You first must select a user **role** for which you want to create a new user.

- **Admin** – Full platform functions, including viewing all service accounts at every level, all payment accounts, reporting, and the ability to create users.
- **Analyst** – All billing functions listed above. The analyst cannot create or edit users.
- **Group Level User** – Can view billing information and be restricted to specific BTNs. **This user cannot make payments.**



- ➢ Click **CREATE** on the main **People** page to display a page you use to create a new user.
- ➢ Type the username in the **Username** field (required). This should be the user's email address.
- ➢ Type the user's email address in the **Email** field (required). Although usernames must be unique and an email address is often used as the username, email addresses do not need to be unique.
- ➢ Choose a role from the **User Role** list (required). The role you choose depends on the level of access the user requires.
- ➢ In the **Account** pane, choose the log-on method. You can choose the Single Sign-On method or the simple username and password method.
- ➢ Click **CREATE** when you are finished.

Manage Users

You can search for existing usernames established for use within Interactive Bill.

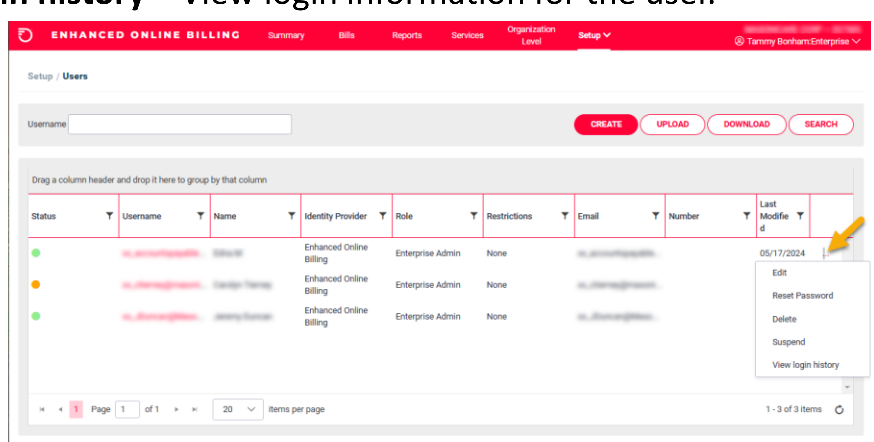
Type a username in the **Username** field, click **Search**, or filter the **Username** column to find a username.

Click **Upload** to upload a properly formatted Excel spreadsheet with user information. Click **Download** to download an Excel spreadsheet with user information.

Click a linked username to impersonate the user. Impersonating a user allows you to view the application as if you are the user with his or her specific permissions. This can help you troubleshoot user issues by seeing what they see. Rest the pointer on a status to see whether a user is active or inactive as of a specific date.

Click the **...** link in the right column of a username row to perform the following actions for a user:

- **Edit** – Edit user information.
- **Reset Password** – Enter a new password for the user and confirm the new password. Click Update.
- **Delete** – Confirm deletion of the user.
- **Suspend** – Suspend user access. This option appears for active user records.
- **Activate** – Activate a suspended user. This option appears for suspended user records.
- **View login history** – View login information for the user.



Data

The **Data** option on the **Setup** tab lets you determine settings for bill delivery.

There are seven pages available. The following shows the **My Delivered Data** page, which you use to set up how reports are delivered. Open another page by clicking the **Setup** menu in the upper-left corner.

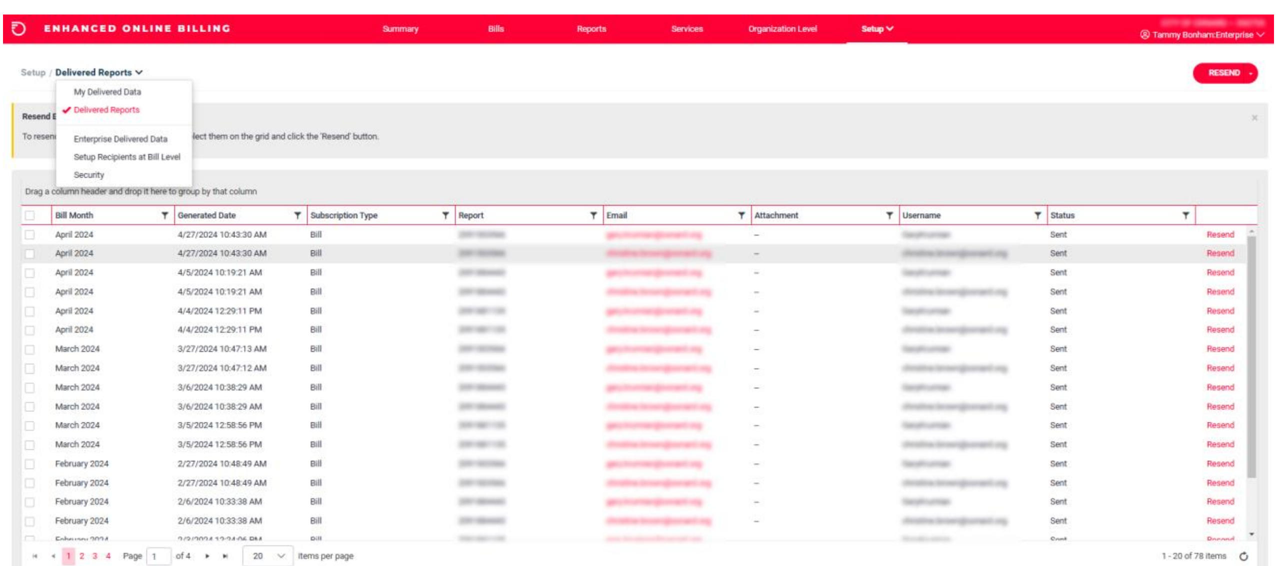
In addition to **My Delivered Data**, the following pages are available:

Delivered Reports – Allows you to view and resend previously delivered reports.

Enterprise Delivered Data – This allows you to set up how enterprise-level reports are delivered.

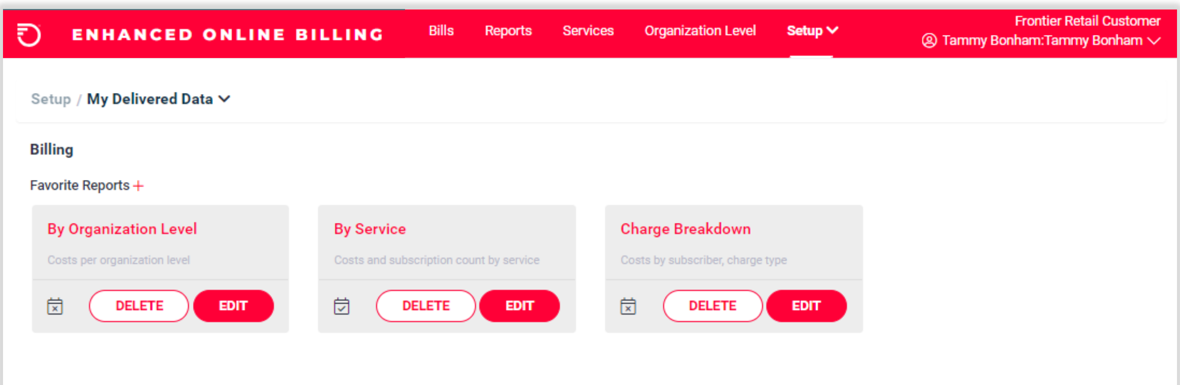
Setup Recipients at Bill Level – Allows you to assign users/recipients to billing accounts and provision new bills for delivery.

Security – Allows you to set whether passwords are required to open bills and reports and configure password complexity requirements.

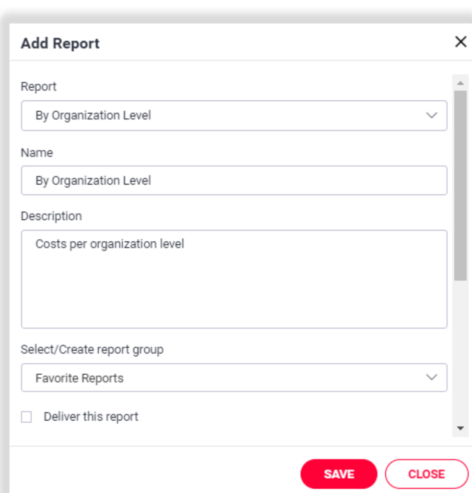


Data – My Delivered Data

The **My Delivered Data** page on the **Setup** tab lets you determine settings for report delivery. You can choose whether to deliver reports by email as soon as they are available, the report formats, whether to compress file size, and whether a password is required to view reports.



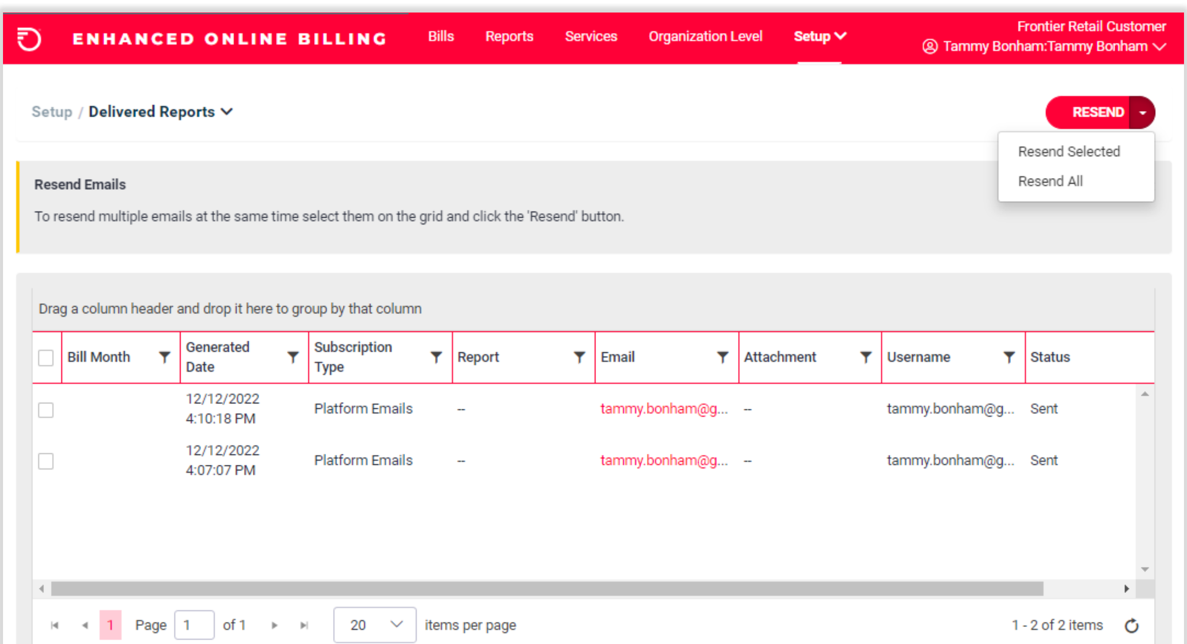
- Click the + link next to **Favorite Reports** to add a report for delivery.
- Click **DELETE** to remove delivery of an existing report.
- Click **EDIT** to configure a report's delivery settings.
- The **Add Report** or **Save Report** dialog box displays when you add or edit a report's settings.



Data – Delivered Reports

You use the **Delivered Reports** page on the **Setup** tab to download and resend previously delivered reports.

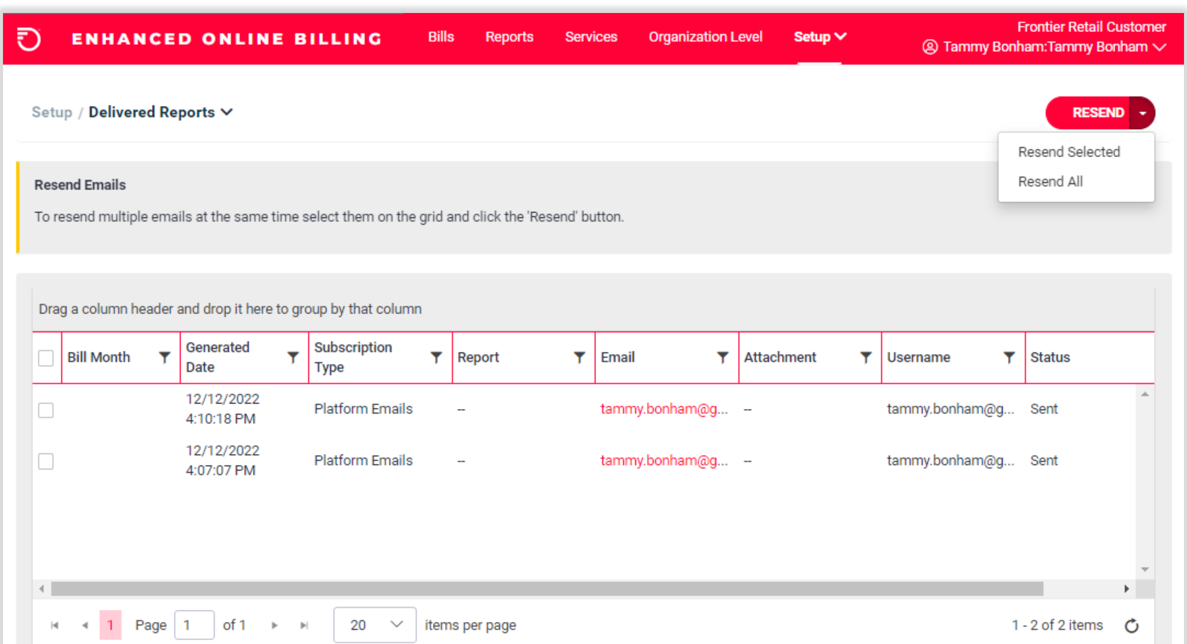
- Click the **Email** link to download the previously sent email with its attachment or click the **Attachment** link to download the email attachment.
- Select the check box to the left of the file and click **RESEND** to resend the email to the designated recipients.
- You can also select multiple files, expand **RESEND**, and click **Resend Selected**. Or you can expand **RESEND** and click **Resend All.**



Data – Enterprise Delivered Data

You use the **Enterprise Delivered Data** page of the **Data** option on the **Setup** tab to determine which reports to deliver to users across your enterprise. You can determine the format of the report, whether to compress the file size, whether a password is necessary to view the report, whether users can request their own personal summary, and whether users can unsubscribe from receiving a report.

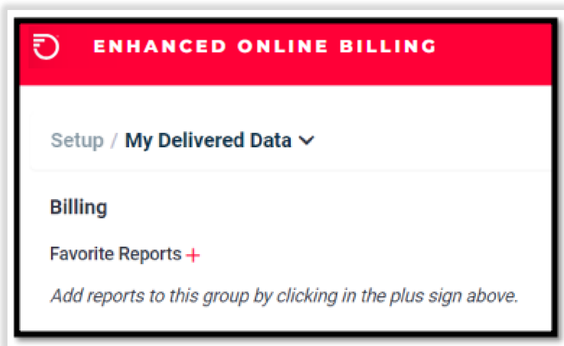
Any report or bill that Enhanced Online Billing delivers to the enterprise appears on this page.



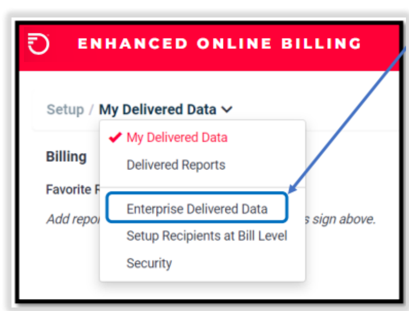
Data – Setup Bill Ready Notification Emails

Customers can set up **Bill Ready Notification** emails in Enhanced Online Billing. After logging into Enhanced Online Billing, choose **Data** under the **Setup** menu.

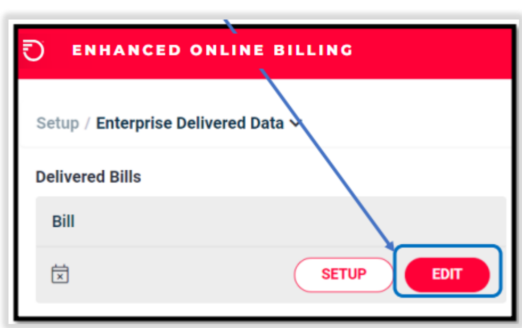
- The following screen will open.



- Click the drop-down arrow to open the menu options. Choose **Enterprise Delivered Data** in the drop-down list.



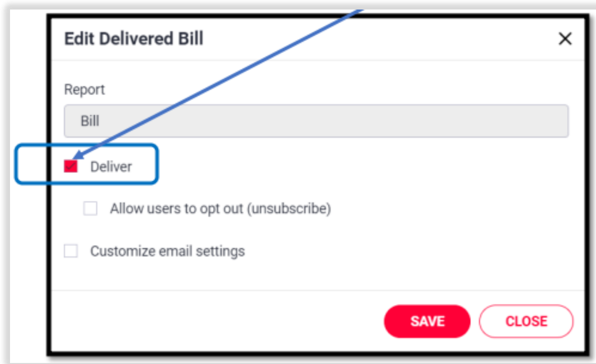
- On the **Delivered Bills** screen, click the **EDIT** button.



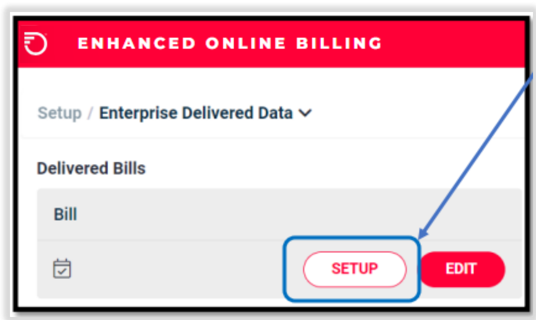
Data – Setup Bill Ready Notification Emails

➢ On the **Edit Delivered Bill** screen, check the box beside **Deliver** and click **SAVE**.

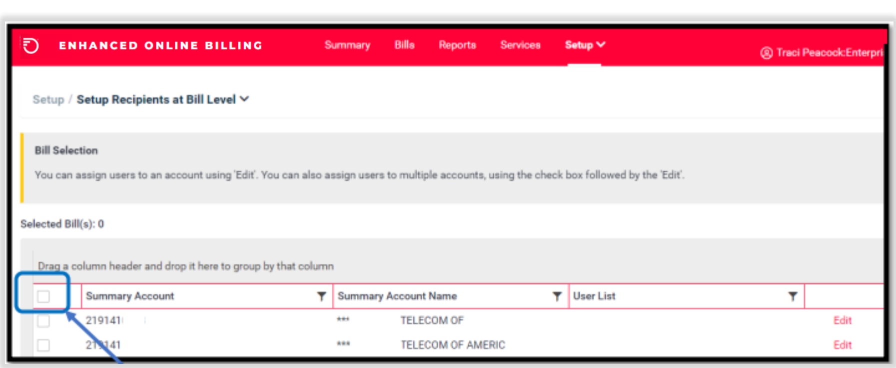
The “Save Successful” message will pop up if the setting change was saved successfully.



➢ After the change is saved, the **Delivered Bills** screen is displayed again. Click the **SETUP** button.

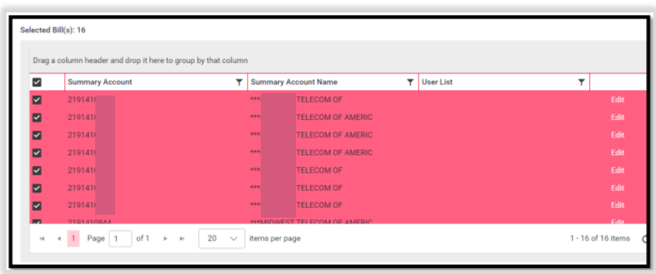


➢ The **Setup Recipients** at **Bill Level** screen displays all Summary Accounts assigned to your Enterprise in Enhanced Online Billing. Recipients can be assigned to individual accounts or multiple accounts by clicking the check box beside the account(s).



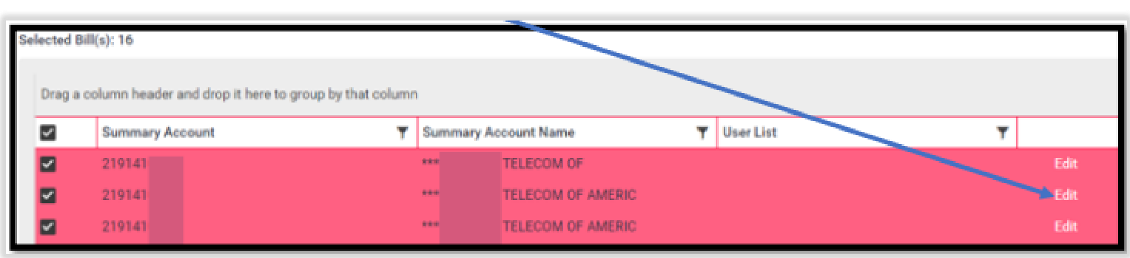
Data – Setup Bill Ready Notification Emails

➢ After clicking the check box(es), the chosen accounts are shaded in red.



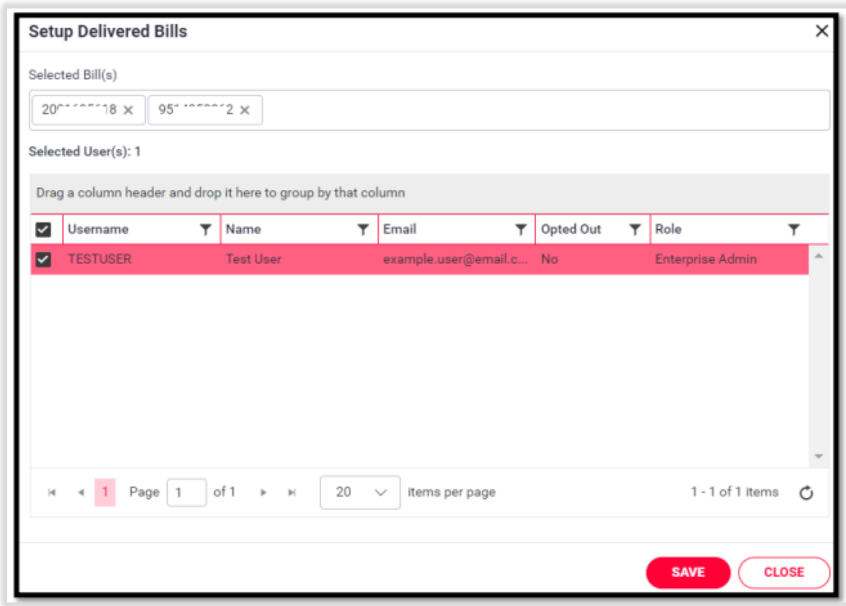
➢ Please note the **Page** and **Items per Page** at the bottom of the screen. The Items per Page can be increased to 100. If the number of accounts is spread over multiple pages, the check box at the top must be clicked on each page to select the accounts on the page.

➢ After choosing accounts, click the **EDIT** link on any account row.

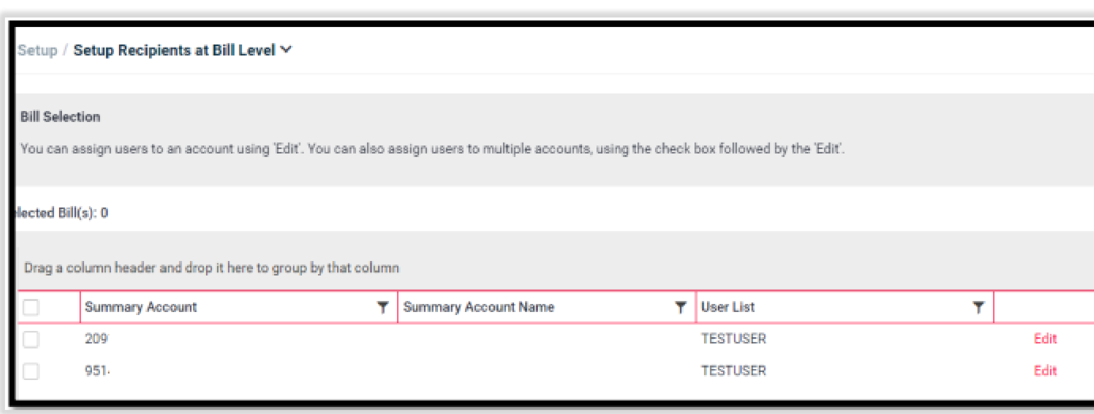


Data – Setup Bill Ready Notification Emails

- The **Setup Delivered Bills** screen displays a list of the accounts chosen and the Usernames assigned to the Enterprise. Click the check box beside the Username(s) that should receive the Bill Ready Notification emails and click the **SAVE** button.



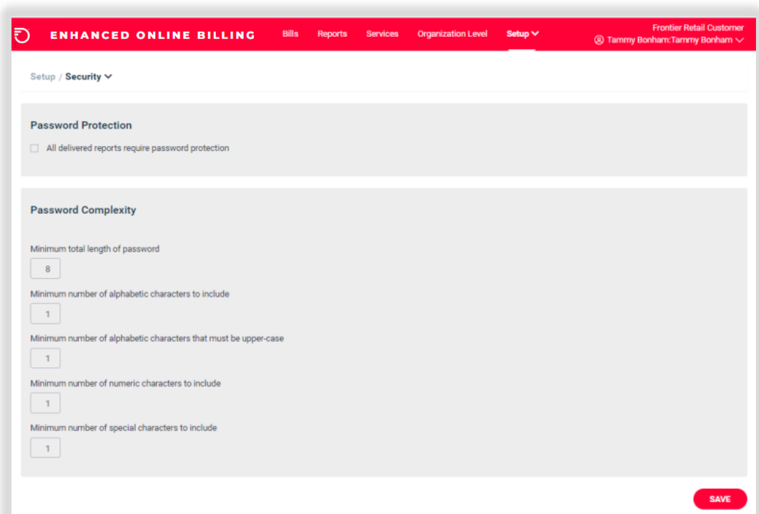
- The **Setup Recipients at Bill Level** screen displays the Username(s) assigned to each account. To change the users later, click the **EDIT** link.



Data – Security

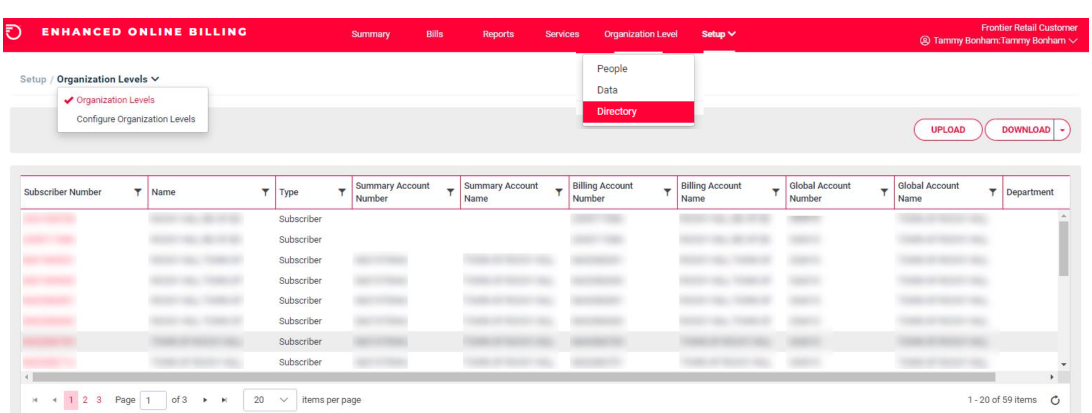
You use the **Security** page of the **Data** option on the **Setup** tab to determine whether all delivered reports require password protection and the specifications for report password protection.

Click **SAVE** when you have established your preferred settings.



Directory

You use the **Directory** option on the **Setup** tab to manage and configure organization levels.



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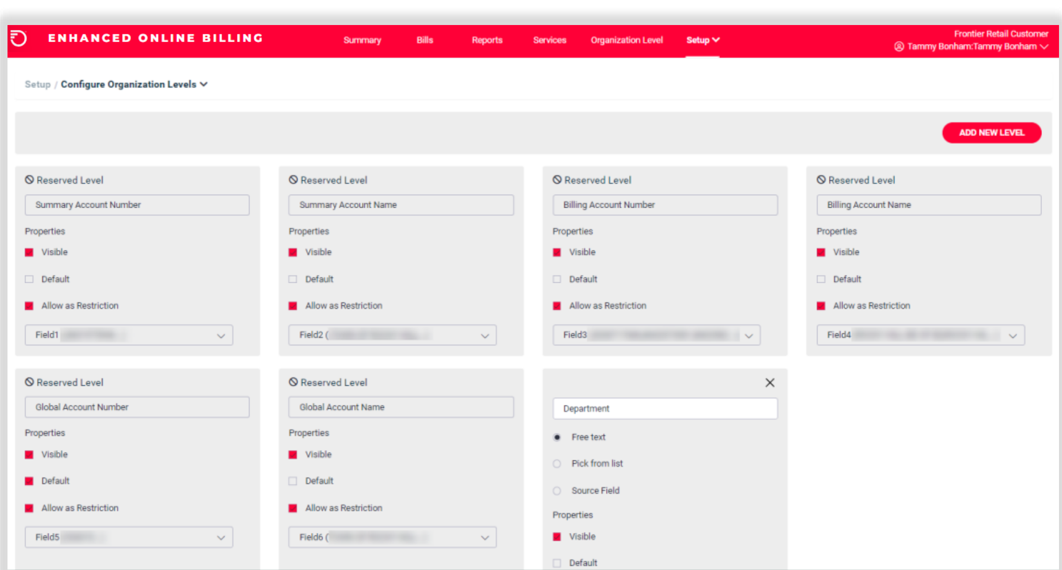
Configure Organizational Levels

You use the **Configure Organization Levels** area of the **Directory** option on the **Setup** tab to establish organization levels, change the order in which organization levels appear in the application, and change drill-down behavior when a user needs more detailed information.

- Click the **Setup** menu in the upper-left corner of the **Directory** page and choose **Configure Organization Levels**.
- Click **ADD NEW LEVEL** to add a new organization level.
- Select the options you need available for the new level.
- Click **SAVE** when you are finished.
- At the bottom of the page, you can use the **Up** and **Down** arrows to modify the order in which organization levels appear.
- You also can include organization levels in drill-down functionality on reports. Select an organization level from either **Not included in drill down** or **Included in drill down**, and then click **ADD** or **REMOVE**.

Organization levels in the **Included in drill down** list become linked on reports to allow users to drill down for more detail.



CHANGE LOG

DATE	PAGE	REVISION	BY
12/14/22	All	Version 1	Tammy Bonham
1/24/23	10	Added Auto Pay Information	Tammy Bonham
7/13/23	5	Removed SMS Reference	Tammy Bonham
7/13/23	31-34	Added Detailed Bill Ready Notification Email Instructions	Tammy Bonham
8/1/23	25	Updated Analyst & Group Level User Roles	Tammy Bonham
5/17/24	All	Name Rebranding	Tammy Bonham

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