Frontier-MasterStream Agent Administrator Training Guide

Agenda

Overview

Create and Manage Agent Users

Reports

Agent Company Profile Updates

Overview

Who Can Use It?

Wholesale customers (Carrier, CLEC, Reseller) of Frontier Communications may request access to the Frontier-MasterStream portal as an Agent Company. Agent Company Users may submit Request for Quote(s) (RFQ) on eligible products across the Frontier service territory.

AGENT ADMINISTRATOR

Only one Agent Administrator login will be provided to each Agent Company. The Agent Company Administrator has the highest level of access and is responsible for establishing default settings and the Agent Company profile, creating Agent Company User access and has access to the reports. The Agent Administrator also has the same functionality as an Agent User.

AGENT USER

Agent Users may be Sales Managers or Reps of the Agent Company. All Agent Users have the ability to create new clients and client locations, submit new RFQs, manage instant quotes and proposals for clients, and access the lookup tool resources. Sales Managers have the additional functionality that allows them to create Rep user access.

What Does it Do?

The Frontier-MasterStream portal provides registered Agent Company Users with the ability to request <u>instant quotes</u> for eligible products to end user (Client) customers in the Frontier Communications service territories.

To request quotes for services where instant quotes are not available via the Frontier-MasterStream portal, please contact your Frontier Account Manager.

The following products are available for instant quoting:

 Wholesale Advantage Broadband

 EVPL/EPL (All Frontier Properties Excluding AZ, NM)

 EPATH (All Frontier Properties Excluding AZ, NM)

 EIA (All Frontier Properties Excluding AZ, NM)

When an instant quote is successful in the Frontier-MasterStream portal, Agents are provided with tools to export quote files and generate proposals that can be presented to their Client customers.

Sample Proposal

Quote Summary

Showing all locations included in RFQ

Product Comments

Specific to product quoted

Agent Company information and Logo as set in application by Agent Company Administrator

Quote Details

One detail section per location included in RFQ

Disclaimers

Apply as applicable

Home Page Navigation

Left Sidebar
The Left Sidebar options are available from each screen

Metrics
Quote Request totals are shown in the body of the home page.

Help
The Help icon is available from most screens and will display help options for the current screen

Show Me How
The 'Show Me How' blue bar and the pull-down options are available to provide users more detailed instructions

Bulletin Board
The Bulletin Board will show important messages to Users

System Menu
The System Menu is available by hovering the mouse over the User's name shown in the top-right corner of the title bar. Refer to User Guide for detailed information about the System Menu.

Agent Users

User Manager

User Manager ❓   👤 **Jane Doe** ✉ 🔔

Status

[Active ▼]   [Transfer Rep]

Click on column header to sort   **Add Sales Manager | Add Rep**

Agent ID	Last Name	First Name	Login	Email	Phone	DL	Links	BB
ZTK1000001	Jetts	Benny	Send	benny.jetts@you.com	919-555-1212	N/A	Yes	Yes
ZTK1000004	Rep	Sally	Send	sally.rep@you.com	919-555-1212	N/A	Yes	Yes
ZTK1010000	Johns	Bee	Send	bee.johns@you.com	919-555-1212	N/A	Yes	Yes
ZTK1010010	Gump	Bubba	Send	b.gump@you.com	919-555-1212	N/A	Yes	Yes
ZTK1020000	Day	Dale	Send	dale.day@you.com	919-555-1212	N/A	Yes	Yes

Administrators and Sales Managers* may View Users by Status – Active, All or Inactive

Administrators may Transfer Representatives between Sales Managers

Administrators may Add new Sales Manager and Sales Representative Users

Sales Managers may Add new Sales Representative Users

Administrators and Sales Managers* may Update User Profiles

Administrators and Sales Managers* may Change User Password

Administrators and Sales Managers* may Deactivate Users and also Reactivate Users

Administrators and Sales Managers* may Access Login Credentials and Send to User

Sales Representatives do not have access to the User Manager

NOTE: Sales Managers may only take the specified actions for Users under their Sales Manager ID group.

Create New Users

To add Sales Manager or Sales Rep "User", click on the "Users" link in the left sidebar.

In the resulting "User Manager" screen, click the "Add Sales Manager" or "Add Rep" button and complete the respective New User Profile screen.

Required fields are marked with an asterisk.

Agent Administrators can create Sales Managers or Rep Users.

Sales Managers can create Rep Users.

Assign a unique Agent ID. The first four characters set as the Agent Company ID, followed by:

- If Sales Manager: a unique 2-digit number and ending with 4 zeros
- If Sales Rep: 2-digit of creator's ID, followed by a unique 4-digit number

Populate the user's First Name, Last Name, Title, Address, City, State, Zip, Phone, Mobile and E-mail.

If the user should not have access to view the Custom Sidebar Links or the Bulletin Board, please uncheck the boxes.

When finished, click the "Save" button.

Transfer Rep Users to New Sales Manager

From the User Manager screen, click the Transfer Rep button to initiate the transfer process

In the resulting screen, from the left pull-down, highlight the Administrator or Sales Manager you want to transfer the rep 'from'

In the right pull-down, select the Administrator or Sales Manager you want to transfer the rep 'to'

The Agent ID of the transferred rep will be updated to reflect the ID of the Administrator or Sales Manager group it has been transferred to.

Send New User Credentials

A confirmation window will appear to confirm the user has been created.

After adding a User (Associate), from the User Manger screen (above) click the "Send" button in the Login column.

In the resulting "Email Associate Login Info" screen, you can view the new user's Agent ID, Username and Password.

Click 'send' to send email notification to the user.

User Updates

To Update or Deactivate Users, select the User link from the left sidebar to open the User Manager screen.

Select the link of the Agent ID to Update or Deactivate.

Updates:

Make the necessary changes including Change Password as necessary

Click the "Update" button.

Deactivate User:

Click the "Deactivate" button.

Confirm Deactivation.

Sales Manager	Registered Since: 08-15-2017
*Agent ID:	ZTK1010000
*First Name:	Bee
*Last Name:	Johns
Title:	Sales Manager
Address:	1 Main St
City:	Durham State: NC Zip: 27712
Country	UNITED STATES OF AMERICA ▾
*Phone:	919-555-1212 ext.:
Mobile:	
Fax:	
*E-mail:	bee.johns@you.com

☑ Show Custom Sidebar Links
☑ Show Bulletin Board

Deactivate   Change Password   Update

Reports

Reports

To open the Report Manager, select "Reports" from the left sidebar.

The standard Sales Funnels report is available.

The report may be defined by Status, Product Type, View, and Date Range drop-down options.

Once the parameters of the Sales Funnels report are set, click the "Search" button.

The report view may be printed, exported as HTML, exported as Excel or exported as CSV by selecting the specific link/button.

Agent Company Profile

Agent Company Profile

From the Agent Company Profile screen, administrators can:

Update their company information

Add a company logo for proposals

Identify if RFQ submission receipt emails are required.

You have completed the Frontier-MasterStream Agent Administrator Training!