

# iCARE-360

## User/System Guide (USG)

(EBC-2325: iCARE CRM & CCI Enhancements)

Version 6.0

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### REVISIONS

| Ver. | Date       | Name                             | Description  |
|------|------------|----------------------------------|--|
| 1    | 6/29/2009  | Michelle Gimmi                   | Initial Release - CCI Front Page re-write to iCARE-360 |
| 2    | 10/16/2009 | Michelle Gimmi<br>J. Mason Costa | Sprint-2,-3,-4 enhancements.                           |
| 3    | 11/10/09   | Michelle Gimmi                   | Sprint 5 and 6 updates                                 |
| 4    | 11/23/09   | Michelle Gimmi                   | Sprint 8 – Additional Activity Tabs                    |
| 5    | 11/7/2012  | J. Mason Costa                   | Added Design and Document Manager (Documents) Tabs     |

|   |            |                |                          |
|---|------------|----------------|--------------------------|
| 6 | 11/12/2012 | J. Mason Costa | Added system description |
|---|------------|----------------|--------------------------|

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## System Description

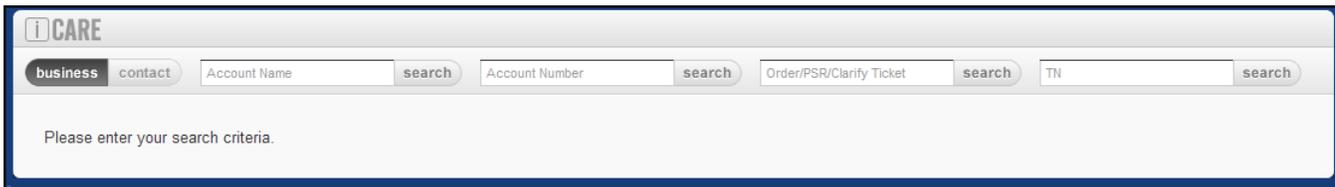
**iCare-360** is a secure and consolidated intranet-based account information portal used by Windstream personnel (internal and partners) in supporting Windstream’s customers. The system pulls and displays account information from various IT systems real-time, and was created as an intended replacement for the MSS-account-centric “CCI Tool”. iCare-360 allows for account search-and-display by various Business and Customer search criteria, and provides a snapshot of the account’s contacts, hierarchy, billing, service, and support details. iCare-360 also provides some basic update functionality including administration of customer contacts, billing addresses, account profiles, consolidated notes and document management (uploads, downloads, etc.).

## Background

As part of the iCARE initiative, enhancements to the Customer Relationship Management (CRM) and Consolidated Customer Information (CCI) systems were made. These enhancements are identified in the following sections.

## iCARE 360 Account Search

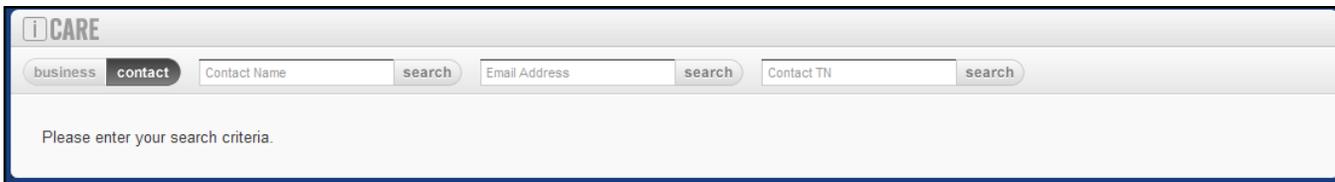
### Search Engine - Business Search



The screenshot shows the iCARE Business Search interface. At the top left is the iCARE logo. Below it are two tabs: 'business' (selected) and 'contact'. The search area contains four input fields with 'search' buttons: 'Account Name', 'Account Number', 'Order/PSR/Clarify Ticket', and 'TN'. Below the search fields is a text prompt: 'Please enter your search criteria.'

Users can utilize the iCARE Three-sixty Business search engine by entering the Customer’s full or partial name Account Name; Customer MSS or RIO Account Number; RIO/MSS/ or Clarify Ticket Number; or a 10 digit NuVox assigned Telephone number (without dashes, dots or spaces or parentheses!)

### Search Engine - Contact Search



The screenshot shows the iCARE Contact Search interface. At the top left is the iCARE logo. Below it are two tabs: 'business' and 'contact' (selected). The search area contains three input fields with 'search' buttons: 'Contact Name', 'Email Address', and 'Contact TN'. Below the search fields is a text prompt: 'Please enter your search criteria.'

Users can utilize the iCARE Three-sixty Contact search engine by entering the Customer’s Contact Name; Email Address or Contact 10 digit TN (without dashes, dots or spaces or parentheses).

Note: If your cursor is in the search box after you enter the information, you must hit “search” to begin the search.

- ❖ Note: Number searches do not support partial telephone or account info even if you use the “%” wild card.

Note: The name search function uses the “starts with” logic, and will display all accounts that start with the exact letters you entered. To search for the word or words you have entered anywhere in a customer’s name place a “%” wild card in front of the words. Capitalization does not matter.

Wild card searches take much longer!!

Example: Enter the word bank. Search results will return 108 Customers whose name BEGINS with bank.

Enter the word %bank%. Search results will return 1122 Customers whose name CONTAINS the word bank.

## Query results for %bank%

Results are initially sorted by Account Number.

You can change the way the results are sorted, by clicking on the arrow buttons  located next to the billing account number, account name, status and billing system.

| Billing Account Number | Account Name   | Status      | Billing System |
|------------------------|--|-------------|----------------|
| 4044562                | THE MEMORY BANK, INC. (billing system information unavailable)                       | Unavailable |                |
| 4044661                | COLDWELL BANKER CAINE (billing system information unavailable)                       | Unavailable |                |
| 4042457                | ARLINGTON BANK 2130 Tremont Ctr Fl 1, Upper Arlington, OH, 43221-3110                | Active      | RC7            |
| 4043301                | 1ST UNITED BANK - COOPER CITY (billing system information unavailable)               | Unavailable |                |
| 4043445                | COLDWELL BANKER SSK REALTORS (billing system information unavailable)                | Unavailable |                |
| 4042850                | COLDWELL BANKER SSK REALTORS 1501 Bass Rd, Macon, GA, 31210-7557                     | Active      | RC7            |
| 4042362                | BANKS CONSTRUCTION 101 Mellichamp Rd, Summerville, SC, 29483-7943                    | Active      | RC7            |
| 4040822                | BANKS & ASSOCIATES LLC (billing system information unavailable)                      | Unavailable |                |
| 4035543                | INTERCREDIT BANK, N.A. (billing system information unavailable)                      | Unavailable |                |
| 4041765                | BANKEAST CORPORATION (billing system information unavailable)                        | Unavailable |                |
| 4041700                | BANKEAST CORPORATION (billing system information unavailable)                        | Unavailable |                |
| 4040687                | JEFFERSON BANK & TRUST - EUREKA (billing system information unavailable)             | Unavailable |                |
| 4040774                | JEFFERSON BANK & TRUST - CONCORD VILLAGE (billing system information unavailable)    | Unavailable |                |
| 4040701                | JEFFERSON BANK & TRUST - OFALLON (billing system information unavailable)            | Unavailable |                |
| 4040773                | JEFFERSON BANK & TRUST COMPANY (billing system information unavailable)              | Unavailable |                |
| 4040775                | JEFFERSON BANK & TRUST - CREVE COEUR (billing system information unavailable)        | Unavailable |                |
| 4033240                | BANKEAST CORPORATION 6000 Kingston Pike, Knoxville, TN, 37919-6345                   | Active      | RC7            |
| 4039038                | GENERATIONS BANK 1200 W 120th St, Overland Park, KS, 66213-1145                      | Active      | RC7            |
| 4039873                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039872                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039870                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039871                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039869                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039836                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039868                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039773                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4038813                | GRANT COUNTY DEPOSIT BANK (billing system information unavailable)                   | Unavailable |                |
| 4038831                | GRANT COUNTY DEPOSIT BANK (billing system information unavailable)                   | Unavailable |                |
| 4038827                | GRANT COUNTY DEPOSIT BANK 225 Violet Rd, Crittenden, KY, 41030-8951                  | Active      | RC7            |
| 4039748                | OMNI NATIONAL BANK BIRMINGHAM 2 20th St N Ste 900, Birmingham, AL, 35203-4062        | Active      | RC7            |
| 4039124                | COLDWELL BANKER UNITED REALTORS - MOBILE (billing system information unavailable)    | Unavailable |                |
| 4038831                | GRANT COUNTY DEPOSIT BANK (billing system information unavailable)                   | Unavailable |                |
| 4038827                | GRANT COUNTY DEPOSIT BANK 225 Violet Rd, Crittenden, KY, 41030-8951                  | Active      | RC7            |
| 4039748                | OMNI NATIONAL BANK BIRMINGHAM 2 20th St N Ste 900, Birmingham, AL, 35203-4062        | Active      | RC7            |
| 4039124                | COLDWELL BANKER UNITED REALTORS - MOBILE (billing system information unavailable)    | Unavailable |                |
| 4039537                | M & I BANK 5225 University Pkwy, Sarasota, FL, 34243-5645                            | Active      | RC7            |
| 4038596                | INDEPENDENCE NATIONAL BANK SIMPSONVILLE LOC (billing system information unavailable) | Unavailable |                |
| 4039352                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4038827                | GRANT COUNTY DEPOSIT BANK 225 Violet Rd, Crittenden, KY, 41030-8951                  | Active      | RC7            |
| 4039748                | OMNI NATIONAL BANK BIRMINGHAM 2 20th St N Ste 900, Birmingham, AL, 35203-4062        | Active      | RC7            |
| 4039124                | COLDWELL BANKER UNITED REALTORS - MOBILE (billing system information unavailable)    | Unavailable |                |
| 4039537                | M & I BANK 5225 University Pkwy, Sarasota, FL, 34243-5645                            | Active      | RC7            |
| 4038596                | INDEPENDENCE NATIONAL BANK SIMPSONVILLE LOC (billing system information unavailable) | Unavailable |                |
| 4039352                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039345                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039327                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039317                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039306                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039345                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039327                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039317                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039306                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039294                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039292                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039281                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039327                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039317                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039306                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039294                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039292                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039281                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039115                | SOUTHERN FIRST BANK - CAYCE 192 Knox Abbott Dr Ste 100, Cayce, SC, 29033-4348        | Active      | RC7            |
| 4038596                | INDEPENDENCE NATIONAL BANK SIMPSONVILLE LOC (billing system information unavailable) | Unavailable |                |
| 4039352                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039345                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039327                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039317                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039306                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039294                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039292                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039281                | GRAND BANK & TRUST OF FLORIDA (billing system information unavailable)               | Unavailable |                |
| 4039115                | SOUTHERN FIRST BANK - CAYCE 192 Knox Abbott Dr Ste 100, Cayce, SC, 29033-4348        | Active      | RC7            |
| 4038829                | GRANT COUNTY DEPOSIT BANK 805 Overton Rd, Corinth, KY, 41010-3013                    | Active      | RC7            |
| 4038823                | GRANT COUNTY DEPOSIT BANK 26 Tall Hwy, Dry Ridge, KY, 41035-8131                     | Active      | RC7            |
| 4038820                | GRANT COUNTY DEPOSIT BANK 1414 N Main St Fl 1, Willamstown, KY, 41097-9478           | Active      | RC7            |
| 4024875                | 1ST UNITED BANK (billing system information unavailable)                             | Unavailable |                |
| 4024859                | 1ST UNITED BANK (billing system information unavailable)                             | Unavailable |                |
| 4024834                | 1ST UNITED BANK (billing system information unavailable)                             | Unavailable |                |
| 4024823                | 1ST UNITED BANK (billing system information unavailable)                             | Unavailable |                |
| 4024831                | 1ST UNITED BANK (billing system information unavailable)                             | Unavailable |                |

## Filtering Options

The Filter option can also be utilized to limit your search by placing a complete or partial of billing account number, account name, status or billing system.

- ❖ Note: The filter will only work on the current column which is selected for sorting.

In my example I have sorted the status and billing system in ascending order and used the filter to show me all the Customer Names with the word “Bank” and then “Cold”

### Query results for %bank% sorted by Cold

| Billing Account Number | Account Name  | Status      | Billing System |
|------------------------|---|-------------|----------------|
| 4044661                | <a href="#">COLDWELL BANKER CAINE</a> (billing system information unavailable)                              | Unavailable |                |
| 4043445                | <a href="#">COLDWELL BANKER SSK REALTORS</a> (billing system information unavailable)                       | Unavailable |                |
| 4042850                | <a href="#">COLDWELL BANKER SSK REALTORS</a> 1501 Bass Rd, Macon, GA, 31210-7557                            | Active      | RC7            |
| 4039124                | <a href="#">COLDWELL BANKER UNITED REALTORS - MOBILE</a> (billing system information unavailable)           | Unavailable |                |
| 4037723                | <a href="#">COLDWELL BANKER KASEY &amp; ASSOCIATES - CORPORATE</a> (billing system information unavailable) | Unavailable |                |
| 4037709                | <a href="#">COLDWELL BANKER - KASEY</a> (billing system information unavailable)                            | Unavailable |                |
| 4037633                | <a href="#">COLDWELL BANKER KASEY - HENDERSONVILLE</a> (billing system information unavailable)             | Unavailable |                |
| 4037630                | <a href="#">COLDWELL BANKER KASEY - DOWNTOWN</a> (billing system information unavailable)                   | Unavailable |                |
| 4037380                | <a href="#">COLDWELL BANKER UNITED REALTORS - DAPHNE</a> (billing system information unavailable)           | Unavailable |                |
| 4037276                | <a href="#">COLDWELL BANKER BOBBY TALLO REALTY</a> (billing system information unavailable)                 | Unavailable |                |
| 4036738                | <a href="#">COLDWELL BANKER UNITED REALTORS - DESTIN</a> 4458 Legendary Dr Rm 100, Destin, FL, 32541-6302   | Active      | RC7            |
| 4035511                | <a href="#">COLDWELL BANKER KASEY &amp; ASSOCIATES - CORPORATE</a> (billing system information unavailable) | Unavailable |                |
| 4035498                | <a href="#">COLDWELL BANKER KASEY - HENDERSONVILLE</a> (billing system information unavailable)             | Unavailable |                |
| 4035489                | <a href="#">COLDWELL BANKER KASEY - DOWNTOWN</a> (billing system information unavailable)                   | Unavailable |                |
| 4035471                | <a href="#">COLDWELL BANKER - KASEY</a> (billing system information unavailable)                            | Unavailable |                |
| 4035357                | <a href="#">COLDWELL BANKER BOBBY TALLO REALTY</a> (billing system information unavailable)                 | Unavailable |                |
| 4035194                | <a href="#">COLDWELL BANKER UNITED REALTORS - MOBILE</a> (billing system information unavailable)           | Unavailable |                |
| 4035089                | <a href="#">COLDWELL BANKER UNITED REALTORS - DAPHNE</a> (billing system information unavailable)           | Unavailable |                |

To access an account, click on the hyper link for the account name.

- ❖ Due to content, some accounts may take longer than others to pull up – clicking on the link multiple times WILL NOT pull your account up in a shorter amount of time! It will actually delay your search!

This will bring you the customer’s Account Summary information screen.

# Summary Tab



COLDWELL BANKER SSK REALTORS 4042850 : BUSINESS : STAND-ALONE : ACTIVE

iCARE Summary Customer Design Products & Services Rio CSR Billing Notes Contacts refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

### Customer Profiles

Dealer

#### Contacts

After Hours Contact, Primary (Authorizing) Customer Contact  
RANDY SMITH  
preferred method of contact:

Billing Contact  
STEVE SOLOMON  
preferred method of contact:

Data Vendor, Vendor - ISP, On Site Coordinator, Vendor - PBX, Voice Vendor  
TONYA HOLMES  
preferred method of contact:

[view all contacts >](#)

#### Support Tickets

|                         |      |
|-------------------------|------|
| Active Tickets:         | 0    |
| Active Service Tickets: | 0    |
| Active Billing Tickets: | 0    |
| Active Escalations:     | 0    |
| Proactive Tickets:      | 0    |
| Last Closed Ticket:     | None |

#### Service

Provider:

Field Service Market:

Start Date:

BTN: (000) 000-0000

Rate Center:

NPA NXX:

LEC:

#### Service Address

1501 Bass Rd  
Macon, GA 31210-7557

#### Sales Agreement

Market:

Agreement Term: null - null

Service Start:

Last Sold Proposal:

Sales Moderator:

Active MSS Orders: 0

Active RIO Orders: 0

#### Billing Information

Number: 4042850

System: REVCHAIN7

Cycle: 20

Suspend Status: Normal

Last payment: \$ 653.04

Payment Date: Jun 1, 2009

#### Billing Address

1501 Bass Rd  
Macon, GA 31210-7557

[edit](#)

#### System IDs

EAN 4042850

COLDWELL BANKER SSK REALTORS  
RC 7 4042850 ACTIVE

COLDWELL BANKER SSK REALTORS  
CLFY 4042850NS ACTIVE

#### Latest Invoice

Number: 2184824

Date: Jun 23, 2009

Amount: \$ 703.89

Previous Balance: \$ 1309.30

Past Due: \$ 656.26

## Account Header Information

In the header of the page the following information is displayed: customer full name, account number, billing relationship of "stand-alone", "child" or "parent", and the status of the account of "Active" or "Inactive".

## Customer Profiles and Profile Flashes

Customers that have Profile indicators and added Profile flashes will have them displayed as the first entry on the Customer Summary page.

COLDWELL BANKER CAINE(864) 233-1331 : 8359 : BUSINESS : STAND-ALONE : ACTIVE

**Customer Profiles**

Dealer Major Account Complex - Data

**Customer Flash: Complex - Data**

\*\*\*\*\*Complex Data Customer\*\*\*\*\*

Please perform all normal troubleshooting for this customer. Escalate tickets to the Complex Customer Network Engineering group for advanced troubleshooting. Contact the group for general questions and also before performing MACDGs. The group Clarify queue is "Complex Customer". Please call before dispatching tickets.

Complex Customer Network Engineering -  
 Normal Business Hours:  
 Phone: Ext 17709  
 E-mail: DL Complex Customer Networking  
 After Hours: 864-710-7700

Additional troubleshooting information, diagrams and advanced configurations can be found here:  
<http://gvlscsppl:8080/sites/opcenters/int/ccn/Shared%20Documents/Forms/AllItems.aspx>

**Contacts**

Billing Contact  
 LYNNE THOMPSON  
 preferred method of contact:

**Service**

Provider: BELLSOUTH - NC/SC  
 Field Service Market: GREENVILLE

**Billing Information**

Number: 8359  
 System: REVCHAIN7

## Related Accounts

If an account has a billing relationship of "child" or "parent" then a box under Account Information section will appear labeled "Related Accounts". If you are on the parent account all child accounts will be displayed. If you are on a child account only the relationship to the parent account will be displayed, and the other child accounts will not be displayed. You can jump to the other related accounts by clicking on the highlighted account number in the "Related Account" details.

## Related Accounts Display

JACKSONVILLE GOLF & COUNTRY CLUB(904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE

**Contacts**

Primary (Authorizing) Customer Contact  
 RYAN PAYSEN  
 preferred method of contact:

Primary (Authorizing) Customer Contact  
 NATALIE SUDA  
 preferred method of contact:

Secondary (Authorizing) Customer Contact  
 GREG THART  
 preferred method of contact:

[view all contacts >](#)

**Service**

Provider: BST - FL  
 Field Service Market: JACKSONVILLE  
 Start Date: Mar 17, 2006  
 BTN: (904) 223-5555  
 Rate Center: JACKSONVL  
 NPA NXX: 904223  
 LEC: BELLSOUTH TELECOMMUNICATIONS, INC.

**Billing Information**

Number: 107592  
 System: REVCHAIN7  
 Cycle: 20  
 Suspend Status: Normal  
 Last payment: \$ 1415.39  
 Payment Date: Jun 10, 2009

**Billing Address**

3985 Hunt Club Rd  
 Jacksonville, FL 32224-8416  
[edit](#)

**Related Accounts**

- JACKSONVILLE GOLF & COUNTRY CLUB [165215](#)
- JACKSONVILLE GOLF & COUNTRY CLUB [165209](#)
- JACKSONVILLE GOLF & COUNTRY CLUB PUMP HOUSE [165219](#)

**Service Address**

3985 Hunt Club Rd  
 Jacksonville, FL 32224-8416

**System IDs**

JACKSONVILLE GOLF & COUNTRY CLUB  
 CLFY 107592NS ACTIVE

## System IDs

The 'System IDs' section of the Summary page displays all the ID numbers for an account as recognized by various IT systems, and also the status of the account in each system (as applicable).

| System IDs  |           |
|---|-----------|
| BOOKER T WASHINGTON INSURANCE<br><b>CLARIFY</b> 4018320   | ACTIVE    |
| <hr/>   |           |
| <b>EAN</b> 4018320  |           |
| <hr/>   |           |
| BOOKER T WASHINGTON INSURANCE<br><b>MSS</b> 4018320       | INSERVICE |
| <hr/>   |           |
| BOOKER T WASHINGTON INSURANCE<br><b>REVCHAIN7</b> 4018320 | ACTIVE    |
| <hr/>   |           |
| BOOKER T WASHINGTON INSURANCE<br><b>SAT</b> 780269        | N/A       |

## Billing Information

Billing Information displays the customers billing account number, Billing system, Bill cycle, suspend status, last payment and the payment date. It does not display current amounts or un-invoiced payments.

| Billing Information |             |
|---------------------|-------------|
| Number:             | 1061525     |
| System:             | REVCHAIN7   |
| Cycle:              | 10          |
| Suspend Status:     | Normal      |
| Last payment:       | \$ 1113.05  |
| Payment Date:       | Jun 8, 2009 |

## Billing Address Edit

The customers Billing Address can be edited via 360 but will require a signed document on company letterhead to process the change. The upload of that document to the Customer's folder is required prior to the Billing Address being updated. Changes to the Billing Address will prompt an email to the customer notifying them of the change.

To edit and address:

| Billing Address  |
|--|
| 302 N Main St<br>Greenville, SC 29601-2118   |
|  edit |

➤ Click 

➤ Make your edits using the Edit screen

The screenshot displays a provider profile in the iCARE 360 system. An 'Edit Billing Address' modal window is open, allowing for updates to the provider's address. The modal includes the following fields:

- Address 1:** 302 N Main St
- Address 2:** (Empty)
- City:** Greenville
- State:** SC
- Zip Code:** 29601-2118

A 'save' button is located at the bottom right of the modal. The background shows the provider's details, including:

- Provider:** BELLSOUTH - GA
- Field Service Market:** ATLANTA
- Start Date:** Oct 10, 2005
- BTN:** (770) 814-6060
- Rate Center:** (770) 814-6060
- NPA NXX:** (770) 814-6060
- LEC:** (770) 814-6060
- Service Address:** 2775 PREMIERE P DLTH, GA 30097
- Sales Agreement:** Market: (Empty), Agreement Term: (Empty), Service Start: (Empty), Last Sold Proposal: (Empty), Sales Moderator: (Empty)
- Active MSS Orders:** 0
- Active RIO Orders:** 0
- Number:** 1061525
- System:** REVCHAIN7
- Cycle:** 10
- Suspend Status:** Normal
- Last payment:** \$ 1113.05
- Payment Date:** Jun 8, 2009
- Billing Address:** 302 N Main St, Greenville, SC 29601-2118
- System IDs:**
  - INNOVATIVE PRODUCT ACHIEVEMENTS INC CLFY 1061525NV ACTIVE
  - INNOVATIVE PRODUCT ACHIEVEMENTS, LLC RC 7 1061525 ACTIVE
  - INNOVATIVE PRODUCT ACHIEVEMENTS MSS NV1061525
  - INNOVATIVE PRODUCT ACHIEVEMENTS SAT 256851
  - EAN 1061525

Changes to the Street address and Suite numbers should be performed in Address Line 1.

Changes to Floor numbers, Building numbers or other indentifying address should be perferemd in the Address Line 2.

Changes to the Attention To Contact will remain a manual change. The current Edit fields in iCARE 360 do not accomadate the Attention To changes.

**Edit Billing Address Window**

This is a close-up view of the 'Edit Billing Address' modal window. The fields are populated with the following information:

- Address 1:** 301 N Main St Ste 9000
- Address 2:** Floor 5
- City:** Greenville
- State:** SC
- Zip Code:** 29601-2171

A 'save' button is located at the bottom of the modal.

### Billing Address

301 N Main St Ste 9000  
Floor 5  
Greenville, SC 29601-2171



### Billing Address Display – RevChain Delivery Information

#### Delivery Information

**Billing Address:** CARTER WATERS LLC, 301 N Main St Ste 9000, Floor 5, Greenville, South Carolina, 29601-2171, U.S.A.

**Email:**

**Fax:**

**Credit Card:**

**Direct Debit:**

[Credit Card History](#)

- Click  to save your edits

Edited addresses are validated. If you enter an invalid address you will receive the following message:

Address verification error: Invalid address entered

- Confirm your changes.

Additional troubleshooting information, diagrams and advanced configurations can be found here:  
<http://gvlscspp1:8080/sites/opcenters/int/ccn/Shared%20Documents/Forms/AllItems.aspx>

|   |   |   |
|---|---|---|
| <b>Contacts</b><br>Billing Contact<br>LYNNE THOMPSON<br>preferred method of contact:<br><a href="#">view all contacts &gt;</a>  | <b>Service</b><br>Provider: BELLSOUTH - NC/SC<br>Field S<br>Market<br>Start<br>BTN:<br>Rate C<br>NPA NXX: 864233<br>LEC: BELLSOUTH TELECOMMUNICATIONS, INC.                                       | <b>Billing Information</b><br>Number: 8359<br>System: REVCHAIN7<br>Cycle: 0<br>Suspend Status: DNC<br>Last payment: \$ 508.96<br>Payment Date: Jun 4, 2009  |
| <b>Support Tickets</b><br>Active Tickets: 0<br>Billing Tickets: 0<br>Collections Tickets: 0<br>Debit Tickets: 0<br>MACD Tickets: 0<br>Proactive Tickets: 0<br>Service Tickets: 0<br>CSR Requests: 0<br>Escalations: 0<br>Last Closed Ticket: 020509-02091 | <b>Service Address</b><br>124 Verdae Blvd Ste 101<br>Suite 101<br>Greenville, SC 29607-3843   | <b>Billing Address</b><br>200 E Broad St<br>Greenville, SC 29601-2887<br><a href="#">edit</a>   |
|   | <b>Sales Agreement</b><br>Market: Greenville<br>Agreement Term: 1/16/2009 - 1/16/2010<br>Service Start: Aug 10, 2005<br>Last Sold Proposal: 12/9/2008<br>Sales Moderator:<br>Active MSS Orders: 0 | <b>System IDs</b><br>COLDWELL BANKER CAINE<br>CLFY 8359NV ACTIVE<br>COLDWELL BANKER CAINE<br>RC 7 8359 ACTIVE<br>COLDWELL BANKER CAINE<br>MSS NV8359<br>COLDWELL BANKER CAINE<br>SAT 208177<br>EAN 8359 |

Some user groups will have the ability to change the Billing address without e-notifying the customer. This can be done to correct mistyped information or add missing information. Internal changes will not prompt an email to the customer notifying them of the change. An Internal Request button will appear only for those who have the security approval to perform this function.

- Select the Internal Request button to bypass the document upload function.

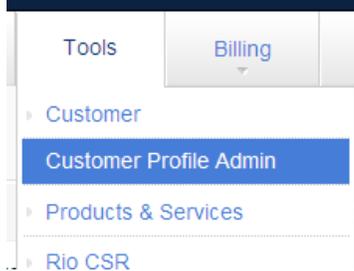


## Tools Tab



The Tools tab offers a few handy selections, but one of the most useful ones is the new **Customer Profile Admin** tool.

## Customer Profile Admin



The Customer Profile Admin tool permits authorized users to add or remove Customer Profiles to or from an account. Unauthorized users get an error message in red if they attempt this action.

Authorization can be granted on a *per-profile* basis.

### CUSTOMER PROFILE ADMINISTRATION

Customer Admin
Welcome e0146115

You are not authorized to add Major Profile

Account Number:

4018320 BOOKER T WASHINGTON INSURANCE

**Available Profiles:**

| Profile Name          | Sub Profile Name |                     |
|-----------------------|------------------|---------------------|
| 24x7                  | Extended         | <a href="#">Add</a> |
| 24x7                  | Standard         | <a href="#">Add</a> |
| 3rd Party Placement   | CACI             | <a href="#">Add</a> |
| 3rd Party Placement   | Capstone         | <a href="#">Add</a> |
| 3rd Party Placement   | MBW              | <a href="#">Add</a> |
| 3rd Party Placement   | Transworld/NCO   | <a href="#">Add</a> |
| Aggressive Monitoring |                  | <a href="#">Add</a> |
| Complex-Services      |                  | <a href="#">Add</a> |
| Complex-Services-SLA  |                  | <a href="#">Add</a> |
| Contract Type         | GSA/GRITS        | <a href="#">Add</a> |
| Contract Type         | GSA70            | <a href="#">Add</a> |
| Contract Type         | Other Gov        | <a href="#">Add</a> |

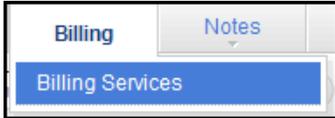
**Customer's Profiles:**

| Profile Name            | Sub Profile Name |                        |
|-------------------------|------------------|------------------------|
| Dealer Assigned         |                  | <a href="#">Remove</a> |
| Family Violence Shelter |                  | <a href="#">Remove</a> |
| Repeat Report           |                  | <a href="#">Remove</a> |

## Billing Tab



## Billing Services



Click on Billing Tab and then Billing Services to display the Billed Services in RevChain 7.

Unclick the “Show Active Features Only” to display Active and Inactive billing items.

Billing Service page also displays the Total Number of Services and Total MRC.

The screenshot shows the 'Billing Services' page. At the top left, there is a checkbox labeled 'Show Active Features Only' which is checked. At the top right, summary statistics are displayed: 'total services: 20' and 'total MRC: \$841.97'. Below this is a table with the following columns: External Service ID, Service ID, Service Name, and Features. Each row includes a 'view connections' link under the Service ID and a 'view' link under the Features column.

| External Service ID | Service ID                                 | Service Name | Features             |
|---------------------|--|--------------|----------------------|
| DID_2               | 642432<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| 9042235555          | 642433<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| 9042239971          | 642437<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| NOT_CONVERTED       | 642439<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| NOT_CONVERTED       | 642441<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| NOT_CONVERTED       | 642445<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
|                     | 642448<br><a href="#">view connections</a> | MRR - DATA   | <a href="#">view</a> |

Click on “view connections” to view connection numbers when available.

The screenshot shows the 'Billing Services' page for JACKSONVILLE GOLF & COUNTRY CLUB. The page includes a search bar and a 'refresh' button. The 'Billing Services' section is active, showing the same table as the previous screenshot. A tooltip is visible over the 'view connections' link for the Service ID 642433, displaying a list of tax IDs: TAX9042235555-1 through TAX9042235555-5.

| External Service ID | Service ID                                 | Service Name | Features             |
|---------------------|--|--------------|----------------------|
| DID_2               | 642432<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| 9042235555          | 642433<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| 9042239971          | 642437<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| NOT_CONVERTED       | 642439<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| NOT_CONVERTED       | 642441<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
| NOT_CONVERTED       | 642445<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">view</a> |
|                     | 642448<br><a href="#">view connections</a> | MRR - DATA   | <a href="#">view</a> |

Click on "view" under features to view billed features, Quantity, Rate Plan, MRC, Status, Start Date and End Date (where applicable)

JACKSONVILLE GOLF & COUNTRY CLUB(904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE

**iCARE** Summary Customer Design Products & Services Rio CSR **Billing** Notes Contacts refresh

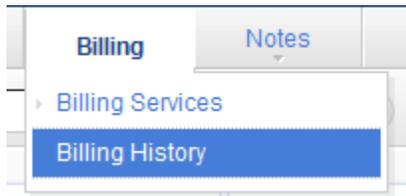
business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

### Billing Services

Show Active Features Only total services: 20 total MRC: \$841.97

| External Service ID | Service ID                                 | Service Name | Features <a href="#">view all</a>   |          |        |         |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
|---------------------|--|--------------|---|----------|--------|---------|-----------|-----|--------|-------|-----|---------|------------------|----|----------------------------|---------|---|---------|--|---------|------|----|----------------------------|--------|---|---------|--|---------|----------|---|---------------------------|----------|---|---------|--|---------|--------------------------|---|---------------------------------|--------|---|---------|--|---------|---------------------------|---|------------------------------|--------|---|---------|--|---------|------------------------|---|---------------------------|--------|---|---------|--|
| DID_2               | 642432<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">hide</a><br><table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>Qty.</th> <th>Rate Plan</th> <th>MRC</th> <th>Status</th> <th>Start</th> <th>End</th> </tr> </thead> <tbody> <tr> <td>3627487</td> <td>DIDs</td> <td>68</td> <td>Voice Feature - DIDs - TDM</td> <td>\$13.60</td> <td>A</td> <td>3/18/06</td> <td></td> </tr> </tbody> </table>   | ID       | Name   | Qty.    | Rate Plan | MRC | Status | Start | End | 3627487 | DIDs             | 68 | Voice Feature - DIDs - TDM | \$13.60 | A | 3/18/06 |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| ID                  | Name                                       | Qty.         | Rate Plan   | MRC      | Status | Start   | End       |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627487             | DIDs                                       | 68           | Voice Feature - DIDs - TDM  | \$13.60  | A      | 3/18/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 9042235555          | 642433<br><a href="#">view connections</a> | MRR - VOICE  | <a href="#">hide</a><br><table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>Qty.</th> <th>Rate Plan</th> <th>MRC</th> <th>Status</th> <th>Start</th> <th>End</th> </tr> </thead> <tbody> <tr> <td>3627488</td> <td>Digital Trunking</td> <td>0</td> <td>Voice Anchor - TDM</td> <td>\$0.00</td> <td>A</td> <td>3/18/06</td> <td></td> </tr> <tr> <td>3627489</td> <td>DIDs</td> <td>20</td> <td>Voice Feature - DIDs - TDM</td> <td>\$0.00</td> <td>A</td> <td>3/18/06</td> <td></td> </tr> <tr> <td>3627490</td> <td>VoxVoice</td> <td>9</td> <td>Voice - Voice Trunk - TDM</td> <td>\$232.47</td> <td>A</td> <td>3/18/06</td> <td></td> </tr> <tr> <td>3627491</td> <td>Local Number Portability</td> <td>9</td> <td>Fees - Local Number Portability</td> <td>\$1.05</td> <td>A</td> <td>3/22/06</td> <td></td> </tr> <tr> <td>3627492</td> <td>Network Cost Recovery Fee</td> <td>9</td> <td>Fees - Network Cost Recovery</td> <td>\$0.00</td> <td>A</td> <td>3/22/06</td> <td></td> </tr> <tr> <td>3627494</td> <td>Emergency Services Fee</td> <td>9</td> <td>Fees - Emergency Services</td> <td>\$0.00</td> <td>A</td> <td>3/18/06</td> <td></td> </tr> </tbody> </table> | ID       | Name   | Qty.    | Rate Plan | MRC | Status | Start | End | 3627488 | Digital Trunking | 0  | Voice Anchor - TDM         | \$0.00  | A | 3/18/06 |  | 3627489 | DIDs | 20 | Voice Feature - DIDs - TDM | \$0.00 | A | 3/18/06 |  | 3627490 | VoxVoice | 9 | Voice - Voice Trunk - TDM | \$232.47 | A | 3/18/06 |  | 3627491 | Local Number Portability | 9 | Fees - Local Number Portability | \$1.05 | A | 3/22/06 |  | 3627492 | Network Cost Recovery Fee | 9 | Fees - Network Cost Recovery | \$0.00 | A | 3/22/06 |  | 3627494 | Emergency Services Fee | 9 | Fees - Emergency Services | \$0.00 | A | 3/18/06 |  |
| ID                  | Name                                       | Qty.         | Rate Plan   | MRC      | Status | Start   | End       |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627488             | Digital Trunking                           | 0            | Voice Anchor - TDM  | \$0.00   | A      | 3/18/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627489             | DIDs                                       | 20           | Voice Feature - DIDs - TDM  | \$0.00   | A      | 3/18/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627490             | VoxVoice                                   | 9            | Voice - Voice Trunk - TDM   | \$232.47 | A      | 3/18/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627491             | Local Number Portability                   | 9            | Fees - Local Number Portability   | \$1.05   | A      | 3/22/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627492             | Network Cost Recovery Fee                  | 9            | Fees - Network Cost Recovery  | \$0.00   | A      | 3/22/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |
| 3627494             | Emergency Services Fee                     | 9            | Fees - Emergency Services   | \$0.00   | A      | 3/18/06 |           |     |        |       |     |         |                  |    |                            |         |   |         |  |         |      |    |                            |        |   |         |  |         |          |   |                           |          |   |         |  |         |                          |   |                                 |        |   |         |  |         |                           |   |                              |        |   |         |  |         |                        |   |                           |        |   |         |  |

## Billing History



Click on the Billing History page to display the current and historical billing information for a customer.

## Current Balance

Displays the customers Current Balance information.

A screenshot of the 'iCARE' system interface showing the 'Current Balance' page. The page header includes 'JACKSONVILLE GOLF & COUNTRY CLUB (904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE'. The navigation bar includes 'Summary', 'Customer', 'Design', 'Products & Services', 'Rio CSR', 'Billing', 'Notes', and 'Contacts'. Below the navigation bar are search fields for 'Account Name', 'Account Number', and 'Order/PSR/Clarify Ticket'. The main content area shows the 'Current Balance' section with the following data:

|                       |               |
|-----------------------|---------------|
| Current Charge:       | \$0.00        |
| Unallocated Payments: | \$0.00        |
| Over 30:              | \$0.00        |
| Over 60:              | \$0.00        |
| Over 90:              | \$0.00        |
| Over 120:             | (\$1,489.49)  |
| <b>Total:</b>         | <b>\$0.00</b> |

## Statement History

Displays the customers Current and Historical Statments.

A screenshot of the 'iCARE' system interface showing the 'Statement History' page. The page header includes 'JACKSONVILLE GOLF & COUNTRY CLUB (904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE'. The navigation bar includes 'Summary', 'Customer', 'Design', 'Products & Services', 'Rio CSR', 'Billing', 'Notes', and 'Contacts'. Below the navigation bar are search fields for 'Account Name', 'Account Number', and 'Order/PSR/Clarify Ticket'. The main content area shows the 'Statement History' section with a table of historical statements:

| Date Billed               | Total Due | Current Charges | Calls/Mo. | Invoice ID | MRC        | Taxes    | Statement Bal. | Usage |
|---------------------------|-----------|-----------------|-----------|------------|------------|----------|----------------|-------|
| 2009-09-20T00:00:00-04:00 | \$0.00    | \$1,317.54      | 0         | 10059228   | \$1,233.75 | \$83.78  | \$0.00         | 0.0   |
| 2009-08-20T00:00:00-04:00 | \$0.00    | \$1,313.62      | 0         | 10008103   | \$1,230.22 | \$83.40  | \$0.00         | 0.0   |
| 2009-07-20T00:00:00-04:00 | \$0.00    | \$1,315.54      | 0         | 2415142    | \$1,231.94 | \$83.60  | \$0.00         | 0.0   |
| 2009-06-20T00:00:00-04:00 | \$0.00    | \$1,366.30      | 0         | 2183548    | \$1,283.44 | \$82.86  | \$0.00         | 0.0   |
| 2009-05-20T00:00:00-04:00 | \$0.00    | \$1,415.39      | 0         | 1877483    | \$1,246.23 | \$169.16 | \$0.00         | 0.0   |
| 2009-04-20T00:00:00-04:00 | \$0.00    | \$1,354.84      | 0         | 1384218    | \$1,248.65 | \$106.19 | \$0.00         | 0.0   |
| 2009-03-20T00:00:00-04:00 | \$0.00    | \$1,360.36      | 0         | 1090689    | \$1,360.36 | \$0.00   | \$0.00         | 0.0   |
| 2009-02-20T00:00:00-05:00 | \$0.00    | \$1,357.35      | 0         | 1173370    | \$1,357.35 | \$0.00   | \$0.00         | 0.0   |
| 2009-01-20T00:00:00-05:00 | \$0.00    | \$1,357.16      | 0         | 1172768    | \$1,357.16 | \$0.00   | \$0.00         | 0.0   |
| 2008-12-20T00:00:00-05:00 | \$0.00    | \$1,299.60      | 0         | 1172245    | \$1,299.60 | \$0.00   | \$0.00         | 0.0   |
| 2008-11-20T00:00:00-05:00 | \$0.00    | \$1,352.89      | 0         | 1171754    | \$1,352.89 | \$0.00   | \$0.00         | 0.0   |
| 2008-10-20T00:00:00-04:00 | \$0.00    | \$1,171.17      | 0         | 1171285    | \$1,171.17 | \$0.00   | \$0.00         | 0.0   |
| 2008-09-20T00:00:00-04:00 | \$0.00    | \$1,328.14      | 0         | 1171100    | \$1,328.14 | \$0.00   | \$0.00         | 0.0   |
| 2008-08-20T00:00:00-04:00 | \$0.00    | \$1,335.51      | 0         | 1170398    | \$1,335.51 | \$0.00   | \$0.00         | 0.0   |
| 2008-07-20T00:00:00-04:00 | \$0.00    | \$1,390.11      | 0         | 1163953    | \$1,390.11 | \$0.00   | \$0.00         | 0.0   |

## Payment History

Displays the customers Payment History .

JACKSONVILLE GOLF & COUNTRY CLUB (904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE

**iCARE** Summary Customer Design Products & Services Rio CSR **Billing** Notes Contacts refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

Current Balance Statement History **Payment History** Pending Payment History Other Payment History Tax Exemptions

| Date | Amt.         | Type | Description | Method |
|------|--------------|------|-------------|--------|
|      | (\$1,317.54) | 1    |             | Check  |
|      | (\$1,313.62) | 1    |             | Check  |
|      | (\$1,315.54) | 1    |             | Check  |
|      | (\$1,366.30) | 1    |             | Check  |
|      | (\$1,415.39) | 1    |             | Check  |
|      | (\$1,354.84) | 1    |             | Check  |
|      | (\$1,360.36) | 1    |             | Check  |

### Pending Payment History

Displays any Pending Payment History the customer may have.

JACKSONVILLE GOLF & COUNTRY CLUB (904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE

**iCARE** Summary Customer Design Products & Services Rio CSR **Billing** Notes Contacts Activity refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

Current Balance Statement History Payment History **Pending Payment History** Other Payment History Tax Exemptions

| Payment Date | Amount | Type |
|--------------|--------|------|
|--------------|--------|------|

### Other Payment History

Displays any Other Payment History the customer may have.

JACKSONVILLE GOLF & COUNTRY CLUB (904) 223-5555 : 107592 : BUSINESS : PARENT : ACTIVE

**iCARE** Summary Customer Design Products & Services Rio CSR **Billing** Notes Contacts Activity refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

Current Balance Statement History Payment History Pending Payment History **Other Payment History** Tax Exemptions

| Transaction Date | Transaction Name | Amount | Description |
|------------------|------------------|--------|-------------|
|------------------|------------------|--------|-------------|

### Tax Exemptions

Displays any Tax Exemptions the customer may have. If the Tax Exemption column displays zero then the customer does not have any tax exemptions.

GSA US ATTORNEY'S OFFICE (417) 575-8000 : 210052 : BUSINESS : PARENT : ACTIVE

**iCARE** Summary Customer Design Products & Services Rio CSR **Billing** Notes Contacts Activity refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

Current Balance Statement History Payment History Pending Payment History Other Payment History **Tax Exemptions**

| Tax Level             | Tax Exemptions | Total Taxes | Tax Exemption Details |
|-----------------------|----------------|-------------|-----------------------|
| Federal               | 0              | 190         | <a href="#">view</a>  |
| Local                 | 0              | 209         | <a href="#">view</a>  |
| State                 | 0              | 194         | <a href="#">view</a>  |
| County Unincorporated | 0              | 195         | <a href="#">view</a>  |
| County                | 0              | 195         | <a href="#">view</a>  |

You can view the Exemption Details by clicking on [view](#) (RC7 Only). This will display the name of the tax, the Level and if the customer currently has a tax exemption for that tax.

JACKSONVILLE GOLF & COUNTRY CLUB

**iCARE** Summary Customer

business contact Account Name

Current Balance Statement History

| Tax Level             | Tax Exemptions |
|-----------------------|----------------|
| Federal               | 0              |
| Local                 | 0              |
| State                 | 0              |
| County Unincorporated | 0              |
| County                | 0              |

**Federal Tax Exemption Details**

| Name   | Level   | Status |
|--|---------|--------|
| Federal School DISTRIC Tax                     | Federal | No     |
| Federal Quebec Sales Tax (QST)                 | Federal | No     |
| Federal CA Teleconnect Fund                    | Federal | No     |
| Federal Police Jury Tax C                      | Federal | No     |
| Federal Fed Telecommunications Relay Svcs      | Federal | No     |
| Federal Communication Service Tax              | Federal | No     |
| Federal E911 Tax (Wireless)                    | Federal | No     |
| Federal School Board Tax E                     | Federal | No     |
| Federal Svcs Tax                               | Federal | No     |
| Federal UUT                                    | Federal | No     |
| Federal License Tax (Business)                 | Federal | No     |
| Federal Improvement DISTRIC Web Hosting Tax    | Federal | No     |
| Federal Sales Tax (Interstate)                 | Federal | No     |
| Federal Health Svcs DISTRIC Tax (Data PROCESS) | Federal | No     |
| Federal License Tax                            | Federal | No     |

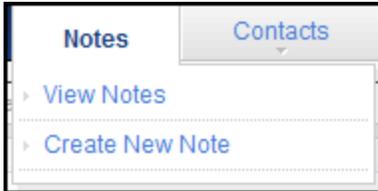
page 1 of 13

## Notes Tab



## View Notes

Click on Notes tab and then View Notes



Initially notes will be sorted by system type, however you do have the ability to resort them by creation date, type id (if applicable), date of note, user who entered the note, note description (if applicable), the note itself (accessed in it's entirety by clicking on the hyper-link) Whether it is a system auto note, circuit note or if it is in a follow up status (if applicable).

The filter option can also be utilized to limit your search even further.

Only RIO notes displayed in the Request number notes will be displayed in 360. All other notes including Hot Ticket and Credit Notes will not be displayed at this time.

## Notes Display

Recent notes for the last 60 days are displayed as a default.

To display every note for that account click  All Notes

To return to the 60 day display click  Last 60 Days .

## Create Notes

You can add a note to the 360 Consolidate notes page by clicking on [Create New Note](#) and then completing the below form:

The “required” indicators indicate information that is required prior to creating a note.

System = The System TYPE with Account Number.

Case Number = Clarify Case Number

Order/PSR = RIO order/MSS PSR number

Exchange carrier circuit id = Exchange carrier circuit id for the notes

User= Person entering the note (Network Login)

Description = Note Description ( Full Disconnect, Clarify Open Codes)

Note = Your Note

Internal Only = Displays as an internal note in Clarify

Circuit = Is this a Circuit note (MSS and RIO)

Follow up = Clarify Follow up action

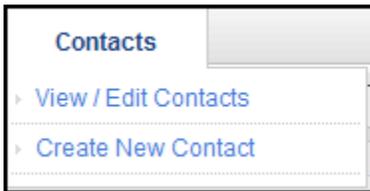
Due date = Due Date that Follow up action is due

❖ **Notes added to the 360 Consolidation page WILL NOT be displayed in the corresponding systems! The added note will only be viewable from the 360 view!**

## Contacts Tab



Contacts are displayed in detail and can be added, edited and deleted via the 360 Contact page. Changes made in 360 will update Clarify, MSS and SAT with the updates.



## Contact Management Summary

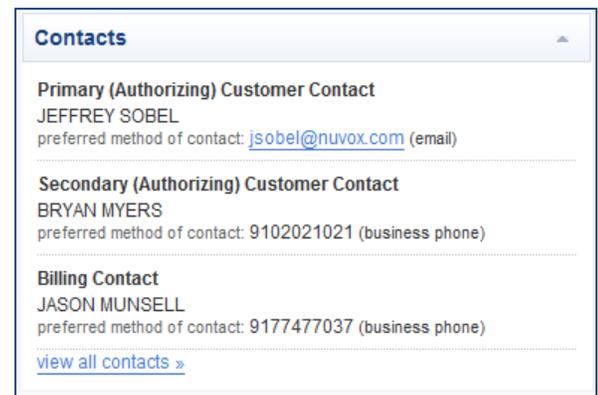
The Summary page only displays the following contact types:

- Primary, Secondary, Billing, and On-Site Coordinator.

Any contact email addresses displayed are also "mailto" hyperlinks that can be clicked to launch a new email message to that contact.

Currently, the Primary contact type is set with a minimum quantity limitation of '1' and an unlimited maximum. Therefore, to delete a sole primary contact right now, you first need to add a second one. (Note: A 'Replace' process is planned for a future release.)

The "view all contacts" link will take you to the full *View/Edit Contacts* page.

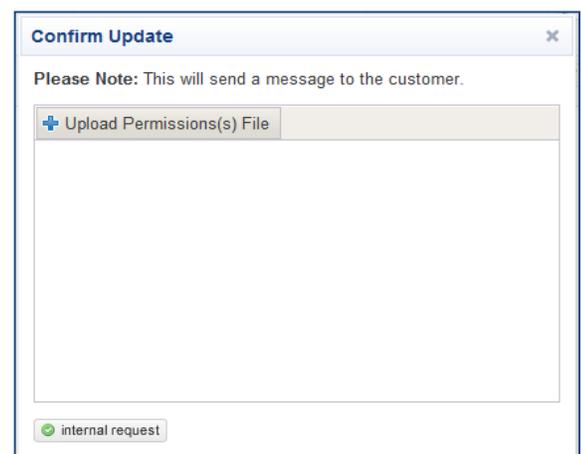


The contact types that require special authorization to add, edit or delete are:

- Primary, Secondary, Billing, and Data Center.

To update these contact types, you need to either select the *Internal Request* button for changes not being requested by the customer (assuming you have access to see this button at the bottom of the Confirm Update screen), or upload a signed permission document on the customer's letterhead (.pdf). This document uploads to the "customer folder" for that account and can be viewed via the Customer Folder link on SAT's "Closing Documents" screen. Upon uploading a permission document, the primary contact is sent an email notification informing them of the contact addition/edit/deletion.

Contact edits made via iCARE-360 also update Clarify, SAT and MSS.





When a contact is "deleted", it gets set to "Obsolete" in Clarify.

If you delete a contact that is also associated with another account, it will also disappear from that account.

Associations with other accounts can only be viewed when in Edit mode for a contact - they appear at the bottom-right in the *Edit Contact Roles* section.

To remove a contact from one account without affecting other accounts with which that contact is associated, go to the *Edit Contact Roles* section of the Edit screen and remove all of the contact's Roles on that account instead of deleting the contact.

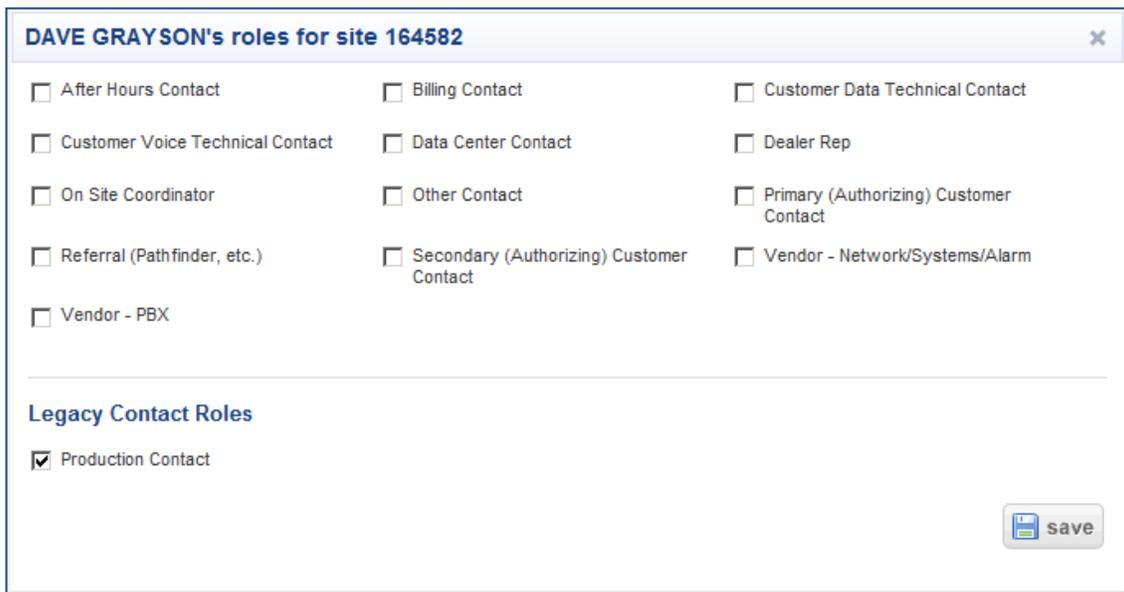
An "obsolete" contact in Clarify (one that was deleted via iCARE-360) remains in the database and can be reactivated again by creating a new contact of the same name and phone number and then choosing to associate it with the existing one that displays in the Associate window. (All contacts in the database - active, inactive and obsolete - are queried by the 'contact association' code.)



If a contact has an assigned role that is not one of the current 13 standard contact roles, it will show under *Legacy Contact Roles*.

If this role gets deselected and a standard one is selected in its place, it is not possible to change it back to the old legacy role.

If there are no legacy roles assigned to a contact, the *Legacy Contact Roles* section as a whole will not display in this Roles screen.



Any time contact info gets added/edited/deleted, an entry gets added to the consolidated *Notes* page for each associated account; including a date-time stamp, whether the edit was an Internal Request (internal\_request : 1), and the username of the editor.

## View/Edit Contact

Click on [View / Edit Contacts](#)

- Select the Contact you wish to edit.
- Edit Information
- Click Save

### Edit Contact Details

First Name required

Last Name required

Telephone required  
 ext.

Email

Address 1

Address 2

City  State  Zip Code

**Preferred Method of Contact** required

**INNOVATIVE PRODUCT ACHIEVEMENTS INC**  
1061525NV 2775 Premiere Pkwy Duluth, GA 30097-4937

 save

## Edit a Contact belonging to Multiple Site id's

If your Contact belongs to Multiple Sites you can update all sites from the account you are editing.

When making a change to the **Edit Contact Details** you will update that Detail information on ALL sites that Contact is associated with.

When making changes to the **Preferred Method of Contact**:

- Select the specific site that you wish to edit.
- Make edits
- Click Save

This will save that information for that Site Id only.

When making changes to the **Edit Contact Roles**:

- Select the specific site that you wish to edit.
- Make edits
- Click Save

This will save that information for that Site id only.

The screenshot displays the iCARE system interface for editing contact information. At the top, the user is logged in as 'ALINK' for 'INNOVATIVE PRODUCT ACHIEVEMENTS, LLC'. The navigation bar includes tabs for Summary, Customer, Design, Products & Services, Rio CSR, Billing, Notes, and Contacts. Search filters are available for Account Name, Account Number, Order/PSR/Clearly Ticket, and TN.

The 'Edit Contacts' section features a table with the following data:

| First Name | Last Name | Phone          | Email | Contact Method             | Roles                     |
|------------|-----------|----------------|-------|----------------------------|---------------------------|
| DAVID      | DUCKY     | (864) 111-4512 |       | Cell Phone: (864) 111-4000 | Vendor - PBX Voice Vendor |

Below the table is a 'page 2 of 2' indicator. To the right, three detailed edit panels are visible:

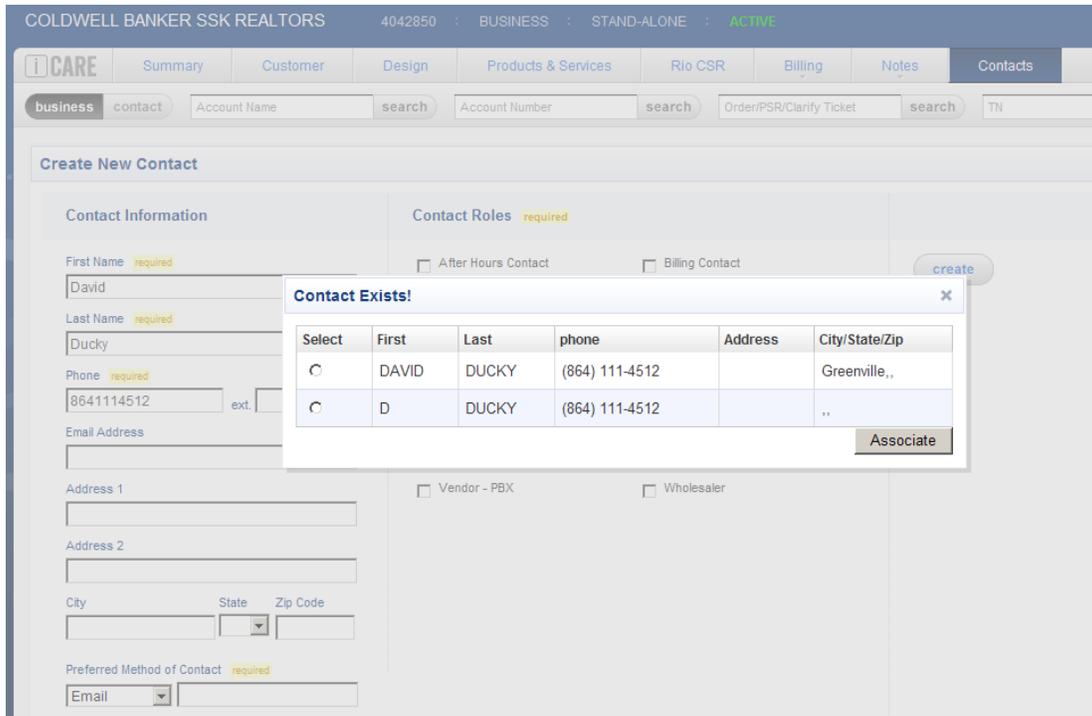
- Edit Contact Details:** Fields for First Name (DAVID), Last Name (DUCKY), Telephone ((864) 111-4512), Email, Address 1, Address 2, City (Greenville), State, and Zip Code.
- Preferred Method of Contact:** A red-bordered section with a 'required' label. It lists two sites: 'INNOVATIVE PRODUCT ACHIEVEMENTS INC' (CellPhone: (864) 111-4000) and 'COLDWELL BANKER SSK REALTORS' (Email: 8641114512). A 'save' button is at the bottom.
- Edit Contact Roles:** A red-bordered section listing roles for '4042850N/COLDWELL BANKER SSK REALTORS' and '1061525NV/INNOVATIVE PRODUCT ACHIEVEMENTS INC'. Each role has an 'edit' button.

## Create New Contact

Click on [Create New Contact](#).

- Fill in the new contact information.
- Click “Create”
  - ❖ Contacts will be added to Clarify, SAT, MSS and RIO.

Associate an already existing Contact



The screenshot shows the 'iCARE' system interface for 'COLDWELL BANKER SSK REALTORS'. The 'Create New Contact' form is displayed, with a 'Contact Exists!' dialog box overlaid. The dialog box contains a table with the following data:

| Select                | First | Last  | phone          | Address | City/State/Zip |
|-----------------------|-------|-------|----------------|---------|----------------|
| <input type="radio"/> | DAVID | DUCKY | (864) 111-4512 |         | Greenville,.   |
| <input type="radio"/> | D     | DUCKY | (864) 111-4512 |         | ..             |

An 'Associate' button is located at the bottom right of the dialog box. The background form shows fields for First Name (David), Last Name (Ducky), Phone (8641114512), and other contact details.

## Create/Edit Primary, Secondary and Data Center Contacts

When updating or editing Primary, Secondary and Data Center Contacts the customer must have a signed document on company letterhead to process the change. The upload of that document to the Customer's folder is required prior to the Contact information being updated. Changes to these Contact types will prompt an email to the customer notifying them of the change.

### Contact Rules

#### Primary

Accounts can have only one Primary Contact Type. If your account has more than one primary you can delete the duplicates but one must always remain. You cannot delete the last Primary Contact you may only edit it. You can create a Primary contact only if one does not already exist.

INNOVATIVE PRODUCT ACHIEVEMENTS, LLC (770) 814-6060 : 1061525 : BUSINESS : STAND-ALONE : ACTIVE

iCARE Summary Customer Design Products & Services Rio CSR Billing Notes **Contacts** refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

### Create New Contact

| Contact Information  | Contact Roles <small>required</small>                                      |   |
|--|--|---|
| First Name <small>required</small><br>Daffy  | <input type="checkbox"/> After Hours Contact                               | <input type="checkbox"/> Billing Contact                  |
| Last Name <small>required</small><br>Duck  | <input type="checkbox"/> Customer Data Technical Contact                   | <input type="checkbox"/> Customer Voice Technical Contact |
| Phone <small>required</small><br>8643637211 ext. <input type="text"/>              | <input type="checkbox"/> Data Center Contact                               | <input type="checkbox"/> Dealer Rep                       |
| Email Address<br>daduck@email.com  | <input type="checkbox"/> On Site Coordinator                               | <input type="checkbox"/> Other Contact                    |
| Address 1<br><input type="text"/>  | <input checked="" type="checkbox"/> Primary (Authorizing) Customer Contact | <input type="checkbox"/> Referral (Pathfinder, etc.)      |
| Address 2<br><input type="text"/>  | <input type="checkbox"/> Secondary (Authorizing) Customer Contact          | <input type="checkbox"/> Vendor - Network/Systems/Alarm   |
| City <input type="text"/> State <input type="text"/> Zip Code <input type="text"/> | <input type="checkbox"/> Vendor - PBX                                      | <input type="checkbox"/> Wholesaler                       |
| Preferred Method of Contact <small>required</small><br>Email daduck@email.com      |  |   |

Not able to Add the Contact.  
Reason: Role Type: Primary  
Addition violates Maximum  
requirements

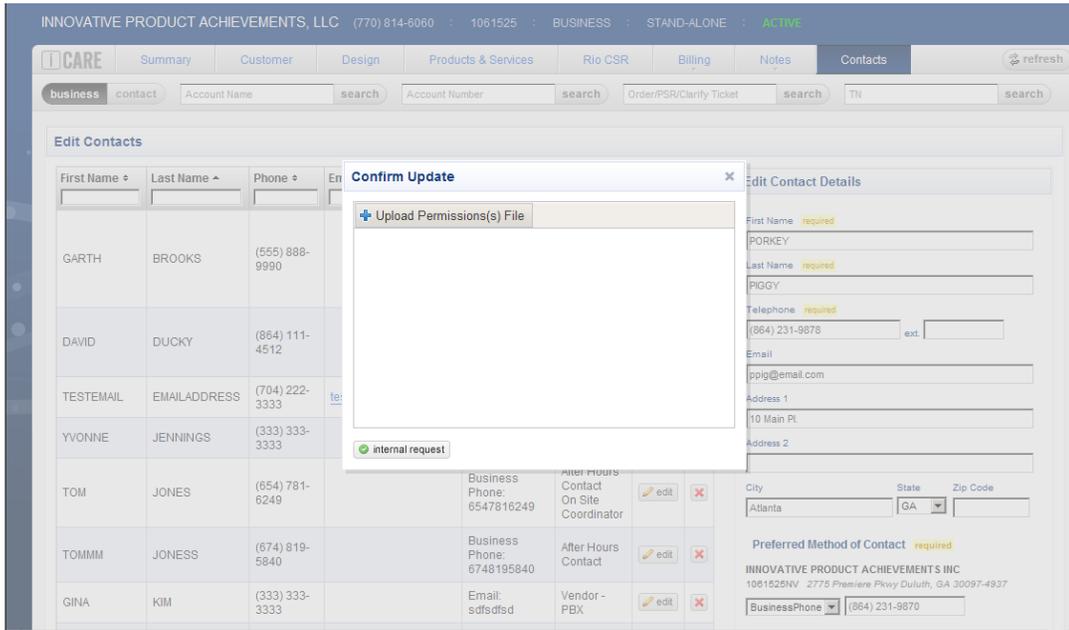
create

#### Data Center

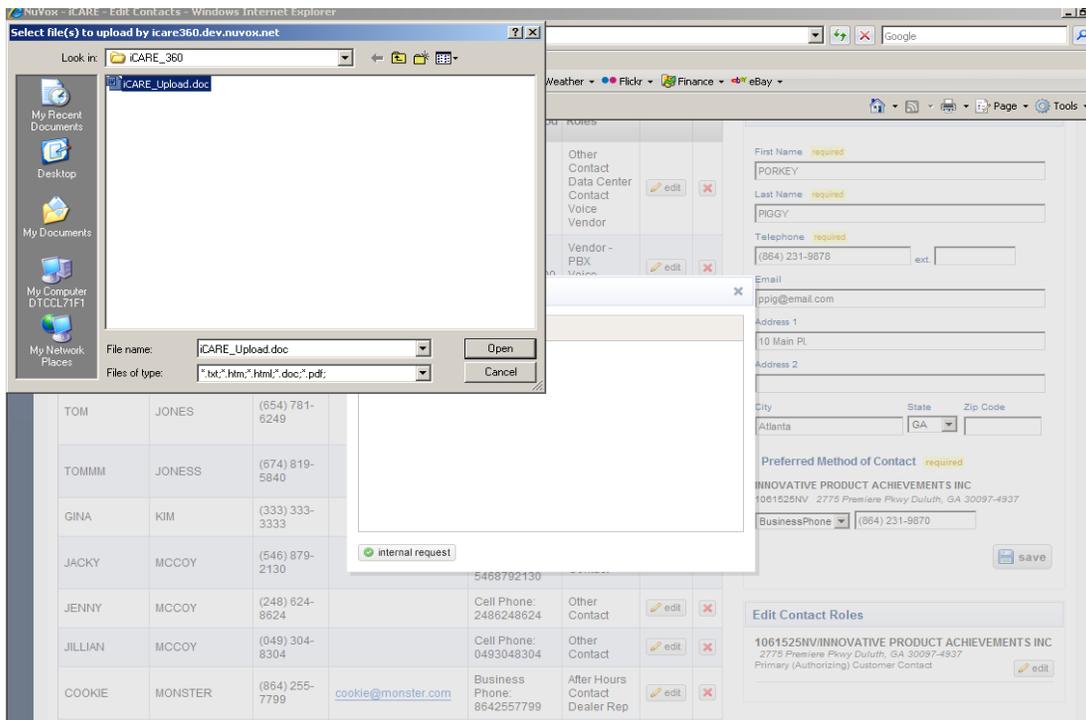
Accounts can have only have up to five Data Center Contact Types.

To upload a document:

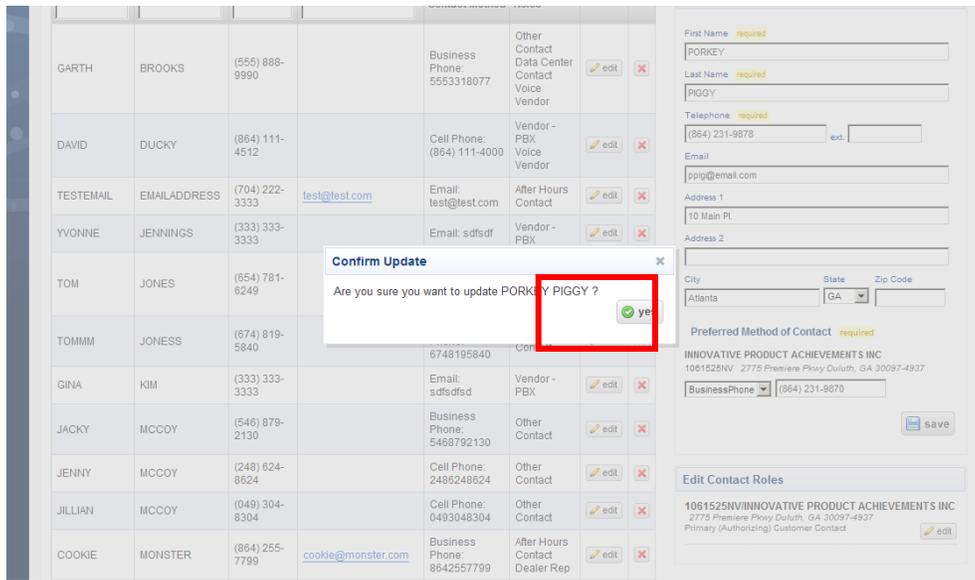
- Click Upload Permission(s) File.



- Select customer's document.



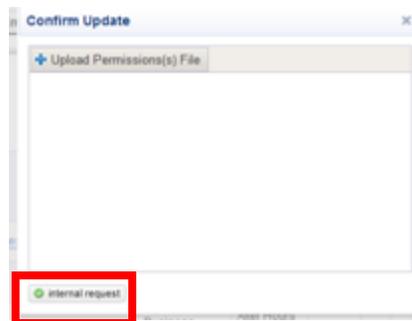
- Confirm your update.



## Create/Edit Primary, Secondary and Data Center Contacts - Internal Edits

Some user groups will have the ability to change Primary, Secondary and Data Center Contacts without a document upload. This can be used to correct mistyped information or add missing information. Internal changes will not prompt an email to the customer notifying them of the change.

- Select the Internal Request button to bypass the document upload function.



- ❖ The internal Request button will only appear for those who have the security approval to perform this function.

## Deleting Contacts

To delete a contact via 360:

- Select the Contact you wish to delete from the Contact Edit Screen.

|       |        |                |  |                            |                     |  |   |
|-------|--------|----------------|--|----------------------------|---------------------|--|---|
| TOMMM | JONESS | (674) 819-5840 |  | Business Phone: 6748195840 | After Hours Contact |  edit |  |
|-------|--------|----------------|--|----------------------------|---------------------|--|---|

- Click the red "X" button.
- Confirm you wish to delete that contact by clicking yes.

|           |              |                |  |                            |                           |   |   |
|-----------|--------------|----------------|--|----------------------------|---------------------------|---|---|
| DAVID     | DUCKY        | (864) 111-4512 |  | Cell Phone: (864) 111-4000 | Vendor - PBX Voice Vendor |    |    |
| TESTEMAIL | EMAILADDRESS | (704) 222-3333 | <a href="mailto:test@test.com">test@test.com</a> | Email: test@test.com       | After Hours Contact       |    |    |
| YVONNE    | JENNINGS     | (333) 333-3333 |  | Email: sdfsd               | Vendor - PBX              |    |    |
| TOM       | JONES        | (654) 781-6249 |  | Business                   | After Hours Contact       |    |    |
| TOMMM     | JONESS       | (674) 819-5840 |  |                            |                           |   |   |
| GINA      | KIM          | (333) 333-3333 |  |                            |                           |   |   |
| JACKY     | MCCOY        | (546) 879-2130 |  | Business Phone:            | Other Contact             |  |  |

**Confirm Delete** ✕

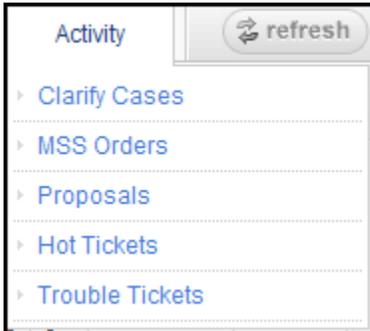
Are you sure you want to delete TOMMM JONESS ?

 yes

## Activity Tab



You can view the Activity of current or historical Clarify Cases, MSS orders, Proposals, RIO Hot Tickets and Historical RIO Trouble Tickets associated with a particular account by clicking on the appropriate sub tab under the Activity tab.



## Clarify Cases

The Clarify tab displays the customers current and historical Clarify Ticket.

UNIVERSAL WOODS INC. (502) 491-1461 : 1000781 : BUSINESS : STAND-ALONE : ACTIVE

iCARE Summary Customer Design Products & Services Rio CSR Billing Notes Contacts Activity refresh

business contact Account Name search Account Number search Order/PSR/Clarify Ticket search TN search

**Clarify Cases** page 1 of 4

| ID                           | Open Date                                  | Opened By | Age | Trouble Type              | Status | Condition | Priority | Close Date | Resp. Org.  | Closed By | Close Type  | Cause         | Credit | T & M Ch. |
|------------------------------|--|-----------|-----|---------------------------|--------|-----------|----------|------------|-------------|-----------|-------------|---------------|--------|-----------|
| <a href="#">100809-01654</a> | Data-UNIVERSAL WOODS INC.-Domain           |           |     |                           |        |           |          |            |             |           |             |               |        |           |
|                              | 10/08/09                                   | sfinley   |     | Service - Data            | Closed | Closed    | Low      | 10/08/09   | Customer    | sfinley   | Data        | None          | \$0.00 | \$0.00    |
| <a href="#">080509-03094</a> | Data-UNIVERSAL WOODS INC.-Domain           |           |     |                           |        |           |          |            |             |           |             |               |        |           |
|                              | 08/05/09                                   | dajones   |     | Service - Data            | Closed | Closed    | Medium   | 08/05/09   | Customer    | dajones   | Data        | None          | \$0.00 | \$0.00    |
| <a href="#">080409-01468</a> | Data-UNIVERSAL WOODS INC.-Domain           |           |     |                           |        |           |          |            |             |           |             |               |        |           |
|                              | 08/04/09                                   | vsellers  |     | Service - Data            | Closed | Closed    | Low      | 08/04/09   | Customer    | vsellers  | Data        | None          | \$0.00 | \$0.00    |
| <a href="#">071309-02288</a> | Data-UNIVERSAL WOODS INC.-No Internet      |           |     |                           |        |           |          |            |             |           |             |               |        |           |
|                              | 07/13/09                                   | jmanthey  |     | Service - Data            | Closed | Closed    | Critical | 07/14/09   | NuVox       | jsnow     | Data        | Configuration | \$0.00 | \$0.00    |
| <a href="#">070609-02970</a> | Collections-UNIVERSAL WOODS INC.-Treatment |           |     |                           |        |           |          |            |             |           |             |               |        |           |
|                              | 07/06/09                                   | sa        |     | Collections - Collections | Closed | Closed    | Medium   | 07/15/09   | Collections | rulemgr   | Collections | Customer Paid | \$0.00 | \$0.00    |
| <a href="#">061009-00677</a> | MACD-UNIVERSAL WOODS INC.-Port             |           |     |                           |        |           |          |            |             |           |             |               |        |           |
|                              | 06/10/09                                   | burtiaga  |     | MACD - Port               | Closed | Closed    | Medium   | 06/10/09   | NuVox       | gjones    | MAC         | None          | \$0.00 | \$0.00    |

Clicking on the Clarify ID will bring up the Detailed Case Report that you can find from the current Clarify Case viewer.

**Case Report - 100809-01654**  
 (This Report May Contain Confidential Internal Information - Please Review)

Site/Caller Summary:

|                    |                      |
|--------------------|----------------------|
| Site ID:           | 1000781              |
| Site Name/Address: | UNIVERSAL WOODS INC. |
| Address 1:         | 2600 GRASSLAND DR    |
| Address 2:         |                      |
| City/State/Zip:    | LOUISVILLE, KY 40299 |
| Caller Name:       | John Clarke          |
| Phone:             | 502-896-2557         |

---

Case Summary:

|                   |                                  |
|-------------------|----------------------------------|
| Case Title:       | Data-UNIVERSAL WOODS INC -Domain |
| ID:               | 100809-01654                     |
| Call Type:        | Problem                          |
| Severity:         | Medium                           |
| Priority:         | Low                              |
| Condition/Status: | Closed/Closed                    |
| Market:           | LOUISVILLE                       |

---

Case History - This Report May Contain Confidential Internal Information - Please Review

\*\*\* Create 10/08/2009 04:59:29 PM sfinley  
 Contact = John Clarke, Priority = Low, Status = Pending.

\*\*\* Phone Log 10/08/2009 05:02:20 PM sfinley  
 \*\*\*SCRIPTING LOG 10/8/2009 5:02:17 PM sfinley  
 "ServiceDataDomain"  
 Alternate Callback: 5026458195  
 Access Mode: 0, 8

## MSS Order

The MSS Order tab displays the customers current and historical MSS Orders.

| Order Number           | Project | Start Date | Install Date | Order Type | Assigned PC | Prov Plan                      |
|------------------------|---------|------------|--------------|------------|-------------|--------------------------------|
| <a href="#">701637</a> | UM ADD  | 10/17/08   | 10/20/08     | VoxIP      |             | <a href="#">Instant Mac</a>    |
| <a href="#">682980</a> | VOXIP   | 08/26/08   | 10/16/08     | VoxIP      | ALLITE03    | <a href="#">RIO Loop VoxIP</a> |

Clicking on the MSS Order will automatically take you to the specific PSR Details found in the CCI tool for that customer.



**Display by PSR - 701637 (PSR)** **CONFIDENTIAL\***

**CNAM**  
OSBURN-HENNING  
Osburn Henning  
osburn Henning

**PSR List for 4018163**

| Notes  | System <input checked="" type="checkbox"/> | Circuit <input checked="" type="checkbox"/> | Show Notes <input type="checkbox"/> |
|--|--|---|-------------------------------------|
| <b>Facility - In Service (CKTPROD)</b>   |  |   |                                     |
| <ul style="list-style-type: none"> <li>Local T1 Facility - In Service (CIRCUIT - 58/HC--/422603/IP /NUVX)<br/>Map LSR from PSR - LOOP - In Service (MAPLSRLOOP)</li> <li>Local T1 Facility - In Service (CIRCUIT - 58/HC--/422604/IP /NUVX)<br/>Map LSR from PSR - LOOP - In Service (MAPLSRLOOP)</li> </ul> |  |   |                                     |
| <b>Prem Router - In Service (EQUIPMENT)</b>  |  |   |                                     |
| <b>Prem Router - In Service (EQUIPMENT)</b>  |  |   |                                     |
| <b>Line Channels/MLHG - In Service (LINEPROD)</b>  |  |   |                                     |
| <ul style="list-style-type: none"> <li>Line Channels With Numbers - In Service (LINE - 407-896-8021-0)<br/>Tel Number: (407) 896-8021</li> </ul>   |  |   |                                     |

Clicking on the Provisioning Plan link will take you to the task list in the Provisioning Plan and display the Status, Due Date, Current Work Queue ID and Completion Date if applicable of all task included on that order.

| Tasks - PSR Order 701637 |                                    |          |          |            |                 |
|--------------------------|------------------------------------|----------|----------|------------|-----------------|
| Task Type                | Description                        | Status   | Due Date | Work Queue | Completion Date |
| APP                      | Application Date                   | Complete | 10/20/08 | DICKLI01   | 10/17/08        |
| TRANSMAC                 | Translations                       | Complete | 10/20/08 | BROOKSBR   | 10/20/08        |
| CUT DATE                 | Cut Date for PSR orders            | Complete | 10/20/08 | BROOKSBR   | 10/20/08        |
| CUTPSR                   | Make changes from OCPSTCUT if nec. | Complete | 10/20/08 | MSUMTER    | 10/21/08        |
| E911SMRT                 | E911 Extract Selection             | Complete | 10/20/08 | SYSWKQUE   | 10/17/08        |
| DD                       | Due Date                           | Ready    | 10/20/08 | MAC CHNG   |                 |
| CARE                     | Customer Account Record Change     | Complete | 10/21/08 | LD PROV    | 10/17/08        |
| BILLING                  | Starts Interface to Orders         | Pending  | 10/22/08 | MAC CHNG   |                 |

## Proposal

The Proposal Tab displays a view of the customer's Proposal History.

CARDINALS ORTHOPAEDIC INSTITUTE (614) 488-1816 : 1115359 : BUSINESS : STAND-ALONE : MSS ACCOUNT : ACTIVE

iCARE Summary Customer Design Products & Services Rio CSR Billing Notes Contacts Activity refresh

business contact search Account Number search Order/PSR/Clarify Ticket search TN search

### Proposals

| Proposal ID | E_ID | Term | P Type  | S Type               | Comments        | Created  | Appr | Sold     | Ready    | SSM Complete | \$         | Line | Diff \$ | D.L. | iCare Order | MSS PSR |
|-------------|------|------|---------|----------------------|-----------------|----------|------|----------|----------|--------------|------------|------|---------|------|-------------|---------|
| 273069      |      | 2    | NuSales | Replacement: Renewal | QID=624525: Ren | 11/19/04 | N    | 12/17/04 | 12/20/04 | 12/22/04     | \$12.00    | 0    | \$0.00  | 0    |             |         |
| 273068      |      | -    | NuSales | Upsell               | QID=620976: ADD | 10/26/04 | N    |          | 10/26/04 | 10/26/04     | \$0.00     | 0    | \$0.00  | 0    |             |         |
| 273067      |      | -    | NuSales | Upsell               | QID=609876: #60 | 08/10/04 | N    | 08/10/04 | 08/10/04 | 08/10/04     | \$2.50     | 0    | \$0.00  | 0    |             |         |
| 273066      |      | 1    | NuSales | Replacement: Renewal | QID=608205: #60 | 07/27/04 | N    | 07/28/04 | 07/28/04 | 07/30/04     | \$107.50   | 4    | \$0.00  | 0    |             |         |
| 273065      |      | 1    | NuSales | Replacement: Renewal | QID=602917: #60 | 06/18/04 | N    |          |          |              | (\$459.00) | -14  | \$0.00  | 0    |             |         |
| 273064      |      | -    | NuSales | Upsell               | QID=599964: #59 | 06/01/04 | N    | 06/01/04 | 06/01/04 | 06/01/04     | \$20.00    | 0    | \$0.00  | 0    |             |         |
| 273063      |      | 1    | NuSales | Replacement: Renewal | QID=597224: #59 | 05/13/04 | N    |          |          | Lost         | \$110.00   | 4    | \$0.00  | 0    |             |         |
| 273062      |      | 1    | NuSales | Undetermined         | QID=573336: Acc | 12/29/03 | N    |          |          | Lost         | \$0.00     | 0    | \$0.00  | 0    |             |         |
| 273061      |      | -    | NuSales | Upsell               | QID=571988: Acc | 12/16/03 | N    |          | 12/16/03 | 12/16/03     | \$0.00     | 0    | \$0.00  | 0    |             |         |
| 273060      |      | -    | NuSales | Upsell               | QID=567463: Num | 11/17/03 | N    | 11/18/03 | 11/18/03 | 11/18/03     | \$0.00     | 0    | \$0.00  | 0    |             |         |

## RIO Hot Tickets

This page displays all (un-archived) hot tickets in RIO for the selected account. You may click on the request number link to view the request order details.

SCHATTE, DAN & MEREDITH (407) 977-3060 : 2035928 : RESIDENTIAL : CHILD : MSS ACCOUNT : ACTIVE

iCARE Summary Customer Design Products & Services Rio CSR Billing Notes Contacts Activity refresh

business contact search Account Name search Order/PSR/Clarify Ticket search TN search

### RIO Hot Tickets

| Req. No.                | Start Date | Type     | COSCODE | Rqst Status | Job Step Dept | ILEC | Job Step     | Job Step User | Closure Date |
|-------------------------|------------|----------|---------|-------------|---------------|------|--------------|---------------|--------------|
| <a href="#">1094012</a> | 09/30/04   | W - Work | HOT     | COMPLETE    | CSC           | BST  | CUST CONTACT | etorres       | 09/30/04     |
| <a href="#">9001784</a> | 11/08/04   | W - Work | HOT     | COMPLETE    | CSC           | BST  | CUST CONTACT | dschatte      | 11/08/04     |

## RIO Trouble Tickets

This page displays all (un-archived) trouble tickets in RIO for the selected account. You may click on the request number link to view the request order details.

SCHATTE, DAN & MEREDITH (407) 977-3060 : 2035928 : RESIDENTIAL : CHILD : MSS ACCOUNT : ACTIVE

**iCARE** Summary Customer Design Products & Services Rio CSR Billing Notes Contacts Activity refresh

business contact Account Name search search Order/PSR/Clarify Ticket search TN search

### RIO Hot Tickets

| Req. No. ↓              | Start Date | Type     | COSCODE ↓ | Rqst Status ↓ | Job Step Dept | ILEC | Job Step ↓   | Job Step User ↓ | Closure Date |
|-------------------------|------------|----------|-----------|---------------|---------------|------|--------------|-----------------|--------------|
| <a href="#">1094012</a> | 09/30/04   | W - Work | HOT       | COMPLETE      | CSC           | BST  | CUST CONTACT | etorres         | 09/30/04     |
| <a href="#">9001784</a> | 11/08/04   | W - Work | HOT       | COMPLETE      | CSC           | BST  | CUST CONTACT | dschatte        | 11/08/04     |

# Design Tab

Summary Summary Tools Billing Notes Contacts Activity **Design** Documents CSR

## MSS Design

Displays current and historical circuit design information

**BOOKER T WASHINGTON INSURANCE** refresh

(205) 328-5454 : 4018320 : BUSINESS : BILLABLE PARENT : ICARE ACCOUNT : REVCHAIN7 : **ACTIVE**

MSS Circuit Design Summary Tools Billing Notes Contacts Activity **Design** Documents CSR

**Circuits**

- DS1: 2023684 - 76/HC--/414464/IP /NUVX/
- DS1: 3143350 - 76/HV--/687423/IP /NUVX/
- DS1: 2023691 - 76/HC--/414471/ /NUVX/
- DS1: 3142467 - 76/HC--/414471/IP /NUVX/
- DS1: 3143350 - 76/HV--/687423/IP /NUVX/

**Circuit Design**

total results: **18**    Circuit Design ID: **3143350**    Version: **1**

| Sequence Number | Order Number | Location    | EQP_TYP_FAC_DES | Relay rack facility type | Unit Channel | Signal Voice Path Type | Miscellaneous Information |
|-----------------|--------------|-------------|-----------------|--------------------------|--------------|------------------------|---------------------------|
| 1               | 1017778      | BRHMALHRCA1 |                 |                          |              |                        |                           |
| 1               | 1034017      | BRHMALHRCA1 |                 |                          |              |                        |                           |
| 1               | 1051588      | BRHMALHRCA1 |                 |                          |              |                        |                           |
| 2               | 1017778      | 76/HC--/    | 414464/IP       | /NUVX/                   | 1            | X4                     |                           |
| 2               | 1034017      | 76/HC--/    | 414464/IP       | /NUVX/                   | 1            | X4                     |                           |
| 2               | 1051588      | 76/HC--/    | 414464/IP       | /NUVX/                   | 1            | X4                     |                           |
| 3               | 1017778      | BRHMALMT    |                 |                          |              |                        |                           |

## RIO Design

Displays limited (POTS) current design information. (Only RIO Channel Pair and Switch Inventory)

**ATLANTA OUT LOUD** (404) 636-9054 : 3027621 : BUSINESS : STAND-ALONE : RIO ACCOUNT : APTIS : **ACTIVE** refresh

RIO Circuit Design Summary Tools Billing Notes Contacts Activity **Design** Documents CSR

total results: **18**

| Type  | RQST    | Host        | CLLI               | Line Num   | CFA                                | Cable  | Pair  | DSLAM   | Sync Speed | Date        | Status |
|---|---------|-------------|--------------------|------------|------------------------------------|--|-------|---|------------|-------------|--------|
| T1 DSLAM  | 1784655 | ATLBGACLDS0 | ATLNGATH9MD        | 10650138   | 81410/T1TIE/1/ATLNGATH/ATLNGATH9MD | T1TIE  | 81410 | EquipID: NLBA<br>Shelf: 1 Slot: 12<br>Circuit: 38.HCFU.802310..SB |            | May 2, 2006 | WO     |
| <b>LEN Assignment: AN: NLBA MOD: 0 Unit: 0 CDS: 50 Line: 14</b> |         |             | <b>MACCT: BAN:</b> |            |                                    | <b>DLC Port Assignment: DLC Shelf: DLC slot:</b> |       |   |            |             |        |
| VoIP Voice Prov Only Nuera                                      | 1784655 | ATLBGACLDS0 | ATLBGACLHN3        | 4043250351 |                                    | F21C   | 710   | EquipID: Unk Shelf: Unk Slot: Unk<br>Circuit: 38.HCFU.802310..SB  |            | May 2, 2006 | WO     |
| <b>LEN Assignment: AN: F21C MOD: 20 Unit: 0 CDS: 7 Line: 10</b> |         |             | <b>MACCT: BAN:</b> |            |                                    | <b>DLC Port Assignment: DLC Shelf: DLC slot:</b> |       |   |            |             |        |
| VoIP Voice Prov Only Nuera                                      | 1784655 | ATLBGACLDS0 | ATLBGACLHN3        | 4046336032 |                                    | F21C   | 712   | EquipID: Unk Shelf: Unk Slot: Unk<br>Circuit: 38.HCFU.802310..SB  |            | May 2, 2006 | WO     |

## IP Information

Displays limited (POTS) current design information. (Only RIO Channel Pair and Switch Inventory)

BOOKER T WASHINGTON INSURANCE



(205) 328-5454 : 4018320 : BUSINESS : BILLABLE PARENT : ICARE ACCOUNT : REVCHAIN7 : ACTIVE

|                |         |       |         |       |          |          |        |           |     |
|----------------|---------|-------|---------|-------|----------|----------|--------|-----------|-----|
| IP Information | Summary | Tools | Billing | Notes | Contacts | Activity | Design | Documents | CSR |
|----------------|---------|-------|---------|-------|----------|----------|--------|-----------|-----|

total results: 9

| RQST    | IP Block & Mask  | No. IPs | Container  | Data Region | Purpose       | IP Block Description  | Assigned | Added               |
|---------|------------------|---------|--|-------------|---------------|---|----------|---------------------|
|         | 64.90.16.20/30   | 4       | /InControl/Turf/Birmingham/Customer Market Allocation                    | BRHM        |               | Booker T Washington Insurance - 683309 - 1728 3rd Ave N - WAN       | 4018320  | 2008-09-22 17:31:01 |
|         | 64.90.27.168/29  | 8       | /InControl/Turf/Birmingham/Customer Market Allocation                    | BRHM        | WAN           | Booker T Washington   | 4018320  | 0                   |
|         | 69.38.53.198/31  | 2       | /InControl/Turf/Birmingham/Customer Market Allocation                    | BRHM        |               | Booker T Washington Insurance - 683309 - 1728 3rd Ave N - VOXIP WAN | 4018320  | 2008-09-22 17:30:29 |
|         | 69.38.116.216/29 | 8       | /InControl/Turf/Birmingham/Customer Market Allocation                    | BRHM        |               | BOOKER T WASHINGTON INSURANCE - 683309 - 1728 3RD AVE N - STATICS   | 4018320  | 2008-09-30 11:28:08 |
|         | 11.10.3.126/31   | 2       | /InControl/Turf/Firewall Management/Customer Firewall Management Tunnels | FWMG        |               | Booker T Washington Insurance - 683309 - 1728 3rd Ave N - FIREWALL  | 4018320  | 2008-09-22 17:31:41 |
|         | 11.10.3.124/31   | 2       | /InControl/Turf/Firewall Management/Customer Firewall Management Tunnels | FWMG        |               | Booker T Washington Insurance - 683309 - 1728 3rd Ave N - FIREWALL  | 4018320  | 2008-09-22 17:31:27 |
| 1017778 | 184.95.137.92/32 | 1       | /InControl/Turf/Birmingham/VoxIP Loopback                                | BRHM        | VOXIPLOOPBACK | BOOKER T WASHINGTON INSURANCE                                       | 4018320  | 0                   |
| 1017778 | 69.38.38.192/31  | 2       | /InControl/Turf/Birmingham/Customer Market Allocation                    | BRHM        | VOXIP         | BOOKER T WASHINGTON INSURANCE                                       | 4018320  | 0                   |
|         | 74.223.2.84/30   | 4       | /InControl/Turf/Birmingham/Customer Market Allocation                    | BRHM        | WAN           | Booker T Washington Insurance                                       | 4018320  | 0                   |

## Documents Tab



### Document Manager Functionality

Document Manger provides a secure interface for the controlled collection and administration of all customer account document files, from proposals to sales to account maintenance. This interface is launched from within SAT (closing docs) and Account Folder Search tool (TBS Add-On), as well as from within iCARE-360.

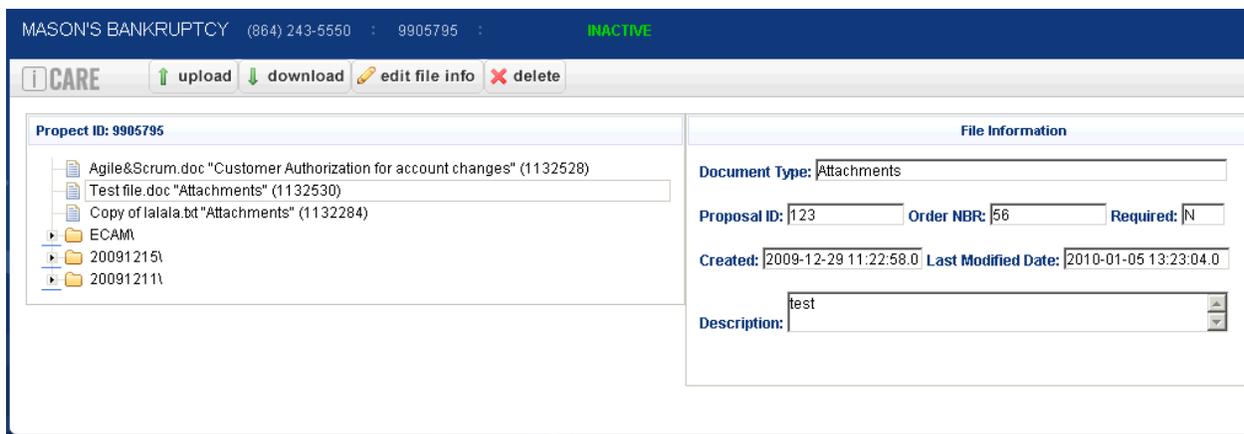
Access to these documents is governed with user rights particular to the role of that user. For example, sales personnel will be able to upload and download documents but will not be allowed to edit or delete them.

The following are the functional requirements for the UI:

- Ability to upload document files via a browse-to method.
- Prohibit uploading the same document twice (same name).
- Ability to download document files.
- Ability to delete document files with confirmation warning.
- Ability to save and edit the following specifics related to the document file:
  - Document Type
  - Proposal ID
  - Order NBR
  - Required flag
  - Created Date
  - Last Modified Date
  - Description (free text field)
- Ability to restrict certain of the above functions per user group; namely:
  - Ability to delete document files
  - Ability to edit "File Information"

### Document Manager Access

Selecting the "Customer Fldr" button in SAT, the "Documents" button in iCare Order Config, or the "Documents" tab on an account loaded in iCare-360 will all bring you to the Document Manager screen for that account.



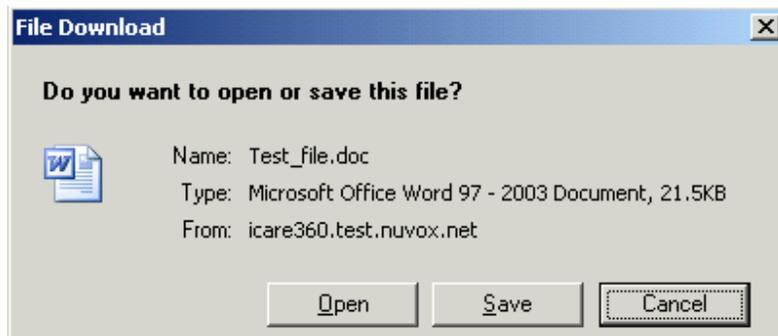
## Document Manager Buttons



## File Upload



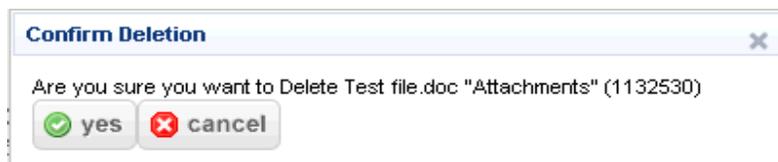
## File Download



## Edit File Info



## File Delete



# CSR Tab

Summary | Summary | Tools | Billing | Notes | Contacts | Activity | Design | Documents | **CSR**

## CSR Details

A printable CSR page is available for each account displaying Telephone Numbers as well as Services & Features.

**ATLANTA OUT LOUD** (404) 636-9054 : 3027621 : BUSINESS : STAND-ALONE : RIO ACCOUNT : APTIS : **ACTIVE** 

CSR | Summary | Tools | Billing | Notes | Contacts | Activity | Design | Documents | CSR

 **Printer friendly version**

**Customer Information**

**ATLANTA OUT LOUD**  
 Account Number: 3027621  
 BTN: (404) 636-9054  
 Business  
 Category: / Stand-Alone  
 Status: active

**Physical Address**

2801 BUFORD HWY NE  
 SUITE 250  
 ATLANTA GA 303290000

**Billing Address**

2801 BUFORD NE HWY  
 SUIT 250  
 ATL GA 303290000

**Telephone Numbers**

| Number     | Type             | BTN | PIC  | LPIC | Circuit            |
|------------|------------------|-----|------|------|--------------------|
| 3027621    |                  |     |      | 5366 |                    |
| 10650138   | 1.54MB DEDICATED |     |      | 5366 | 38.HCFU.802310..SB |
| 10650138   | T1-A             |     |      | 5366 | 38.HCFU.802310..SB |
| 10767240   | PKG              |     |      | 5366 |                    |
| 4043250351 | BUSINESS LINE    |     | 5366 | 5366 | 38.HCFU.802310..SB |
| 4046336032 | BUSINESS LINE    |     | 5366 | 5366 | 38.HCFU.802310..SB |
| 4046336128 | BUSINESS LINE    |     | 5366 | 5366 | 38.HCFU.802310..SB |

**Services & Features**

| Feature                                  | Quantity | UoM | Revenue * |
|--|----------|-----|-----------|
| 10650138 1.54Mb Dedicated                |          |     |           |
| 10650138 Additional Static IPs-5 Usable  |          |     |           |
| 10650138 DS-1 Access                     |          |     |           |
| 10650138 Equipment Maintenance Fee       |          |     | 10.95     |
| 10650138 IAD-Adtran 624 FR               |          |     |           |
| 10650138 IP Administration Fee           |          |     | 3.46      |
| 10650138 Pkg Web 100MB/30 Email/9GB Xfer |          |     |           |
| 4043250351 Access Recovery Charge        |          |     | 1         |
| 4043250351 Broadline 4 Business Line     |          |     |           |
| 4043250351 Call Block                    |          |     |           |