



Evergent CRM User Documentation (Beacon)

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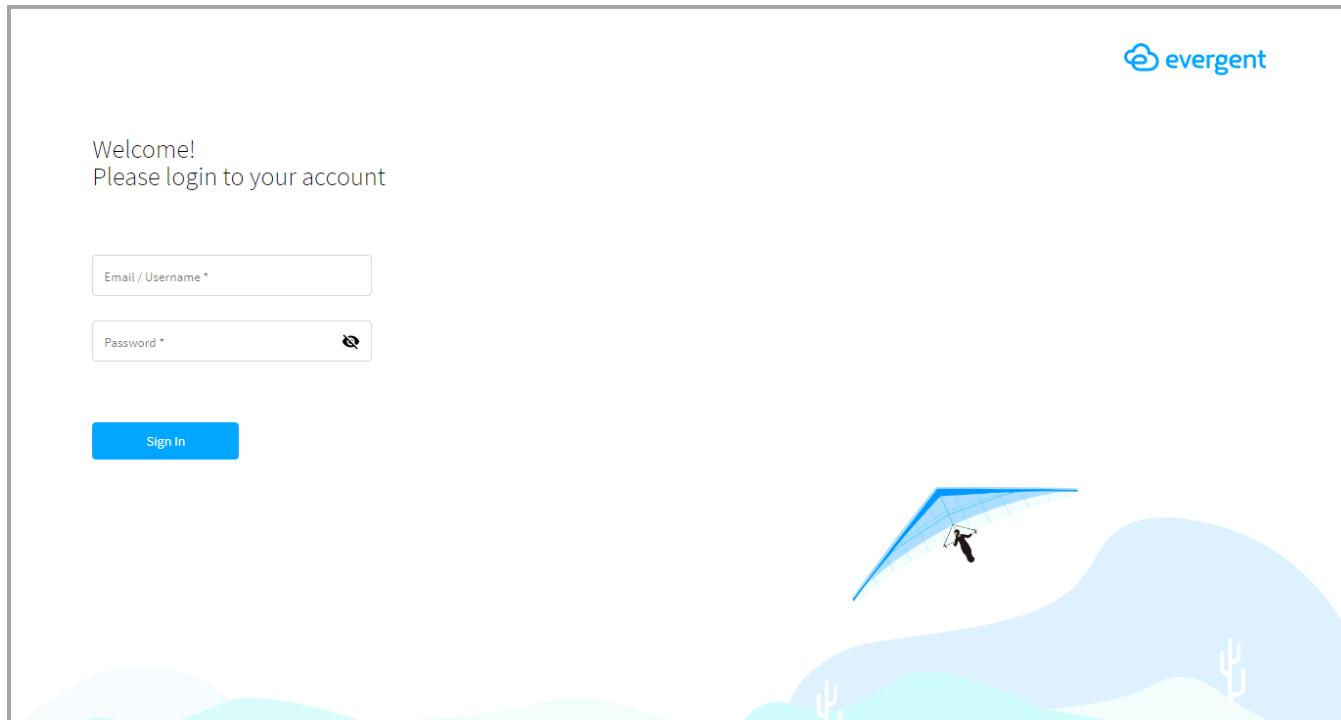
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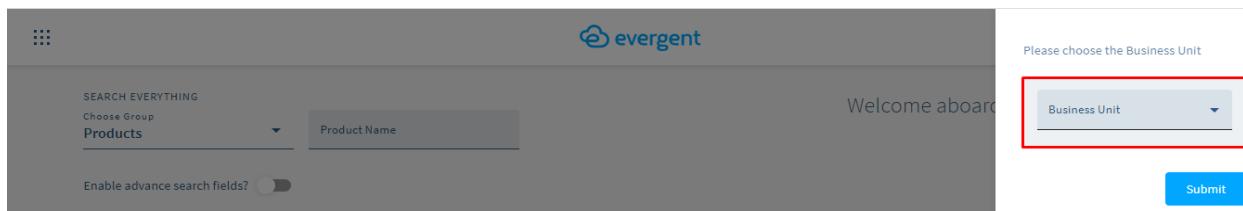
Account Management

Login to Account Management

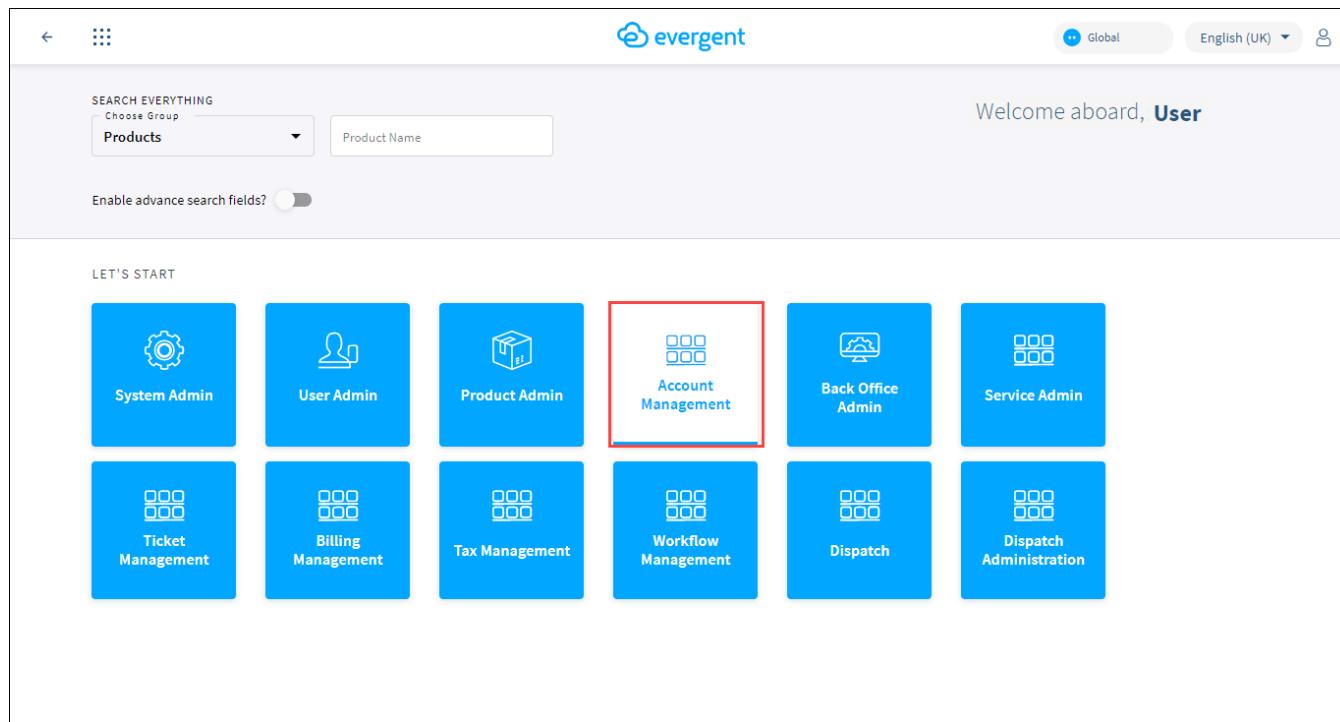
- Open a web browser, such as Internet Explorer / Mozilla Firefox / Google Chrome.
- In the address bar, enter the application URL as provided by Evergent.
- Enter the valid Email/Username and Password.
- Click the **Sign In** button. This will begin your Evergent session.



- The users with access to multiple business units must select the business unit from the available drop-down list and click **Submit**.



- Once a business unit is selected, the user is redirected to the dashboard Home screen, as shown below.
- Click the **Account Management** image button on the dashboard home screen to enter the Account Management application.

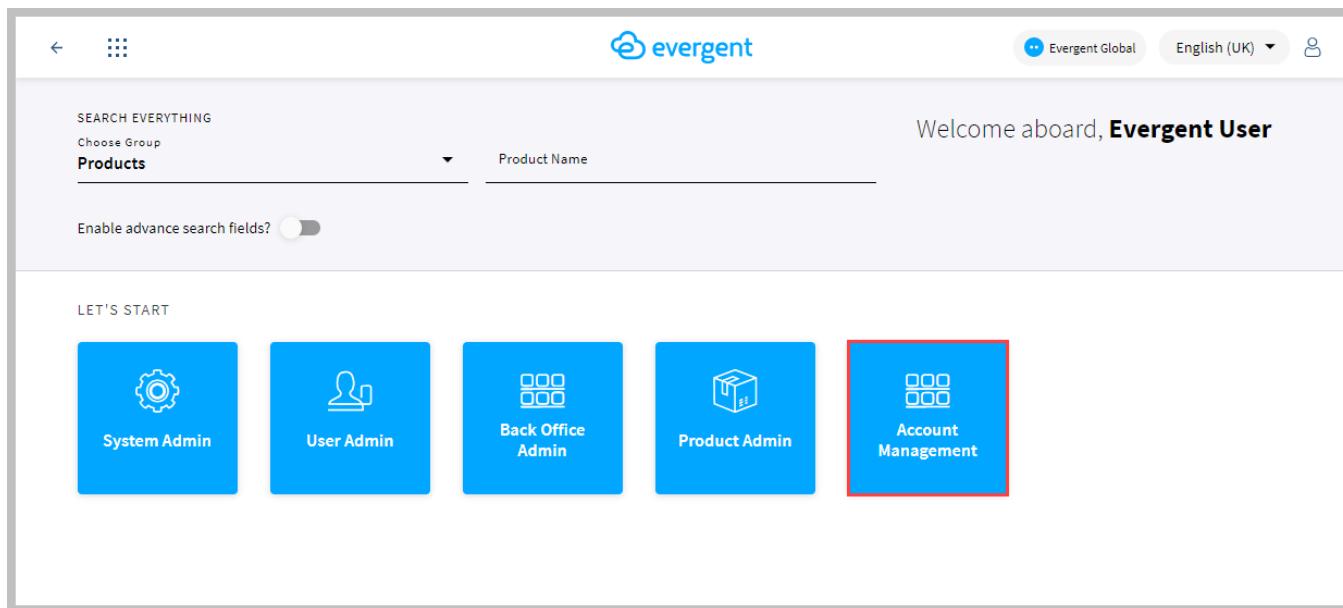


- On clicking the **Account Management** image button, the pop-up modal dialog box will display asking the user to choose the kind of action to perform in the Account Management module like:
 - Create Account
 - Existing Account
 - Incomplete Orders

The Dashboard menu icon <> on the top - left margin of the screen will remain stable as user navigates throughout the system.

To refresh your screen, click any of the tabs located at the top of the screen.

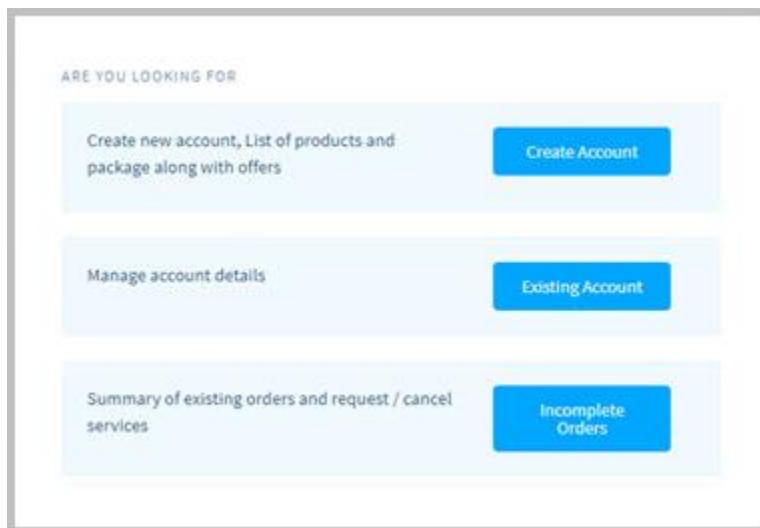
The Account Management module is used to maintain customer details, services, orders, billing and financial, etc. to build relationships with current and potential customers of Evergent.



Account Management Home Screen

The Account Management screen is the access to the CCB account details that allow a user to manage account information and settings such as creating a new account, searching the existing accounts, and viewing incomplete orders.

- On clicking the **Account Management** button, the dialog box appears asking a user to choose the kind of action to perform in the Account Management module:



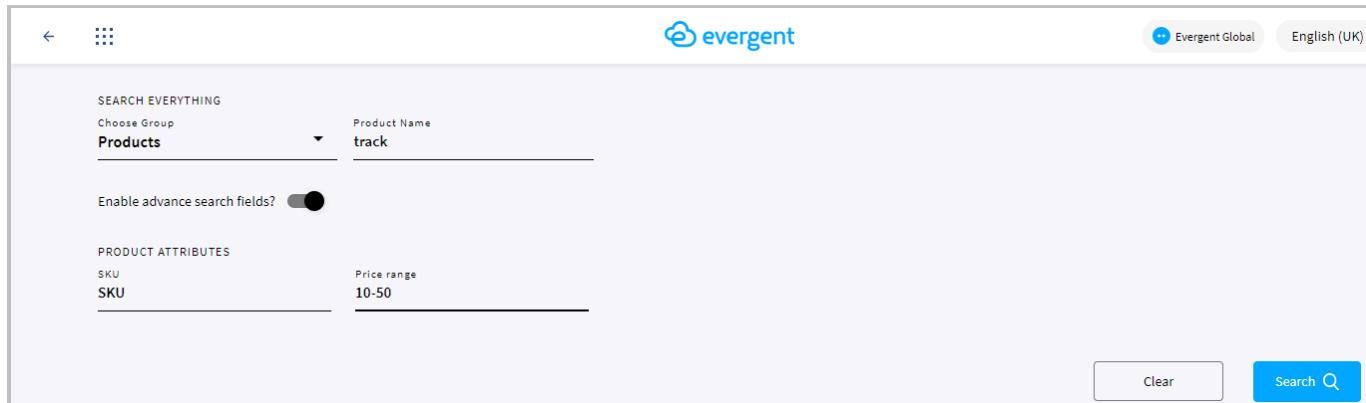
| Button Name | Description |
|----------------|---|
| Create Account | Click this button to create a new Customer Account along with the list of Products, Packages, and Offers. |

| | |
|-------------------|---|
| Existing Account | Click this button to manage existing customer account information. |
| Incomplete Orders | Click this button to search for accounts with incomplete orders thereby viewing the Summary of existing orders and want to request/cancel the services. |

Search Everything

The users can search accounts by Group, Product Name (Search Everything), SKU, and Price Ranges (Advanced Search).

- Enable the toggle switch to see the SKU and Price Ranges fields.



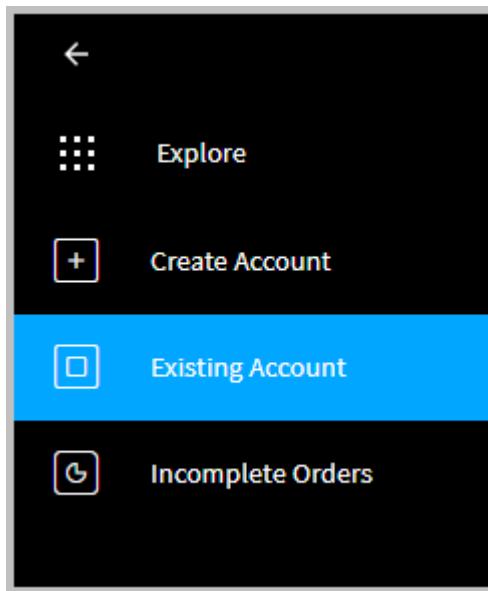
The screenshot shows the 'SEARCH EVERYTHING' section of the application. It includes a dropdown for 'Choose Group' set to 'Products', a search bar for 'Product Name' containing 'track', a toggle switch for 'Enable advance search fields?' which is turned on, and two input fields for 'SKU' ('SKU') and 'Price range' ('10-50'). At the bottom right are 'Clear' and 'Search' buttons.

Existing Account

A user can search an existing account by account details, contact information, and credit card details.

To search an existing account, do the following:

- Click the **Account Management** module on the **Dashboard** screen or in the **Explore** section in the **Left Menu** bar.
- Click **Existing Account**.



Account Search

CCB application allows you to search for a subscriber account with the details provided. This screen is to search for existing accounts, modify accounts, access accounts, activities, and other information related to the CCB accounts.

Search by Account Type / Business Unit / Account Number

- On the **Account Search** screen, in the **SEARCH ANYTHING** section, enter the account related details to search the existing account by Account Type, Business Unit, or Account Number.



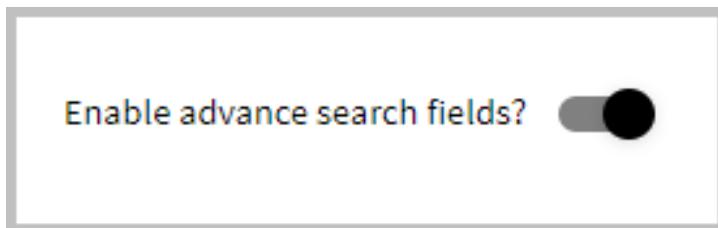
Home / Account Management

Account Search

SEARCH ANYTHING

| | | |
|---|---|-------------------------------------|
| Choose Account Type Residential | Business Unit Evergent Global | Account Number 1234567789 |
|---|---|-------------------------------------|

- To view more search options, enable the **Advanced Search Fields** toggle switch.



Note:

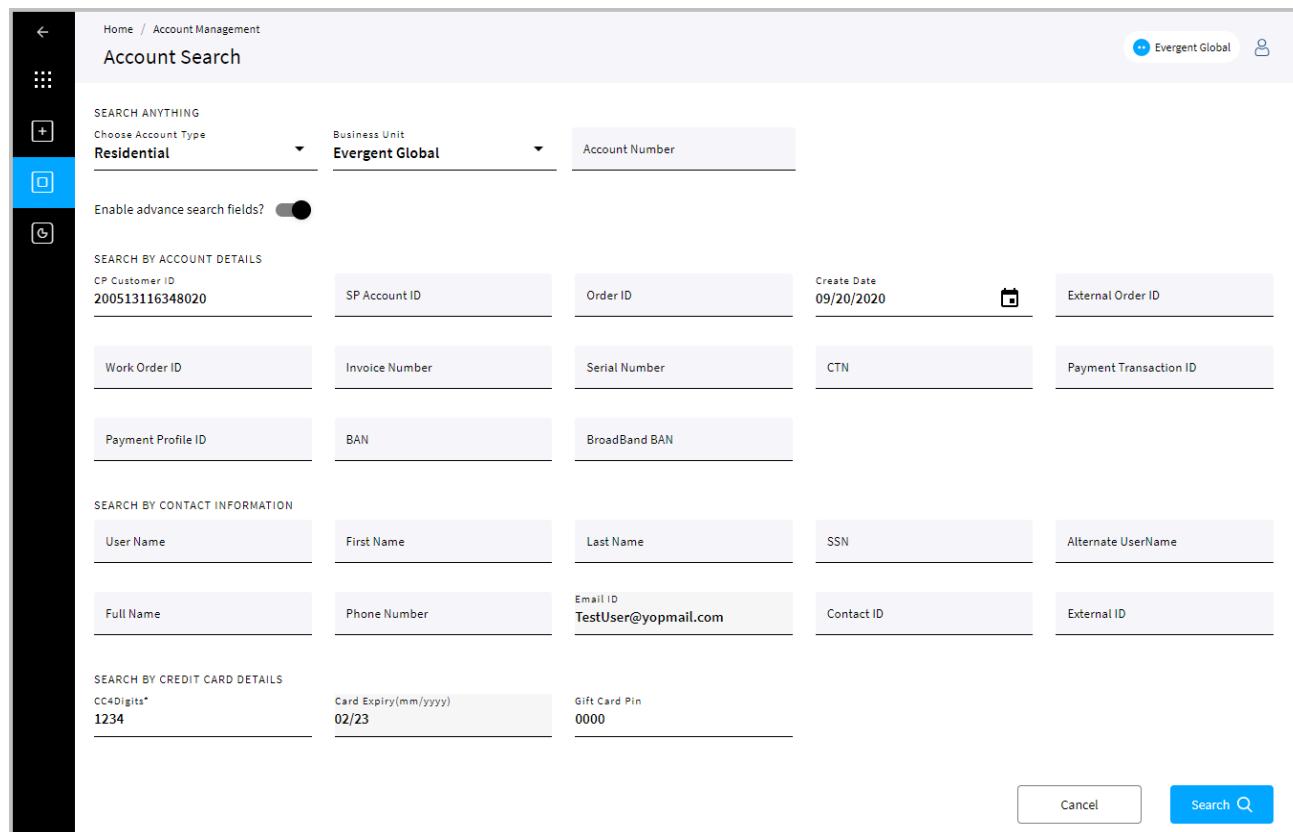
By default, the advanced search fields are enabled. To disable the advanced search fields, click the Advanced Search Fields toggle switch.

Search by Account Details / Contact Information / Credit Card Details

- On the Account Summary screen, enter the necessary search criteria to search by Account Details/Contact Information/Credit Card Details.
- Click **Search** to view the Account Summary.

On the Account Search screen, enter any one or combination of the search criteria in the following fields:

- Search by Account Details
- Search by Contact Information
- Search by Credit Card Details



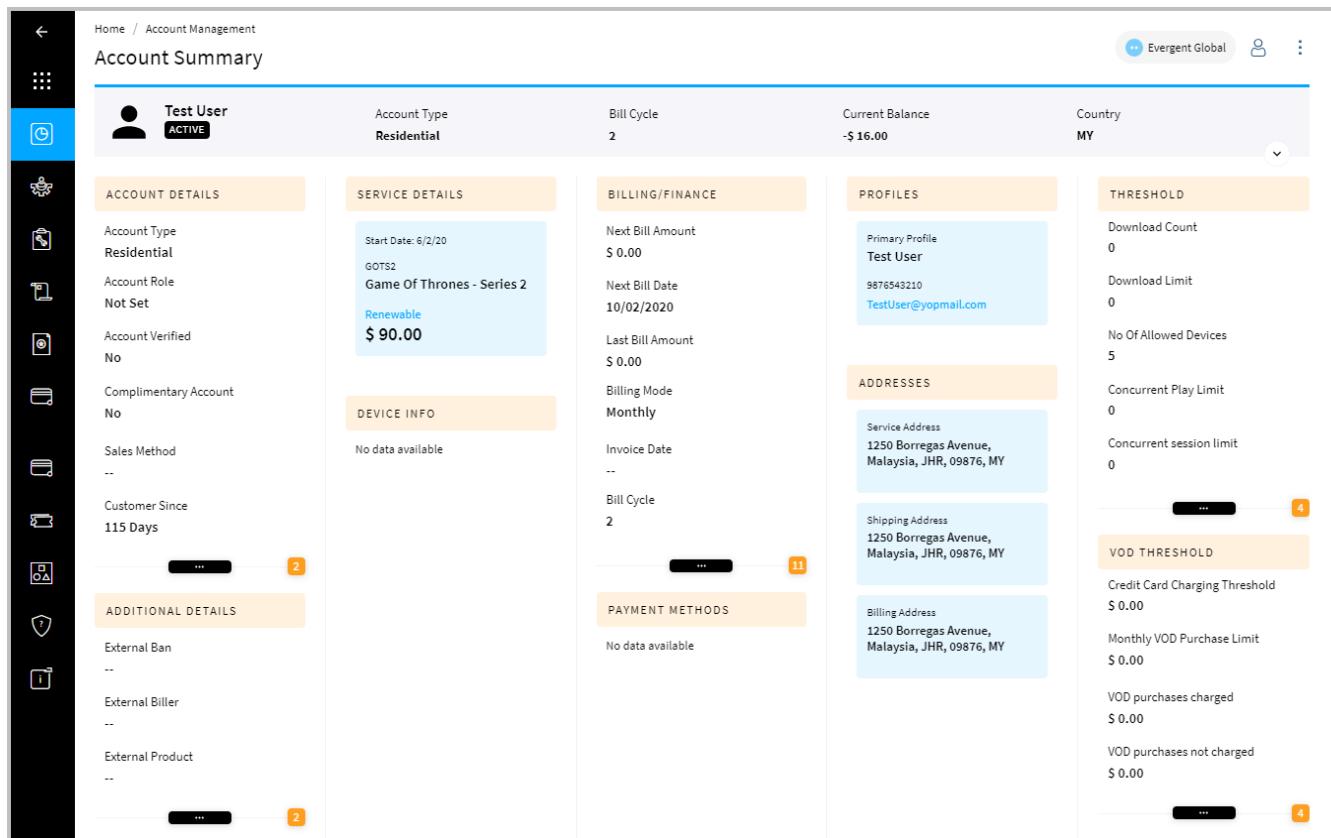
The screenshot shows the 'Account Search' page. On the left is a vertical toolbar with icons for Home, Back, Forward, Refresh, and other navigation. The main area has a header 'Home / Account Management' and 'Account Search'. It includes a 'SEARCH ANYTHING' section with dropdowns for 'Choose Account Type' (Residential) and 'Business Unit' (Evergent Global), and a text input for 'Account Number'. Below this is a toggle switch for 'Enable advance search fields?' which is turned on. The interface is divided into three main sections: 'SEARCH BY ACCOUNT DETAILS', 'SEARCH BY CONTACT INFORMATION', and 'SEARCH BY CREDIT CARD DETAILS'. Each section contains several input fields for various identifiers like Customer ID, Work Order ID, Payment Profile ID, User Name, Full Name, etc. At the bottom right are 'Cancel' and 'Search' buttons.

| Field Name | Description |
|---------------------|--|
| Select BusinessUnit | Search for a customer under a particular Business unit. |
| Account Number | Unique Account number of the customer-generated on successful registration in Evergent system. |
| CP Customer ID | Unique CP Customer ID of the customer in the Evergent system. |

| | |
|------------------------|---|
| Create Date | Creation date on which customer is registered in Evergent system. |
| Work Order ID | Unique Work Order ID generated for the customer on successful registration/ Activation. Can be extracted from getWorkOrderDetails() API |
| Serial Number | Unique Serial number of the hardware subscription purchased by the customer. Can be extracted from getAccountDevices() API. |
| Registration Number | Unique Registration number of the customer-generated on successful registration in Evergent system. |
| SP Account ID | Unique SP Account ID of the customer in the provisioning system |
| Order ID | Unique Order ID generated for the customer on the successful purchase of a subscription. Can be extracted from the getCompleteAccountDetail() API |
| Invoice Number | Unique Invoice ID generated for the customer on successful bill delivery. |
| CTN | Unique customer telephone number |
| Payment Transaction ID | Klarna Payment gateway: Order number from Klarna transaction DIBS payment gateway: VerifyID from DIBS transaction |
| External OrderId | Unique external order ID generated for the customer on successful external order purchase. |
| Payment Profile ID | Unique payment id that is generated at the time of payment |
| BAN | Unique BAN related to the customer account |
| BroadBand Ban | This field is used to search for the existing broadband accounts. |
| User Name | Customer's login username as per the latest customer records. |
| First Name | Customer's First name as per the latest customer records. |
| Last Name | Customer's last name as per the latest customer records. |
| SSN | Customer's SSN (Social Security Number) that is provided during registration and as per the customer's latest records. |
| Alternate UserName | Customer's Alternate UserName provided during registration. This field holds either any of the Phone Numbers or Email or alphanumeric values during saving. |
| Full Name | Customer's Full Name i.e., First Name and Last name as per the latest customer records. |

| | |
|------------------------------|--|
| Phone Number | Can be any of the customer's Home or Work or Cell phone number that is provided during registration and as per the customer's latest records. |
| Email | Customer's registered primary email address as per the latest customer records. |
| Contact ID | Contact ID of the customer. Can be primary or secondary contact ID. This value can be extracted from getAccountDetails() or getContacts() API. |
| CC4Digits | Customer's Credit Card last 4 digits that are registered or added later to the customer account. |
| Expiry Month and Expiry year | Expiry month and year of the customer's registered credit card in MM and YYYY format. |
| Gift Card PIN | The gift card PIN for the gift cards. |

If the search result yields only one account, then the customer's **Account Summary** screen displays to view the 360-degree customer information.



The screenshot shows the Account Summary screen for a customer named "Test User". The top navigation bar includes "Home / Account Management" and "Account Summary". The right side features a "Evergent Global" dropdown and a user profile icon. The main content area is divided into several sections:

- Customer Information:** Shows "Test User" (ACTIVE), "Residential" Account Type, "2" Bill Cycle, "-\$ 16.00" Current Balance, and "MY" Country.
- Account Details:** Includes "Account Type: Residential", "Account Role: Not Set", "Account Verified: No", "Complimentary Account: No", "Sales Method: --", and "Customer Since: 115 Days".
- Service Details:** Shows "Start Date: 6/2/2020", "GOTS2", "Game Of Thrones - Series 2", "Renewable", and a total amount of "\$ 90.00".
- Billing/Finance:** Displays "Next Bill Amount: \$ 0.00", "Next Bill Date: 10/02/2020", "Last Bill Amount: \$ 0.00", "Billing Mode: Monthly", "Invoice Date: --", "Bill Cycle: 2", and "Billing Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY".
- Profiles:** Lists "Primary Profile: Test User" with ID "9876543210" and email "TestUser@yopmail.com".
- Thresholds:** Shows "Download Count: 0", "Download Limit: 0", "No Of Allowed Devices: 5", "Concurrent Play Limit: 0", "Concurrent session limit: 0", "Credit Card Charging Threshold: \$ 0.00", "Monthly VOD Purchase Limit: \$ 0.00", "VOD purchases charged: \$ 0.00", and "VOD purchases not charged: \$ 0.00".
- Address:** Lists "Service Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY", "Shipping Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY", and "Billing Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY".
- Payment Methods:** Shows "No data available".
- Additional Details:** Lists "External Ban: --", "External Biller: --", and "External Product: --".

| Field Name | Description |
|------------|-------------|
| | |

| Account Details Section | |
|--------------------------------|---|
| Account Number | Unique Account number of the customer-generated on successful registration in Evergent system. |
| Registration Number | Unique Registration number of the customer-generated on successful registration in Evergent system. |
| Account Verified | Denotes whether the email verification is done status by a subscriber. |
| Parental Control | If checked, will enable parental control. |
| CP Customer ID | Unique CP Customer ID of the customer in the Evergent system. |
| SP Account ID | Unique SP Account ID of the customer in the provisioning system. |
| Complimentary Account | Denotes whether the account is a complementary mode or not. |
| Complaint Mode | Denotes whether the account is in complaint mode or not. |
| Account Type | Denotes the subscriber account type. |
| SalesMethod | Denotes the sales method through customer acquisition is done. |
| Billing Mode | Denotes the frequency of bill mode. |
| Bill Cycle | Indicates customer bill generation date. |
| Bill Delivery Type | Type of bill delivery opted by the customer. |
| Account Role | Indicates the account role of the customer. |
| Cool Off | This indicates whether the customer is eligible for any type of offers/promotion as per the segments defined in the segments tab. |
| Migrated Category | It indicates the reason why the user account is not migrated. |
| Service Details Section | |
| Complaint Mode | Denotes whether the account is complaint mode or not |
| Account Type | Denotes the subscriber account type. |
| SalesMethod | Denotes the sales method through customer acquisition is done. |
| Billing Mode | Denotes the frequency of bill mode. |

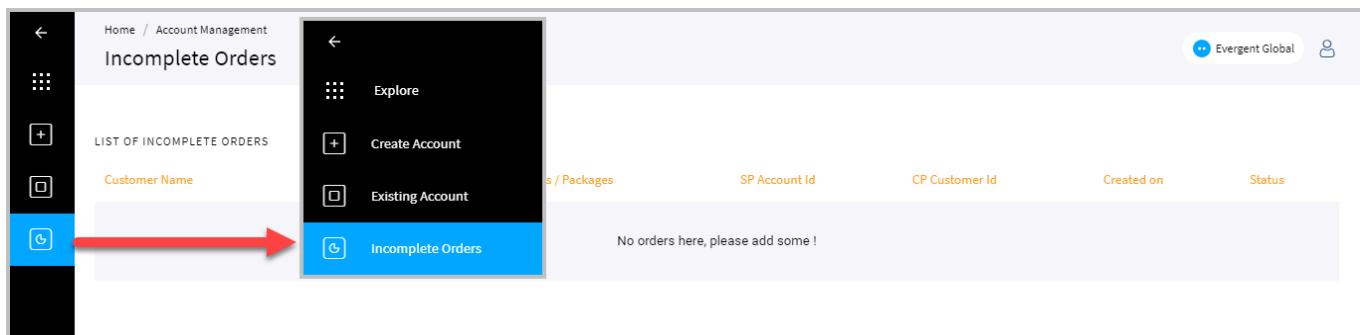
| | |
|--|--|
| Bill Cycle | Indicates customer bill generation date. |
| Bill Delivery Type | Type of bill delivery opted by the customer. |
| Billing and Finance Section | |
| Last Bill Amount | Denotes customer last bill amount |
| Current Balance | Customer's current balance amount |
| Next Bill Amount | This indicates the next bill amount that is to be collected from the customer |
| Device Activation Date (RTP date unless 10ft device activated) | This field is introduced to display the date up to which the device activation can be done for the customer after purchase. |
| Devices on Service Fee | This reflects the Installment Details feature. On clicking this the user is navigated to the Orders tab in the Account Management module for getting the installment details. |
| Next Bill Date | This indicates the next bill generation date of the customer |
| Wallet Balance | This indicates the available wallet balance for the customer account |
| Customer Since | Indicates when the customer is with the business. |
| Revenue till date | Indicates revenue generated from that customer to date. |
| Calls from Customer till date | Number calls received from customer till date to CSR. |
| No. of Compensations | The total number of compensations provided to the customer. |
| Total Compensation Amount | Total compensation amount provided to the customer. |
| Loyalty Points | The points earned by the customers based on their purchases. |
| Encashable Points/Amount | The points that can be encashable by the customer and the amount that can be cashed for the accumulated points. |
| Payment Methods Section | |
| Setup | Displays the type of Auto Payment Method of the customer along with the card details in a masked form. Can be Credit/Debit Card, Operator Billing, Appstore Billing, Google Wallet, etc. |
| Addresses Section | |

| | |
|--------------------------------|---|
| Service Address | Indicates the service address of a customer. |
| Shipping Address | Shipping address of a customer. |
| Billing Address | Address of a customer. |
| Threshold Section | |
| Download Limit | Will display the total download limit for the account. |
| Download Count | Will display the total download count allowed for that account. |
| No of Allowed Devices | Will display the number of allowed devices for that account. |
| Concurrent Play Limit | Will display concurrent play limit for that account. |
| Concurrent Session Limit | Will display concurrent session limit for that account. |
| VOD Threshold Section | |
| Credit card charging threshold | The credit card charging Threshold limit to collect payment. |
| Monthly VOD Purchase Limit | The amount provided for monthly VOD Purchase Limit in System Admin. We can edit this value by clicking on the pencil icon beside the Monthly VOD Purchase Limit amount. |
| VOD purchases charged | Will display the total charges of active VOD Products, which are charged. |
| VOD purchases not charged | Will display the pending charges of the VOD Products that are <u>not</u> charged. |

- If multiple accounts are found, then a list of accounts with matching information will appear on the screen along with the respective customer info like Channel Partner, Account Name, Email, CP Customer ID, SP Account ID, Status, Service Plan, and Last Login Date of the account below the Search criteria screen.
- Click any one of the customers' account details from the search results to navigate to the customer Account Summary screen to view the 360-degree customer information.

Incomplete Orders

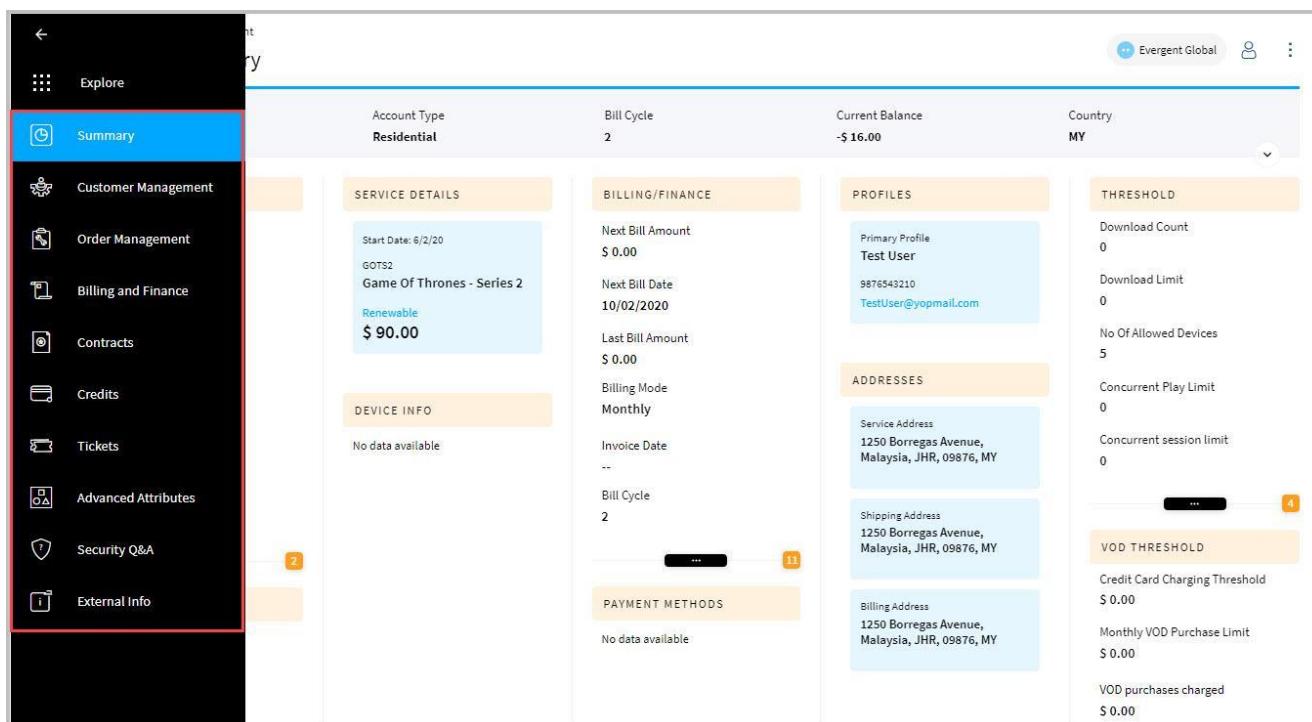
This section provides the ability in handling the fallout management where a CSR can search for pending orders and proceed to the order fulfillment flow.



Account Management – Tabs Overview

From Account Management, a user can view 360-degree customer account information across various tabs:

- Summary
- Customer Management
- Order Management
- Billing and Finance
- Credits



The screenshot shows the 'Summary' tab selected in the 'Explore' section of Account Management. The main content area displays account details such as Account Type (Residential), Bill Cycle (2), Current Balance (-\$ 16.00), and Country (MY). It also shows service details, billing/finance information, profiles, addresses, shipping addresses, payment methods, and VOD threshold settings.

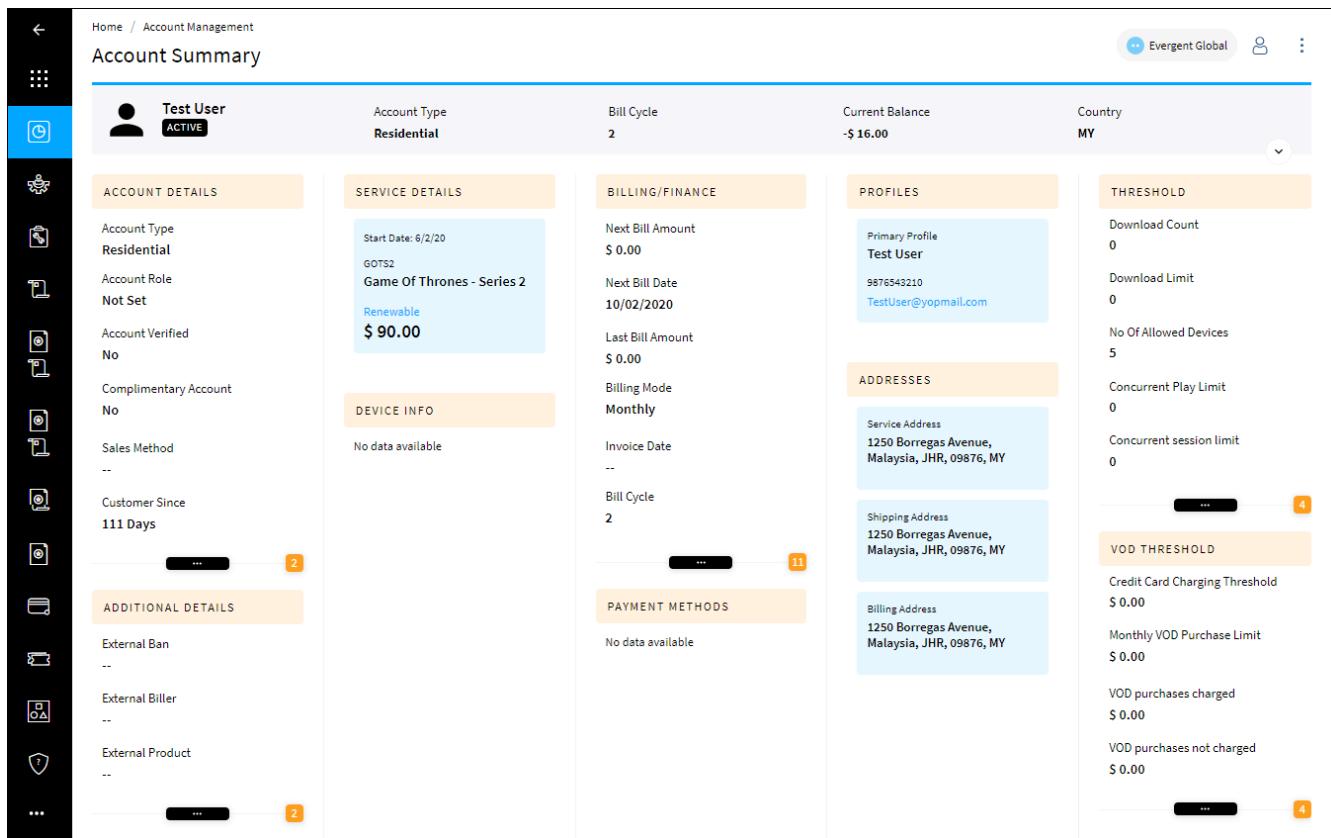
| Account Type | Bill Cycle | Current Balance | Country |
|--------------|------------|-----------------|---------|
| Residential | 2 | -\$ 16.00 | MY |

| SERVICE DETAILS | | BILLING/FINANCE | | PROFILES | | THRESHOLD | |
|--------------------|----------------------------|---------------------------|----------------------------|----------------------------|------------|----------------------|--------------------------|
| Start Date: 6/2/20 | GOTS2 | Next Bill Amount: \$ 0.00 | Next Bill Date: 10/02/2020 | Primary Profile: Test User | 9876543210 | TestUser@yopmail.com | Download Count: 0 |
| | Game Of Thrones - Series 2 | Last Bill Amount: \$ 0.00 | Billing Mode: Monthly | | | | Download Limit: 0 |
| | Renewable | | Invoice Date: -- | | | | No Of Allowed Devices: 5 |
| | \$ 90.00 | | Bill Cycle: 2 | | | | Concurrent Play Limit: 0 |

| DEVICE INFO | | PAYMENT METHODS | | ADDRESSES | | VOD THRESHOLD | |
|-------------------|--|-------------------|--|---|--|---|---|
| No data available | | No data available | | Service Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY | Shipping Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY | Billing Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY | Credit Card Charging Threshold: \$ 0.00 |

Summary

The Account Summary screen displays the complete data for all the project-related fields. From this screen, a user can access and control the account details, device info, billing/finance, additional details, service details, VOD threshold, profiles, addresses, threshold, and payment methods.



The screenshot shows the 'Account Summary' tab of the Evergent CRM interface. At the top, it displays the user's name, 'Test User', status as 'ACTIVE', account type as 'Residential', bill cycle as '2', current balance as '\$-16.00', and country as 'MY'. On the left, a vertical sidebar lists various account management icons. The main area is divided into several sections: 'ACCOUNT DETAILS' (Account Type: Residential, Account Role: Not Set, Account Verified: No, Complimentary Account: No, Sales Method: --, Customer Since: 111 Days); 'SERVICE DETAILS' (Start Date: 6/2/20, GOTs2 Game Of Thrones - Series 2, Renewable: \$ 90.00); 'BILLING/FINANCE' (Next Bill Amount: \$ 0.00, Next Bill Date: 10/02/2020, Last Bill Amount: \$ 0.00, Billing Mode: Monthly, Invoice Date: --, Bill Cycle: 2); 'PROFILES' (Primary Profile: Test User, ID: 9876543210, Email: TestUser@yopmail.com); 'ADDRESSES' (Service Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY); 'SHIPPING ADDRESS' (Shipping Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY); 'BILLING ADDRESS' (Billing Address: 1250 Borregas Avenue, Malaysia, JHR, 09876, MY); 'THRESHOLD' (Download Count: 0, Download Limit: 0, No Of Allowed Devices: 5, Concurrent Play Limit: 0, Concurrent session limit: 0); and 'VOD THRESHOLD' (Credit Card Charging Threshold: \$ 0.00, Monthly VOD Purchase Limit: \$ 0.00, VOD purchases charged: \$ 0.00, VOD purchases not charged: \$ 0.00).

Account Details

The Account Details section displays all the account information. The **Account Summary** tab screen of an account is displayed, when navigated to the Account Details section.

- Click the **Account Type** edit icon (edit icon) to change the type of the account.
- Click the **Account Role** edit icon (edit icon) to select the roles for a user (Example: Admin User, Super User, Employee User, and Test User).
- Click the **Account Verified** drop-down list to update the customer's email verification status to Yes/No.
- Click the **Complimentary Account** drop-down list and select Yes or No to specify whether the account is complimentary or not.
- Click the **Parental Control** edit icon (edit icon) to activate the parental control for the customer to restrict viewing the channels or movies on a user's video screen. When saved, the user will be redirected to the Edit Primary Contact screen where it will be asked to provide the Parental Control Level and Parental Control PIN.

ACCOUNT DETAILS

Account Type
Residential

Account Role
Test User

Account Verified
Yes

Complimentary Account
Yes

Customer Since
118 Days

Create Date
6/2/20

Account #
20200602120752130

Parental Control
Yes

... 4

Note:

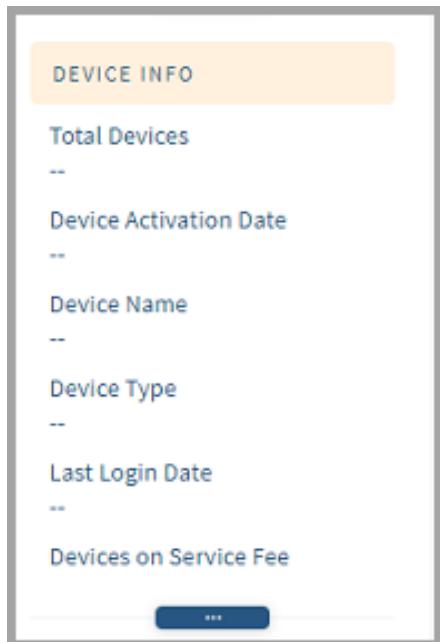
To see more options in the Account Details section, click the More icon () at the bottom of the section.

The users can add more options to the Account Details section from the System Admin. The following account details can be added:

- Sales Method
- Migrated User
- Tax ID
- Customer Type
- Migration Category
- Cool Off
- Complaint Mode
- CP Customer ID
- SP Customer ID
- Registration No.
- Migrated User
- Customer Type
- Segments
- Registration Number

Device Info

A user can view the device information from the Device Info section. The Device Info section provides the details like Total Devices, Device Activation Date, Device Name, Device Type, Last Login Date, Devices on Service Fee.



Billing/Finance

The Billing and Finance section provides the information related to the customer billing details such as Next Bill Amount, Next Bill Date, Last Bill Amount, Billing Mode, Bill Cycle, Bill Delivery Date and Bill delivery Type and financial details like Current Balance, Wallet Balance, Calls from Customer till Date, Loyalty Points, Encash Points/Amount, No. of Compensations, Total Compensation Amount, Revenue till Date, Invoice No & Date.

BILLING/FINANCE

Last Bill Amount
\$ 0.00

Next Bill Amount
\$ 0.00

Next Bill Date
10/02/2020

Bill Cycle

2

Billing Mode
Monthly

Bill Delivery Type
E-mail/PDF

Current Balance
-\$ 16.00

Wallet Balance
\$ 0.00

Payment Methods

A user can add a new payment method and manage the existing payment methods for their customer's account.

PAYMENT METHODS

Card Holder

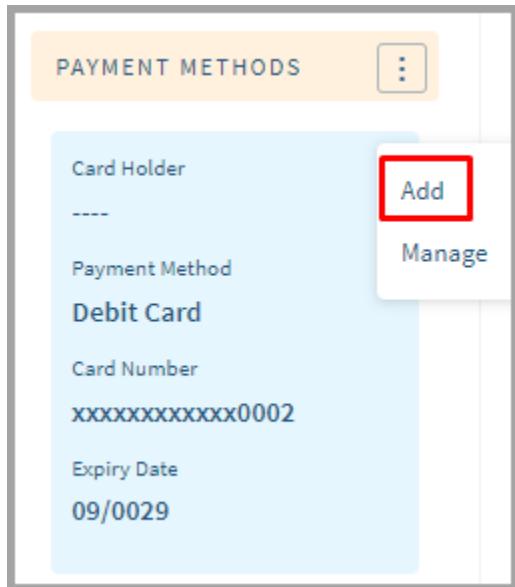
Payment Method
Debit Card

Card Number
xxxxxxxxxxxx0002

Expiry Date
09/0029

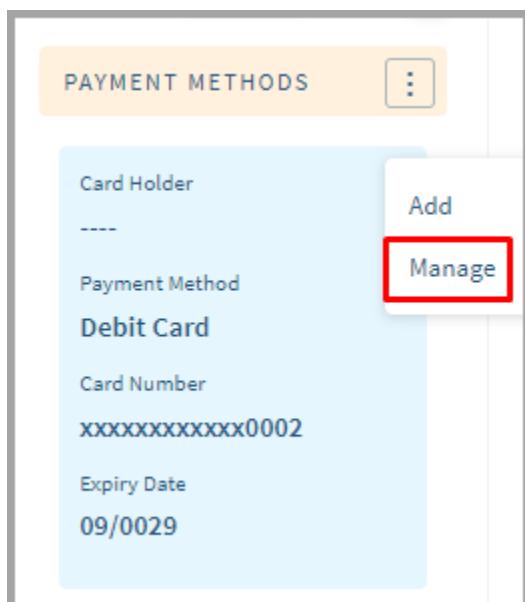
Add a New Payment

To add a new payment method, click the (⋮) icon in the **Payment methods** section and click Add. The user is navigated to the Add Payment Method screen in the Payments section under Customer Management.



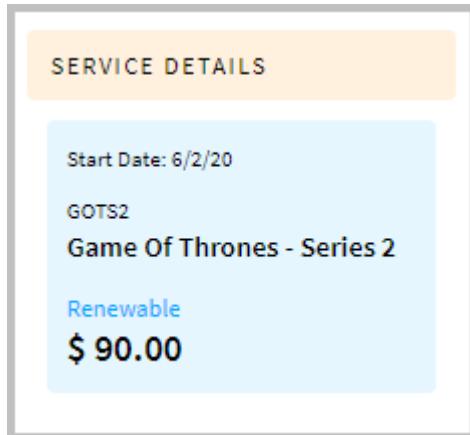
Manage Payments

To manage the new payment method, click the (⋮) icon in the **Payment methods** section, and click Manage. The user is navigated to the Manage Payment Method screen in the Payments section, under Customer Management.



Service Details

This Service Details section displays the service summary details of a user account.

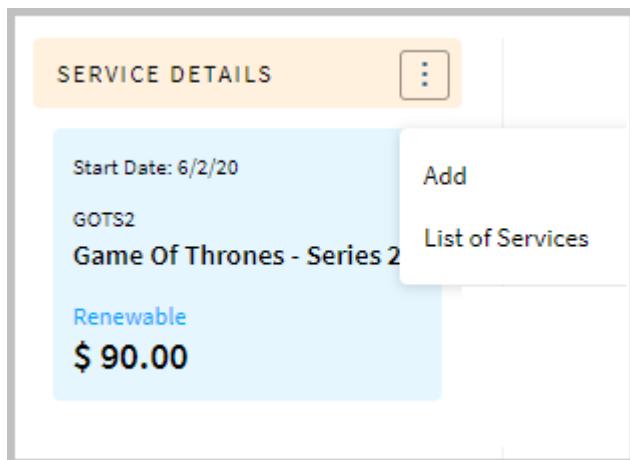


The screenshot shows a summary of a service in a light blue box. At the top left is a yellow header bar with the text "SERVICE DETAILS". Below it, the service details are listed:
Start Date: 6/2/20
GOTS2
Game Of Thrones - Series 2
Renewable
\$ 90.00

Add a New Service

To add a new service, do the following:

- Click the  icon in the **Service Details** section and click **Add**.

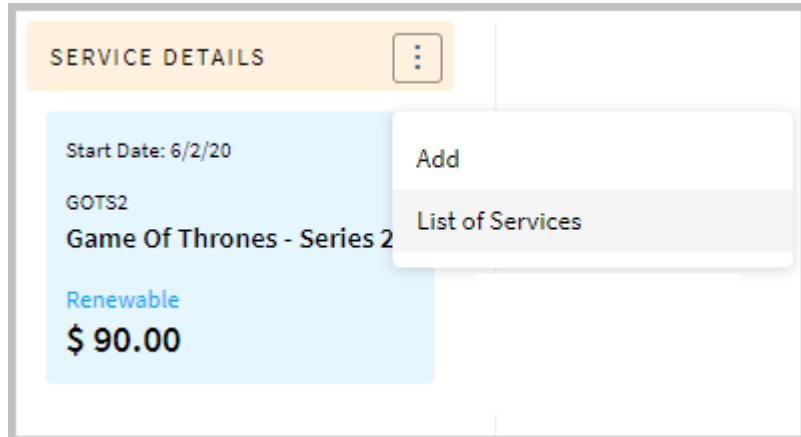


The screenshot shows the same service summary as before, but with a context menu open over the "Game Of Thrones - Series 2" entry. The menu has two options: "Add" and "List of Services".

- The user is navigated to the **New Order** screen in Order Management.
- Select the Sale Channel, Offer Type, and Service Type from the drop-down list.
- Select the Products and Packages monthly/annually/build your plan.
- Click Continue.
- The **New Payment Method** screen appears.
- Enter the payment details and click Continue.

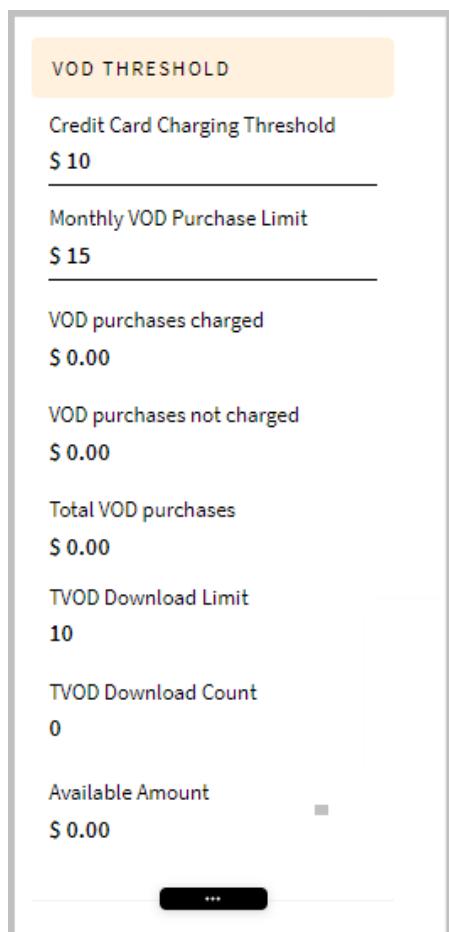
List a Services

To view the list of Products/Packages that are associated with the account, click the  icon in the Service Details section, and click **List of Services**. The user is navigated to the **List of Products / Packages** screen.



VOD Threshold

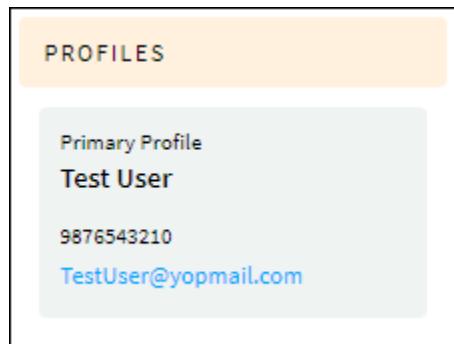
The VOD Threshold section provides the VOD details that are linked to the customer account.



- **Monthly VOD Purchase Limit:** The amount provided for monthly VOD Purchase Limit in System Admin. We can edit this value by clicking on the (edit) icon beside the Monthly VOD Purchase Limit amount.
- **VOD Purchases Charged:** It displays the total charges of active VOD Products, which are charged.
- **VOD Purchases Not Charged:** It displays the pending charges of the VOD Products that are not charged.
- **Total VOD Purchases:** It displays the total VOD charges of the Pending and Active VOD products.
- **TVOD Download Limit:** It displays the total TVOD download limit for the account.
- **TVOD Download Count:** It displays the total TVOD download count allowed for that account.
- **Available Amount:** Total Balance Amount available for the customer.

Profiles - Summary

The Profiles section provides the list of contacts that are added to the customer account.

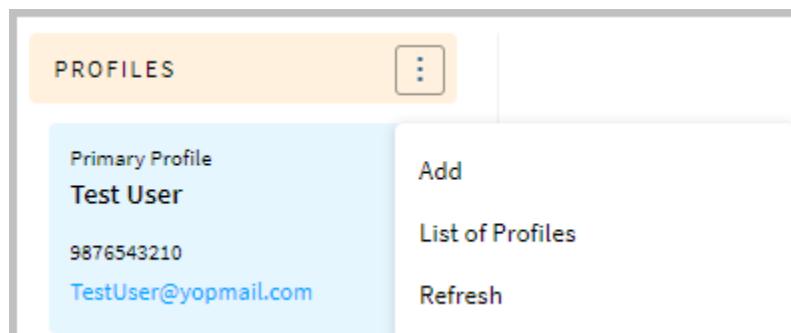


A screenshot of the 'Profiles - Summary' screen. At the top, there is a header bar with the word 'PROFILES'. Below the header, there is a list of profiles. The first profile listed is 'Primary Profile' followed by 'Test User'. Underneath 'Test User', there are two more entries: '9876543210' and 'TestUser@yopmail.com'.

Add a New Profile

To add a new profile, click the (add) icon in the **Profiles** section, and click **Add**. The user will be navigated to the New Profile screen in the Profiles section under Customer Management. Enter all the required details in the New Profile screen and click **Create**.

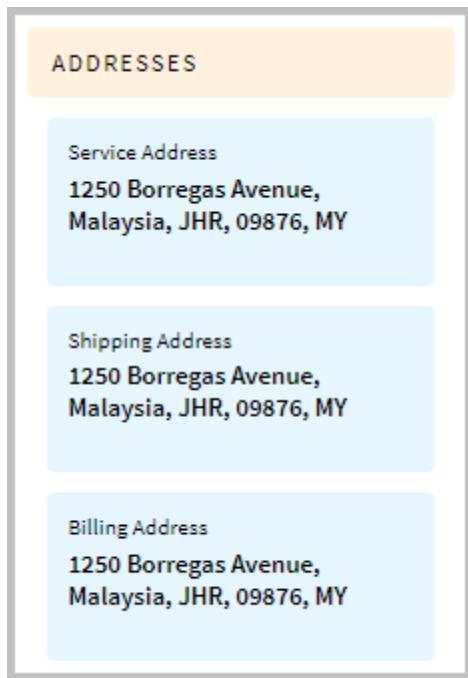
- To view the profiles, click the List of Profiles.



A screenshot of the 'Profiles - Summary' screen. A context menu is open over the 'Test User' profile. The menu items are 'Add', 'List of Profiles', and 'Refresh'. The 'Add' item is highlighted.

Addresses

The Addresses section displays the Service address, Shipping Address, and Billing Address that are added in the Addresses section under Customer Management.



Threshold

The Threshold section provides details like Download Limit, Concurrent session limit, Download Count, No. of Registered Devices per Year, Current Sessions Count, No. of Registered Devices, Credit Card Charging Threshold, and Max. Devices per Year.

- Click the edit icon () to modify/reset the specific parameter.

| THRESHOLD | |
|------------------------------------|----|
| Download Count | 0 |
| Download Limit | 10 |
| No Of Allowed Devices | 5 |
| Concurrent Play Limit | 5 |
| Concurrent session limit | 10 |
| No. of Registered Devices per Year | 0 |
| Current Sessions Count | 0 |
| No. of Registered Devices | 0 |
| Max. Devices per Year | 10 |
| ... | |

Additional Details

The additional details section provides details like External Ban, External Biller, External Product, Sunset Date, Scheduled Disconnection.

ADDITIONAL DETAILS**External Ban**

--

External Biller

--

External Product

--

Sunset Date

--

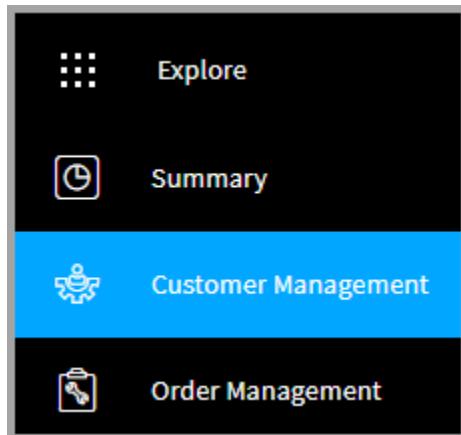
Scheduled Disconnection

--

Customer Management

The Customer Management tab is used to manage the core functions of the customer (account) like managing Profiles, Account status, Addresses, Payment methods, and History.

- Click the **Customer Management** tab to navigate to the Customer Management Home screen.

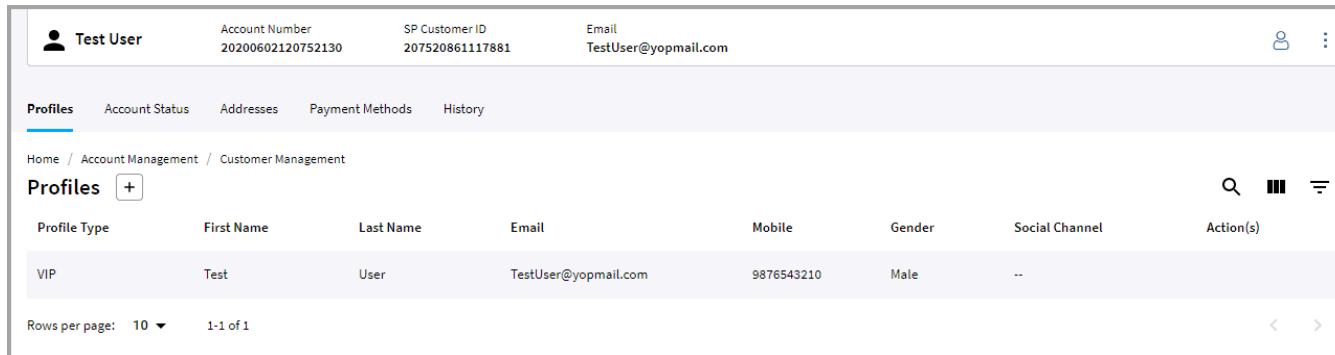


The following are the functionalities that can be provisioned by the user on the Customer Management tab:

- Profiles
- Account Status
- Addresses
- Payment Methods
- History

Profiles

Profiles are used to add/update profiles to an account and perform other actions like resetting the password, mark the profile as primary.



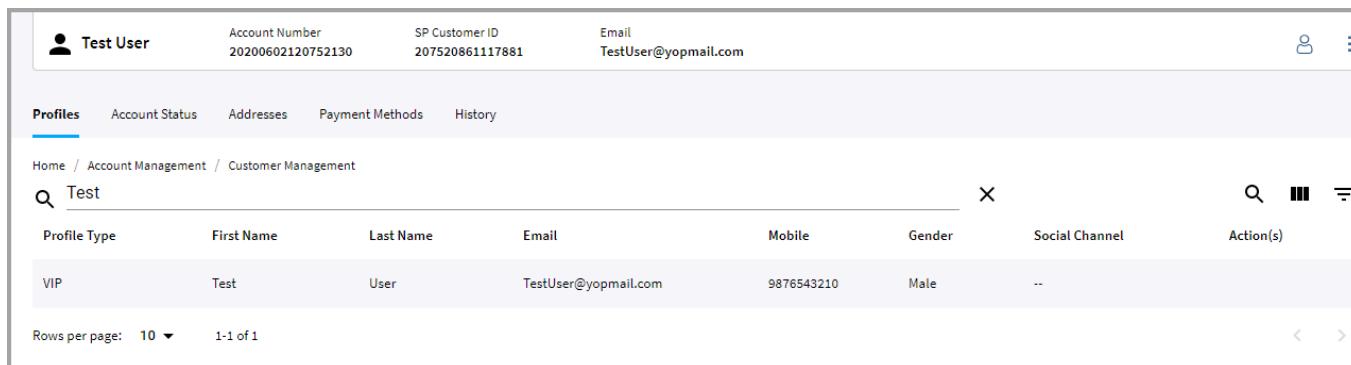
The screenshot shows the Evergent CRM interface. At the top, there's a header with the evergent logo and the title "Evergent CRM_Beacon User training Handout_v1.0". Below the header, the main content area has a title "Profiles". On the left, there's a sidebar with navigation links: "Profiles" (which is underlined in blue), "Account Status", "Addresses", "Payment Methods", and "History". The main content area displays a single profile card for "Test User" with details: Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, there's a list of profiles with columns: Profile Type, First Name, Last Name, Email, Mobile, Gender, Social Channel, and Action(s). One profile is listed: VIP, First Name: Test, Last Name: User, Email: TestUser@yopmail.com, Mobile: 9876543210, Gender: Male, Social Channel: --. At the bottom of the list, there are pagination controls showing "Rows per page: 10" and "1-1 of 1".

Note: Earlier (CCB 2.0), the Profiles were known as Contacts.

Search a Profile

To search a profile, do the following:

- Navigate to the **Profiles** section under the Customer Management tab.
- Click the **Search** icon (🔍).
- In the **Search** field, type the value that you want to search for a profile.

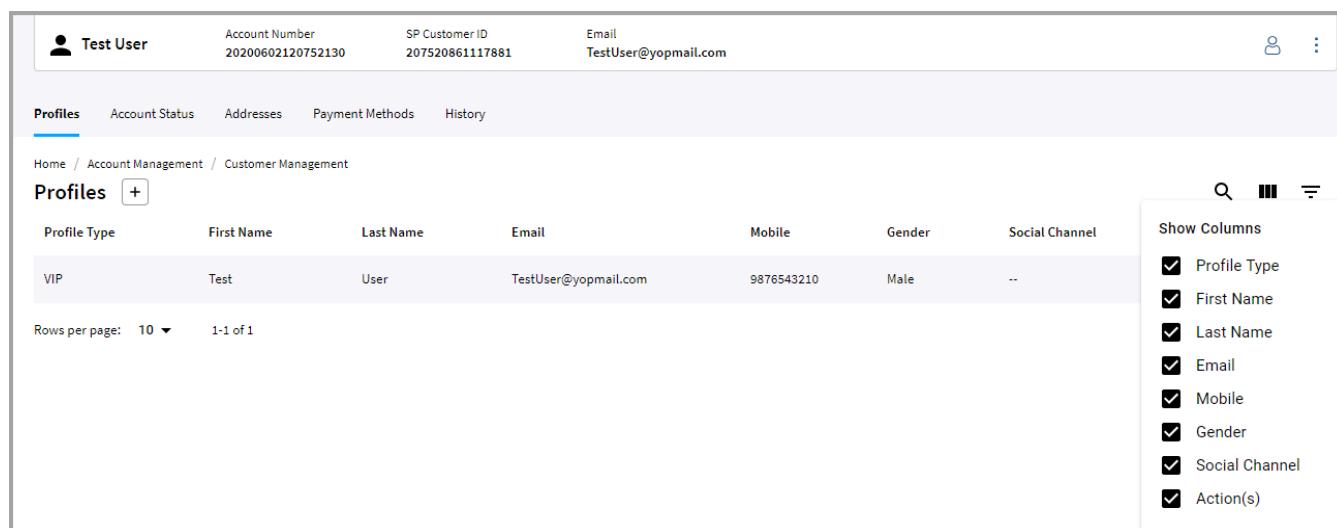


The screenshot shows the same Evergent CRM interface as the previous one, but with a search applied. The search bar at the top contains the text "Test". The list of profiles now shows only one result: VIP, First Name: Test, Last Name: User, Email: TestUser@yopmail.com, Mobile: 9876543210, Gender: Male, Social Channel: --. The rest of the interface, including the sidebar and pagination, remains the same.

Select Column Headings for Profiles

To view the column headings for the Profiles, do the following:

- Navigate to the **Profiles** section under the Customer Management tab.
- Click the **View Columns** icon (☰).
- In the **Show Columns** list, select the checkboxes that you want to view the Profiles Column Headings.

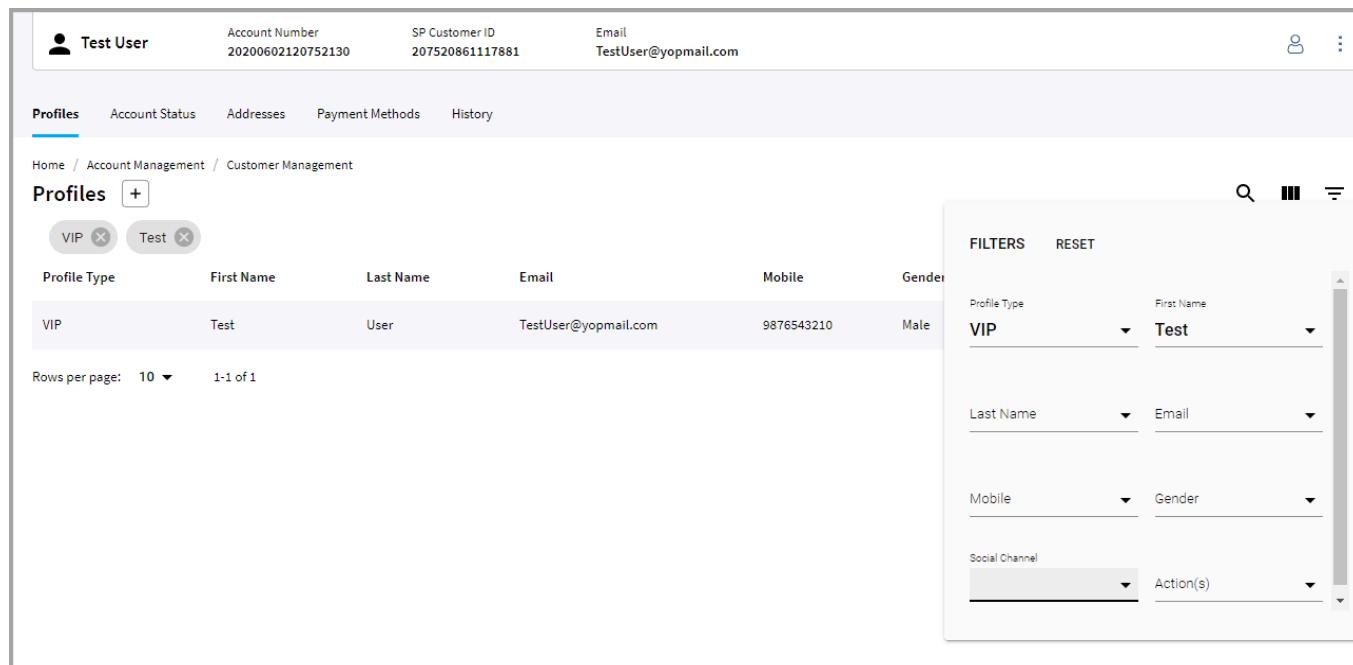


The screenshot shows the Evergent CRM interface. At the top, there's a header with the evergent logo and the title "Evergent CRM_Beacon User training Handout_v1.0". Below the header, a user profile for "Test User" is displayed with details: Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. The main content area is titled "Profiles" and shows a table of profiles. The table has columns: Profile Type, First Name, Last Name, Email, Mobile, Gender, and Social Channel. One row is visible: VIP, Test, User, TestUser@yopmail.com, 9876543210, Male, and --. Below the table, it says "Rows per page: 10" and "1-1 of 1". To the right of the table is a "Show Columns" sidebar with checkboxes for all columns. A search bar and filter icons are also present.

Filtering Profiles

To filter the profiles, do the following:

- Navigate to the **Profiles** section under the Customer Management tab.
- Click the **Filter Table** icon ().
- Select the criteria that you want to filter and view the specific profiles.
- To clear the filter table, click the **RESET** button.

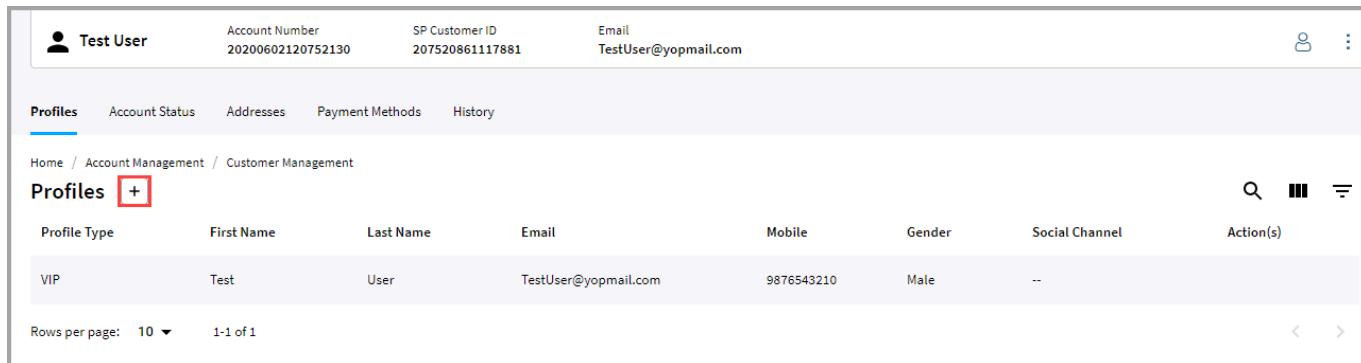


This screenshot shows the same CRM interface as above, but with filters applied. In the "Profiles" section, there are two filter buttons: "VIP" and "Test". To the right, a detailed filter panel is open with sections for "FILTERS" and "RESET". The "FILTERS" section contains dropdowns for Profile Type (set to VIP), First Name (set to Test), Last Name, Email, Mobile, Gender, Social Channel, and Action(s). The "RESET" button is located at the top right of the filter panel. The rest of the interface is identical to the first screenshot, showing the single profile for "Test User".

Adding a Profile

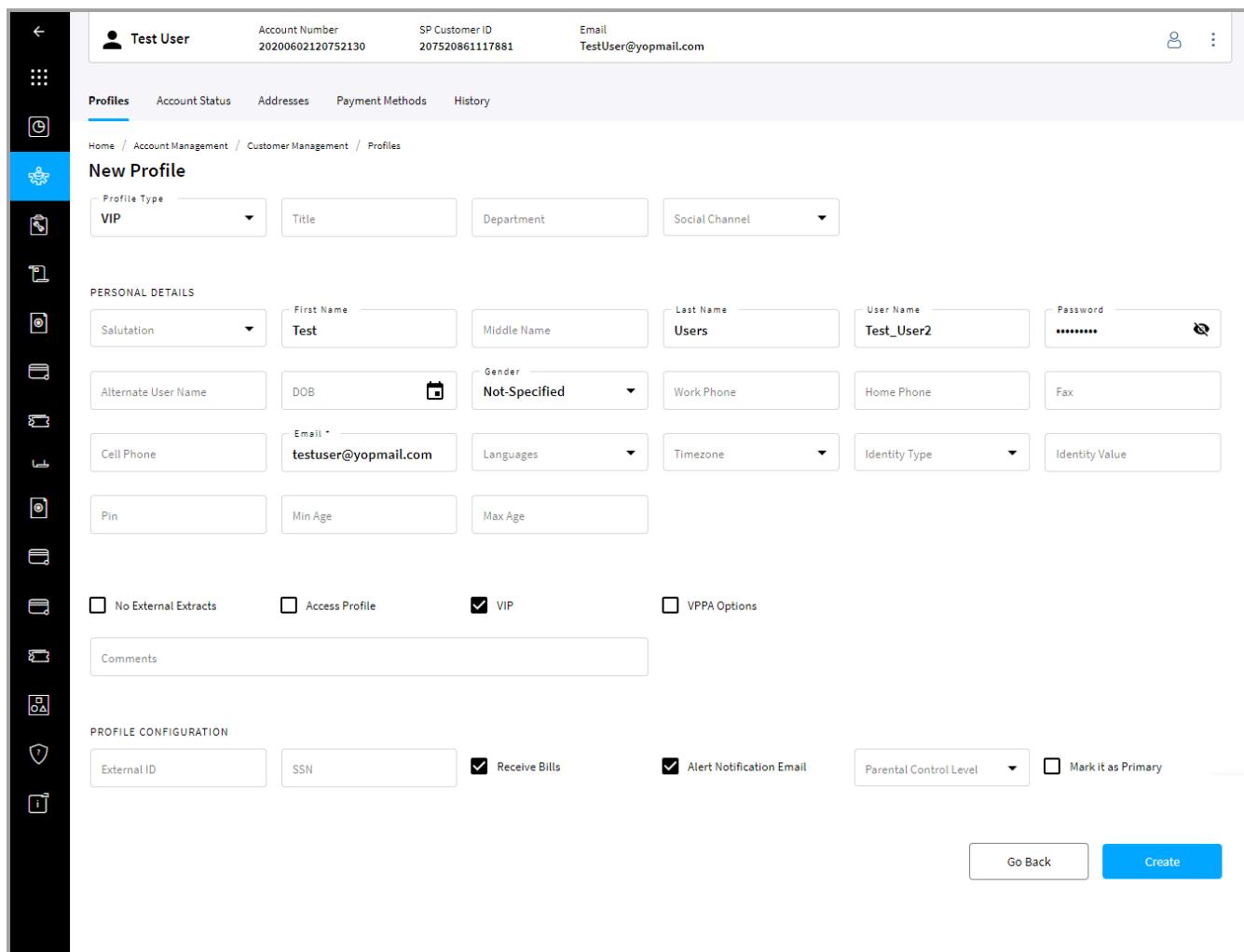
To add a new profile, do the following:

- Navigate to the **Profiles** section under the Customer Management tab.
- Click the Add (+) icon to add a new profile.



The screenshot shows the 'Profiles' section of the Evergent CRM interface. At the top, there is a header with account details: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below the header is a navigation bar with tabs: Profiles (which is selected), Account Status, Addresses, Payment Methods, and History. Underneath the navigation bar, the breadcrumb path is Home / Account Management / Customer Management / Profiles. A red box highlights the 'Add' button (+) in the top-left corner of the main content area. The main content area displays a table of profiles with columns: Profile Type, First Name, Last Name, Email, Mobile, Gender, Social Channel, and Action(s). One row is visible: VIP, Test, User, TestUser@yopmail.com, 9876543210, Male, --. At the bottom left, it says 'Rows per page: 10' and '1-1 of 1'. On the right side of the table, there are search, filter, and sort icons.

- On the **New Profile** screen, fill in the mandatory and required details of new contact information.



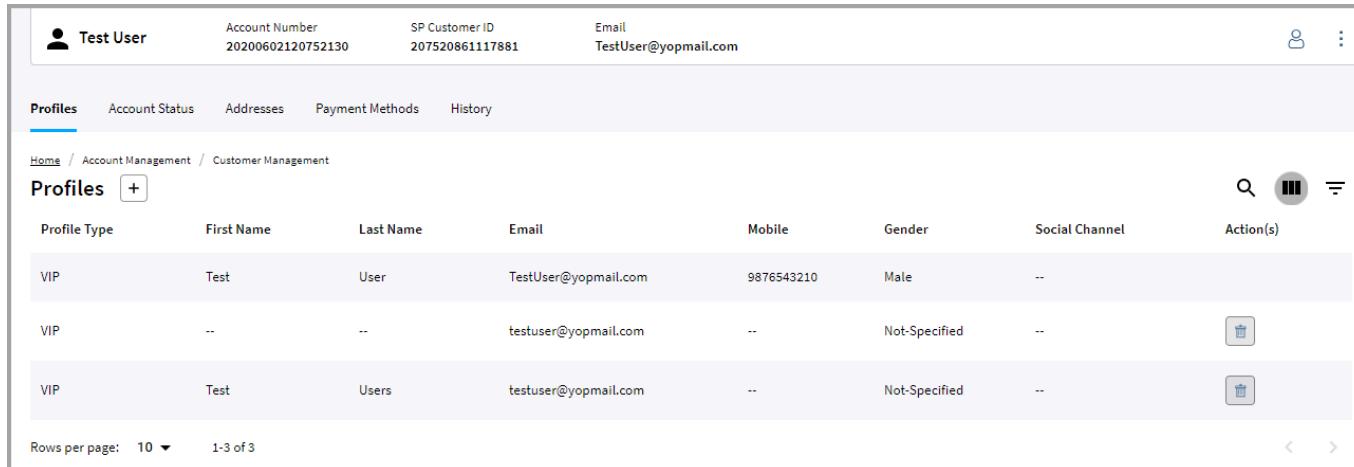
The screenshot shows the 'New Profile' creation screen. On the left, there is a vertical sidebar with various icons. The main form has a header 'New Profile' with tabs: Profiles (selected), Account Status, Addresses, Payment Methods, and History. The breadcrumb path is Home / Account Management / Customer Management / Profiles / New Profile. The form fields include:

- Profile Type:** A dropdown menu set to 'VIP'.
- Personal Details:** Fields for Salutation (dropdown), First Name (Test), Middle Name, Last Name (Users), User Name (Test_User2), and Password (*****).
- Other Details:** Fields for Alternate User Name, DOB, Gender (Not-Specified), Work Phone, Home Phone, Fax, Cell Phone, Email (testuser@yopmail.com), Languages, Timezone, Identity Type, and Identity Value.
- Checkboxes:** No External Extracts, Access Profile, VIP (checked), VPPA Options.
- Comments:** A text input field for comments.
- Profile Configuration:** Fields for External ID, SSN, Receive Bills (checked), Alert Notification Email (checked), Parental Control Level (dropdown), and Mark it as Primary (checkbox).

 At the bottom right are 'Go Back' and 'Create' buttons.

- Click the Password label to edit and provide a password for the contact.
- Click the VIP checkbox if you want to indicate the contact as VIP contact.
- Click the Receive Bills checkbox if the contact can receive bills to the email id on bill delivery.

- Check the Alert Notification Email checkbox if you want to alert the customer with notification emails.
- Click the Create button to save the new contact else click the Go Back button to discard the changes.
- Click the Create button to display the new contact in the Contacts section screen as shown below:



The screenshot shows the 'Profiles' section of the Evergent CRM. At the top, there is a header with fields for 'Account Number' (20200602120752130), 'SP Customer ID' (207520861117881), and 'Email' (TestUser@yopmail.com). Below the header, there are tabs for 'Profiles', 'Account Status', 'Addresses', 'Payment Methods', and 'History'. The 'Profiles' tab is selected. The main area displays a table of contacts with columns: Profile Type, First Name, Last Name, Email, Mobile, Gender, Social Channel, and Action(s). There are three contacts listed: 1. VIP, Test, User, TestUser@yopmail.com, 9876543210, Male, --. 2. VIP, --, --, testuser@yopmail.com, --, Not-Specified, --. 3. VIP, Test, Users, testuser@yopmail.com, --, Not-Specified, --. Each contact has a delete icon in the Action(s) column. At the bottom left, it says 'Rows per page: 10' and '1-3 of 3'. At the bottom right, there are navigation icons.

- You can add multiple contacts to an account.

Modifying a Profile

- Navigate to the Profiles section under the Customer Management tab.
- Click the profile that you want to modify.
- The Manage Profile screen appears.
- Make the necessary changes to the required fields.
- Click the Update button to save the changes else, click the Go Back button to discard the changes.

Reset Password

- Navigate to the Profiles section under the Customer Management tab.
- To reset the password of a profile, click the Reset Password button.
- Enter your password in the Password field and click the Reset button.
- The reset notification email will be sent to the customer on this email id to reset the password.

Reset Password

X

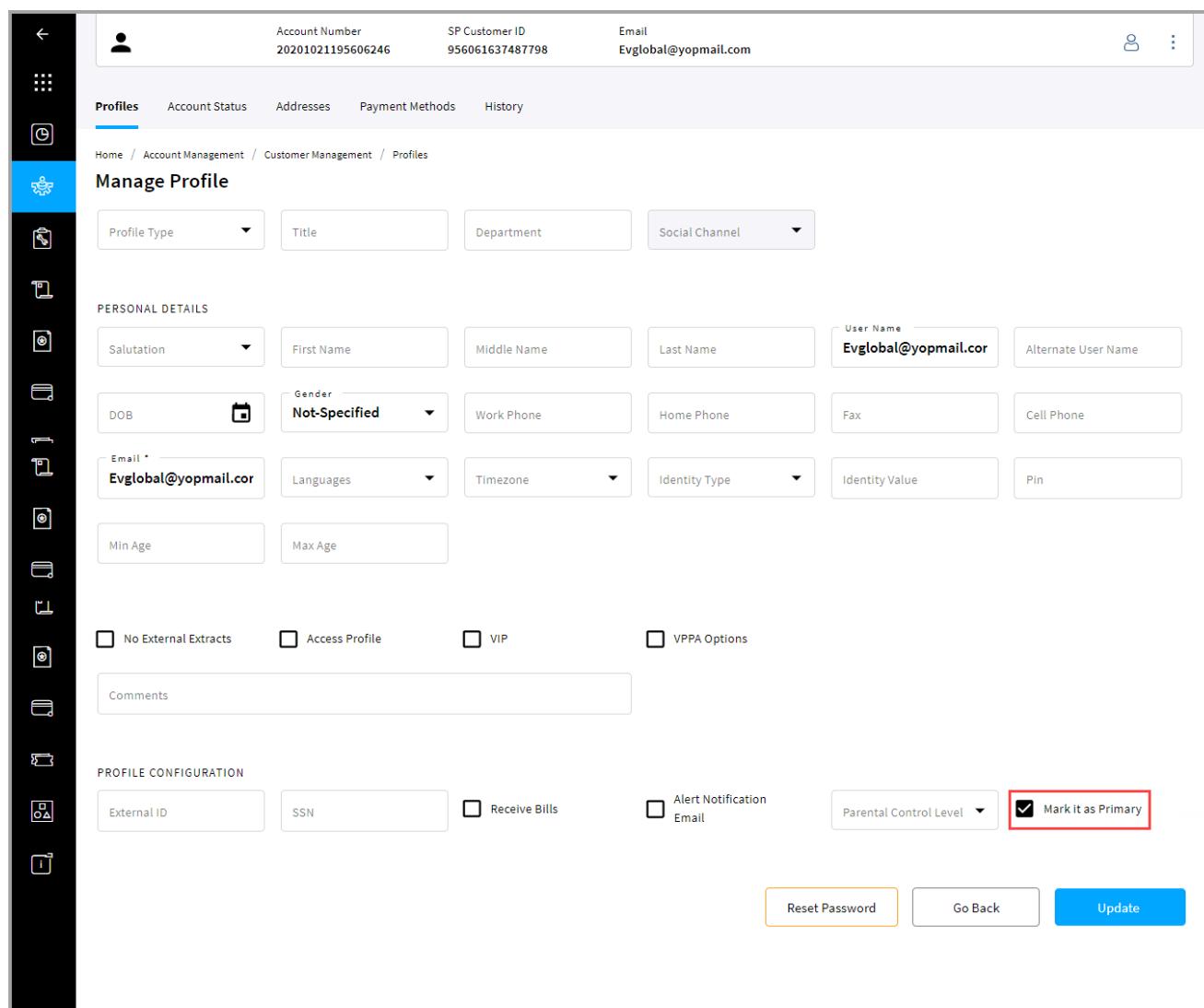
Email *

Password * (8)

Reset Go Back

Make a Profile as a Primary Contact

- Navigate to the **Profiles** section under the Customer Management tab.
- Click the profile that you want to make it as a primary contact.
- In the Profile Configuration section under the **Manage Profile** screen, click **Mark it as Primary**.

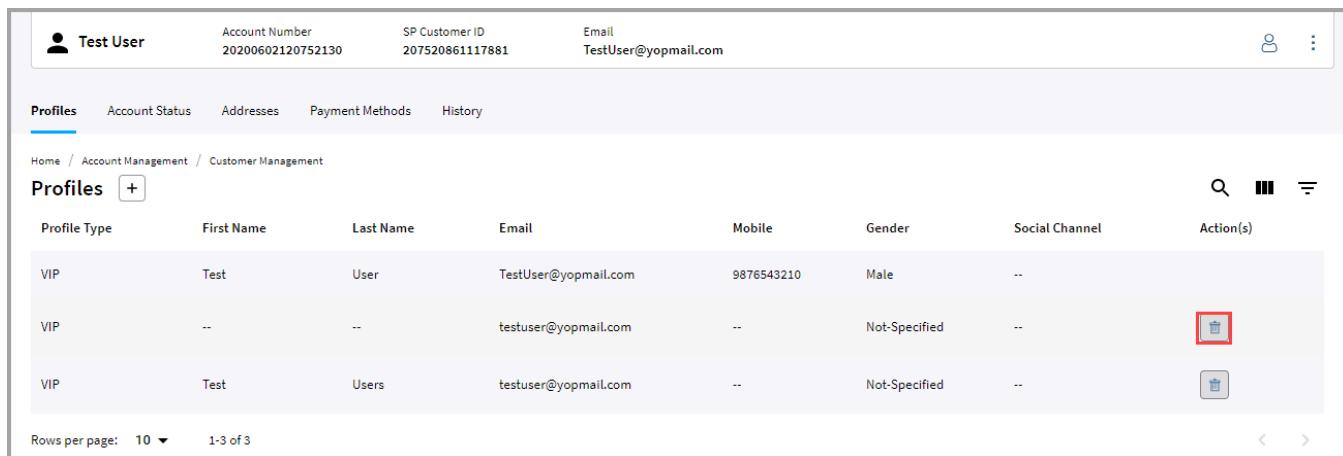


The screenshot shows the 'Manage Profile' section of the Evergent CRM. At the top, there are tabs for Profiles, Account Status, Addresses, Payment Methods, and History. Below the tabs, a breadcrumb navigation shows Home / Account Management / Customer Management / Profiles. The main area is titled 'Manage Profile'. It includes fields for Profile Type, Title, Department, and Social Channel. Under 'PERSONAL DETAILS', there are fields for Salutation, First Name, Middle Name, Last Name, User Name (highlighted in red), Alternate User Name, DOB, Gender (Not-Specified), Work Phone, Home Phone, Fax, Cell Phone, Email (highlighted in red), Languages, Timezone, Identity Type, Identity Value, Min Age, and Max Age. There are also checkboxes for No External Extracts, Access Profile, VIP, and VPPA Options. A 'Comments' text area is present. Under 'PROFILE CONFIGURATION', there are fields for External ID, SSN, Receive Bills, Alert Notification Email, Parental Control Level, and a checkbox for 'Mark it as Primary' (highlighted in red). At the bottom, there are buttons for Reset Password, Go Back, and Update.

- The selected profile will be saved as Primary contact of the customer. The previous existing Primary contact will be changed to secondary contact of the customer.

Remove a Profile from the Account

- Navigate to the **Profiles** section under the Customer Management tab.



The screenshot shows the 'Profiles' section of the Evergent CRM interface. It displays three contact entries:

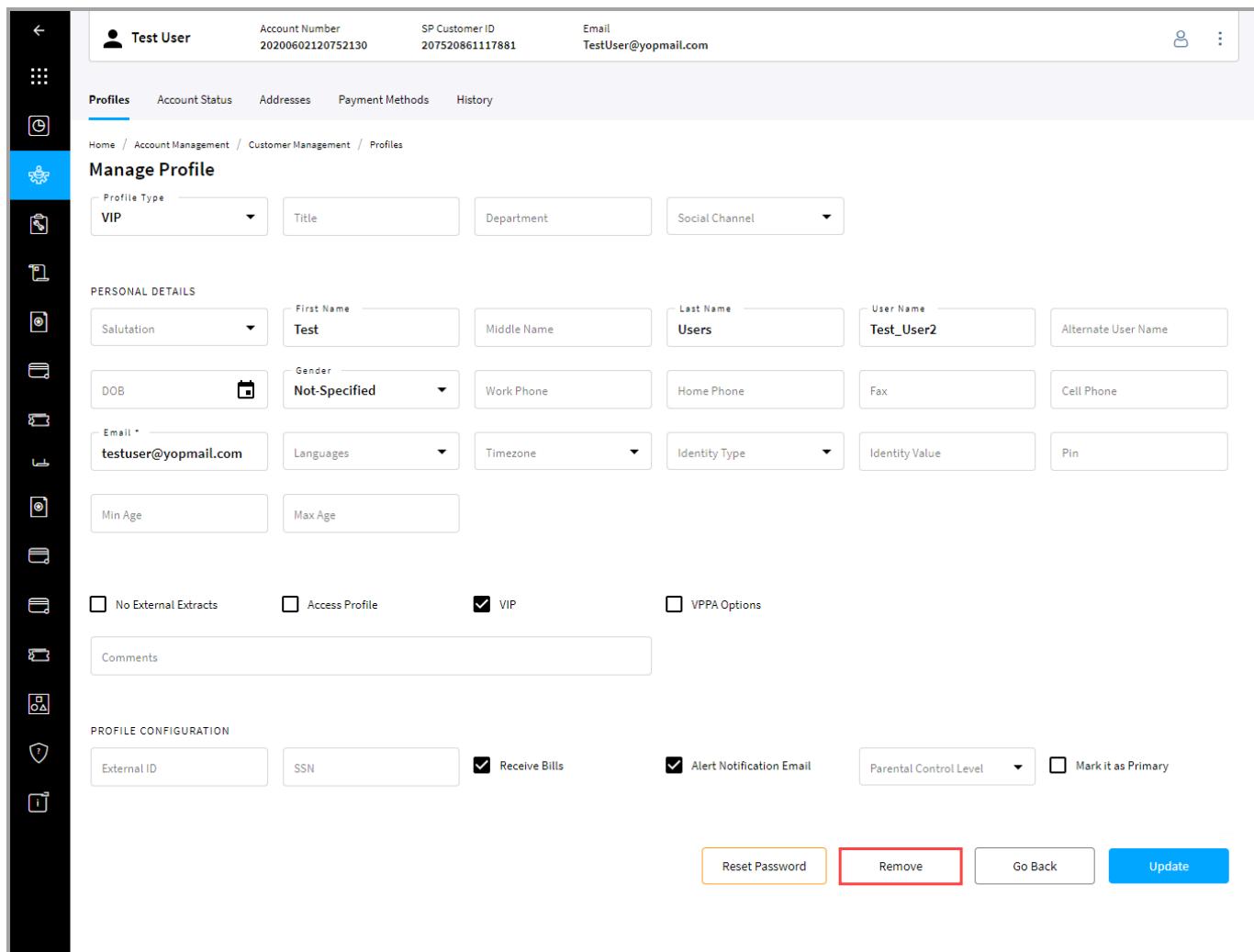
| Profile Type | First Name | Last Name | Email | Mobile | Gender | Social Channel | Action(s) |
|--------------|------------|-----------|----------------------|------------|---------------|----------------|-----------|
| VIP | Test | User | TestUser@yopmail.com | 9876543210 | Male | -- | |
| VIP | -- | -- | testuser@yopmail.com | -- | Not-Specified | -- | |
| VIP | Test | Users | testuser@yopmail.com | -- | Not-Specified | -- | |

Rows per page: 10 ▾ 1-3 of 3

- Click the Delete () icon corresponding to the contact to remove from the list.

Or

- A user can also delete the account from the **Manage Profile** screen.
- Click the account, you want to delete.



The screenshot shows the 'Manage Profile' screen for a VIP profile. The profile details include:

- Profile Type: VIP
- Personal Details: First Name: Test, Middle Name: , Last Name: Users, User Name: Test_User2, Alternate User Name: , DOB: , Gender: Not-Specified, Work Phone: , Home Phone: , Fax: , Cell Phone: , Email: testuser@yopmail.com, Languages: , Timezone: , Identity Type: , Identity Value: , Min Age: , Max Age:
- Checkboxes: No External Extracts (unchecked), Access Profile (unchecked), VIP (checked), VPPO Options (unchecked)
- Comments:
- Profile Configuration: External ID: , SSN: , Receive Bills (checked), Alert Notification Email (checked), Parental Control Level: , Mark it as Primary (unchecked)

Buttons at the bottom: Reset Password, Remove (highlighted with a red box), Go Back, Update

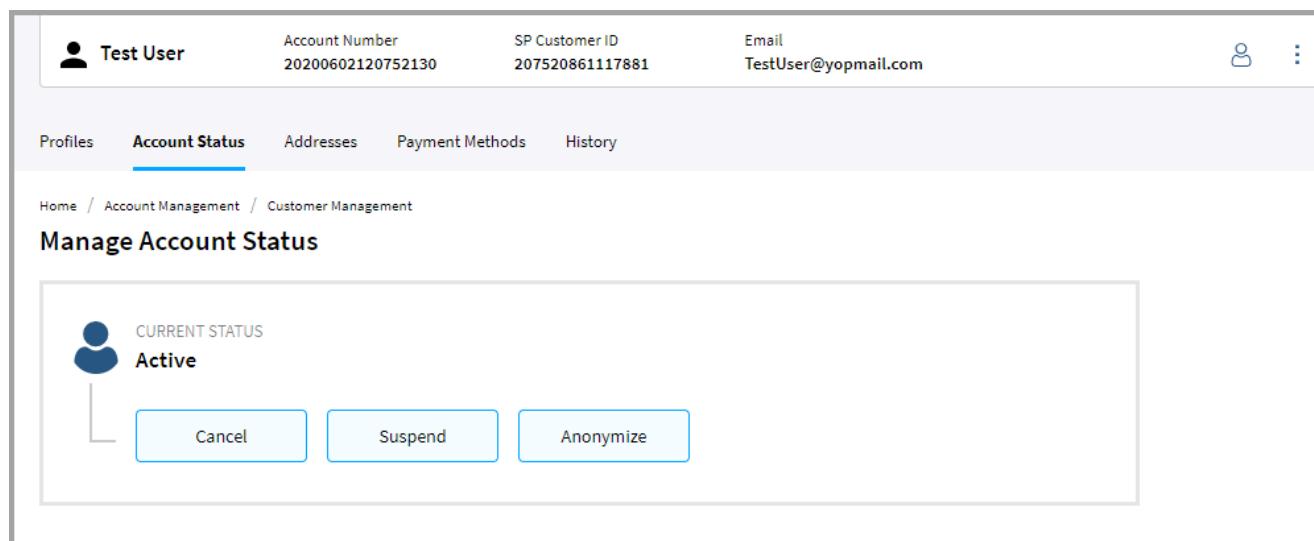
- The Manage Profile screen is displayed. Click the **Remove** button at the bottom of the screen.
- The selected contact will be removed from the list.

Note:

You will NOT be allowed to remove the primary contact from the profiles list that is labeled as Primary in the section on the **Profiles** screen.

Account Status

The Account status is used to change the account status of a customer from Active status to Cancel/Suspend/Anonymize.



The screenshot shows the 'Manage Account Status' screen. At the top, there is a header with a user profile icon, the name 'Test User', and account details: Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below the header is a navigation bar with tabs: Profiles, **Account Status**, Addresses, Payment Methods, and History. The 'Account Status' tab is currently selected. Underneath the navigation bar, the breadcrumb trail shows Home / Account Management / Customer Management. The main content area is titled 'Manage Account Status'. It displays a 'CURRENT STATUS' section with an icon of a person and the word 'Active'. Below this are three buttons: 'Cancel', 'Suspend', and 'Anonymize'.

Managing Account Status

Cancelling an Account

To cancel an account, do the following:

- Click the **Account Status** hyperlink under the Customer Management tab.
- The Manage Account Status screen appears.
- Click the **Cancel** button to cancel the account.
- Select the reason for canceling the account from the **Select Reason** drop-down list.
- Select the **Service End Date** and enter Comments in the comments field.
- Click **Yes** for canceling the account or else click **No**.

Are you sure ?

Do you want to Cancel the account.

Select Reason * Account Status Change ▾

Service End Date * 11/02/2020

Comments *
Cancel Account

Suspending an Account

To temporary suspend all the subscriptions of an account, do the following:

- Click the **Account Status** hyperlink under the Customer Management tab.
- The **Manage Account Status** screen appears.
- Click the **Suspend** button to suspend the account.
- Select the reason for suspending the account from the **Select Reason** drop-down list.
- Select the Suspend Start Date and Suspend End Date.
- Enter additional comments in the **Comments** box.
- Click **Yes** to temporarily pause the account or else click **No**.

Are you sure ?

Do you want to Suspend the account.

! Subscription will be temporarily paused and limited access for account.

Select Reason *

Suspend Start Date *

Suspend End Date *

Comments *

Yes No

Reactivating the Account

To reactivate the suspended account, do the following:

- On the Manage Account Status screen, click the **Reactivate** button.
- Select the reason for reactivating the account from the **Select Reason** drop-down list.
- Select the **Service Start Date**.
- Enter additional comments in the **Comments** box.

Profiles **Account Status** Addresses Payment Methods History

Home / Account Management / Customer Management

Manage Account Status

 CURRENT STATUS
Pending Suspend

! All Subscription temporarily paused and limited access for account.

[Reactivate](#) [Anonymize](#)

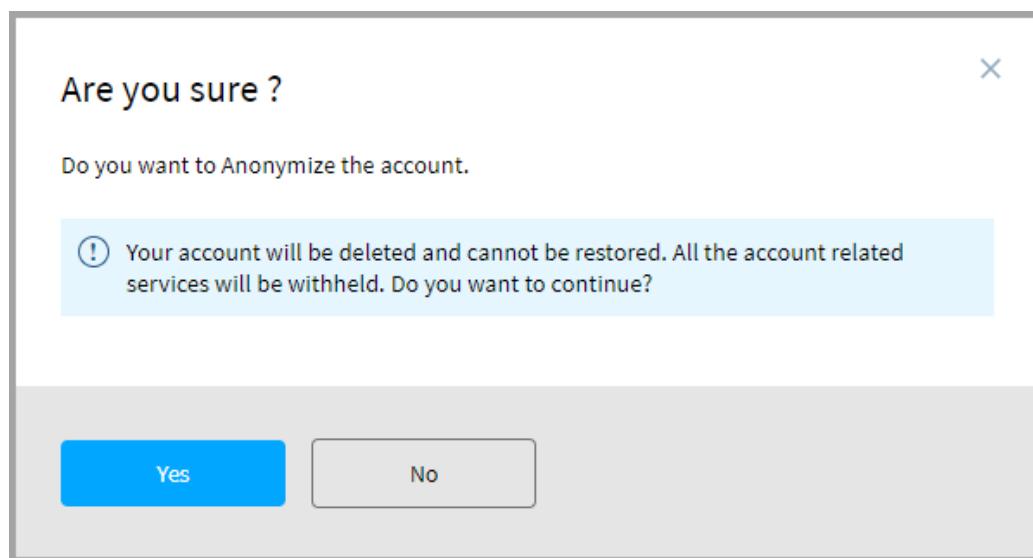
Anonymizing User Account

Anonymization is a data managing method that removes the accounts and account-related services will be withheld.

Warning: When you anonymize a user account, the account will be deleted, and the complete data will be erased and cannot be restored.

To anonymize an account, do the following:

- Click the **Account Status** hyperlink under the Customer Management tab.
- The Manage Account Status screen appears.
- Click the **Anonymize** button to delete the account related services.
- Click **Yes** to delete the account or else click **No**.



Viewing Status History

To view the status history, do the following:

- Click the **Account Status** hyperlink under the Customer Management tab.
- The **Manage Account Status** screen is displayed as shown below.

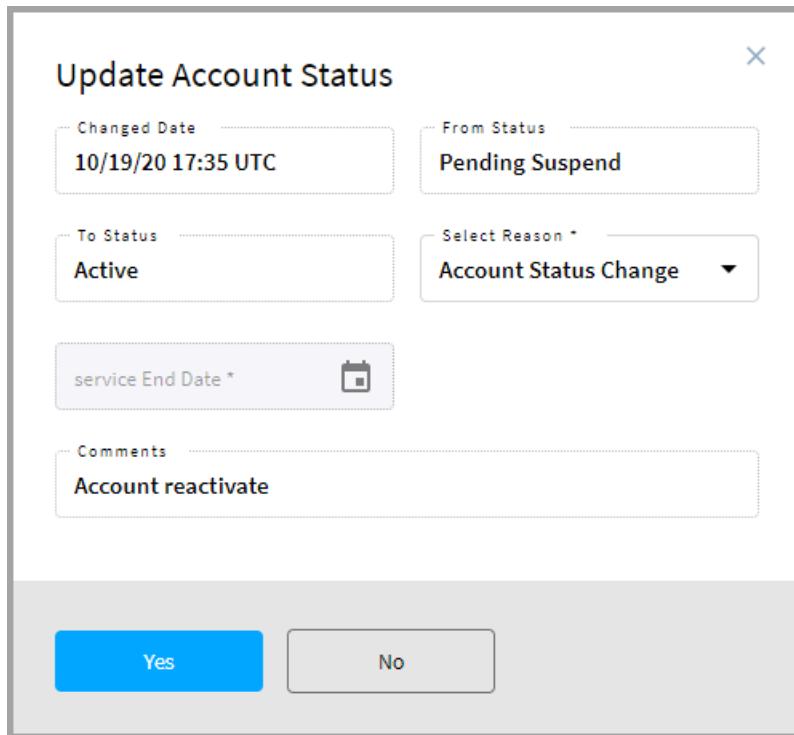
| Changed Date | From Status | To Status | Reason Code | Service Start Date | Service End Date | Suspend Start Date | Suspend End Date | Modified By | Comments | Action(s) |
|--------------------|-----------------|-----------------|-----------------------|--------------------|------------------|--------------------|------------------|---------------|---|-----------|
| 10/19/20 17:35 UTC | Pending Suspend | Active | Account Status Change | -- | -- | -- | -- | Evergent User | Account reactivate | |
| 10/19/20 17:22 UTC | Active | Pending Suspend | Account Status Change | -- | -- | -- | -- | Evergent User | Account will be suspended on 20-10-2020 | |
| 6/9/20 15:39 UTC | Pending Suspend | Active | Account Status Change | -- | -- | -- | -- | Evergent User | Test | |
| 6/9/20 06:12 UTC | Active | Pending Suspend | Account Status Change | -- | -- | -- | -- | Evergent User | Account will be suspended on 10-06-2020 | |

- The status history is displayed at the bottom of the screen if an account status changes occur.

Updating the Account Status

To update the status of an account, do the following:

- In the Status History section, click the Update (edit) icon.
- Make the required changes and click **Yes**.



The screenshot shows the 'Update Account Status' dialog box. It contains the following fields:

- Changed Date: 10/19/20 17:35 UTC
- From Status: Pending Suspend
- To Status: Active
- Select Reason: Account Status Change
- Comments: Account reactivate
- Buttons: Yes (blue), No (grey)

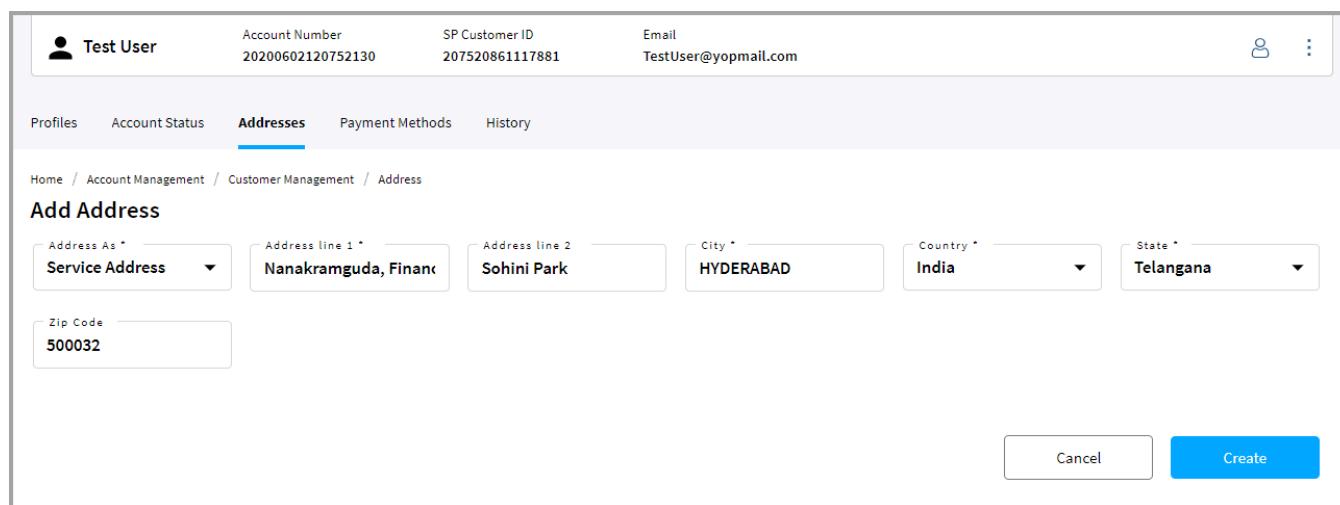
Addresses

The Address section is used to define the different types of addresses related to the user account like service address, billing address, and shipping address.

Adding an Address

To add a new address, do the following:

- Click the **Addresses** hyperlink under the Customer Management tab.
- The **Add Address** screen is displayed, as shown below.



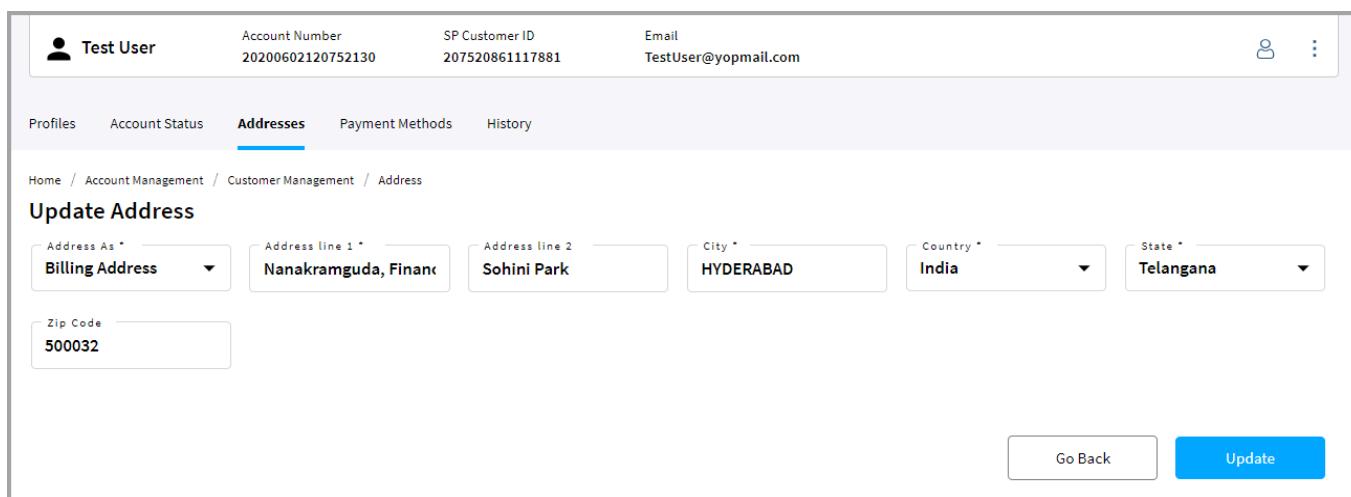
The screenshot shows the Evergent CRM interface for managing customer addresses. At the top, there's a header with the Evergent logo and navigation links for Account Number (20200602120752130), SP Customer ID (207520861117881), and Email (TestUser@yopmail.com). Below the header, a navigation bar includes Profiles, Account Status, Addresses (which is underlined in blue), Payment Methods, and History. A breadcrumb trail shows Home / Account Management / Customer Management / Address. The main section is titled 'Add Address'. It contains several input fields: 'Address As' dropdown set to 'Service Address', 'Address line 1' input field containing 'Nanakramguda, Financ', 'Address line 2' input field containing 'Sohini Park', 'City' dropdown set to 'HYDERABAD', 'Country' dropdown set to 'India', 'State' dropdown set to 'Telangana', and a 'Zip Code' input field containing '500032'. At the bottom right are 'Cancel' and 'Create' buttons.

- Click **Address As** to select the address type as Service Address, Shipping Address, or Billing Address from the available drop-down list.
- Enter the address details in the **Address Line 1**, and **Address Line 2** fields.
- Select a city from the available the **City** list.
- Select a country from the available the **Country** list.
- Select a state from the available the **State** list.
- Enter the **Zip Code**.
- Click the **Create** button to save a new address.

Updating an Address

To update an existing address, do the following:

- Click the **Addresses** hyperlink under the Customer Management tab.
- Select and click the address that you want to modify.
- The **Update Address** screen appears, as shown below.
- Modify the required details and click **Update**.



The screenshot shows the 'Addresses' tab selected in the Evergent CRM interface. At the top, there are fields for 'Account Number' (20200602120752130), 'SP Customer ID' (207520861117881), and 'Email' (TestUser@yopmail.com). Below the tabs, the breadcrumb navigation shows Home / Account Management / Customer Management / Address. The main section is titled 'Update Address' and contains fields for 'Address As' (Billing Address), 'Address line 1' (Nanakramguda, Financ), 'Address line 2' (Sohini Park), 'City' (HYDERABAD), 'Country' (India), 'State' (Telangana), and 'Zip Code' (500032). At the bottom right are 'Go Back' and 'Update' buttons.

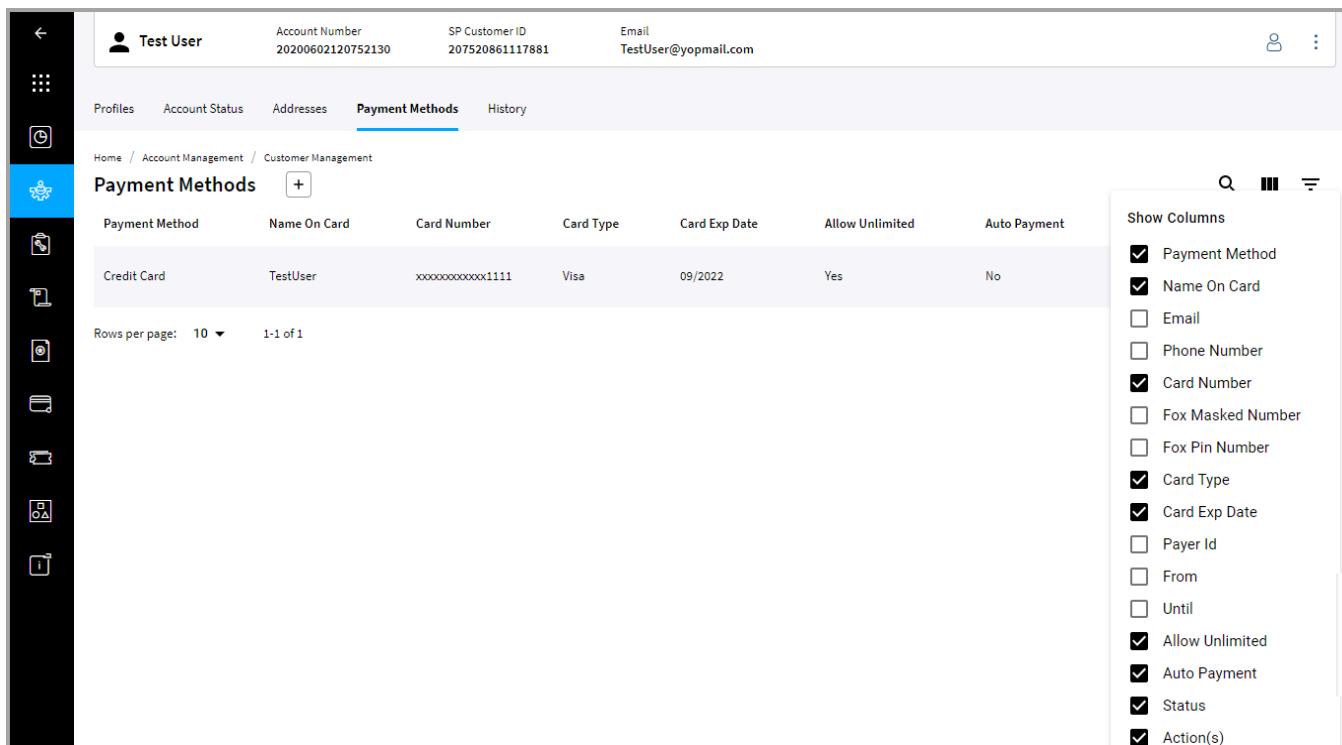
Payment Methods

The Payment Methods section is used to add/modify/inactive a payment method for the customer account.

Selection of Column Headings for Payment Methods

To select the column headings for the payment method that you want to view, do the following:

- Click the **Payment Methods** hyperlink under the Customer Management tab.
- Click the **View Columns** icon (☰).
- In the **Show Columns** list, select the checkboxes that you want to view the Payment Methods column headings.



| Payment Method | Name On Card | Card Number | Card Type | Card Exp Date | Allow Unlimited | Auto Payment |
|----------------|--------------|----------------|-----------|---------------|-----------------|--------------|
| Credit Card | TestUser | xxxxxxxxxx1111 | Visa | 09/2022 | Yes | No |

Rows per page: 10 ▾ 1-1 of 1

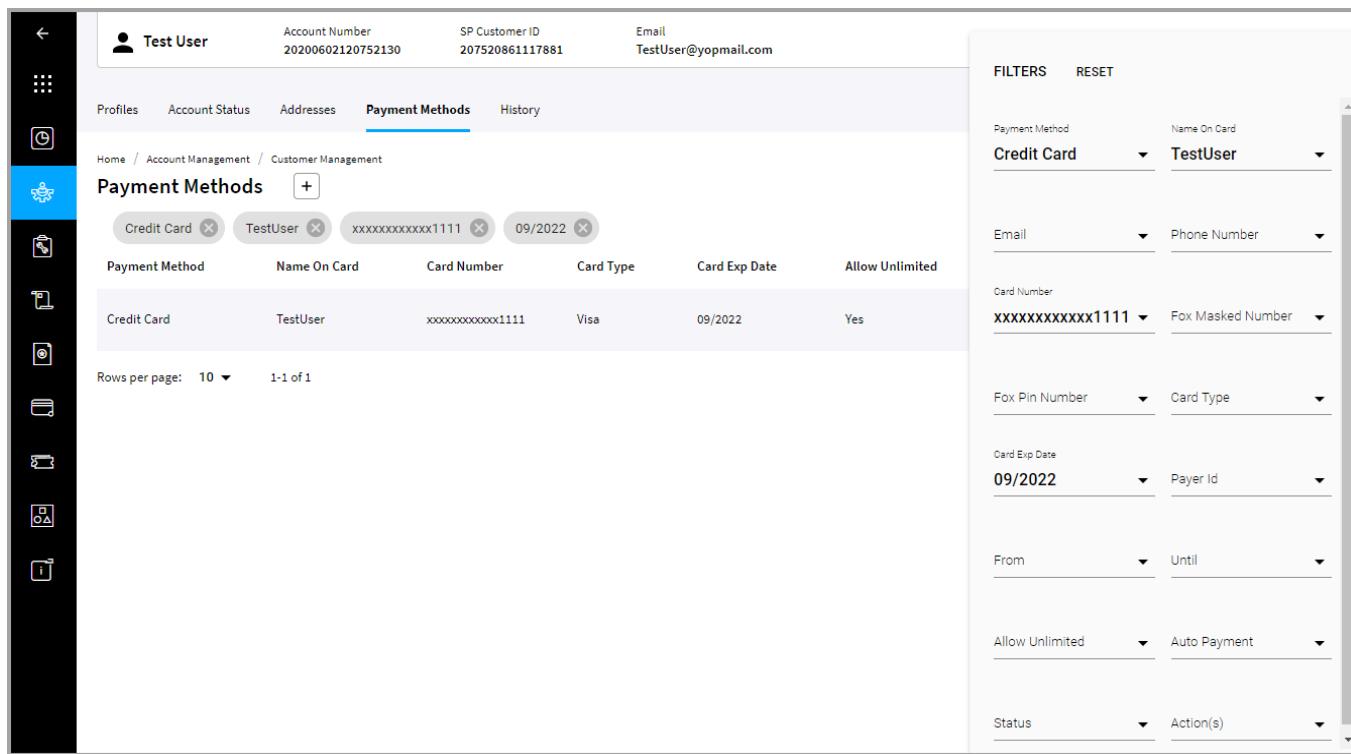
Show Columns

- Payment Method
- Name On Card
- Email
- Phone Number
- Card Number
- Fox Masked Number
- Fox Pin Number
- Card Type
- Card Exp Date
- Payer Id
- From
- Until
- Allow Unlimited
- Auto Payment
- Status
- Action(s)

Filtering Payment Methods

To filter the payment method, do the following:

- Click the **Payment Methods** hyperlink under the Customer Management tab.
- Click the **Filter Table** icon (FILTER).
- Select the criteria that you want to filter and view the specific payment method.
- To clear the filter table, click the **RESET** button.

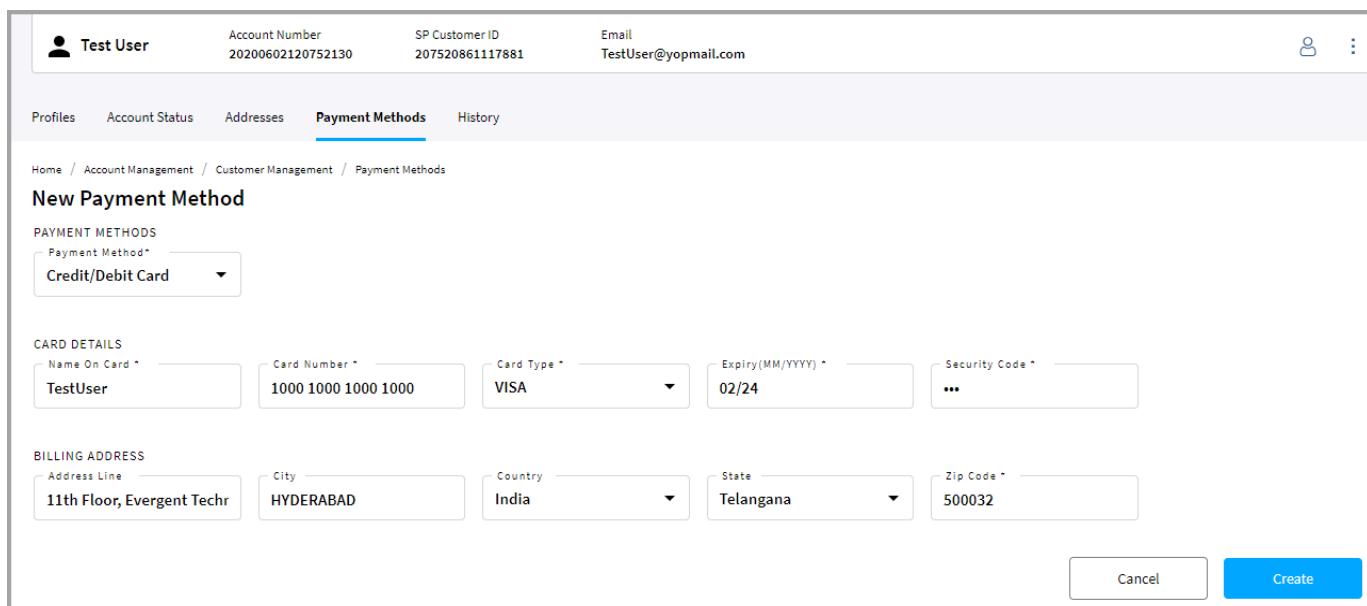


The screenshot shows the Evergent CRM interface for managing payment methods. At the top, it displays the user's account information: Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, the 'Payment Methods' tab is selected. The main area shows a table of payment methods, with one row highlighted for a Credit Card named 'TestUser' with card number 'xxxxxx1111'. To the right, there is a sidebar titled 'FILTERS' with dropdown menus for Payment Method ('Credit Card'), Name On Card ('TestUser'), and other fields like Card Number, Exp Date, and Type.

Adding a Payment Method

For adding a new payment method, do the following:

- Click the **Payment Methods** hyperlink under the Customer Management tab.
- Click the Add (+) icon to add a new payment method.
- The **New Payment Method** screen is displayed, as shown below.



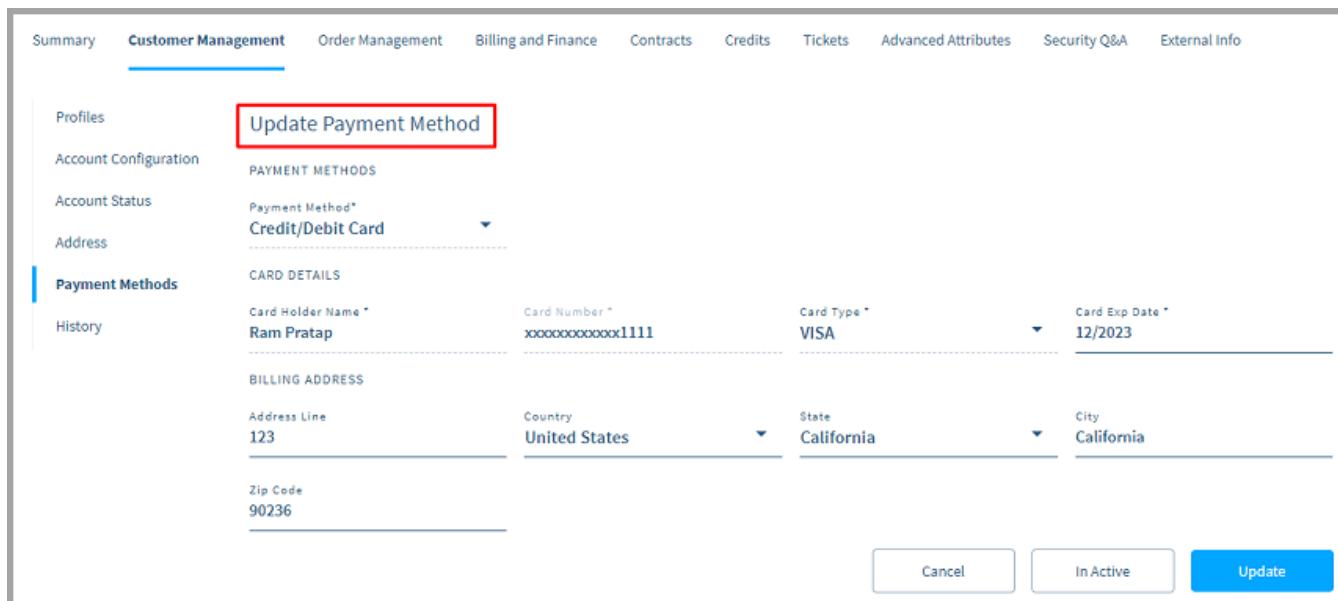
The screenshot shows the 'New Payment Method' form. It includes sections for 'PAYMENT METHODS' (Payment Method: Credit/Debit Card), 'CARD DETAILS' (Name On Card: TestUser, Card Number: 1000 1000 1000 1000, Card Type: VISA, Expiry: 02/24, Security Code: ***), and 'BILLING ADDRESS' (Address Line: 11th Floor, Evergent Techr, City: HYDERABAD, Country: India, State: Telangana, Zip Code: 500032). At the bottom are 'Cancel' and 'Create' buttons.

- Select the payment method as a **Credit/Debit Card** or **Klarna** type in the **Payment Method** section.
- If the payment method is selected as the Credit/Debit Card, then enter the card information in the provided fields:
 - Enter the card name in the **Name on Card** field in the Card Details section.
 - Enter the card number in the **Card Number** field.
 - Select the **Card Type** from the available drop-down.
 - Enter the card expiry date in the **Expiry (MM/YYYY)** field. The expiry date must be in the MM/YYYY format.
 - Enter the card security code in the **Security Code** field.
 - Enter address in the **Address Line** field in the Billing Address section.
 - Enter a city in the **City** field.
 - Select a country from the **Country** drop-down list.
 - Select a state from the **State** drop-down list.
 - Enter the zip code of the address in the **Zip Code** field.
 - Click the **Create** button.

Modifying a Payment Method

To modify a payment method, do the following:

- Click the **Payment Methods** hyperlink under the Customer Management tab.
- Select a payment method from the available list that you want to modify.
- The **Update Payment Method** screen is displayed, as shown below.



The screenshot shows the Evergent CRM Customer Management interface. The 'Customer Management' tab is selected. Under 'Payment Methods', a card is selected named 'Credit/Debit Card'. The card details are filled out: Card Holder Name is 'Ram Pratap', Card Number is 'xxxxxx1111', Card Type is 'VISA', and Card Exp Date is '12/2023'. The Billing Address section shows an address line '123', country 'United States', state 'California', and city 'California'. The zip code is '90236'. At the bottom, there are three buttons: 'Cancel', 'In Active' (disabled), and 'Update'.

- Make the changes as required and click the **Update** or else click Cancel to discard the changes.
- Click the **InActive** button to deactivate the payment method.

History

- Any activity done by the user related to a Customer's Account is an Event.
- Logging an event is mandatory while closing an account after accessing it and for navigating to the Home screen.
- The events are recorded or logged in the History section.
- A user should log other events like inbound calls, outbound calls, and others.
- Any changes made by a customer through Self-Care are also logged in the History section.

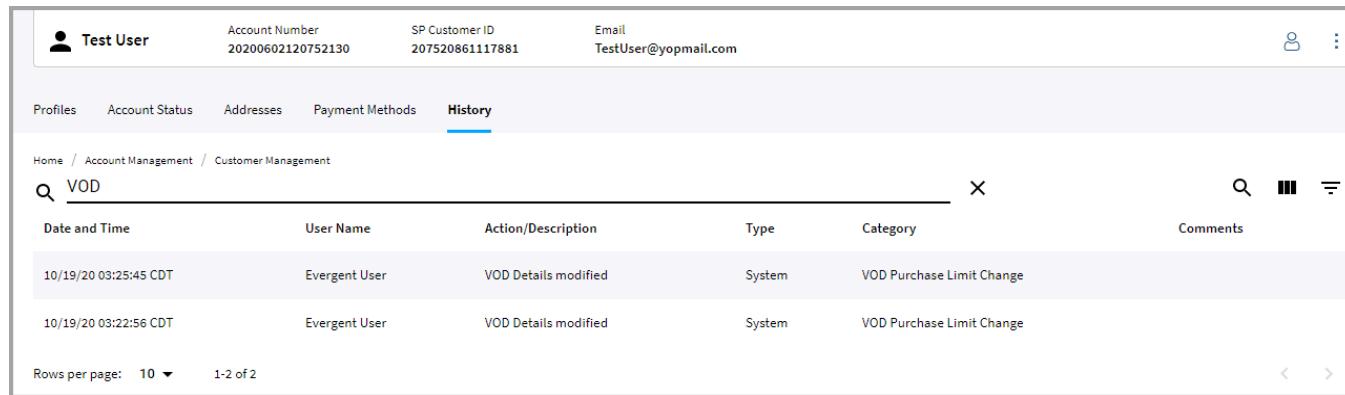
Some of the events generated through a batch process that is logged automatically are:

- Email Notifications
- Onetime Renewal Failure
- Onetime Renewal Success
- Onetime Payment Declined
- Device Status Changed from Active to Pending Active
- Account Status Change from Pending Suspend to Involuntary Suspend
- Payment Success
- Credit Card Expiry Notification

Searching an Event

To search for an event, do the following:

- Click the History hyperlink under the Customer Management tab.
- Click the Search icon (🔍).
- In the Search field, type the value that you want to search for the event.

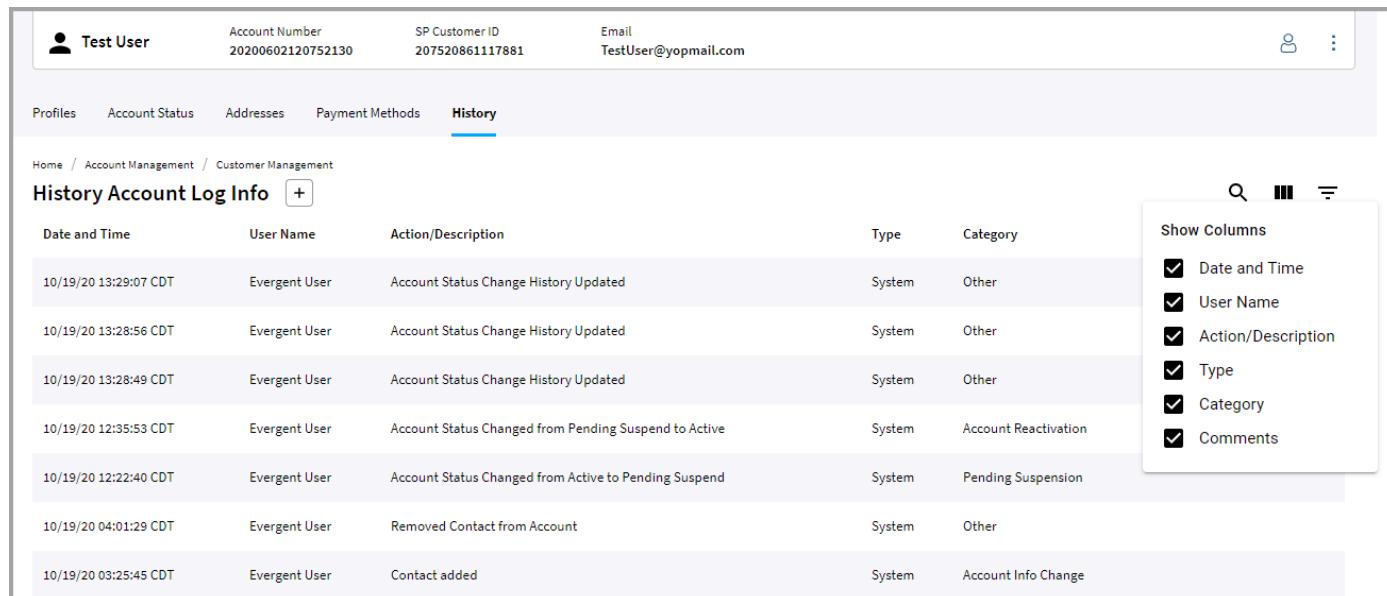


| Date and Time | User Name | Action/Description | Type | Category | Comments |
|-----------------------|---------------|----------------------|--------|---------------------------|----------|
| 10/19/20 03:25:45 CDT | Evergent User | VOD Details modified | System | VOD Purchase Limit Change | |
| 10/19/20 03:22:56 CDT | Evergent User | VOD Details modified | System | VOD Purchase Limit Change | |

Selection of Column Headings for History

To select the column headings for the History that you want to view, do the following:

- Click the **History** hyperlink under the Customer Management tab.
- Click the View Columns icon (☰).
- In the **Show Columns** list, select the checkboxes that you want to view the History column headings.

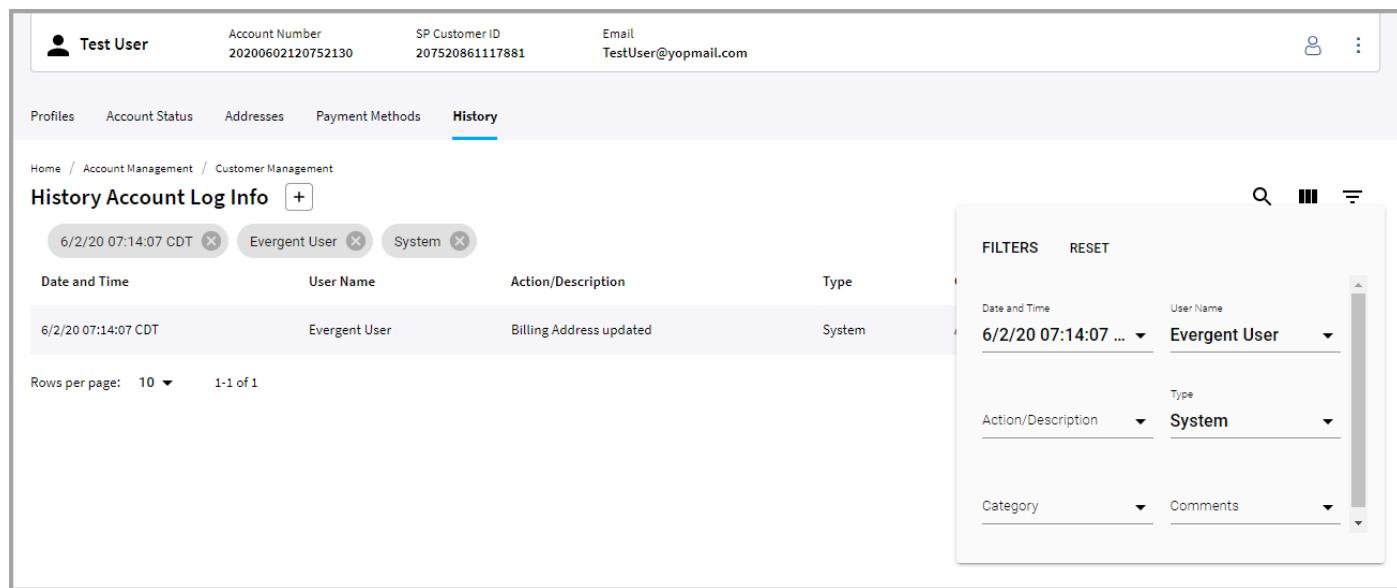


| Date and Time | User Name | Action/Description | Type | Category |
|-----------------------|---------------|---|--------|----------------------|
| 10/19/20 13:29:07 CDT | Evergent User | Account Status Change History Updated | System | Other |
| 10/19/20 13:28:56 CDT | Evergent User | Account Status Change History Updated | System | Other |
| 10/19/20 13:28:49 CDT | Evergent User | Account Status Change History Updated | System | Other |
| 10/19/20 12:35:53 CDT | Evergent User | Account Status Changed from Pending Suspend to Active | System | Account Reactivation |
| 10/19/20 12:22:40 CDT | Evergent User | Account Status Changed from Active to Pending Suspend | System | Pending Suspension |
| 10/19/20 04:01:29 CDT | Evergent User | Removed Contact from Account | System | Other |
| 10/19/20 03:25:45 CDT | Evergent User | Contact added | System | Account Info Change |

Filtering Events

To filter the events, do the following:

- Click the **History** hyperlink under the Customer Management tab.
- Click the **Filter Table** icon ().
- Select the criteria that you want to filter and view the specific events.
- To clear the filter table, click the **RESET** button.

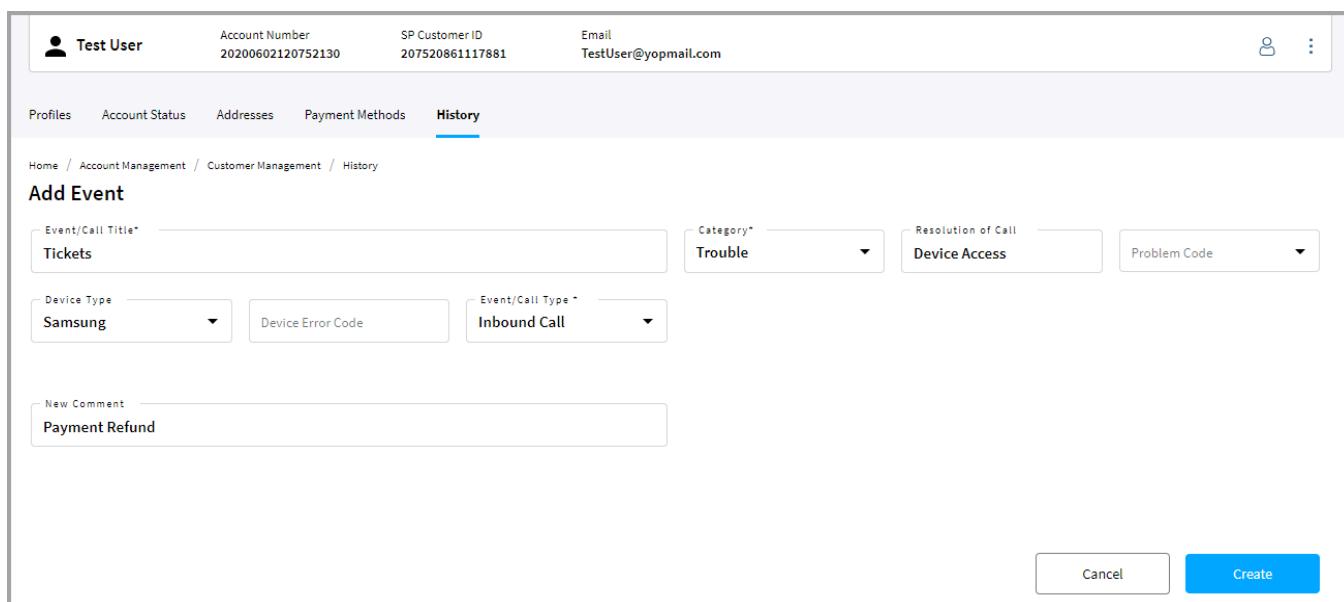


The screenshot shows the Evergent CRM interface. At the top, there's a header with a user profile for 'Test User' and account details: Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below the header, a navigation bar includes 'Profiles', 'Account Status', 'Addresses', 'Payment Methods', and 'History', with 'History' being the active tab. A breadcrumb trail shows 'Home / Account Management / Customer Management'. The main area is titled 'History Account Log Info' with a '+' button. It displays a table with one row of data: Date and Time (6/2/20 07:14:07 CDT), User Name (Evergent User), Action/Description (Billing Address updated), and Type (System). Below the table, it says 'Rows per page: 10' and '1-1 of 1'. To the right of the table is a 'FILTERS' panel with dropdown menus for Date and Time (set to 6/2/20 07:14:07 ...), User Name (Evergent User), Action/Description (System), Category, and Comments.

Adding an Event

To add a new event, do the following:

- Click the **History** hyperlink under the Customer Management tab.
- Click the Add () icon to add a new event in history.
- The **Add Event** screen is displayed as shown below.



- Enter the event title in the **Event/Call Title** field.
- Select the required category from the Category drop-down list. The list of event category is shown in the following table:

| Field Description | Description |
|------------------------------|--|
| Account Creation | Displays “New Account created” when an account is created. |
| Account Info Change | Displays “Contact updated” when the primary contact is updated/modified. |
| Account Status Change | Displays “Account status changed” when account status has been changed. |
| Account Reactivation | Displays “Account status changed” when account status has been changed. |
| Account cancellation | Displays “Account status changed” when account status has been changed. |
| Activate STB | Displays “CPE updated” when the CPE is updated. |
| Add CPE | Displays “CPE added” when CPE is newly added. |
| Add Order | Displays “Placed New Order” when a new order has been taken place. |
| Address Change | Displays “Shipping/Billing/Service Address updated” when the address is updated. |
| CC Charging Threshold Change | Displays “VOD Details modified” when CC Charging Threshold is updated |

| | |
|---------------------------|--|
| Involuntary Suspension | Displays "Account Status Change from Pending Suspend to Involuntary Suspend" when the account status has been changed to Involuntary Suspend. |
| One Time Payment | Displays "One-Time Payment Succeeded" when one-time payment is succeeded. |
| Payment Failure | Displays "Payment Declined" when payment is failed. |
| Payment Method Change | Displays "Auto Payment Method Updated /Card Payment Method Updated/ Card Payment Method Inserted"; when the Auto Payment Method updated/ Card Payment Method updated/ New Payment method Inserted. |
| Pending Suspension | Displays "Account Status Changed from Active to Pending Suspend" |
| Service Change | Displays "Basic service changed" when the basic service of the account is changed |
| VOD Purchase Limit Change | Displays "VOD Details modified" when the VOD limit of the account is modified. |
| Voluntary Suspension | Display "Account status changed" when the status of the account has been changed. |
| Out Standing Balance | Displays "Outstanding balance is \$XX" for the account. |
| Refund | Amount: \$XX refunded on Product: Product Name |
| Payment Success | Displays "Nightly Payment Succeeded" when the night job thread is successful. |
| Others | Edit field details as Customers' requirements. |

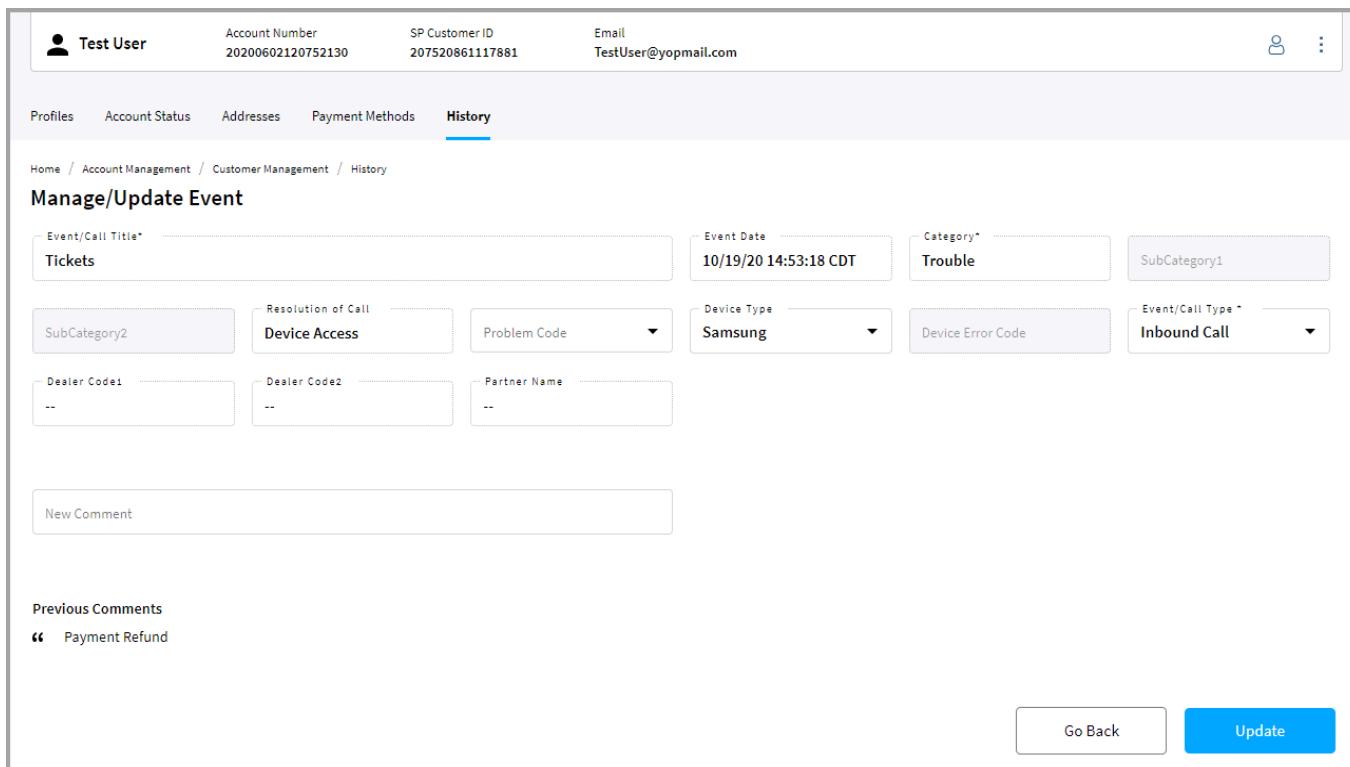
- Enter resolution of call in the **Resolution of Call** field.
- Select **Problem Code** and **Device Type** from the available drop-down list.
- Enter device error code in the **Device Error Code** field.
- Select the event type from the **Event/Call Type** drop-down list.
- Enter comments in the **New Comment** box.
- Click **Create**.

Editing an Event

To edit an event, do the following:

- Click the **History** hyperlink under the Customer Management tab.

- The Manage/Update Event screen is displayed as shown below.



Test User Account Number: 20200602120752130 SP Customer ID: 207520861117881 Email: TestUser@yopmail.com

Profiles Account Status Addresses Payment Methods **History**

Home / Account Management / Customer Management / History

Manage/Update Event

Event/Call Title*

Event Date

Category*

SubCategory1

SubCategory2

Resolution of Call

Device Type

Device Error Code

Dealer Code1

Dealer Code2

Partner Name

New Comment

Previous Comments
“ Payment Refund

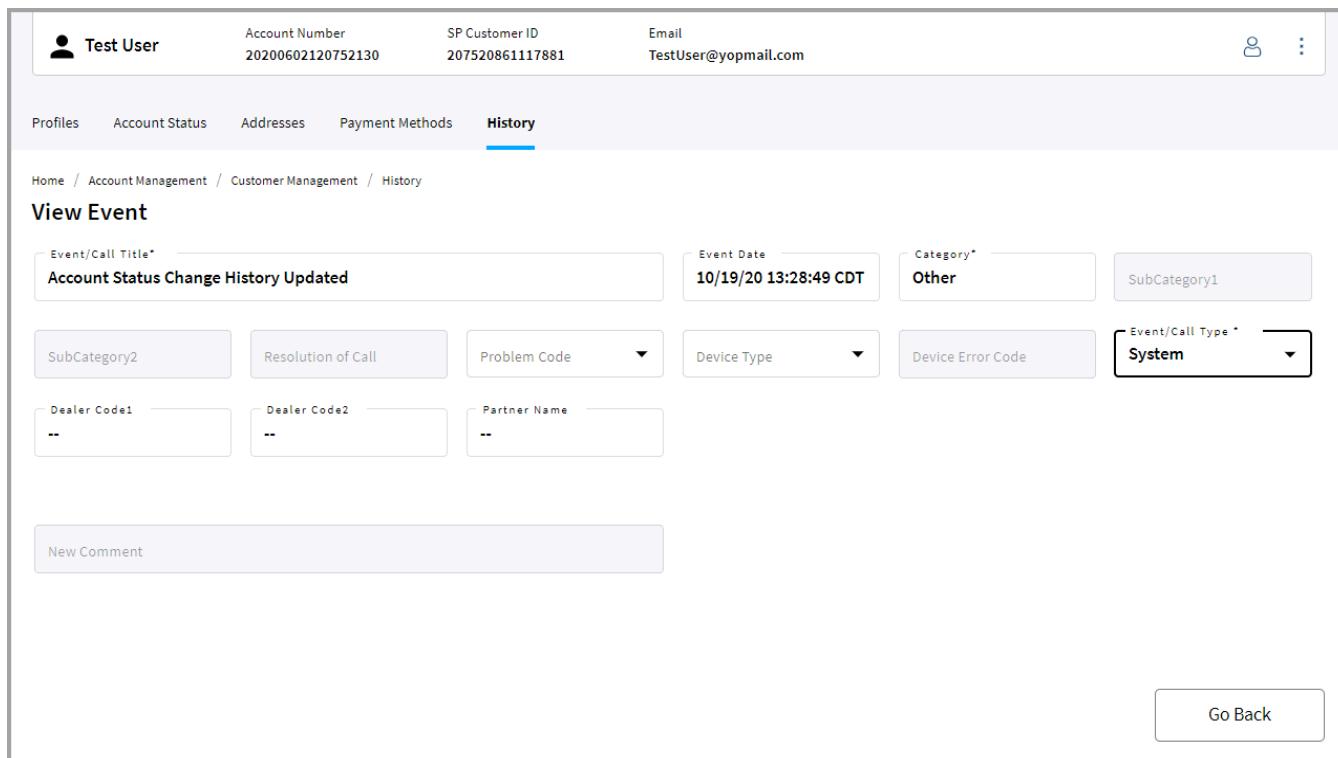
Go Back **Update**

- Make the necessary changes to the event fields and click **Update** to make the changes to the event, or else click Cancel to discard the changes.

Viewing an Event

To view an event, do the following:

- Click the **History** hyperlink under the Customer Management tab.
- Click the event that you want to view.
- The **View Event** screen is displayed, as shown below.



The screenshot shows the Evergent CRM interface for managing account history. At the top, it displays the user's name ('Test User'), account number ('20200602120752130'), SP Customer ID ('207520861117881'), and email ('TestUser@yopmail.com'). The 'History' tab is currently selected. The page includes a breadcrumb navigation path: Home / Account Management / Customer Management / History. Below the navigation, there are several input fields and dropdown menus for recording event details. These include fields for 'Event/Call Title' (set to 'Account Status Change History Updated'), 'Event Date' (set to '10/19/20 13:28:49 CDT'), 'Category' (set to 'Other'), 'SubCategory' (set to 'SubCategory1'), and various dropdowns for 'SubCategory2', 'Resolution of Call', 'Problem Code', 'Device Type', 'Device Error Code', 'Dealer Code1', 'Dealer Code2', and 'Partner Name'. A 'New Comment' text area is available for additional notes, and a 'Go Back' button is located at the bottom right.

- Click the **Go Back** button to return to the History Account Log Info screen.

Order Management

Order Management is a digital way to manage the life cycle of an order. It tracks all the information and processes, including order entry, service history, devices, orders, and coupons

- Click the **Order Management** tab to navigate to the Order Management Home screen.

The following are the functionalities that can be provisioned by the user on the Order Management tab:

- Product/Packages
- Service History
- Devices
- Orders
- Coupons

Product/Packages

The Products/Packages section is used to view the list of products/packages that are associated with the account.

Searching for a Product/Package

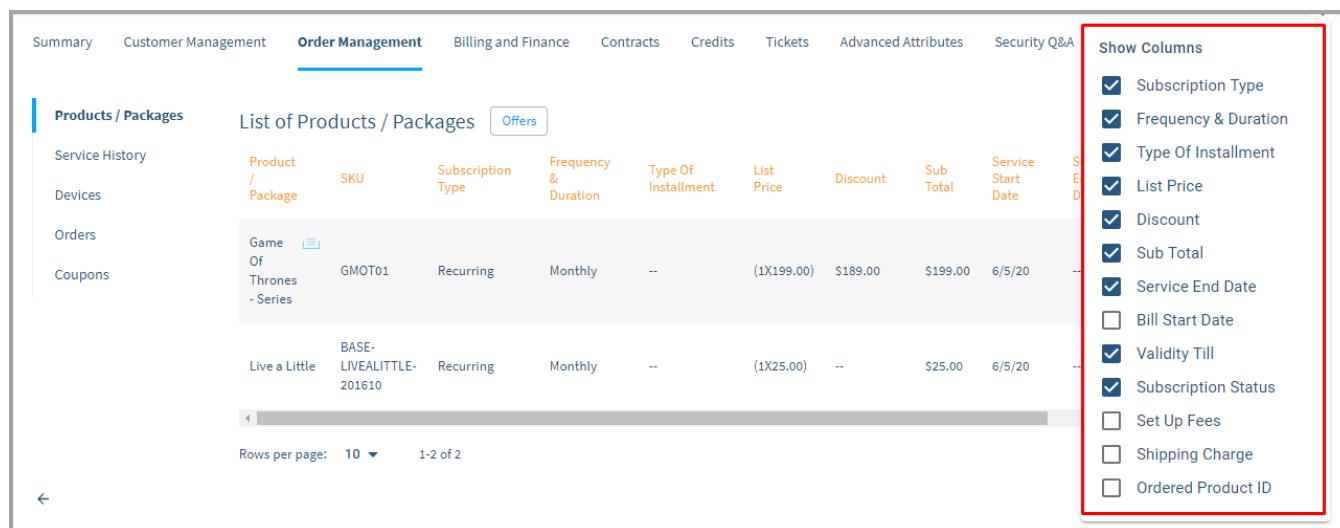
To search for a product/package, do the following:

- Click the **Products/ Packages** hyperlink under the Order Management.
- Click the **Search** icon (🔍).
- In the Search field, type the value that you want to search for the product/package.

Selection of Column Headings for Products/Packages

To select the column headings for the Products/Packages that you want to view, do the following:

- Click the **Products/ Packages** hyperlink under the Order Management.
- Click the **View Columns** icon (☰).
- In the **Show Columns** list, select the checkboxes that you want to view the Products/ Packages Column Headings.

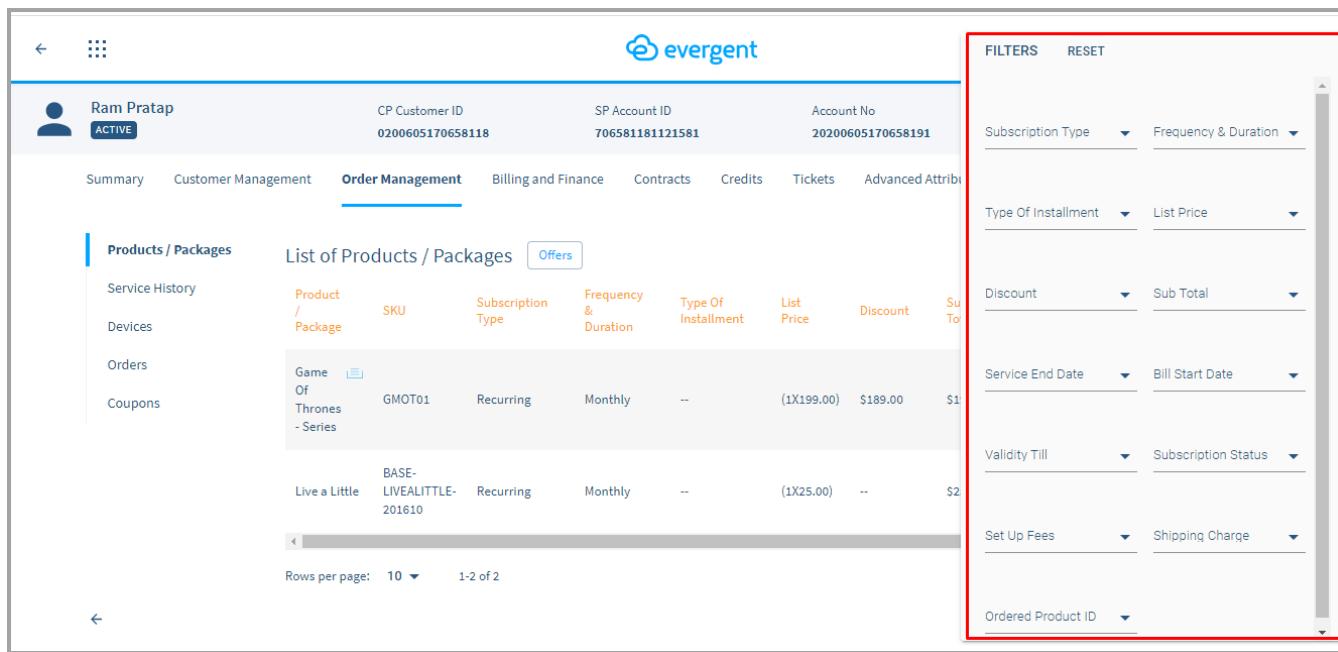


The screenshot shows the 'Products / Packages' list under the 'Order Management' tab. The list displays two items: 'Game Of Thrones - Series' and 'Live a Little'. The columns include Service History, Product / Package, SKU, Subscription Type, Frequency & Duration, Type Of Installment, List Price, Discount, Sub Total, Service Start Date, and End Date. A 'Show Columns' dropdown menu is open on the right, listing various checkboxes for selecting columns. Most checkboxes are checked, including 'Subscription Type', 'Frequency & Duration', 'Type Of Installment', 'List Price', 'Discount', 'Sub Total', 'Service End Date', 'Validity Till', and 'Subscription Status'. Unchecked checkboxes include 'Bill Start Date', 'Set Up Fees', 'Shipping Charge', and 'Ordered Product ID'. The 'Show Columns' menu has a red border around it.

Filtering Products/Packages

To filter the product/package, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the **Filter Table** icon (FilterWhere).
- Select the criteria that you want to filter and view the specific product/package.
- To clear the filter table, click the **RESET** button.

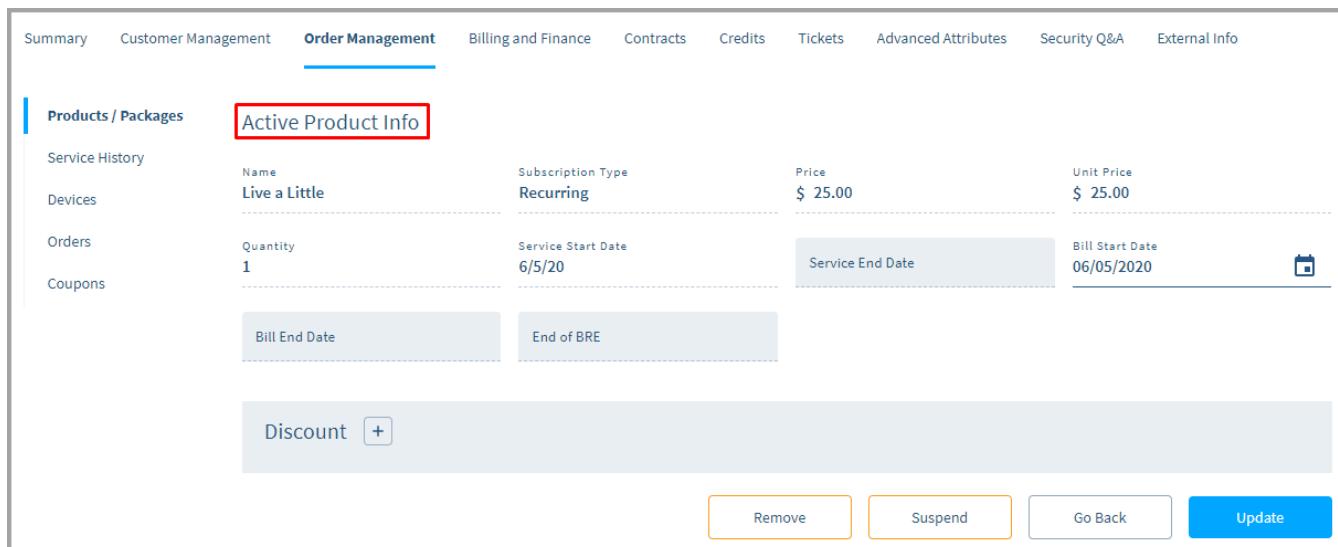


The screenshot shows the Evergent CRM interface for Order Management. At the top, there's a header with the user's name (Ram Pratap) and account details (CP Customer ID: 0200605170658118, SP Account ID: 706581181121581, Account No: 20200605170658191). Below the header, there are tabs for Summary, Customer Management, Order Management (which is selected), Billing and Finance, Contracts, Credits, Tickets, and Advanced Attributes. The main content area displays a table of products/packages, with rows for Service History, Devices, Orders, and Coupons. The first row under Orders shows a product named 'Game Of Thrones - Series' with SKU GMOT01, Recurring, Monthly frequency, and a price of \$189.00. The second row shows another product named 'Live a Little' with SKU BASE-LIVEALITTLE-201610, Recurring, Monthly frequency, and a price of \$25.00. On the right side of the screen, there's a 'FILTERS' section with various dropdown menus for filtering products by type, duration, price, and other criteria.

Viewing Products/Packages

For viewing a product/package, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the product/package which you want to view.
- Based on the product or package Active Product Info or Active Package Info screen is displayed, respectively.



The screenshot shows the 'Active Product Info' screen for the 'Live a Little' package. At the top, there are tabs for Summary, Customer Management, Order Management (selected), Billing and Finance, Contracts, Credits, Tickets, Advanced Attributes, Security Q&A, and External Info. The main content area has a 'Products / Packages' section with a 'Active Product Info' tab (highlighted with a red box). Below this, there are sections for Service History, Devices, Orders, and Coupons. For the 'Live a Little' package, the details shown are: Name (Live a Little), Subscription Type (Recurring), Price (\$ 25.00), and Unit Price (\$ 25.00). There are also fields for Quantity (1), Service Start Date (6/5/20), Service End Date (06/05/2020), Bill Start Date (06/05/2020), and Bill End Date. At the bottom, there are buttons for Discount (+), Remove, Suspend, Go Back, and Update.

Adding Discount to a Product/Package

Adding Discount to a Product

To add a discount to a product, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the product to which you want to add a discount.
- Click the **Add** (+) icon beside the Discount label.
- The **Add Discount** pop-up screen is displayed.
- Select the **Start Date from** which the discount to the product will apply.
- Select the **End Date from** which the discount to the product will end.
- Choose a reason code from the **Choose Reason Code** available drop-down list.
- Select the Offer Type from the available drop-down list.
- Enter the Offer Value and Comment.
- Click **Add** to add the discount, or else click **Cancel**.

Adding Discount to a Package

To add a discount to the package, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the package to which you want to add a discount.
- Active Package Info screen appears.
- Click the **Add** (+) icon beside the Discount label.
- The **Add Discount** pop-up screen is displayed.
- Select the **Start Date** from which the discount to the product will apply.
- Select the **End Date** from which the discount to the product will end.
- Choose a reason code from the **Choose Reason Code** available drop-down list.
- Select an Offer Type from the available drop-down list.
- Enter Offer Value and Comment.
- Click **Add** to add the discount or else click **Cancel**.

Suspending a Product/Package

Suspending a Product

To suspend a product, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the product which you want to suspend.
- Active Product Info screen appears.
- Click **Suspend** to suspend the product.
- The Service Suspend screen appears.
- Select **Suspend Start Date** and **Suspend End Date** from which period the product should be suspended.
- Enter the comments in the **Comments** field.
- Click **Suspend** to suspend the product, or else click **Go Back**.

Suspending a Package

To suspend a package, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the package which you want to suspend.
- Active package Info screen appears.
- Click **Suspend** to suspend the package.
- The Service Suspend screen appears.
- Select **Suspend Start Date** and **Suspend End Date** from which period the package should be suspended.
- Enter comments in the **Comments** field.
- Click **Suspend** for suspending the package or else click **Go Back**.

Removing a Product/Package

Removing a Product

For removing a product, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.

- Click the product which you want to remove.
- The Active Product Info screen appears.
- Click **Remove**.
- The **Are You Sure** screen appears.
- Select the **Service End Date** from which the product should be removed.
- Select the **Choose Reason** from the available drop-down list.
- Enter the comments in the **Comments** field.
- Click **Yes Remove** to remove the product or else click **No Keep It** to discard the changes.

Removing a Package

To remove a package, do the following:

- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the package that you want to remove.
- The Active Package Info screen appears.
- Click **Remove**.
- The **Are You Sure** screen appears.
- Select the **Service End Date** from which package should be removed.
- Select **Choose Reason** from the available drop-down list.
- Enter comments in the **Comments** field.
- Click **Yes Remove** for removing the package or else click **No Keep** it to discard the changes.

Service History

The service history is used to view the removed subscription products/packages from the customer account.

| Summary | Customer Management | Order Management | Billing and Finance | Contracts | Credits | Tickets | Advanced Attributes | Security Q&A | External Info |
|------------------------|---|-------------------------|---------------------|-----------|---------------------|---------------------|---------------------|------------------|---|
| Products / Packages | Service History (Removed Subscriptions) | | | | | | | | Search icon View Columns icon Print icon |
| Service History | | | | | | | | | |
| Devices | Product/Package | SKU | Subscription Type | Quantity | Type Of Installment | Subscription Status | Service Start Date | Service End Date | Validity Till Date |
| Orders | CPOP HBO | CPOP_HBO | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | -- |
| Coupons | EPIX | BOLT-EPIX-201907 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | -- |
| | OPTIMO MÁS | BASE-OPTIMOMAS-122018 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | -- |

Searching a Service History

To search a Service History, do the following:

- Click the **Service History** hyperlink under the Order Management tab.
- Click the **Search** icon ().
- In the Search field, type the value that you want to search for the Service History.

| Summary | Customer Management | Order Management | Billing and Finance | Contracts | Credits | Tickets | Advanced Attributes | Security Q&A | External Info |
|------------------------|---|-------------------------|---------------------|-----------|---------------------|---------------------|---------------------|------------------|---|
| Products / Packages | Service History (Removed Subscriptions) | | | | | | | | Search icon View Columns icon Print icon |
| Service History | | | | | | | | | |
| Devices | Product/Package | SKU | Subscription Type | Quantity | Type Of Installment | Subscription Status | Service Start Date | Service End Date | Validity Till Date |
| Orders | CPOP HBO | CPOP_HBO | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | -- |
| Coupons | EPIX | BOLT-EPIX-201907 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | -- |
| | OPTIMO MÁS | BASE-OPTIMOMAS-122018 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | -- |

Selection of Column Headings for a Service History

To select the column headings for the Service History that you want to view, do the following:

- Click the **Service History** hyperlink under the Order Management tab.
- Click the **View Columns** icon ().
- In the **Show Columns** list, select the checkboxes that you want to view the Service History Column Headings.

| Summary | Customer Management | Order Management | Billing and Finance | Contracts | Credits | Tickets | Advanced Attributes | Security Q&A | Show Columns | | | | | | | | |
|------------------------|---------------------|--|---------------------|-----------|---------|---------|---------------------|--------------|---|--|--|--|--|--|--|--|--|
| Products / Packages | | Service History (Removed Subscriptions) | | | | | | | | | | | | | | | |
| Service History | | | | | | | | | | | | | | | | | |
| Devices | | | | | | | | | | | | | | | | | |
| Orders | CPOP HBO | CPOP_HBO | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | <input checked="" type="checkbox"/> Product/Package | | | | | | | | |
| Coupons | EPIX | BOLT-EPIX-201907 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | <input checked="" type="checkbox"/> SKU | | | | | | | | |
| | OPTIMO MÁS | BASE-OPTIMOMAS-122018 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | <input checked="" type="checkbox"/> Subscription Type | | | | | | | | |
| | STARZ | BOLT-STARZ-201610 | Recurring | 1 | -- | -- | 4/8/20 | 6/8/20 | <input checked="" type="checkbox"/> Quantity | | | | | | | | |
| | Regional Sports Fee | RSN-TIER2-201812 | Recurring | 1 | -- | -- | 4/8/20 | 6/8/20 | <input checked="" type="checkbox"/> Type Of Installment | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Subscription Status | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Service Start Date | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Service End Date | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Validity Till Date | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Retail Price | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Price Charged | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Status | | | | | | | | |
| | | | | | | | | | <input checked="" type="checkbox"/> Action(s) | | | | | | | | |

Filtering Service History

To filter the Service History, do the following:

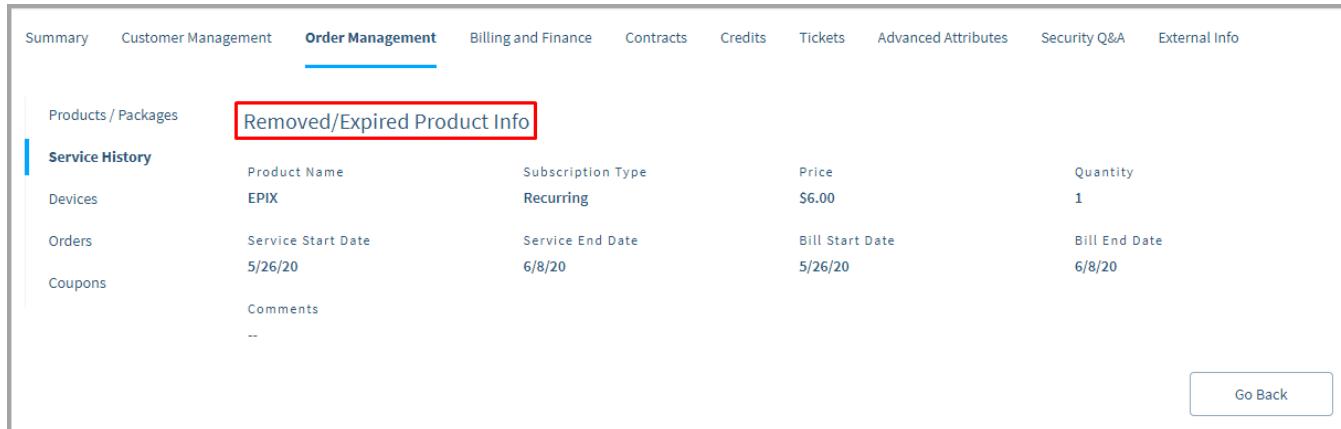
- Click the **Service History** hyperlink under the Order Management tab.
- Click the **Filter Table** icon ().
- Select the criteria that you want to filter and view the specific Service History.
- To clear the filter table, click the **RESET** button.

| Summary | Customer Management | Order Management | Billing and Finance | Contracts | Credits | Tickets | Advanced Attributes | FILTERS | RESET | | | | | | | | |
|---------------------------------|--|-----------------------------------|---------------------|-----------|---------------------|---------------------|---------------------|---------|---------------------|--|--|--|--|--|--|--|--|
| Navatha valeti ACTIVE | | CP Customer ID 200408085894385 | | | | | | | | | | | | | | | |
| Customer Since 62 Days | | | | | | | | | | | | | | | | | |
| Opened Tickets 9 | | | | | | | | | | | | | | | | | |
| Products / Packages | Service History (Removed Subscriptions) | | | | | | | | | | | | | | | | |
| Service History | | | | | | | | | | | | | | | | | |
| Devices | Product/Package | SKU | Subscription Type | Quantity | Type Of Installment | Subscription Status | Service Start Date | SKU | Product/Package | | | | | | | | |
| Orders | CPOP HBO | CPOP_HBO | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | Subscription Type | | | | | | | | |
| Coupons | EPIX | BOLT-EPIX-201907 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | Quantity | | | | | | | | |
| | OPTIMO MÁS | BASE-OPTIMOMAS-122018 | Recurring | 1 | -- | -- | 5/26/20 | 6/8/20 | Type Of Installment | | | | | | | | |
| | STARZ | BOLT-STARZ-201610 | Recurring | 1 | -- | -- | 4/8/20 | 6/8/20 | Subscription Status | | | | | | | | |
| | Regional Sports Fee | RSN-TIER2-201812 | Recurring | 1 | -- | -- | 4/8/20 | 6/8/20 | Service Start Date | | | | | | | | |
| | | | | | | | | | Service End Date | | | | | | | | |
| | | | | | | | | | Validity Till Date | | | | | | | | |
| | | | | | | | | | Retail Price | | | | | | | | |
| | | | | | | | | | Price Charged | | | | | | | | |
| | | | | | | | | | Status | | | | | | | | |
| | | | | | | | | | Action(s) | | | | | | | | |

Viewing a Product/Package in Service History

For viewing a product/package in-service history, do the following:

- Click the **Service History** hyperlink under the Order Management tab.
- Click the product/package which you want to view.
- The Removed/Expired Product Info screen is displayed as shown below.



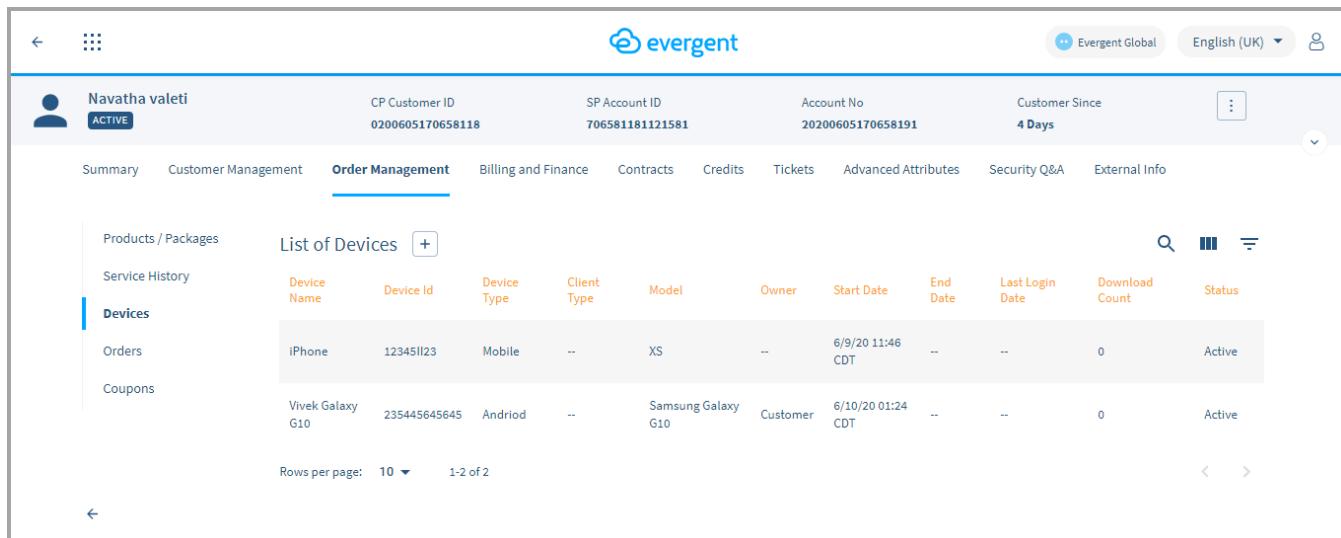
| | Product Name | Subscription Type | Price | Quantity |
|---------|-------------------------------|----------------------------|----------------------------|-------------------------|
| Devices | EPIX | Recurring | \$6.00 | 1 |
| Orders | Service Start Date 5/26/20 | Service End Date 6/8/20 | Bill Start Date 5/26/20 | Bill End Date 6/8/20 |
| Coupons | Comments -- | | | |

[Go Back](#)

- The details like Product Name, Subscription Type, Amount, Service Start Date, Service End Date, Bill Start Date, and Bill End Date.
- Click Go Back to go back to the Service History (Removed Subscriptions) screen.

Devices

The Devices section is used to manage the devices that are linked to the customer account.



| Device Name | Device Id | Device Type | Client Type | Model | Owner | Start Date | End Date | Last Login Date | Download Count | Status |
|------------------|--------------|-------------|-------------|--------------------|----------|-------------------|----------|-----------------|----------------|--------|
| iPhone | 123451123 | Mobile | -- | XS | -- | 6/9/20 11:46 CDT | -- | -- | 0 | Active |
| Vivek Galaxy G10 | 235445645645 | Andriod | -- | Samsung Galaxy G10 | Customer | 6/10/20 01:24 CDT | -- | -- | 0 | Active |

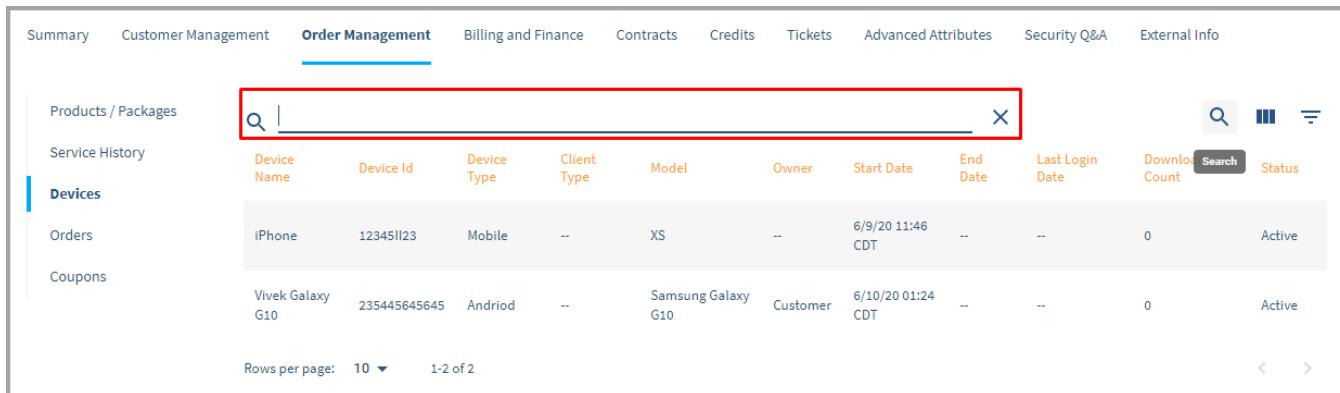
Rows per page: 10 1-2 of 2

Searching a Device

To search a device, do the following:

- Click the **Device** hyperlink under the Order Management tab.
- Click the **Search** icon (🔍).

- In the Search field, type the value that you want to search for the device.

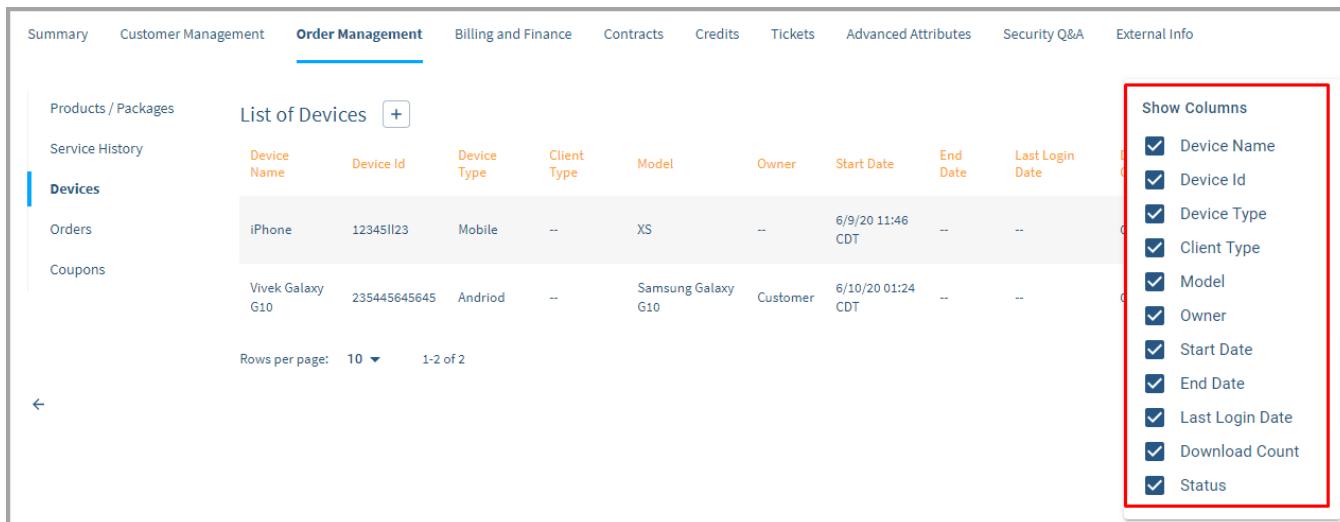


The screenshot shows the Evergent CRM interface with the Order Management tab selected. At the top, there is a navigation bar with tabs: Summary, Customer Management, Order Management (which is highlighted in blue), Billing and Finance, Contracts, Credits, Tickets, Advanced Attributes, Security Q&A, and External Info. Below the navigation bar is a search bar with a magnifying glass icon and a clear button (X). To the right of the search bar are icons for filter, sort, and refresh. The main content area displays a table of devices. The table has columns: Device Name, Device Id, Device Type, Client Type, Model, Owner, Start Date, End Date, Last Login Date, Download Count, and Status. Two rows of data are visible: one for an iPhone and one for a Samsung Galaxy G10. At the bottom left, there is a "Rows per page:" dropdown set to 10 and a "1-2 of 2" indicator. At the bottom right, there are navigation arrows.

Selection of Column Headings for a Device

To select the column headings for the device that you want to view, do the following:

- Click the **Device** hyperlink under the Order Management tab.
- Click the **View Columns** icon (grid icon).
- In the **Show Columns** list, select the checkboxes that you want to view the Devices Column Headings.



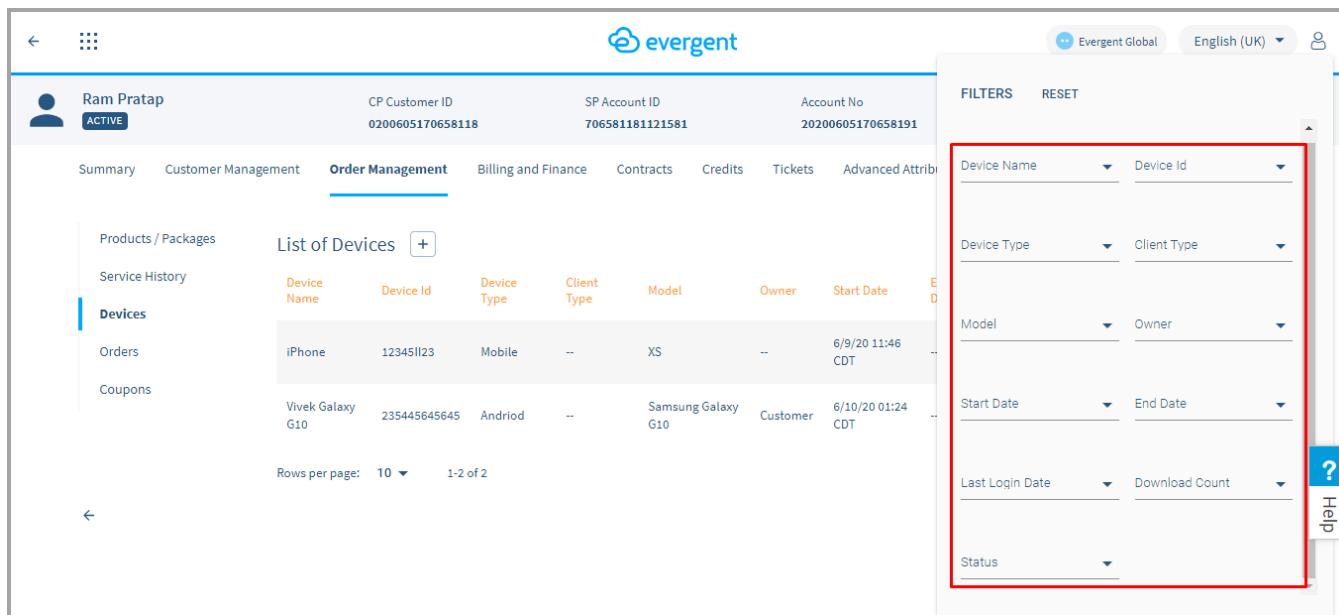
The screenshot shows the same interface as the previous one, but with a red box highlighting the "Show Columns" list on the right side of the screen. This list contains checkboxes for all the columns in the device table, and they are all checked. The list includes: Device Name, Device Id, Device Type, Client Type, Model, Owner, Start Date, End Date, and Last Login Date. The rest of the interface remains the same, showing the Order Management tab, the device table with two entries, and the pagination information at the bottom.

Filtering a Device

To filter the Device, do the following:

- Click the **Device** hyperlink under the Order Management tab.
- Click the **Filter Table** icon (grid icon).
- Select the criteria that you want to filter and view the specific Device.

- To clear the Filters table, click the **RESET** button.

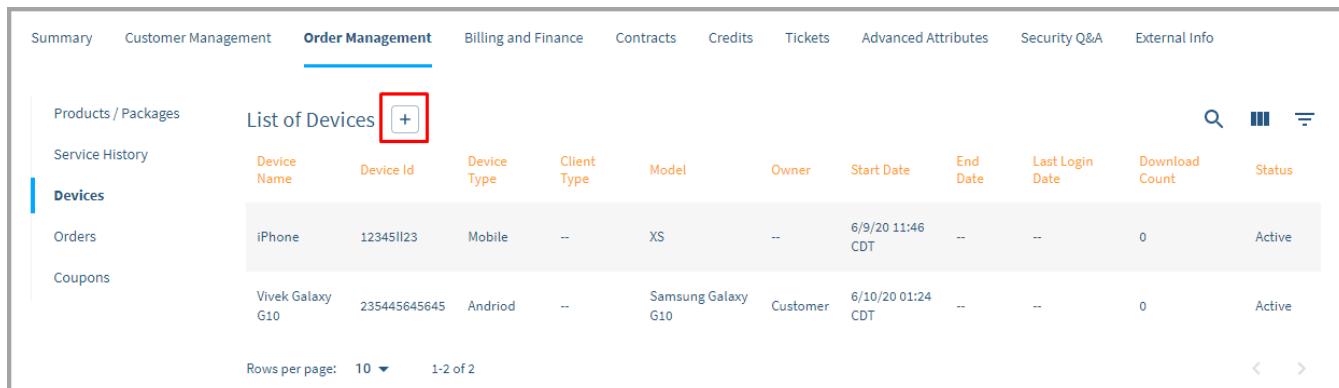


The screenshot shows the Evergent CRM interface. At the top, there's a header with the evergent logo, user information (Ram Pratap, ACTIVE), and navigation links (Summary, Customer Management, Order Management, Billing and Finance, Contracts, Credits, Tickets, Advanced Attributes). Below the header is a sidebar with links for Products / Packages, Service History, Devices (which is selected), Orders, and Coupons. The main content area displays a table titled "List of Devices" with two rows of data. The first row shows an iPhone with Device Name "iPhone", Device Id "12345|l23", Device Type "Mobile", Client Type "--", Model "XS", Owner "--", Start Date "6/9/20 11:46 CDT". The second row shows a Samsung Galaxy G10 with Device Name "Vivek Galaxy G10", Device Id "235445645645", Device Type "Andriod", Client Type "--", Model "Samsung Galaxy G10", Owner "Customer", Start Date "6/10/20 01:24 CDT". Below the table are pagination controls: "Rows per page: 10" and "1-2 of 2". To the right of the table is a "FILTERS" panel with several dropdown fields: Device Name, Device Id, Device Type, Client Type, Model, Owner, Start Date, End Date, Last Login Date, Download Count, and Status. A "RESET" button is located at the top of the filters panel. A red box highlights the entire "FILTERS" panel.

Adding a Device

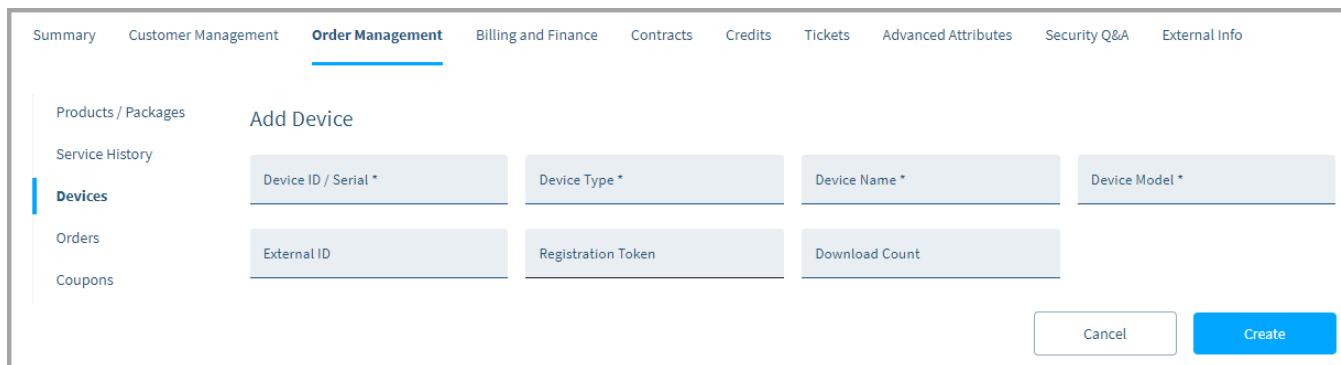
To add a new device, do the following:

- Click the **Device** hyperlink under the Order Management tab.
- Click the Add (+) icon to add a new device.



This screenshot shows the same Evergent CRM interface as the previous one, but with a different focus. The "Devices" link in the sidebar is highlighted with a blue box. In the main content area, the "List of Devices" table is shown with the same two rows of data. The "Add" icon (+) in the top right corner of the table header is highlighted with a red box. The rest of the interface, including the header, sidebar, and filters panel, appears identical to the previous screenshot.

- The **Add Device** screen is displayed as shown below.



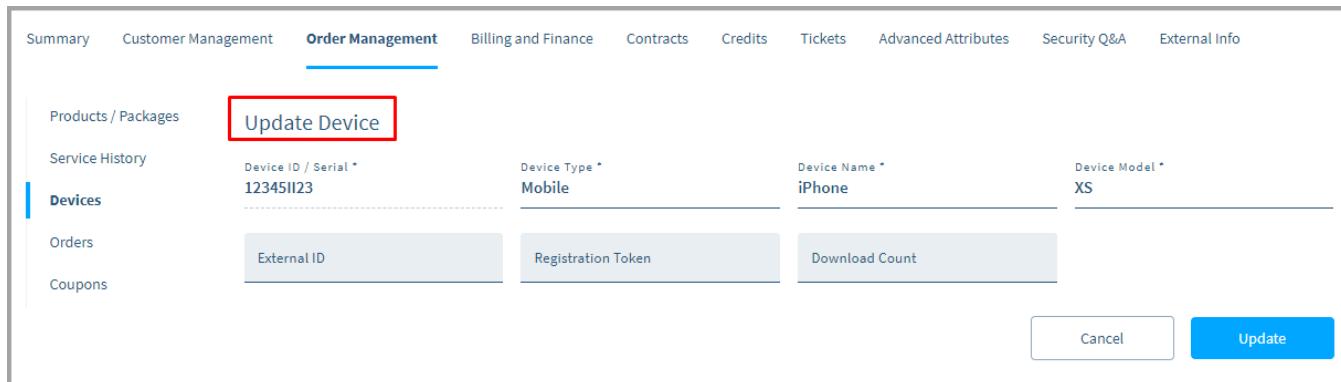
The screenshot shows the 'Order Management' tab selected in the top navigation bar. On the left, there's a sidebar with links for 'Products / Packages', 'Service History', 'Devices' (which is currently selected and highlighted in blue), 'Orders', and 'Coupons'. The main area is titled 'Add Device' and contains four input fields: 'Device ID / Serial *' (containing '12345II23'), 'Device Type *' (containing 'Mobile'), 'Device Name *' (containing 'iPhone'), and 'Device Model *' (containing 'XS'). Below these fields are three smaller input fields: 'External ID' (empty), 'Registration Token' (empty), and 'Download Count' (empty). At the bottom right are two buttons: 'Cancel' and 'Create'.

- Enter the details for Device ID / Serial number, Device Type, Device Name, Device Model, External ID, Registration Token, and Download Count.
- Click Create to add a device or click Cancel to cancel.

Modifying a Device

To modify a device, do the following:

- Click the **Device** hyperlink under the Order Management tab.
- Click the device that you want to modify.
- The **Update Device** screen is displayed as shown below.



The screenshot shows the 'Order Management' tab selected in the top navigation bar. The 'Devices' link in the sidebar is also selected and highlighted in blue. The main area is titled 'Update Device' and contains the same four input fields as the 'Add Device' form: 'Device ID / Serial *' (containing '12345II23'), 'Device Type *' (containing 'Mobile'), 'Device Name *' (containing 'iPhone'), and 'Device Model *' (containing 'XS'). Below these fields are the same three smaller input fields: 'External ID' (empty), 'Registration Token' (empty), and 'Download Count' (empty). At the bottom right are the 'Cancel' and 'Update' buttons. The 'Update' button is highlighted with a red box.

- Modify the device details as required.
- Click **Update** for updating the information or click **Cancel** to discard the changes.

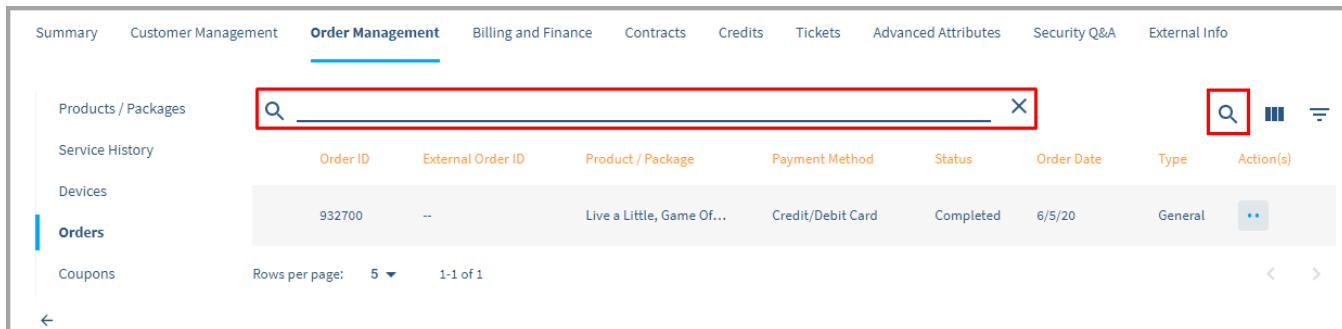
Orders

Searching an Order

To search for an order, do the following:

- Click the **Orders** hyperlink under the Order Management tab.

- Click the **Search** icon (🔍).
- In the Search field, type the value that you want to search for the order.

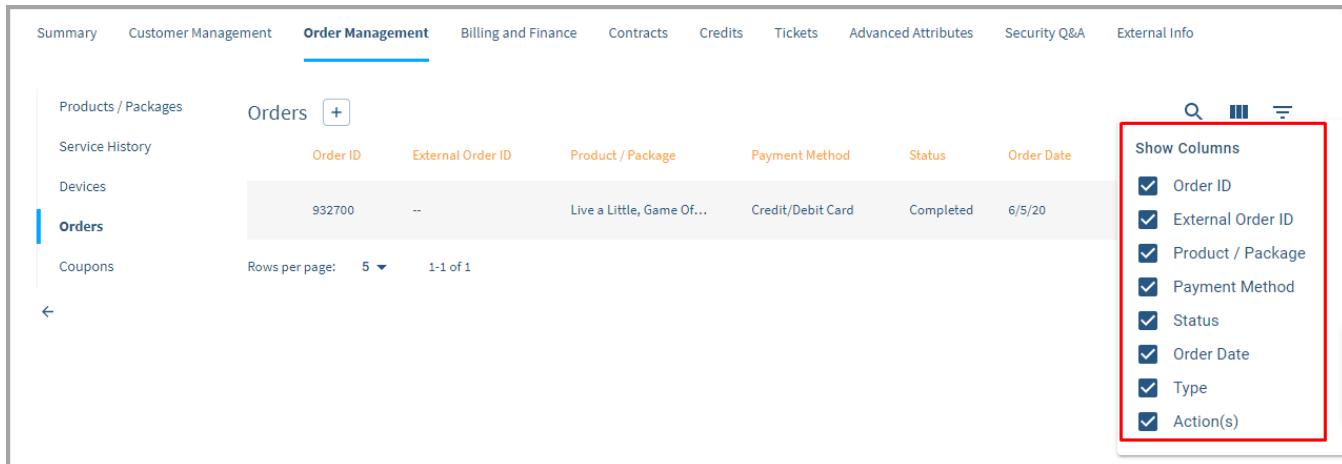


The screenshot shows the Evergent CRM interface with the 'Order Management' tab selected. At the top, there is a search bar with a magnifying glass icon, which is highlighted with a red box. Below the search bar is a table with one row. The columns are labeled: Order ID, External Order ID, Product / Package, Payment Method, Status, Order Date, Type, and Action(s). The first column contains the value '932700'. The status is 'Completed' and the order date is '6/5/20'. The 'Action(s)' column has a blue 'More' button icon.

Selection of Column Headings for an Order

To select the column headings for the order that you want to view, do the following:

- Click the **Orders** hyperlink under the Order Management tab.
- Click the **View Columns** icon (☰).
- In the **Show Columns** list, select the checkboxes that you want to view the Orders Column Headings.

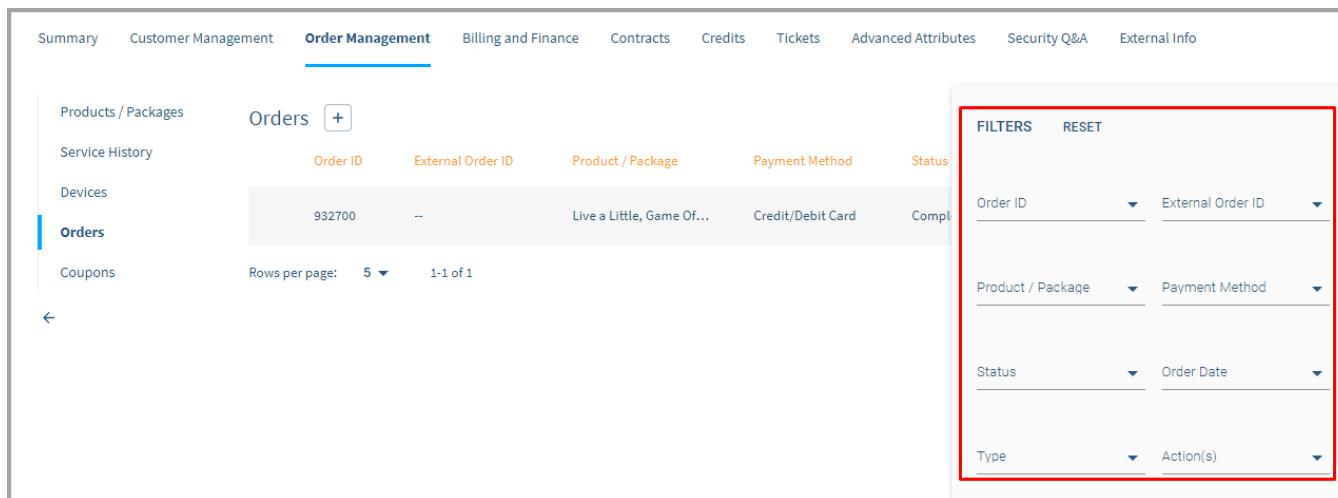


The screenshot shows the 'Order Management' tab with the 'Orders' section selected. On the right side, a 'Show Columns' menu is open, containing a list of checkboxes for each column heading. All checkboxes are checked, indicating that all columns will be displayed. The columns listed are: Order ID, External Order ID, Product / Package, Payment Method, Status, and Order Date.

Filtering Orders

To filter the orders, do the following:

- Click the **Orders** hyperlink under the Order Management tab.
- Click the **Filter Table** icon (FilterWhereTableIcon).
- Select the criteria that you want to filter and view the specific order.
- To clear the Filter table, click the **RESET** button.

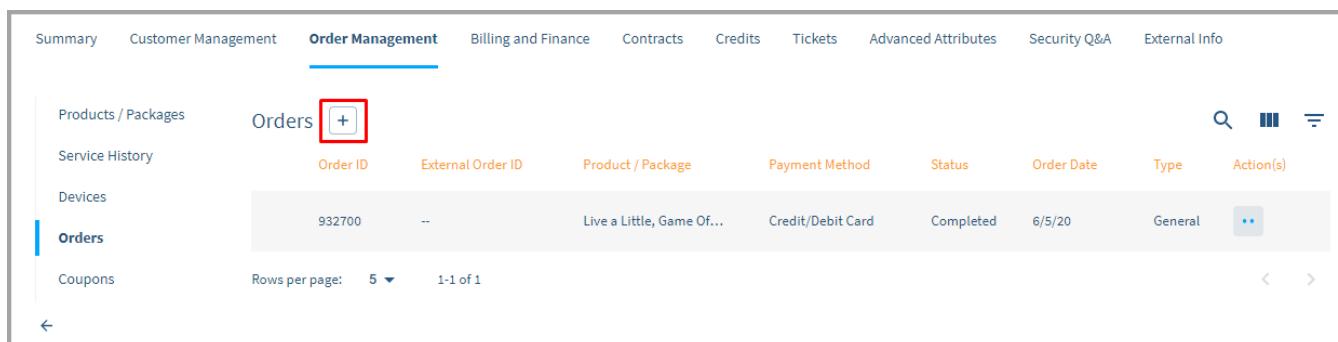


The screenshot shows the Order Management tab selected. In the Orders section, there is a 'Filters' panel on the right side with several dropdown menus for filtering orders based on Order ID, External Order ID, Product / Package, Payment Method, Status, Type, and Action(s). A red box highlights this 'FILTERS' panel.

Placing an Order

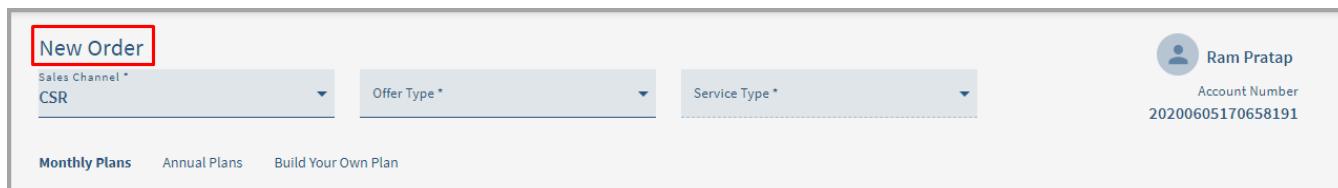
To place an order, do the following:

- Click the Orders hyperlink under the Order Management tab.
- Click the Add (+) icon to add a new order.



The screenshot shows the Order Management tab selected. In the Orders section, the 'Add (+)' icon is highlighted with a red box. The table below lists one order: Order ID 932700, External Order ID --, Product / Package 'Live a Little, Game Of...', Payment Method 'Credit/Debit Card', Status 'Completed', Order Date '6/5/20', Type 'General', and Action(s) with a three-dot menu icon.

- The New Order screen is displayed as shown below.



The screenshot shows the 'New Order' screen. It includes fields for Sales Channel (CSR), Offer Type, and Service Type. On the right, there is a user profile for Ram Pratap with the account number 20200605170658191. Below the main form, there are tabs for 'Monthly Plans', 'Annual Plans', and 'Build Your Own Plan'. A red box highlights the 'New Order' button at the top left of the form.

- Select the Sales Channel and Offer Type from the available drop-down list.
- The Service Type is displayed based on the Sales Channel and Offer Type selection.
- The available product and packages are displayed as shown below.

New Order

Sales Channel * CSR Offer Type * New Customer Service Type * SVOD

Service Address: 123,California,California,United States,90236

Monthly Plans Annual Plans Build Your Own Plan

SVOD

| Products | Packages |
|--|---|
| Live a Little \$25 <input type="checkbox"/> | Game Of Thrones - Series \$199 <input type="checkbox"/> |
| Game Of Thrones - Series 1 \$51 <input type="checkbox"/> | Game Of Thrones - Series 1 Game Of Thrones - Series 2 |
| SHOWTIME \$35 <input type="checkbox"/> | Offers FlatOff10 \$10 <input type="checkbox"/> |
| | Premium Package \$149 <input type="checkbox"/> |

Skip **Continue**

- Select the desired product/package from the list and click **Continue**.

New Order

Sales Channel * CSR Offer Type * New Customer Service Type * SVOD

Service Address: 123,California,California,United States,90236

Monthly Plans Annual Plans Build Your Own Plan

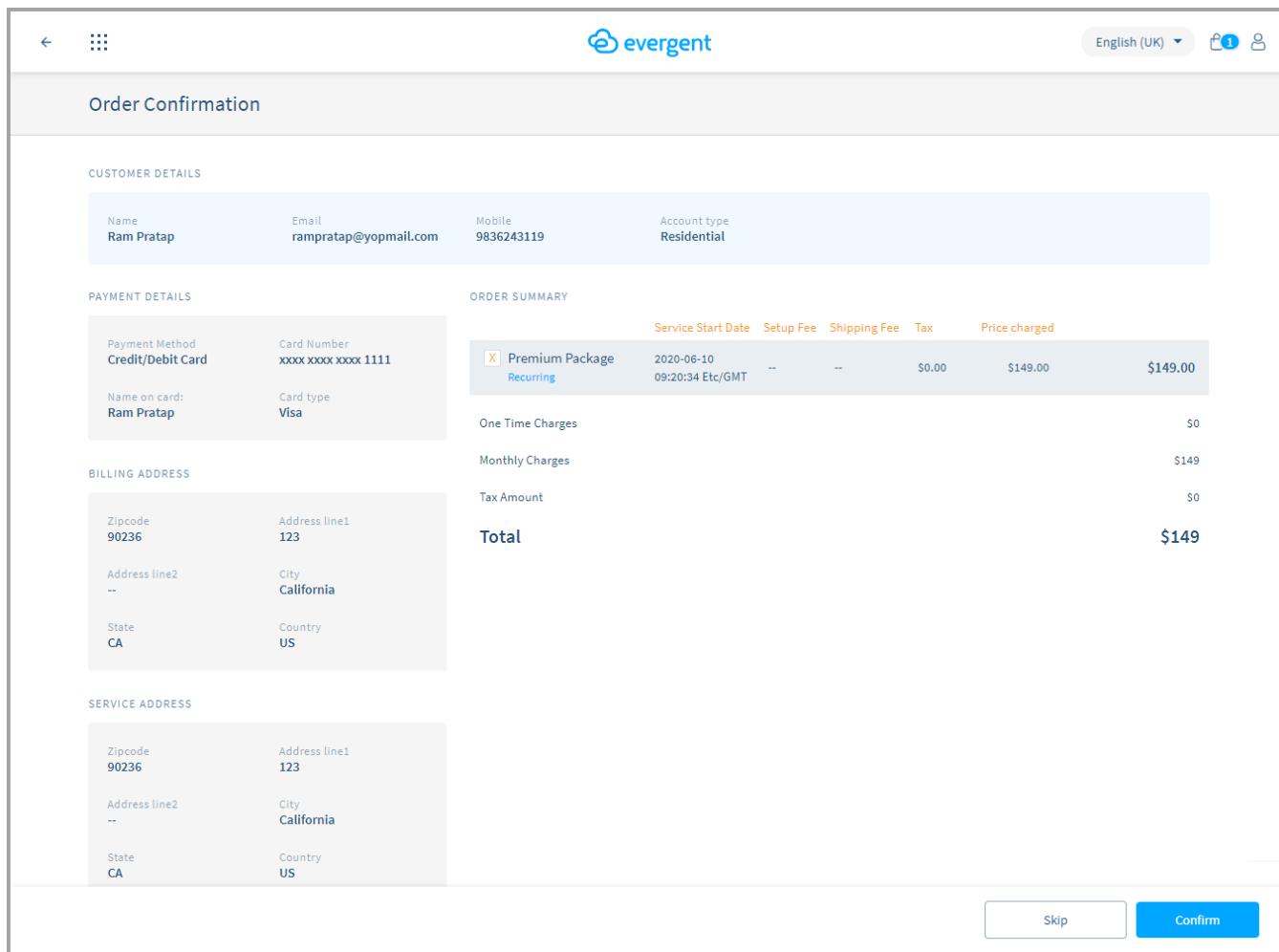
SVOD

| Products | Packages |
|--|---|
| Live a Little \$25 <input type="checkbox"/> | Game Of Thrones - Series \$199 <input type="checkbox"/> |
| Game Of Thrones - Series 1 \$51 <input type="checkbox"/> | Game Of Thrones - Series 1 Game Of Thrones - Series 2 |
| SHOWTIME \$35 <input type="checkbox"/> | Premium Package \$149 <input checked="" type="checkbox"/> |
| | SHOWTIME Game Of Thrones - Series 1 Game Of Thrones - Series 2 Captain Phillips Live a Little |
| | Ultra Premium Package \$101 <input type="checkbox"/> |
| | Game Of Thrones - Series 1 Game Of Thrones - Series 2 |

Total Items: [1] \$ 149.00

Skip **Continue**

- By clicking the Continue button, the user is directed to the Choose Payment Method screen where the user can add a new payment method by clicking on Add (+) icon or select from the existing payment methods.
- Enter the Billing Address and enter the Coupon Code if any.
- Click **Continue**.
- By clicking continue, the user is directed to Order Confirmation Screen as shown below.



CUSTOMER DETAILS

| | | | |
|--------------------|--------------------------------|----------------------|-----------------------------|
| Name Ram Pratap | Email rampratap@yopmail.com | Mobile 9836243119 | Account type Residential |
|--------------------|--------------------------------|----------------------|-----------------------------|

PAYMENT DETAILS

| | |
|--|------------------------------------|
| Payment Method Credit/Debit Card | Card Number xxxx xxxx xxxx 1111 |
| Name on card: Ram Pratap | Card type Visa |

ORDER SUMMARY

| | Service Start Date 2020-06-10 09:20:34 Etc/GMT | Setup Fee -- | Shipping Fee -- | Tax \$0.00 | Price charged \$149.00 |
|------------------------------|--|-----------------|--------------------|---------------|---------------------------|
| Premium Package Recurring | | | | | |
| One Time Charges | | | | | \$0 |
| Monthly Charges | | | | | \$149 |
| Tax Amount | | | | | \$0 |
| Total | | | | | \$149 |

BILLING ADDRESS

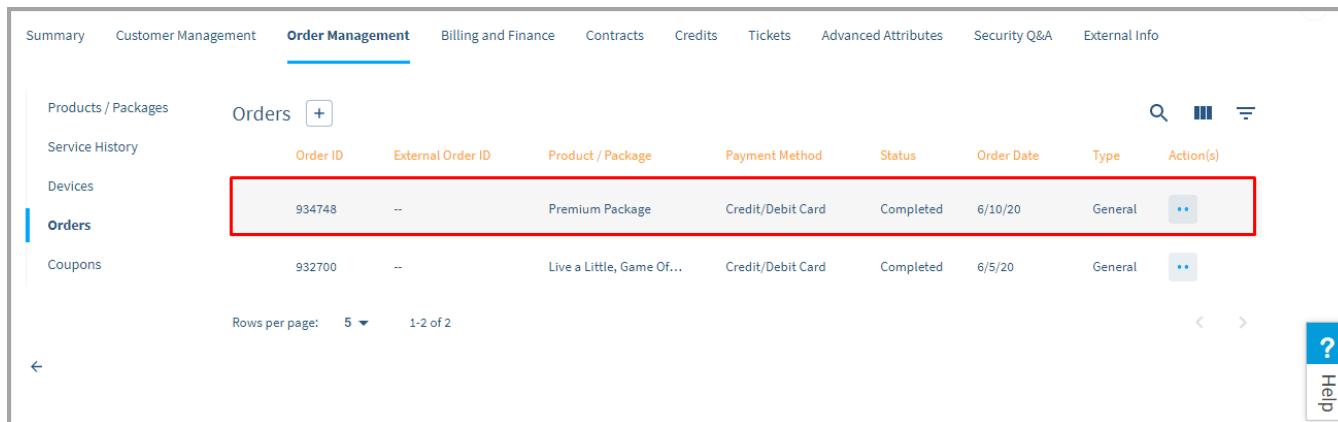
| | |
|---------------------|----------------------|
| Zipcode 90236 | Address line1 123 |
| Address line2 -- | City California |
| State CA | Country US |

SERVICE ADDRESS

| | |
|---------------------|----------------------|
| Zipcode 90236 | Address line1 123 |
| Address line2 -- | City California |
| State CA | Country US |

[Skip](#) [Confirm](#)

- Click Confirm to confirm the order, or else click Skip to discard the changes.
- The added product/package is displayed in the Orders section as shown below.



Order Management

| Products / Packages | Orders | Order ID | External Order ID | Product / Package | Payment Method | Status | Order Date | Type | Action(s) |
|---------------------|--------|----------|-------------------|---------------------------|-------------------|-----------|------------|---------|---------------------|
| Devices | Orders | 934748 | -- | Premium Package | Credit/Debit Card | Completed | 6/10/20 | General | ... |
| Coupons | | 932700 | -- | Live a Little, Game Of... | Credit/Debit Card | Completed | 6/5/20 | General | ... |

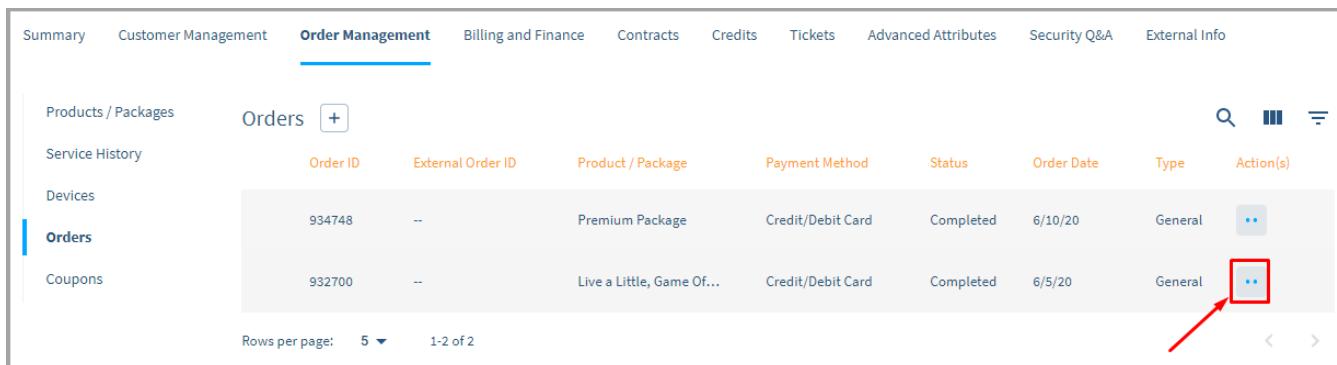
Rows per page: 5 1-2 of 2

Viewing the Order Details

To view the order details, do the following:

- Click the Orders hyperlink under the Order Management tab.

- Click the Action (..) icon inline button of a product/package in which you want to see the details.

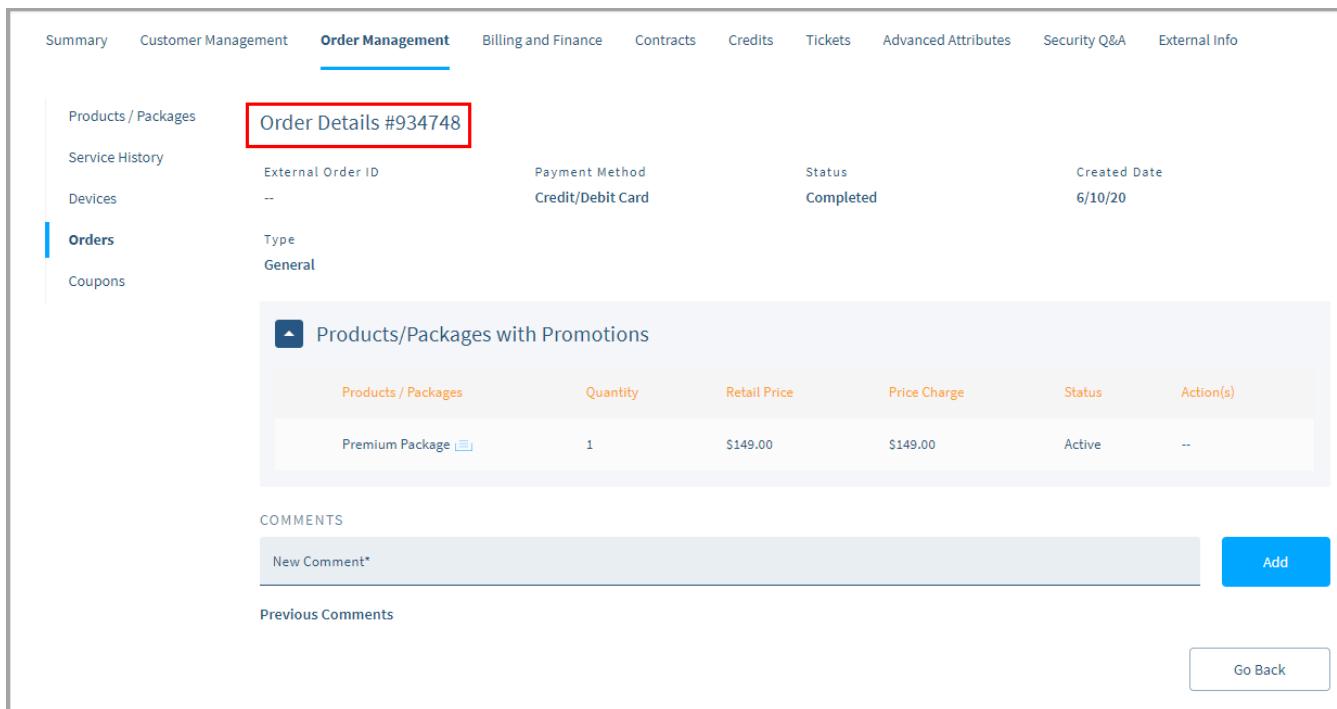


The screenshot shows the Order Management screen. The 'Orders' tab is selected. There are two orders listed:

| | Order ID | External Order ID | Product / Package | Payment Method | Status | Order Date | Type | Action(s) |
|--|----------|-------------------|---------------------------|-------------------|-----------|------------|---------|-----------|
| | 934748 | -- | Premium Package | Credit/Debit Card | Completed | 6/10/20 | General | |
| | 932700 | -- | Live a Little, Game Of... | Credit/Debit Card | Completed | 6/5/20 | General | |

Rows per page: 5 ▾ 1-2 of 2

- The Order Details screen is displayed as shown below.



The screenshot shows the Order Details screen for Order #934748. The title 'Order Details #934748' is highlighted with a red box. The order details are as follows:

| External Order ID | Payment Method | Status | Created Date |
|-------------------|-------------------|-----------|--------------|
| -- | Credit/Debit Card | Completed | 6/10/20 |

Type: General

Products/Packages with Promotions

| Products / Packages | Quantity | Retail Price | Price Charge | Status | Action(s) |
|---------------------|----------|--------------|--------------|--------|-----------|
| Premium Package | 1 | \$149.00 | \$149.00 | Active | -- |

COMMENTS

New Comment*

Previous Comments

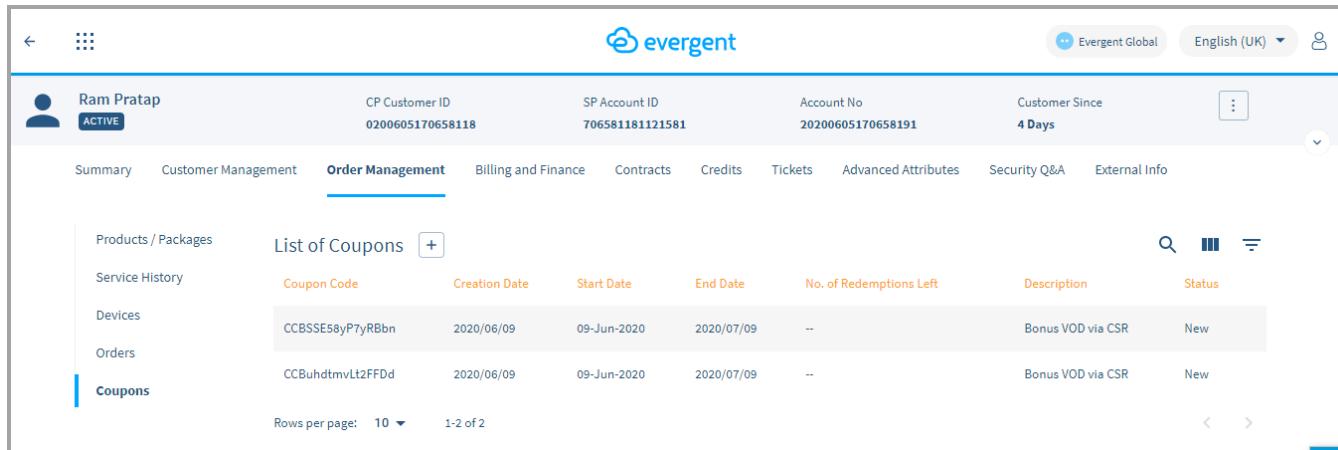
Go Back

- Enter comments in the Comments text area and click the Add button to save the comments into comments history.
- To go to the previous Orders screen, click Go Back.

Coupons

A “Coupon” also known as “Voucher Codes” or “Promo Codes”, refers to discounts on selected Product(s) and/or Package(s). Coupons can also be defined on applicable Promotion(s). A Coupon can be redeemed once or multiple times by a single user or multiple users, depending on the coupon type generated. Optional Constraints like expiry dates can also be provided while generating coupons.

A CSR can generate a coupon, view the redeemed coupons, and expired coupons linked to an account by accessing the coupons tab from the Account Management module.

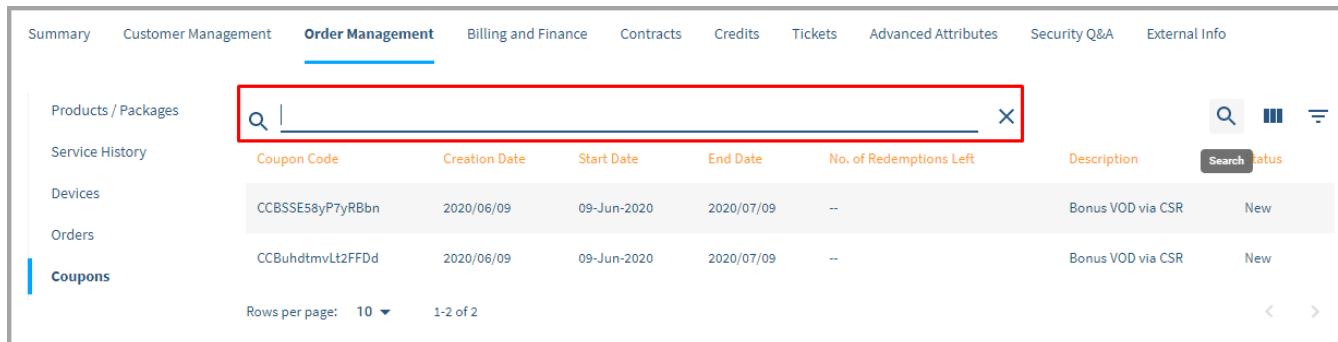


| Coupon Code | Creation Date | Start Date | End Date | No. of Redemptions Left | Description | Status |
|------------------|---------------|-------------|------------|-------------------------|-------------------|--------|
| CCBSSE58yP7yRBbn | 2020/06/09 | 09-Jun-2020 | 2020/07/09 | -- | Bonus VOD via CSR | New |
| CCBuhtdmvLt2FFDd | 2020/06/09 | 09-Jun-2020 | 2020/07/09 | -- | Bonus VOD via CSR | New |

Searching for a Coupon

To search for a coupon, do the following:

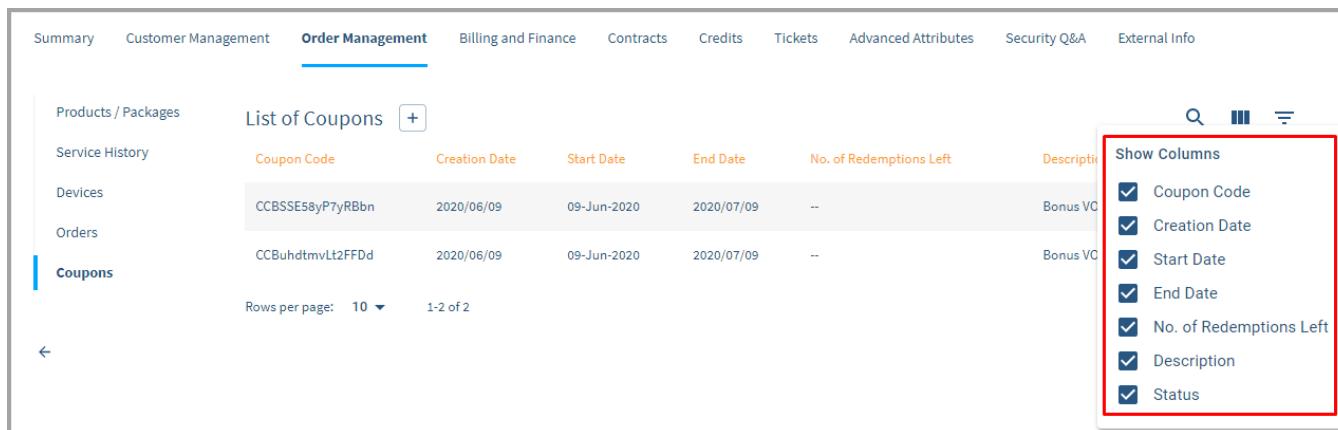
- Click the Coupons hyperlink under the Order Management tab.
- Click the Search icon (🔍).
- In the Search field, type the value that you want to search for a coupon.



Selection of Column Headings for a Coupon

To select the column headings for the coupon that you want to view, do the following:

- Click the Coupons hyperlink under the Order Management tab.
- Click the View Columns icon (☰).
- In the **Show Columns** list, select the checkboxes that you want to view the Coupons Column Headings.



The screenshot shows the 'Order Management' tab selected in the top navigation bar. On the left sidebar, the 'Coupons' link is highlighted. The main area displays a table titled 'List of Coupons' with two rows of data. The columns are: Coupon Code, Creation Date, Start Date, End Date, No. of Redemptions Left, and Description. To the right of the table is a 'Show Columns' dropdown menu with checkboxes for all columns except Status, which is checked.

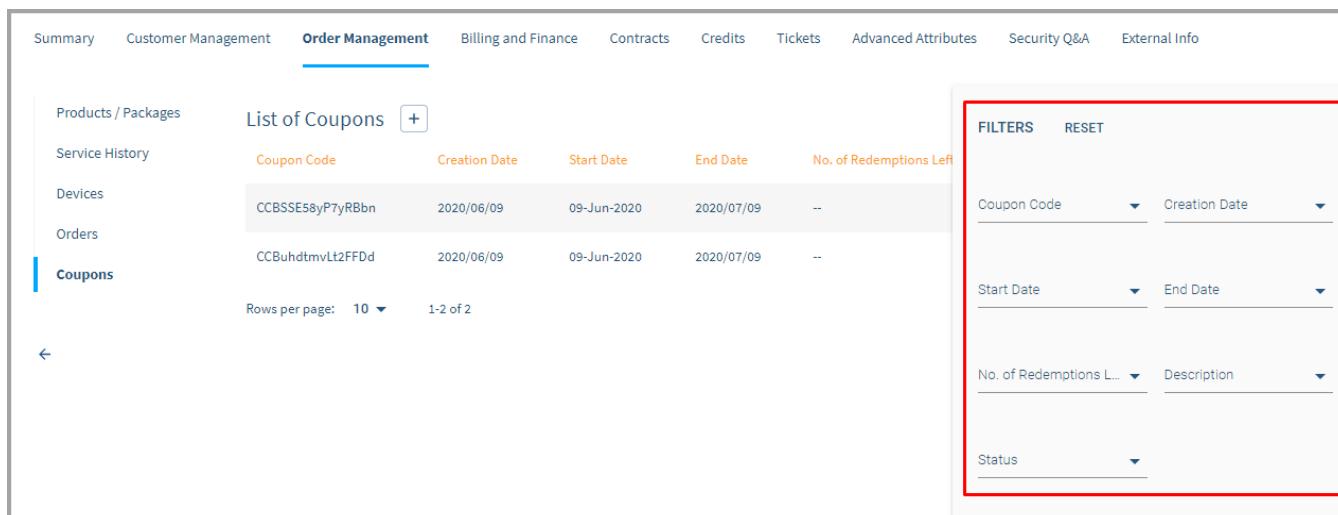
| Service History | Coupon Code | Creation Date | Start Date | End Date | No. of Redemptions Left | Description |
|-----------------|-------------------|---------------|-------------|------------|-------------------------|-------------|
| Devices | CCBSSE58yP7yRBbn | 2020/06/09 | 09-Jun-2020 | 2020/07/09 | -- | Bonus VC |
| Orders | CCBuhdtnvLlt2FFDd | 2020/06/09 | 09-Jun-2020 | 2020/07/09 | -- | Bonus VC |

Rows per page: 10 1-2 of 2

Filtering Coupons

To filter the coupons, do the following:

- Click the Coupons hyperlink under the Order Management tab.
- Click the **Filter Table** icon ().
- Select the criteria that you want to filter and view the specific coupon.
- To clear the filter table, click the **RESET** button.

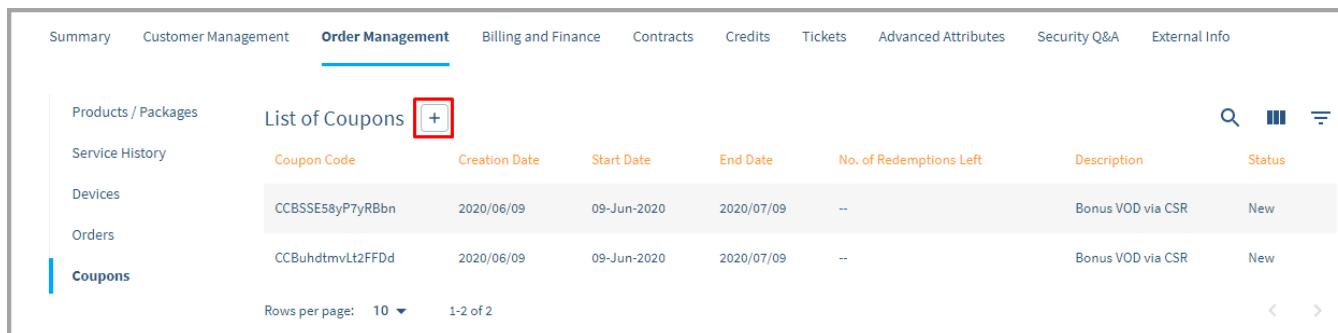


The screenshot shows the same interface as the previous one, but with a red box highlighting the 'FILTERS' and 'RESET' buttons at the top right of the filter panel. Below these buttons are several input fields for filtering: 'Coupon Code' and 'Creation Date' (with dropdown arrows), 'Start Date' and 'End Date' (with dropdown arrows), 'No. of Redemptions L...', 'Description' (with dropdown arrows), and 'Status' (with dropdown arrow).

Adding a Coupon

To add a coupon, do the following:

- Click the Coupons hyperlink on the left dashboard of the Order Management.
- Click the Add () icon to add a coupon.

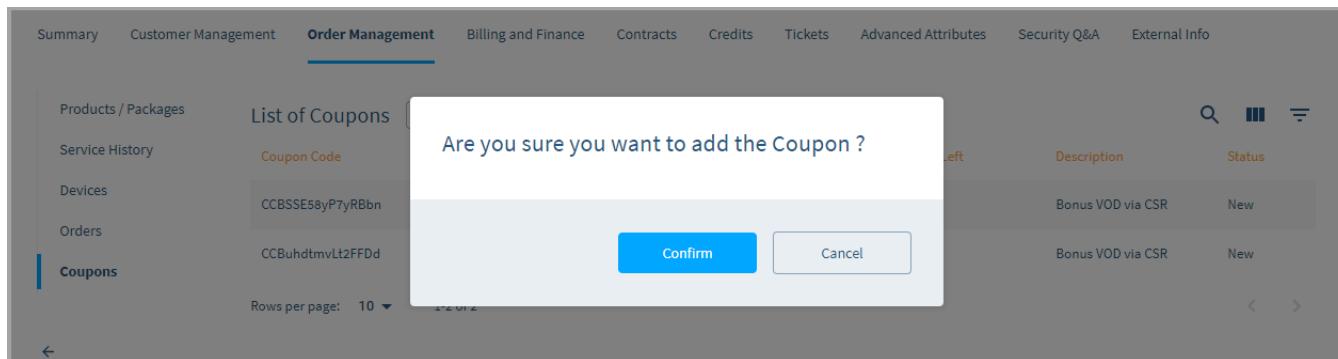


The screenshot shows the 'Order Management' tab selected. Under the 'Coupons' section, there are two entries:

| Coupon Code | Creation Date | Start Date | End Date | No. of Redemptions Left | Description | Status |
|------------------|---------------|-------------|------------|-------------------------|-------------------|--------|
| CCBSSE58yP7yRBbn | 2020/06/09 | 09-Jun-2020 | 2020/07/09 | -- | Bonus VOD via CSR | New |
| CCBuhtdmvLt2FFDd | 2020/06/09 | 09-Jun-2020 | 2020/07/09 | -- | Bonus VOD via CSR | New |

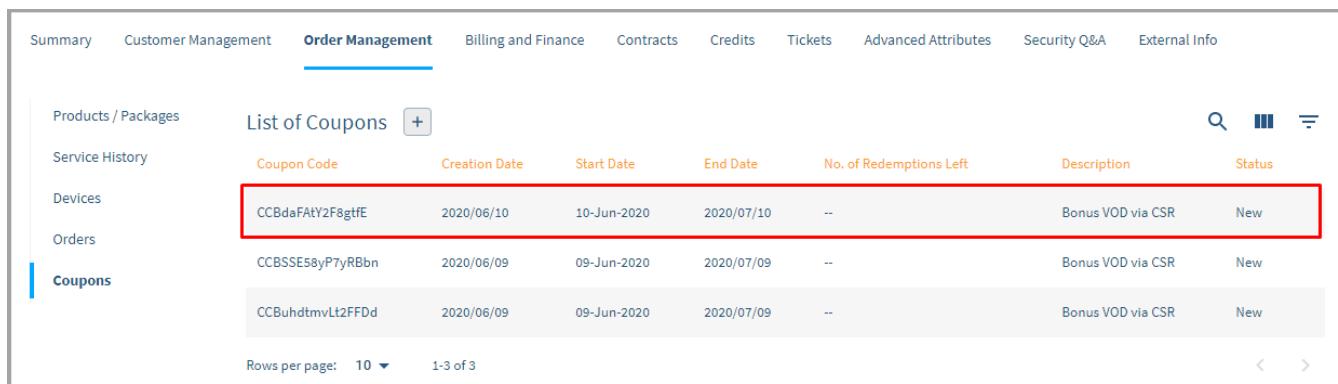
At the bottom left, it says 'Rows per page: 10 ▾ 1-2 of 2'. On the right, there are navigation arrows.

- A dialog box, "Are you sure you want to add the Coupon?" appears, as shown below.



The screenshot shows the same interface as above, but with a modal dialog box centered over the table. The dialog contains the text "Are you sure you want to add the Coupon ?" with two buttons at the bottom: "Confirm" (blue) and "Cancel" (white).

- Click Confirm to add the coupons, or else click Cancel.
- The added coupon is displayed in the Coupons section, as shown below.

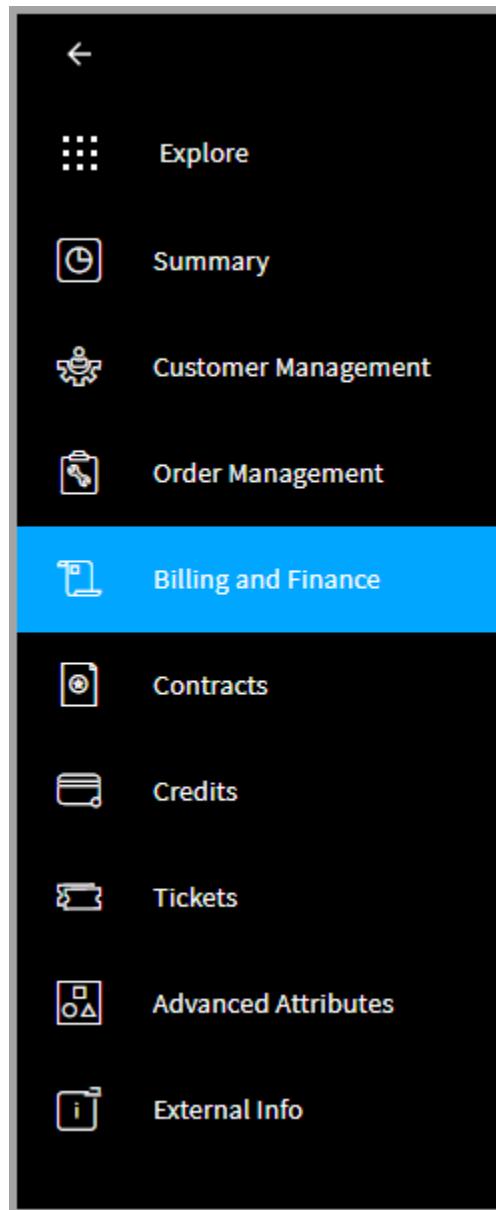


The screenshot shows the same interface after adding a new coupon. The newly added coupon, "CCBdaFATY2F8gtfE", is highlighted with a red box. The other two coupons listed earlier remain visible.

Billing and Finance

The **Billing and Finance** tab is used to provide the users to view the Billing and Financial history of their customers. A user can issue Payments, Adjustments, and Refunds to their customers, depending on the complaints received from customers about the business needs, from the Billing and Finance tab.

- Click the **Billing and Finance** tab to navigate to the Billing and Finance Home screen.

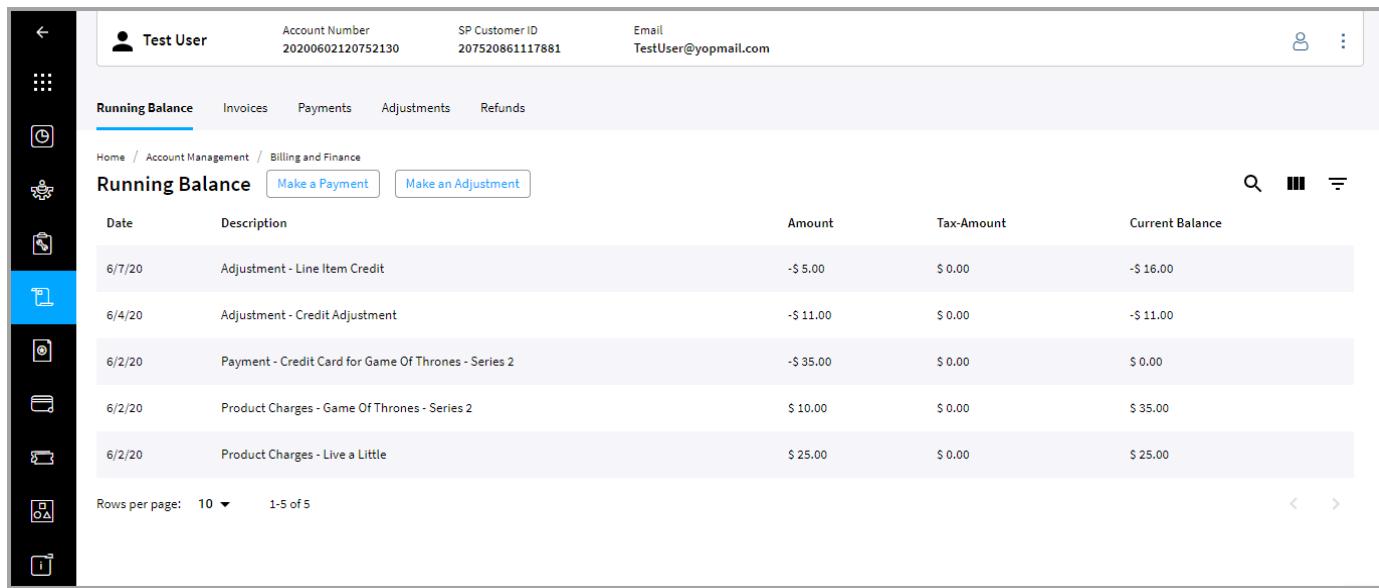


The following are the functionalities that can be provisioned by the user in the Billing and Finance tab:

- Running Balance
- Invoices
- Payments
- Adjustments
- Refunds

Running Balance

Running balance is a dynamic ledger balance that shows all the credit and debit transactions of that user account that are dynamically displayed over the UI based on the selected range with the latest record.



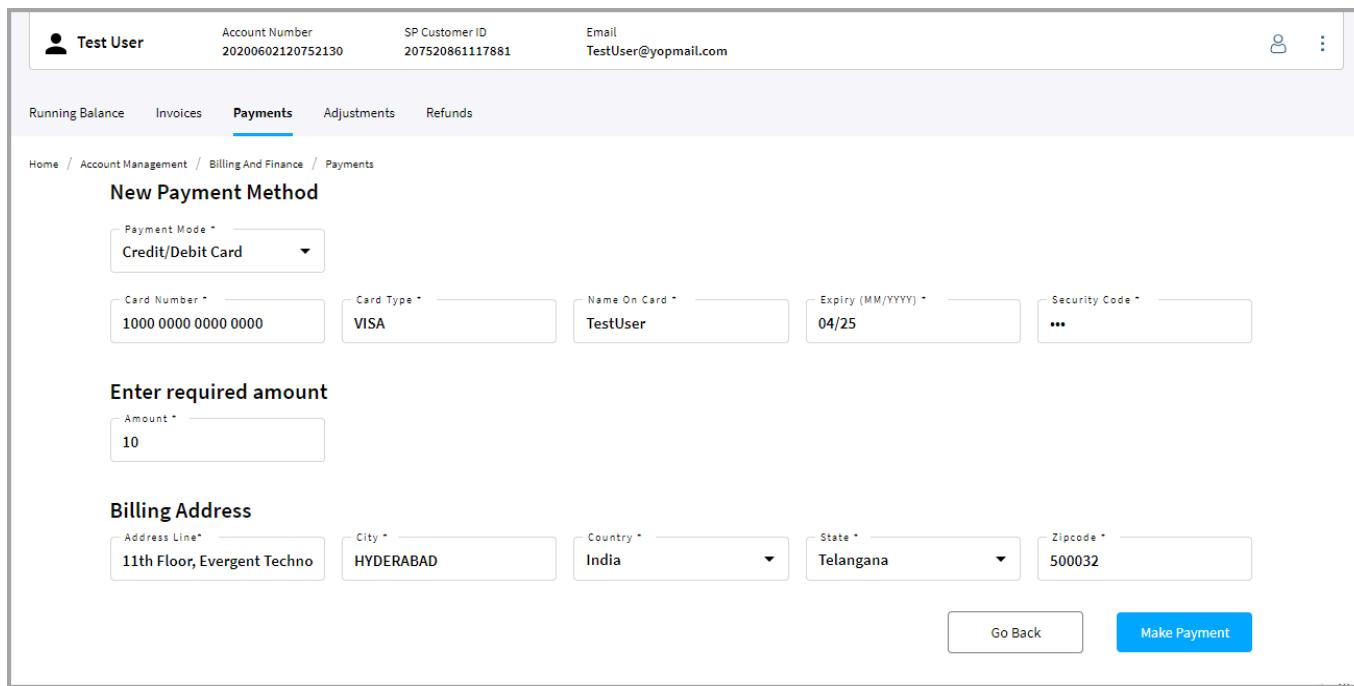
| Date | Description | Amount | Tax-Amount | Current Balance |
|--------|--|-----------|------------|-----------------|
| 6/7/20 | Adjustment - Line Item Credit | -\$ 5.00 | \$ 0.00 | -\$ 16.00 |
| 6/4/20 | Adjustment - Credit Adjustment | -\$ 11.00 | \$ 0.00 | -\$ 11.00 |
| 6/2/20 | Payment - Credit Card for Game Of Thrones - Series 2 | -\$ 35.00 | \$ 0.00 | \$ 0.00 |
| 6/2/20 | Product Charges - Game Of Thrones - Series 2 | \$ 10.00 | \$ 0.00 | \$ 35.00 |
| 6/2/20 | Product Charges - Live a Little | \$ 25.00 | \$ 0.00 | \$ 25.00 |

Make a Payment

This module is used to make payment for a user account by an existing payment method and a new payment method.

To make a payment, do the following:

- Click the **Running Balance** hyperlink under the Billing and Finance tab.
- Click the **Make a Payment** button.
- Select the payment mode that you want to make a payment.
- Enter the card number in the **Card Number** field.
- Enter the type of card in the **Card Type**.
- Enter the name of a cardholder in the **Name on Card** field.
- Enter the card expiry date in the **Expiry (MM/YYYY)** field.
- Enter the security code in the **Security Code** field.
- Enter the required amount in the **Amount** field.
- Click the **Make Payment** button. The payment line-item will be added to Payment History.



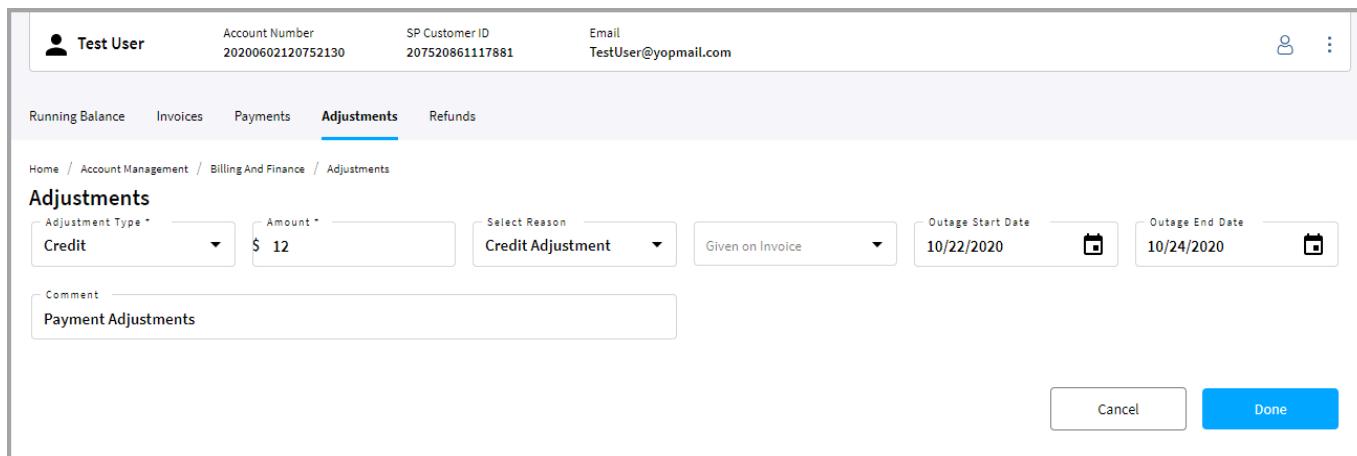
The screenshot shows the 'Payments' tab selected in the navigation bar. The main section is titled 'New Payment Method'. It contains fields for payment mode (set to 'Credit/Debit Card'), card details (card number, type, name, expiry, security code), amount (10), and billing address (address line, city, country, state, zipcode). At the bottom are 'Go Back' and 'Make Payment' buttons.

Adjustments

This module is a transaction that provides the payment corrections of a customer account payment entry.

To make the payment adjustments to the account, do the following:

- Click the **Running Balance** hyperlink under the Billing and Finance tab.
- Click the **Make an Adjustments** button.
- Select the **Adjustment Type** from the drop-down list.
- Enter the amount that you want to adjust in the **Amount** field.
- Select the reason for the payment adjustments from the **Select Reason** drop-down list.
- Select the invoice from the **Given-on Invoice** drop-down list for which you want to make the adjustments.
- Select the **Outage Start Date** and **Outage End Date** from the calendar.
- Type the comments in the **Comment** field.
- Click the **Done** button. The adjustments are added in the List of Adjustments section.



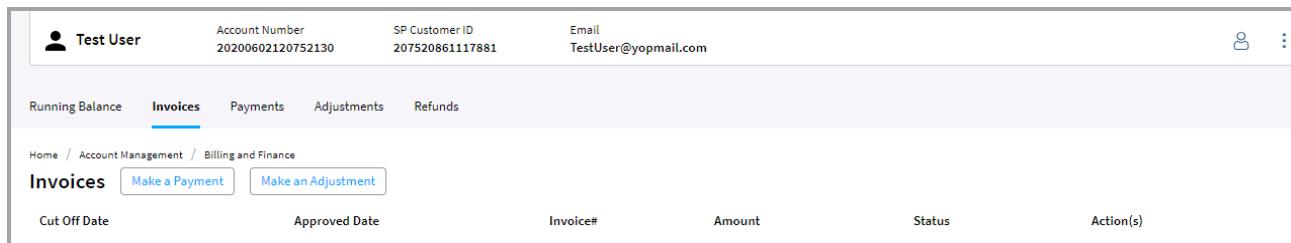
The screenshot shows the 'Adjustments' section of the Evergent CRM interface. At the top, account details are displayed: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, a navigation bar includes 'Running Balance', 'Invoices', 'Payments', 'Adjustments' (which is underlined in blue), and 'Refunds'. A breadcrumb trail shows Home / Account Management / Billing And Finance / Adjustments. The main area is titled 'Adjustments' and contains fields for 'Adjustment Type' (Credit), 'Amount' (\$12), 'Select Reason' (Credit Adjustment), 'Given on Invoice' (selected), 'Outage Start Date' (10/22/2020), and 'Outage End Date' (10/24/2020). A comment field contains 'Payment Adjustments'. At the bottom right are 'Cancel' and 'Done' buttons.

Write-off

The Write-Off button in the Running Balance of the respective accounts will get displayed only when the balance due for the account is positive, i.e., the customer must pay the amount. When clicking on the Write-Off button, if the customer has paid the amount and add a negative adjustment amount to make the balance due to zero.

Invoices

The invoices section shows all the general invoices created for an account. It shows in detail for each invoice.

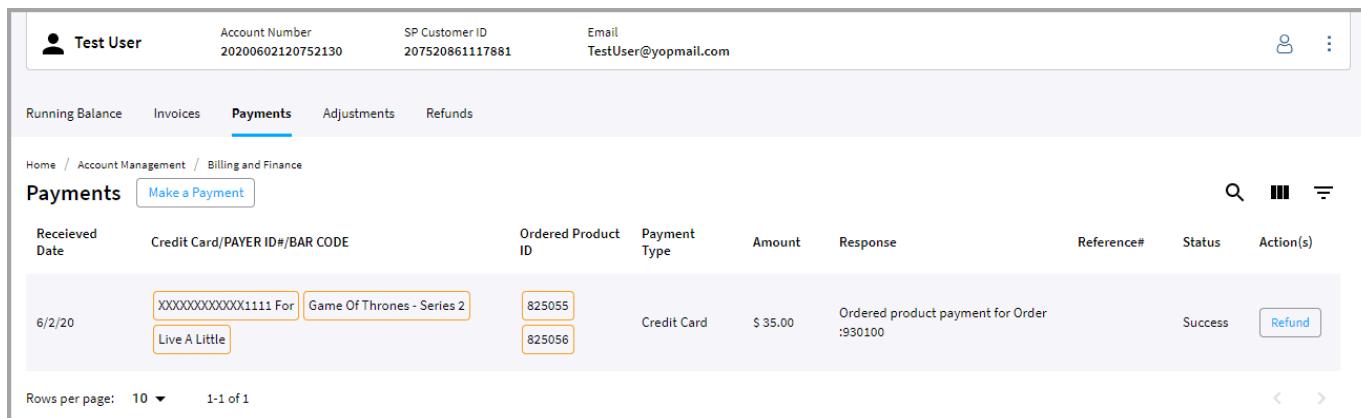


The screenshot shows the 'Invoices' section of the Evergent CRM interface. At the top, account details are displayed: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, a navigation bar includes 'Running Balance', 'Invoices' (underlined in blue), 'Payments', 'Adjustments', and 'Refunds'. A breadcrumb trail shows Home / Account Management / Billing and Finance. The main area is titled 'Invoices' and contains buttons for 'Make a Payment' and 'Make an Adjustment'. Below these buttons, there are columns for 'Cut Off Date', 'Approved Date', 'Invoice#', 'Amount', 'Status', and 'Action(s)'. The 'Invoices' tab is selected.

- The generated bills for the account are displayed as invoice hyperlink in the Invoices tab.
- Invoices that are approved are displayed under the Invoices Section Heading.

Payments

A user can create a new payment and view the existing customer payment history, which provides a record of credit card details, ordered product Id, the payment received date, amount, status, along with the option to refund the payment to the customer.

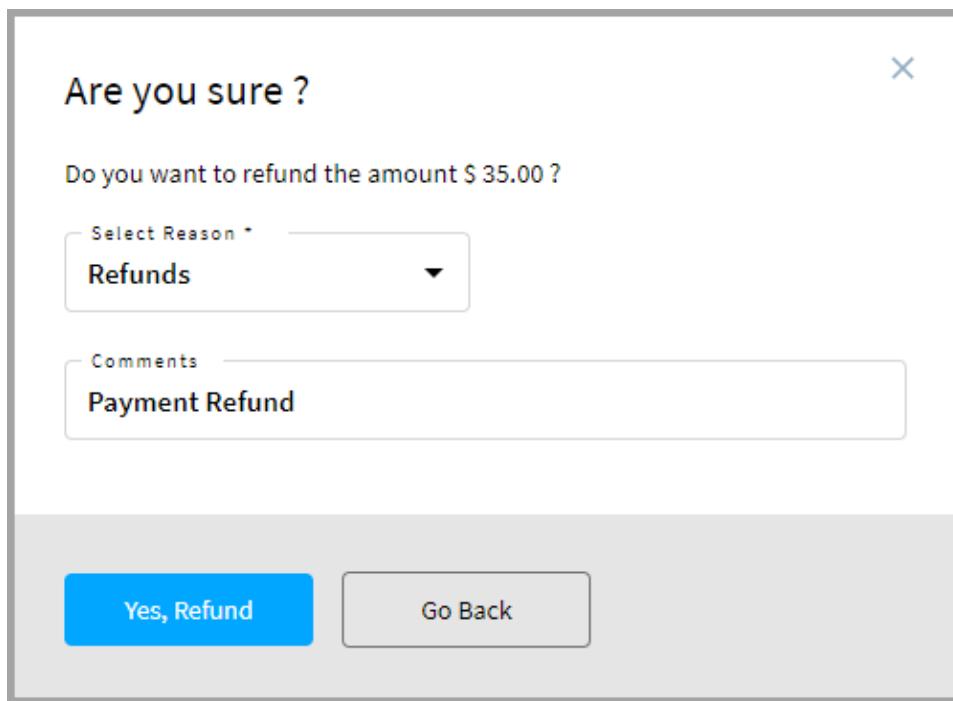


The screenshot shows the Evergent CRM interface for managing payments. At the top, it displays account details: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, a navigation bar includes links for Running Balance, Invoices, Payments (which is underlined in blue), Adjustments, and Refunds. The main content area is titled "Payments" and includes a "Make a Payment" button. The "Payments" section lists a single transaction: a payment of \$35.00 on 6/2/2020 for the product "Game Of Thrones - Series 2" (Ordered Product ID 825055) using a Credit Card (Reference# 825056). The response indicates it's an "Ordered product payment for Order :930100" and was successful. A "Refund" button is visible next to the transaction.

Refunding the Amount

To refund the amount, do the following:

- Click the **Payments** hyperlink under the Billing and Finance tab.
- On the Payment History screen, click the **Refund** button in the Actions column heading that you want to refund for the account.
- A dialog box, “**Are you sure?**” appears as shown below.



- Select a reason for the refund in the **Select Reason** drop-down list.
- Type the comments for payment refund in the **Comments** box.
- Click the **Yes, Refund** button to provide a refund, or else click **Go Back** to discard the changes.

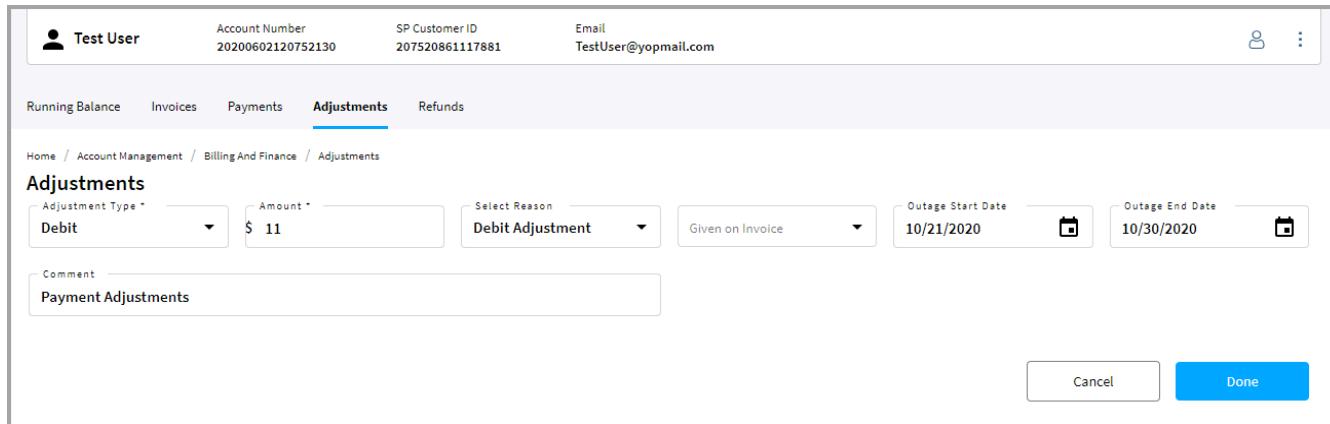
Adjustments

This module is a transaction that provides the payment corrections of a customer account payment entry.

Making a Payment Adjustment

To make payment adjustments, do the following:

- Click the **Adjustments** hyperlink under the Billing and Finance tab.
- Click the **Make an Adjustment** button to adjust payments.
- The **Adjustments** screen is displayed as shown below.



The screenshot shows the 'Adjustments' screen in the Evergent CRM. At the top, there's a header with user information: 'Test User', 'Account Number 20200602120752130', 'SP Customer ID 207520861117881', and 'Email TestUser@yopmail.com'. Below the header are navigation tabs: 'Running Balance', 'Invoices', 'Payments', 'Adjustments' (which is highlighted in blue), and 'Refunds'. Underneath the tabs, a breadcrumb trail shows 'Home / Account Management / Billing And Finance / Adjustments'. The main area is titled 'Adjustments' and contains several input fields:

- 'Adjustment Type' dropdown set to 'Debit'.
- 'Amount' input field showing '\$ 11'.
- 'Select Reason' dropdown set to 'Debit Adjustment'.
- 'Given on Invoice' dropdown set to 'Given on Invoice'.
- 'Outage Start Date' calendar set to '10/21/2020'.
- 'Outage End Date' calendar set to '10/30/2020'.
- A 'Comment' text area containing 'Payment Adjustments'.

At the bottom right are two buttons: 'Cancel' and 'Done'.

- Select the **Adjustment Type** from the available drop-down list.
- Enter the amount that you want to adjust in the **Amount** field.
- Select **Reason** and **Given on Invoice** from the available drop-down list.
- Select **Outage Start Date** and **Outage End Date**.
- Enter the comments for adjustments in the **Comment** box.
- Click **Done** for providing the adjustment or else click **Go Back**.

Refunds

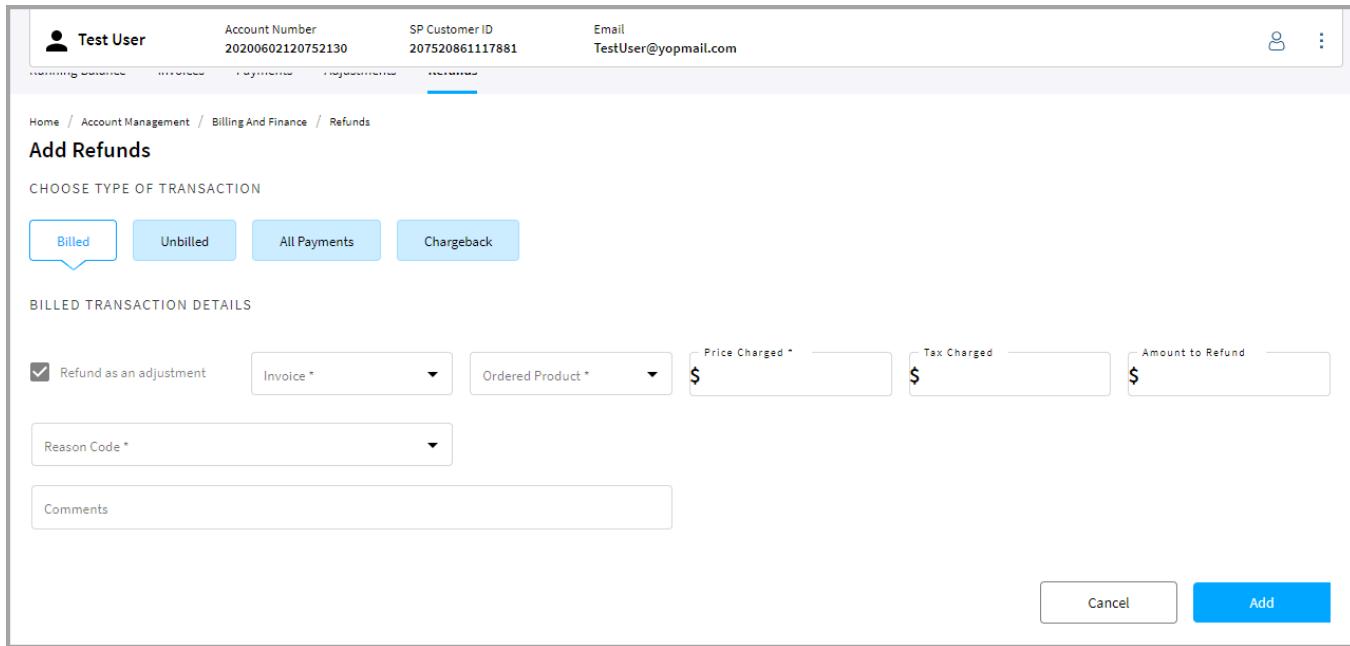
Refunds are calculated, whenever a service is removed or disconnected. From the disconnected/removed date, it will refund the amount for whatever duration it is billed.

Add Refunds

To add refunds to the user account, do the following:

- Click the **Refunds** hyperlink under the Billing and Finance tab.
- Click the **Refunds Add** icon (+) to issue a refund to a customer.
- The following are the refund types in the Type of Transaction list:

- Billed
- Unbilled
- All Payments
- Chargeback



The screenshot shows the 'Add Refunds' interface. At the top, it displays the customer information: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, the navigation path is Home / Account Management / Billing And Finance / Refunds. The main section is titled 'Add Refunds' and 'CHOOSE TYPE OF TRANSACTION'. It includes four buttons: Billed (selected), Unbilled, All Payments, and Chargeback. Under 'BILLED TRANSACTION DETAILS', there is a checked checkbox 'Refund as an adjustment' followed by dropdowns for 'Invoice' (Invoice *), 'Ordered Product' (Ordered Product *), 'Price Charged' (\$), 'Tax Charged' (\$), and 'Amount to Refund' (\$). There is also a dropdown for 'Reason Code' and a text area for 'Comments'. At the bottom right are 'Cancel' and 'Add' buttons.

Refund on Billed Transactions

- On selecting the Billed transaction type from the **Type of Transaction** drop-down list box.
- Select any one of the invoices from the **Select the Invoice** drop-down list.
- Select any one of the products from the **Select Ordered Product** drop-down list box.
- Enter the price to be charged in the **Price Charged** field.
- Enter the tax amount in the **Tax Charged** field.
- Enter the refund amount in the **Amount to Refund** field.
- Select the reason for refunding the amount in the **Reason Code** drop-down.
- Type the comments in the **Comments** box.
- Click the **Add** button to apply the refund to the customer, else click the **Go Back** button to cancel.

Refund on Unbilled Transactions

- On selecting the Unbilled transaction type from the **Type of Transaction** drop-down list box.
- Select any one of the Products/Packages from the **Select Ordered Product** drop-down list box.
- Enter the price to be charged in the **Price Charged** field.
- Enter the tax amount in the **Tax Charged** field.
- Enter the amount to refund in the **Amount to Refund** field.
- By default, the Adjustment checkbox is selected, which indicates that credit adjustment will be added to the refund amount that will be issued, to clear the running balance amount display as zero.
- Select the reason for refunding the amount in the **Reason Code** drop-down list.
- Type the comments in the **Comments** box.
- Click the **Add** button to apply the refund to the customer, else click the **Go Back** button to cancel.

Refund on All Payments Transactions

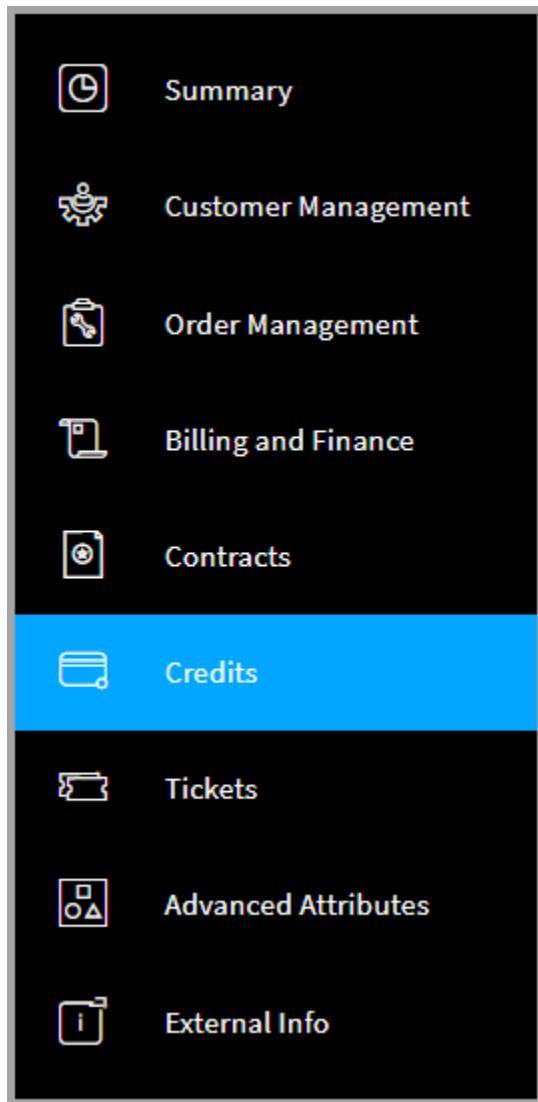
- On selecting the All-Payments transaction type from the **Type of Transaction** drop-down list.
- Select the payment from the list of available payments in the **Select Payment** drop-down list.
- Enter the tax amount in the **Tax Charged** field.
- Enter the refund amount in the **Amount to Refund** field.
- Select the reason for refunding the amount in the **Reason Code** drop-down list.
- Type the comments in the **Comments** box.
- Click the **Add** button to apply the refund to the customer, else click the **Go Back** button to cancel.

Refund on Chargeback Transactions

- On selecting the Chargeback transaction type from the **Type of Transaction** drop-down list box.
- Enter the tax amount in the **Tax Charged** field.
- Enter the refund amount in the **Amount to Refund** field.
- Enter the Id in the **Reconciliation ID** field.
- Enter the Id in the **Transaction ID** field.
- Select the reason for refunding the amount in the **Reason Code** drop-down.
- Type the comments in the **Comments** box.
- Click the **Add** button to apply the refund to the customer, else click the **Go Back** button to cancel.

Credits

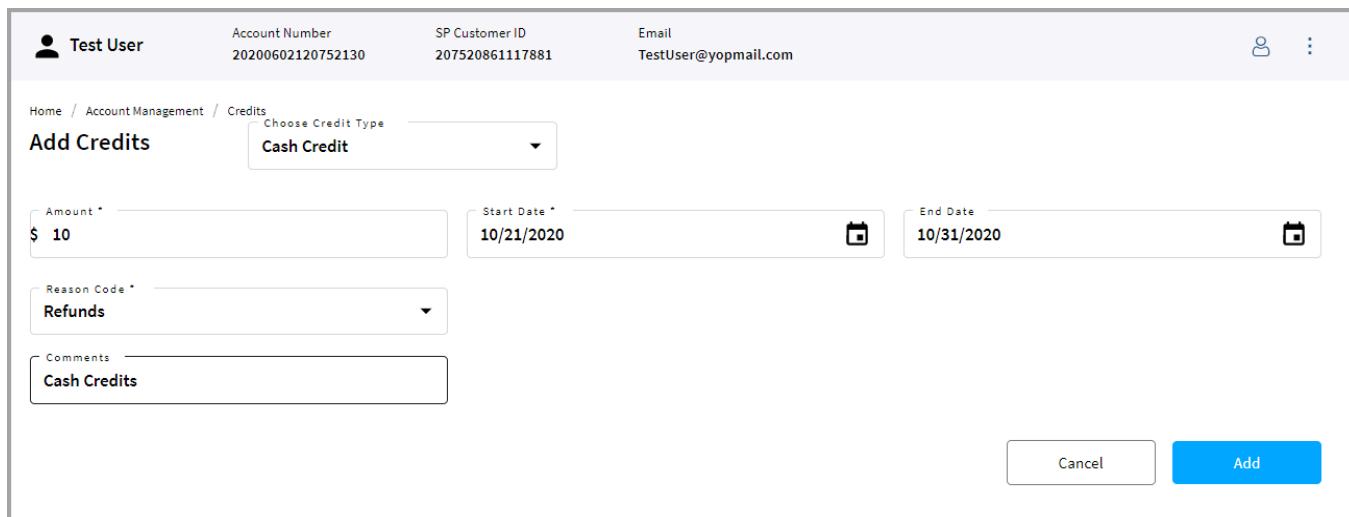
Credit is what businesses typically provided to a customer when the amount on an invoice or purchase is disputed or incorrect. This might be due to an admin error, or because the customer requires a full or partial refund.



Adding Cash Credits

To add the cash credits to the user account, do the following:

- On the **Credits** screen, click the Add (+) icon to add a new credit.
- The **Add Credits** screen appears.
- Click the **Choose Credit Type** drop-down list and select **Cash Credit**.
- Enter the credit amount in the **Amount** field.
- Select the start date and end date in the **Start Date** and **End Date** calendar.
- Select the reason from the **Reason Code** drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the cash credit, else click the **Go Back** button to cancel.



Add Credits

Choose Credit Type: Cash Credit

Amount *: \$ 10

Start Date *: 10/21/2020

End Date: 10/31/2020

Reason Code *: Refunds

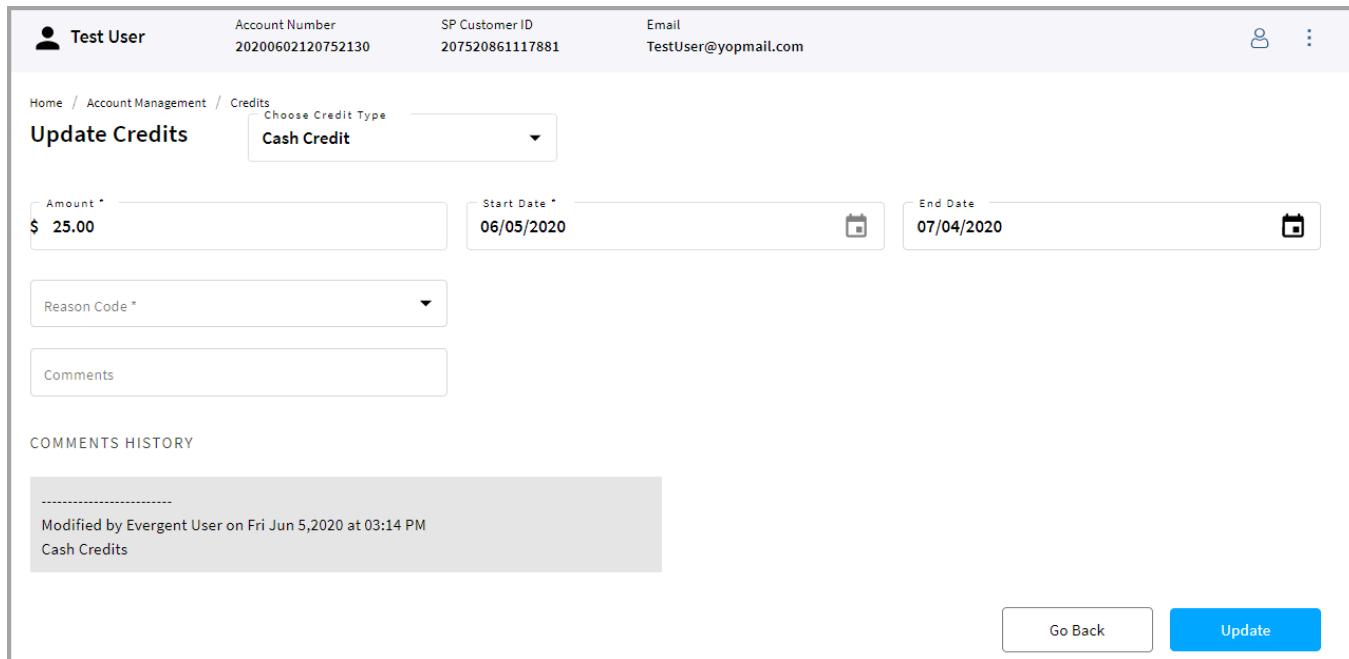
Comments: Cash Credits

Cancel Add

Updating Cash Credits

To update the cash credits of a user account, do the following:

- Click the credit record where you want to update the cash credit details on the Credits screen.
- The Update Credits screen is displayed as shown below.



Update Credits

Choose Credit Type: Cash Credit

Amount *: \$ 25.00

Start Date *: 06/05/2020

End Date: 07/04/2020

Reason Code *: Refunds

Comments: Cash Credits

COMMENTS HISTORY

Modified by Evergent User on Fri Jun 5,2020 at 03:14 PM
Cash Credits

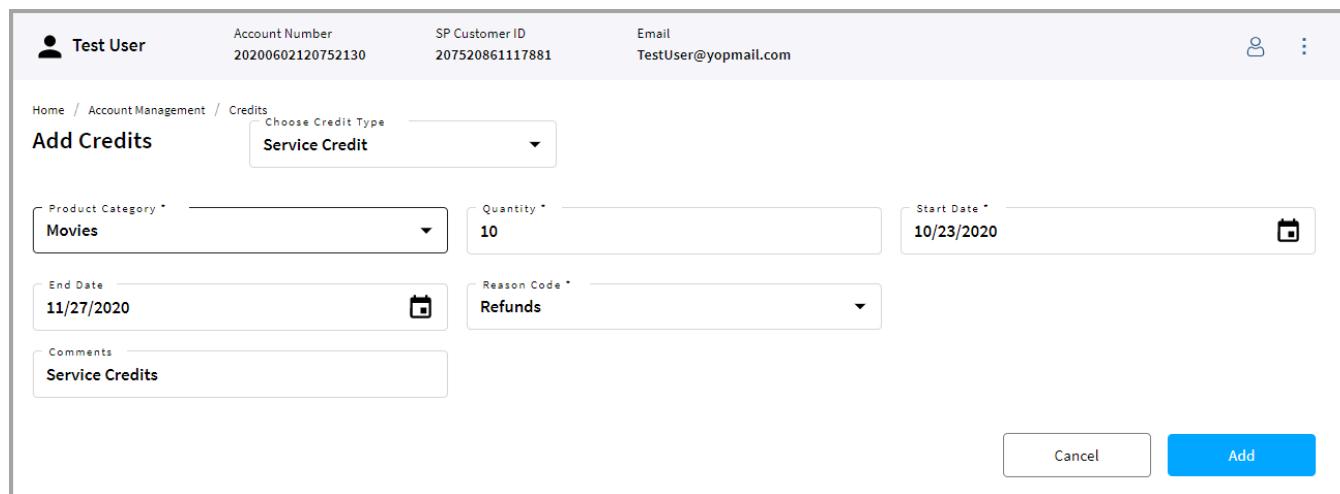
Go Back Update

- Make the necessary changes to the required fields, and click the **Update** button to save the changes, else click the **Go Back** button to cancel.

Adding Service Credit

To add the service credit to the user account, do the following:

- On the **Credits** screen, click the Add (+) icon to add a new service credit.
- The **Add Credits** screen appears.
- Click the **Choose Credit Type** drop-down list and select **Service Credit**.
- Select a product category from the **Product Category** drop-down list.
- Enter the quantity in the **Quantity** field.
- Select the start date in the **Start Date** and the end date in the <End Date> calendar.
- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the service credit, else click the **Go Back** button to cancel.

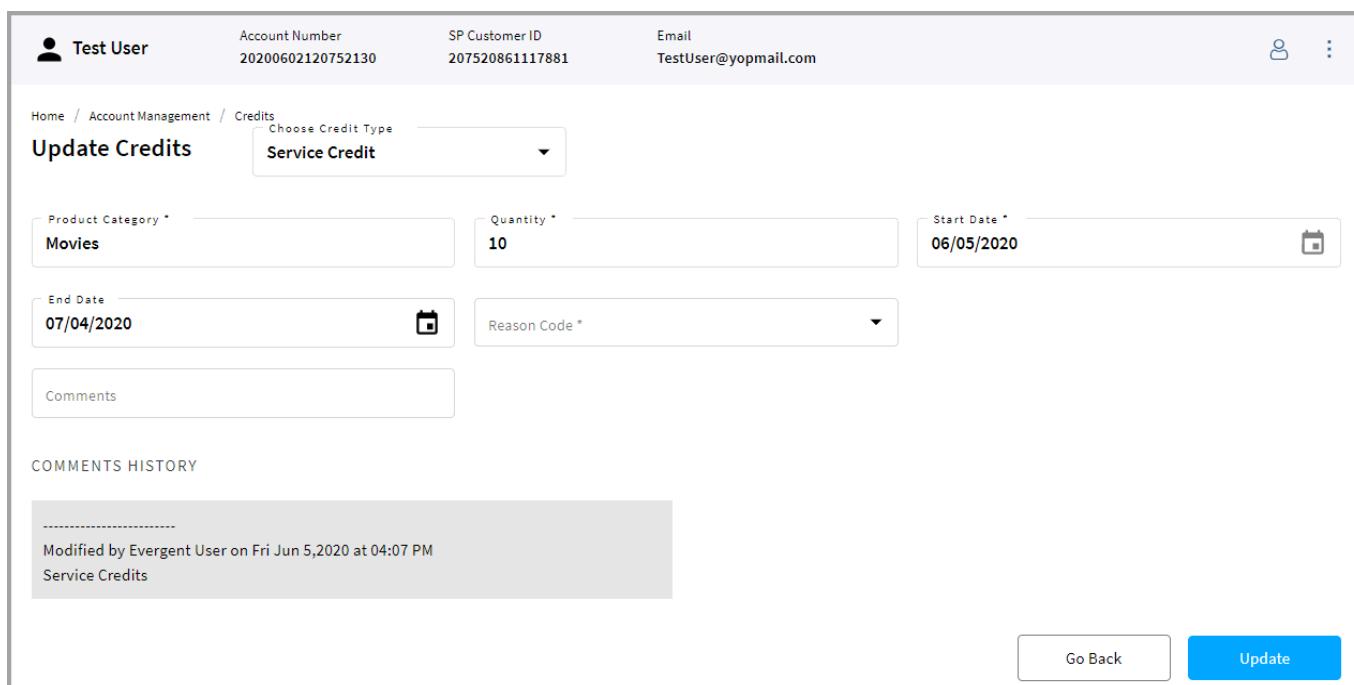


The screenshot shows the 'Add Credits' form in the Evergent CRM interface. At the top, it displays the user profile: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below the header, the navigation path is Home / Account Management / Credits. The main section is titled 'Add Credits' with a dropdown menu showing 'Service Credit'. The form contains several input fields: 'Product Category' set to 'Movies', 'Quantity' set to '10', 'Start Date' set to '10/23/2020', 'End Date' set to '11/27/2020', 'Reason Code' set to 'Refunds', and a 'Comments' text area containing 'Service Credits'. At the bottom right are 'Cancel' and 'Add' buttons.

Updating Service Credits

To update the service credit of a user account, do the following:

- Click the service credit record where you want to update the service credit details on the Credits screen.
- The Update Credits screen is displayed as shown.



Test User Account Number 20200602120752130 SP Customer ID 207520861117881 Email TestUser@yopmail.com

Home / Account Management / Credits

Choose Credit Type

Update Credits

Service Credit

Product Category * Movies

Quantity * 10

Start Date * 06/05/2020

End Date 07/04/2020

Reason Code *

Comments

COMMENTS HISTORY

Modified by Evergent User on Fri Jun 5,2020 at 04:07 PM
Service Credits

Go Back Update

- Make the necessary changes to the required fields and click the **Update** button to save the changes, else click the **Go Back** button to cancel.

Adding Line-Item Credits

To add the line-item credit to the user account, do the following:

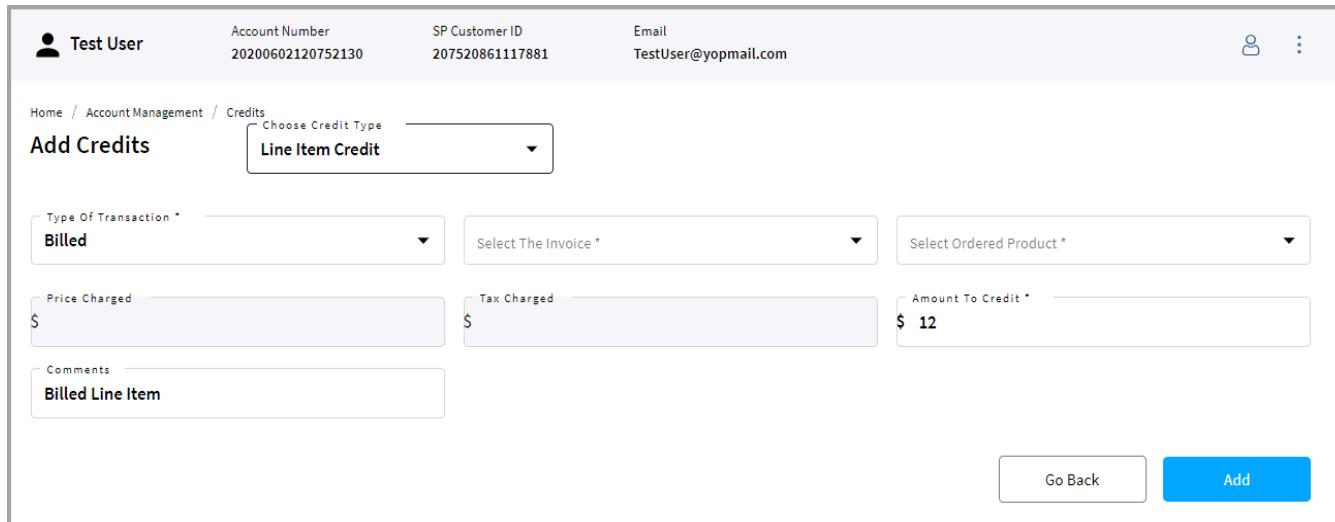
- On the **Credits** screen, click the Add (+) icon to add a new line-item credit.
- The **Add Credits** screen appears.
- Click the **Choose Credit Type** drop-down list and select the **Line-Item Credit**.
- Select a type in the **Type of Transaction** drop-down list.
 - Billed
 - Unbilled
 - Chargeback

Billed

When a user selects Billed from the Type of Transaction list, do the following:

- Select an invoice from the **Select the Invoice** drop-down list.
- Select a product from the **ordered Product** drop-down list.
- Enter the amount in the **Price Charged** field.
- Enter the amount in the **Amount to Credit** field.

- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the service credit, else click the **Go Back** button to cancel.

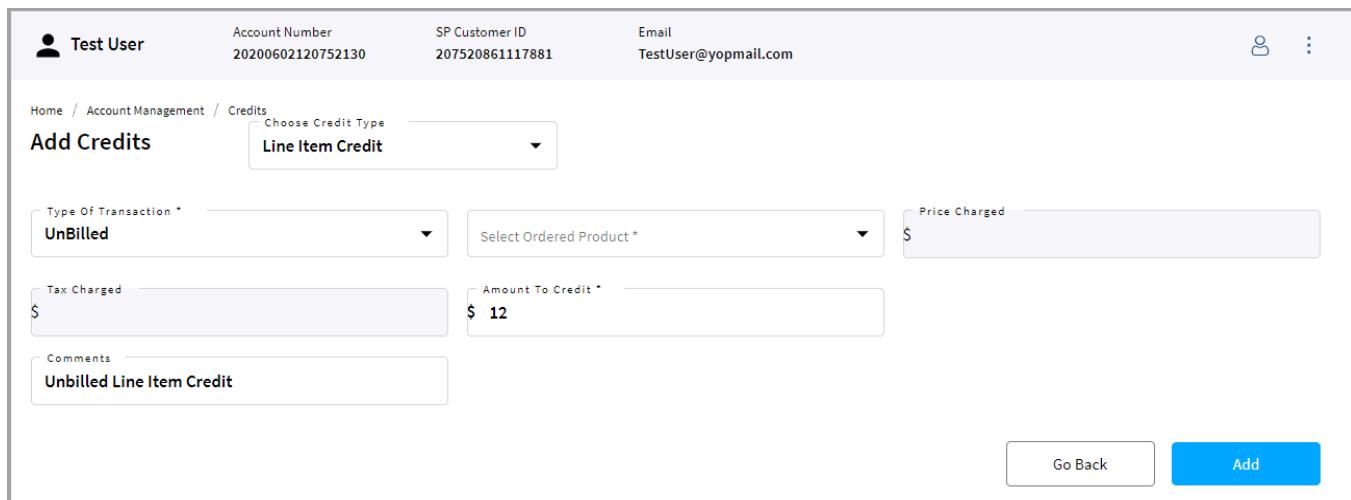


The screenshot shows the 'Add Credits' form for a 'Billed' transaction. The 'Type Of Transaction' dropdown is set to 'Billed'. The 'Select The Invoice' and 'Select Ordered Product' dropdowns are empty. The 'Price Charged' field contains '\$' followed by a blank input field. The 'Tax Charged' field contains '\$' followed by a blank input field. The 'Amount To Credit' field contains '\$ 12'. The 'Comments' text area contains 'Billed Line Item'. At the bottom right are 'Go Back' and 'Add' buttons.

Unbilled

When a user selects **Unbilled** from the **Type of Transaction** list, do the following:

- Select a product from the **ordered Product** drop-down list.
- Enter the amount in the **Price Charged** field.
- Enter the amount in the **Amount to Credit** field.
- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the service credit, else click the **Go Back** button to cancel.

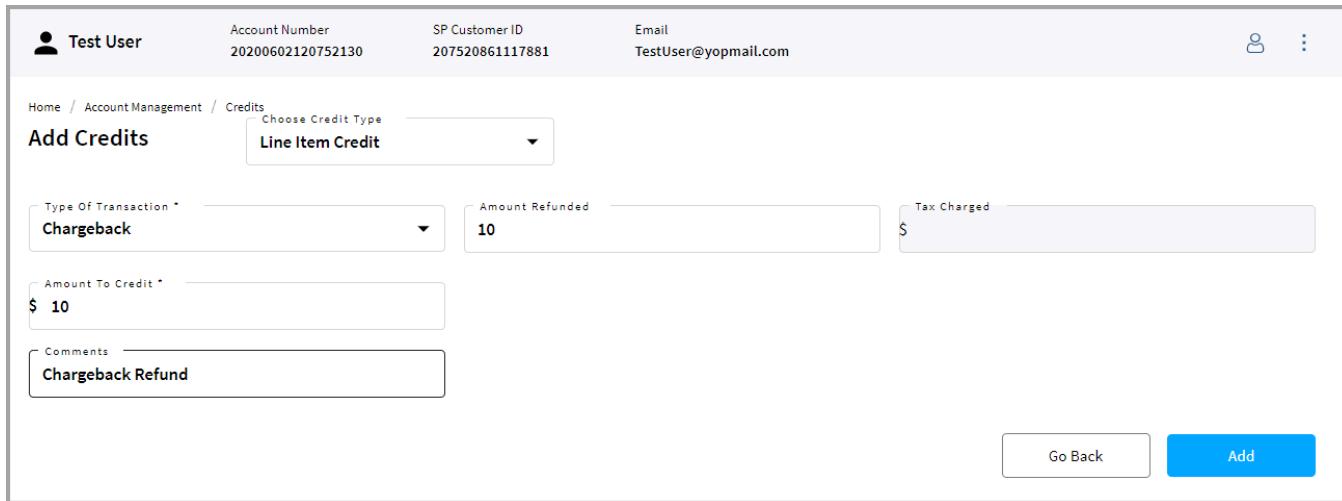


The screenshot shows the 'Add Credits' form for an 'Unbilled' transaction. The 'Type Of Transaction' dropdown is set to 'UnBilled'. The 'Select Ordered Product' dropdown is empty. The 'Price Charged' field contains '\$' followed by a blank input field. The 'Tax Charged' field contains '\$' followed by a blank input field. The 'Amount To Credit' field contains '\$ 12'. The 'Comments' text area contains 'Unbilled Line Item Credit'. At the bottom right are 'Go Back' and 'Add' buttons.

Chargeback

When a user selects **Chargeback** from the **Type of Transaction** list, do the following:

- Enter the amount in the **Amount Refunded** field.
- Enter the amount in the **Amount to Credit** field.
- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the service credit, else click the **Go Back** button to cancel.



The screenshot shows the Evergent CRM Credits screen. At the top, it displays account details: Test User, Account Number 20200602120752130, SP Customer ID 207520861117881, and Email TestUser@yopmail.com. Below this, the navigation path is Home / Account Management / Credits. The main section is titled "Add Credits" and has a dropdown menu "Choose Credit Type" set to "Line Item Credit". The "Type Of Transaction" dropdown is set to "Chargeback". The "Amount Refunded" input field contains "10". The "Tax Charged" input field starts with a dollar sign. The "Amount To Credit" input field also starts with a dollar sign and contains "10". The "Comments" input field contains "Chargeback Refund". At the bottom right are "Go Back" and "Add" buttons.

Updating Line-Item Credits

To update the line item of a user account, do the following:

- Click the line-item record where you want to update the line item details on the Credits screen.
- Make the necessary changes to the required fields and click the **Update** button to save the changes, else click the **Go Back** button to cancel.

Test User Account Number 20200602120752130 SP Customer ID 207520861117881 Email TestUser@yopmail.com

Home / Account Management / Credits Choose Credit Type
Update Credits Line Item Credit

Type Of Transaction * UnBilled Product Name Live a Little Start Date * 06/07/2020

Given on Invoice # Available Credit \$ 5.00 Credit Amount \$ 5.00

COMMENTS HISTORY

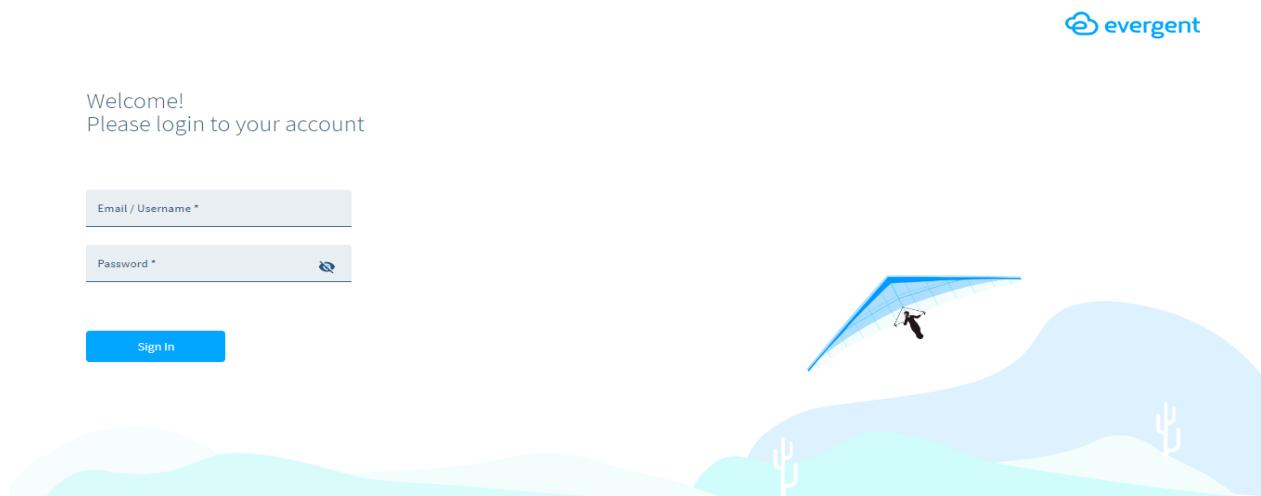
Payment Refund

Go Back

Back Office Admin

Login to Back Office Admin

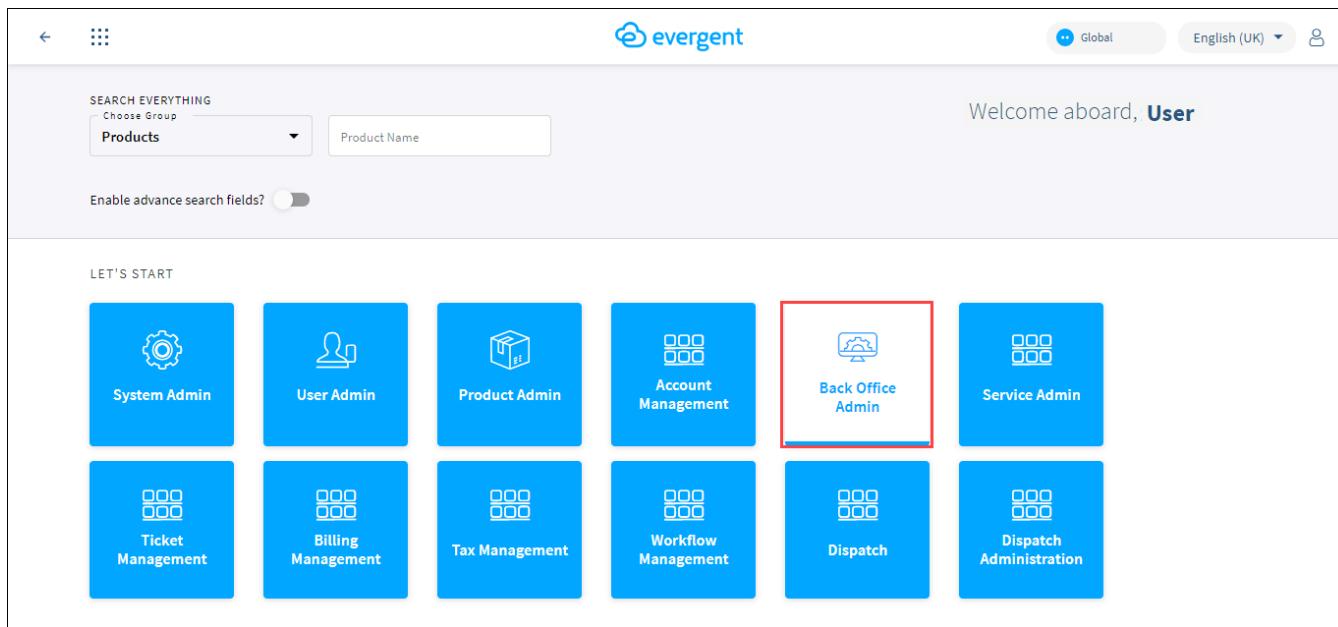
- Open a web browser, such as Internet Explorer / Mozilla Firefox / Google Chrome.
- In the address bar, enter the application URL as provided by Evergent.
- Enter the valid Email/Username and Password.
- Click the **Sign In** button. This will begin your Evergent session.



- The users with access to multiple business units must select the business unit from the available drop-down list and click **Submit**.



- Once a business unit is selected, the user is redirected to the dashboard home screen.
- Click the **Back Office Admin** image button on the dashboard home screen to enter the Back Office Admin application.

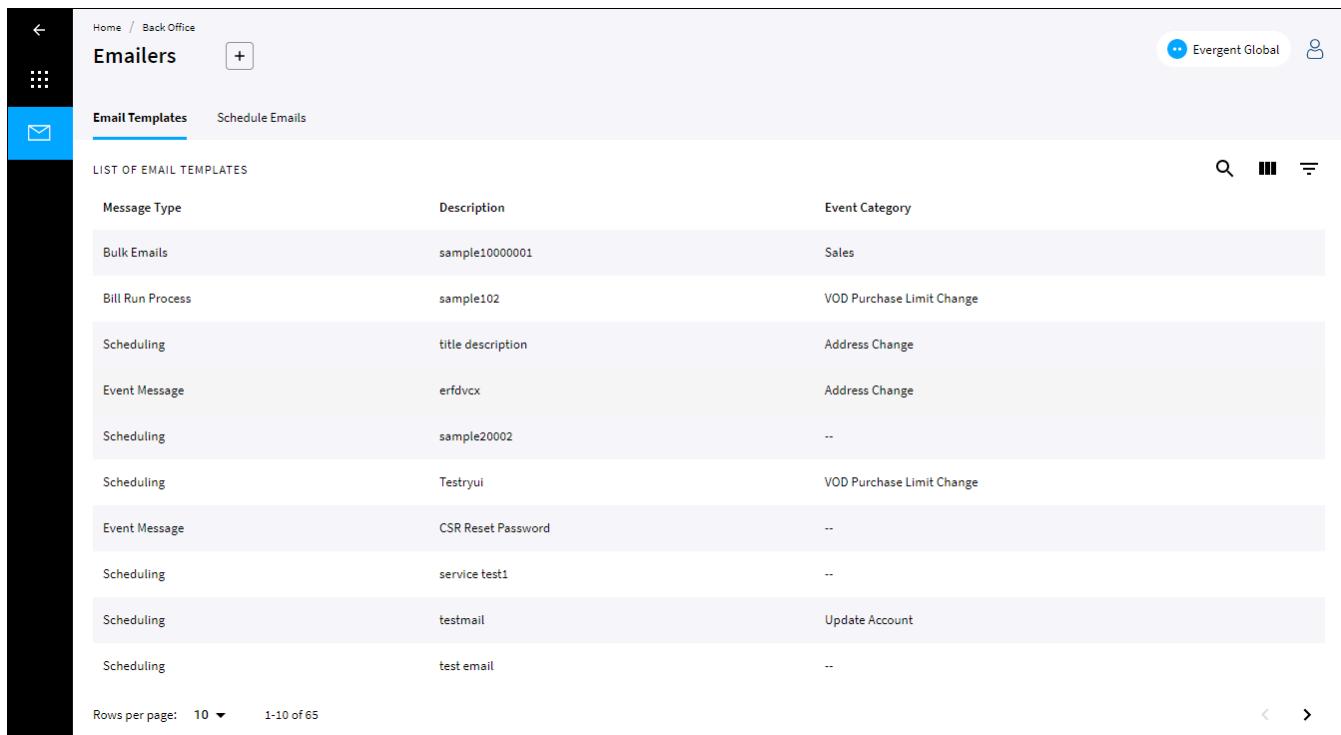


Back Office Admin

Back Office handles the administrative aspects and internal processes of a business like save contract details, save process to save scripts process payments, credit scores, save letters, create emails, messages.

Emailers

The Emailers tab is used to add/edit the email templates and schedule emails for a Business Unit.



The screenshot shows the 'Emailers' screen in the Evergent CRM Back Office. The left sidebar has icons for Home, Back Office, Emailers (selected), and others. The main area has tabs for 'Email Templates' (selected) and 'Schedule Emails'. A search bar and filter icons are at the top right. Below is a table titled 'LIST OF EMAIL TEMPLATES' with columns: Message Type, Description, and Event Category. The table lists 10 entries:

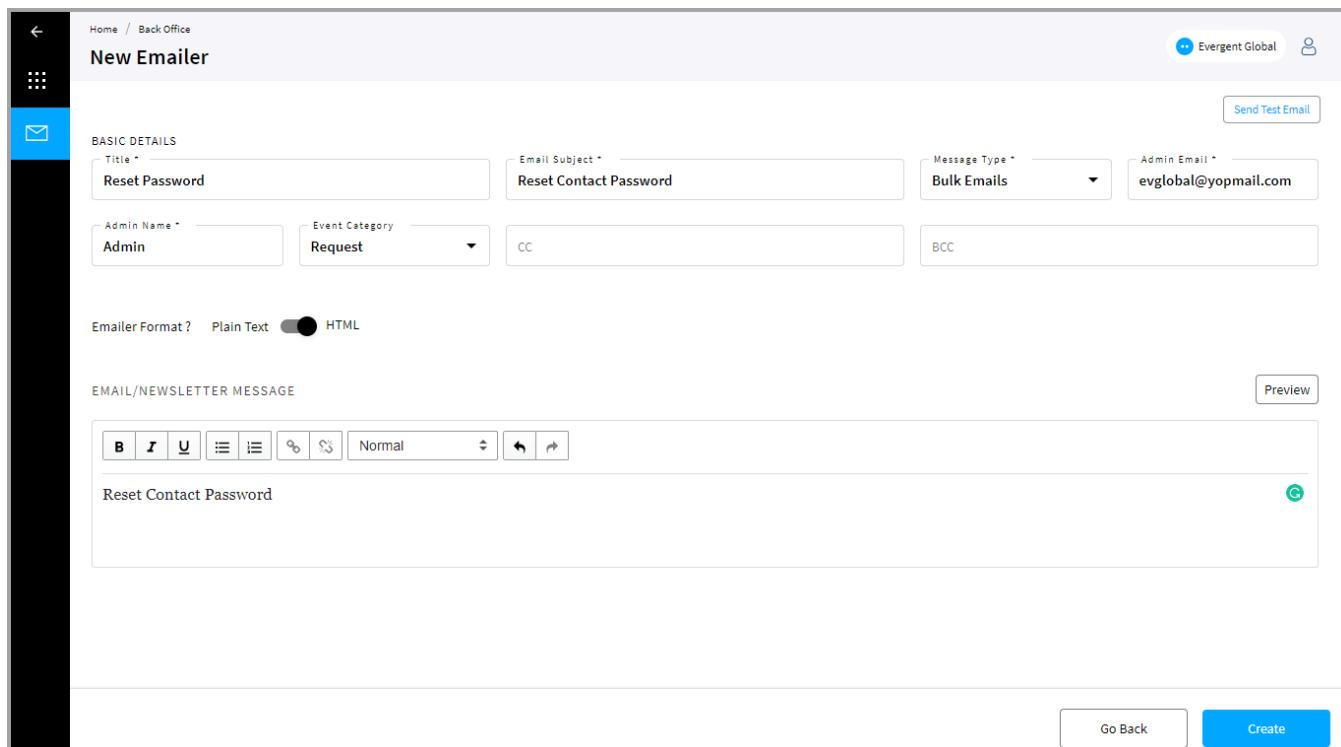
| Message Type | Description | Event Category |
|------------------|--------------------|---------------------------|
| Bulk Emails | sample1000001 | Sales |
| Bill Run Process | sample102 | VOD Purchase Limit Change |
| Scheduling | title description | Address Change |
| Event Message | erfdvcx | Address Change |
| Scheduling | sample20002 | -- |
| Scheduling | Testryui | VOD Purchase Limit Change |
| Event Message | CSR Reset Password | -- |
| Scheduling | service test1 | -- |
| Scheduling | testmail | Update Account |
| Scheduling | test email | -- |

At the bottom, it says 'Rows per page: 10 ▾ 1-10 of 65'.

Adding a New Emailer

To add a new emailer, do the following:

- On the **Emailers** screen of a Business Unit, click the Add (+) icon.
- In the **Basic Details** section, enter the required details, as follows:
 - On the **Title** field, enter the title for the email.
 - On the **Email Subject** field, type the subject of the email.
 - Select the message type that you are going to define an email message from the **Message Type** drop-down list.
 - In the **Admin Email** field, enter the email id that you want the email to be sent.
 - In the **Admin Name** field, enter the Admin name.
 - Select the **Event Category** from the provided drop-down list.
 - Enter the email id of the persons that you want the email to be sent in the **Cc** and **Bcc** fields.
Note: You can specify multiple email ids in the Cc and Bcc fields by separating each email id with a comma (,).
- Select **Plain Text** or **HTML** to send the email in the selected format.
- In the **Email/Newsletter Message** section, in the **Email Body** text box, enter the message template that you want the message to be displayed on the customer's email.
- Click **Preview** beside the text box area to view the email message in the Plain Text or HTML format.



BASIC DETAILS

Title * Reset Password Email Subject * Reset Contact Password Message Type * Bulk Emails Admin Email * evglobal@yopmail.com

Admin Name * Admin Event Category Request CC BCC

Emailer Format ? Plain Text HTML

EMAIL/NEWSLETTER MESSAGE

Reset Contact Password

Preview

Go Back Create

| Field Name | Description |
|----------------|--|
| Business Unit | Select the BU to which the e-mail messages to be added. |
| Title | The title for the email message. |
| Email Subject | The subject of the Message. |
| Admin Name | Name of the Admin to whom the e-mail needs to be sent. |
| Admin Email | The email address of the admin. |
| Cc | Add and send the copies of an email to other people (if any). |
| Bcc | Add and send the copies of an email to other people (If any). (This email list of recipients will not be visible to others). |
| Message Type | Type of the message. |
| Message | Message to be displayed to the customer. |
| Upload Message | upload the message template from your system by clicking on the Browse button beside the Upload Message label. |
| Emailer Format | A user can send the email messages in the Plain Text or HTML format. |

| | |
|----------------|--|
| Event Category | Indicates the required mapping for the event category. |
| Email Message | Email message to be sent to the category. |

Updating an Emailer

- Navigate to the **Emailer** screen of a Business Unit.
- In the **List of Email Templates** section, click the email template that you want to edit.
- The **Update Emailer** screen appears, make the necessary changes in the available fields, click **Update**.

Note:

A user cannot modify the **Message Type** and **Event Category** fields on the Update Emailer screen.

Schedule Emails

A user can schedule the emails to send them later. This screen is to schedule the bulk emails on a specified time basis or daily to the DMA or Service.

Schedule an Email

- On the **Emailers** screen, on the **Email Templates** tab, click the message type email as Bulk Emails.
- Click the **Schedule Emails** tab. The list of scheduled emails appears.
- To schedule an email, click the Add (+) icon.
- Enter the email id in the **Send Mail To** field.
- Click the **Time to Execute** field to select the schedule date and time.
- To schedule emails daily on the selected date and time, select the **Daily Schedule** checkbox.

Schedule Email

Message * sample10000001

Send Mail To * Service

Service * package16

Time To Execute * 10/11/2020 21:26 Daily Schedule

Deleting a Scheduled Email

To delete the scheduled emails, do the following:

- Click the **Email Templates** tab, under the **Emailers** tab from the left menu bar.
- Click a Bulk Email (Message Type) that you want to remove.
- The **Update Emailer** screen appears.
- Click the **Schedule Emails** tab.
- Click the **Delete** () icon in the **Actions** column that you want to delete the scheduled email from the **List of Scheduled Emails**.

Home / Back Office

Update Emailer

Configure **Schedule Emails**

LIST OF SCHEDULED EMAILS

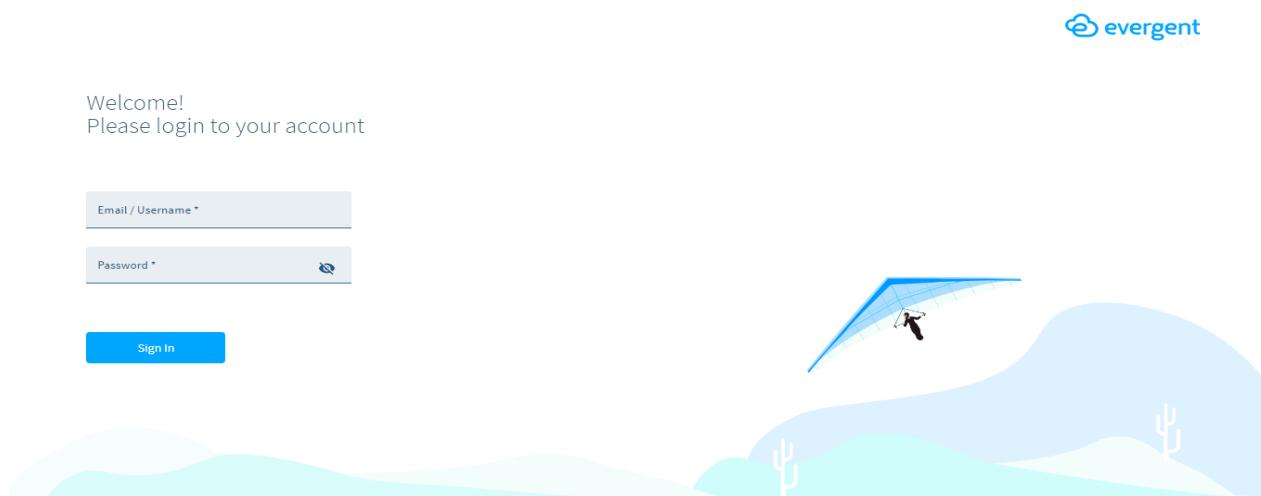
| Mail Message | Scheduled Time | DMA ID | Service Name | Status | Daily Scheduled | Actions |
|----------------|-------------------|--------|--------------|-----------------------|-----------------|---|
| sample10000001 | 10/26/20, 7:27 AM | -- | -- | Finished Successfully | Yes |  |
| sample10000001 | 10/25/20, 7:27 AM | -- | -- | Finished Successfully | Yes |  |
| sample10000001 | 10/24/20, 7:27 AM | -- | -- | Finished Successfully | Yes |  |
| sample10000001 | 10/21/20, 7:27 AM | -- | -- | Finished Successfully | Yes |  |
| sample10000001 | 10/20/20, 7:27 AM | -- | -- | Finished Successfully | Yes |  |
| sample10000001 | 11/10/20, 3:56 PM | -- | package16 | Not Started | Yes |  |

Rows per page: 10 ▾ 1-6 of 6

Ticket Management

Login to Ticket Management

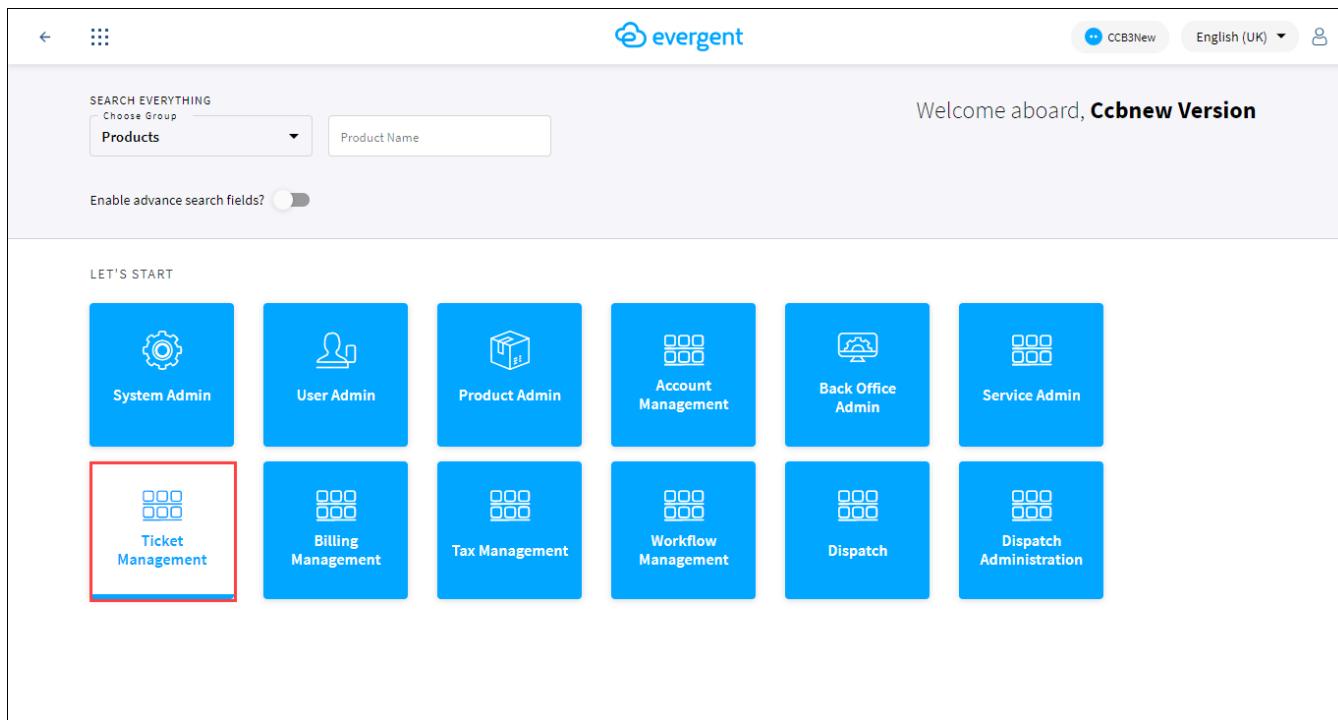
- Open a web browser, such as Internet Explorer / Mozilla Firefox / Google Chrome.
- In the address bar, enter the application URL as provided by Evergent.
- Enter the valid Email/Username and Password.
- Click the **Sign In** button. This will begin your Evergent session.



- The users with access to multiple business units must select the business unit from the available drop-down list and click **Submit**.



- Once a business unit is selected, the user is redirected to the dashboard home screen.
- Click the **Ticket Management** image button on the dashboard home screen to enter the Ticket Management application.



- The Search Business Units screen appears.
- Type the Business Unit in the Search field or select the Business Unit from the available Business Units list.



This screenshot shows the 'Ticket Management' search interface. At the top, there is a header with the evergent logo, a welcome message ('Welcome Ccbnew Version!'), a 'Change Password' link, and a 'Logout' button. Below the header, a dropdown menu shows 'Language English'. The main area has a title 'Welcome > Ticket Management' and a sub-section titled 'Business Units'. It contains a search bar with a placeholder 'Search Business Units:' and a 'Search' button. Below the search bar, there is a table with two columns: 'BUSINESS UNITS' and 'CCB3NEW | TEST 1'. The entire interface has a light blue header and a white body.

Ticket Management

The Ticket Management system allows the user to record several different issues concerning the system or the user's operation.

- The system is designed to record the full life cycle of problems, issues, change requests, software bugs, and trouble tickets by logging in and each user's interaction with the system in a chronological comment log that is part of the Ticket.

Welcome > Ticket Management > Acme-Inc > Search

Evergent User

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Search

Ticket ID Show Only Unread Tickets

Assignment Filters

| | | | |
|---|--|---|---|
| Assigned To --Unassigned-- Ammg Amng DZX1 DZx Dax Dax Evergent User John Grishm Manual Tester5 Namper Namper Raja Benz installer User | Group Acme-Inc Admin Group Acme-Inc CSR Group C CSR group DD f | Assigned By Ammg Amng DZX1 DZx Dax Dax Evergent User John Grishm Manual Tester5 Namper Namper Raja Benz installer User | Business Unit ATT Bill ATT Bill BU ATT MOBILITY ATT NEW Acme-Inc Acme-Inc Acme_Inc Admin Portal Airtel Dish Alpha-Inc |
|---|--|---|---|

Ticket Filters

| | | | |
|---|---|--|---|
| By Type ABC Bzc Maintenance Outage Trouble | By Domain Router Issues Signal Problem Maintenance Invoice Issues Payment Issues | By Priority Medium High Critical Low | By Status Open Closed Validation In Progress Test Design Build Paused Validation Reopen |
|---|---|--|---|

Date Filters

Opened On Date (MM/DD/YYYY) from to
Promise Date (MM/DD/YYYY) from to

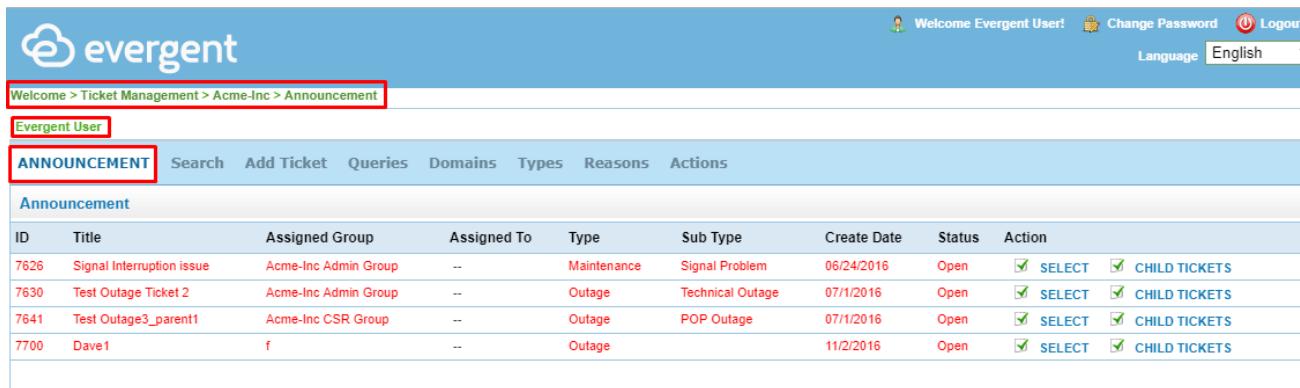
First Sort Reverse Second Sort Reverse Third Sort Reverse Fourth Sort Reverse

Query Name

| Tab Name | Description |
|--------------|---|
| Announcement | Access this screen to view the list of outage tickets that are created for that business unit. |
| Search | Access this screen to find existing trouble tickets and the status associated with these tickets. You can update, close, and print trouble tickets from this search results screen. |
| Add Ticket | Access this screen to create a new trouble ticket. |

| | |
|---------|--|
| Queries | A query is some saved search criteria. You can use queries to track commonly used search criteria so that you do not need to repeatedly indicate the different criteria. Access this screen to execute, edit, or delete queries. |
| Domains | A domain is a category of problems. You can add, modify, or delete domains from this screen. |
| Types | Use this screen to create different types of tickets that customer issues are related to. You can add/ edit/ delete different ticket types from this screen. |
| Reasons | Ticket reasons. Use this screen to define different reasons for logging a ticket by the customer/ CSR. You can add/ edit/ remove the reasons from this screen. The reasons that are defined under the selected groups will be displayed while creating a ticket by customer/ CSR. |
| Actions | Ticket Actions. Use this screen to define different actions that can be performed on a specific ticket reason. You can add/ edit/ remove different actions from this screen. |

Announcement Screen



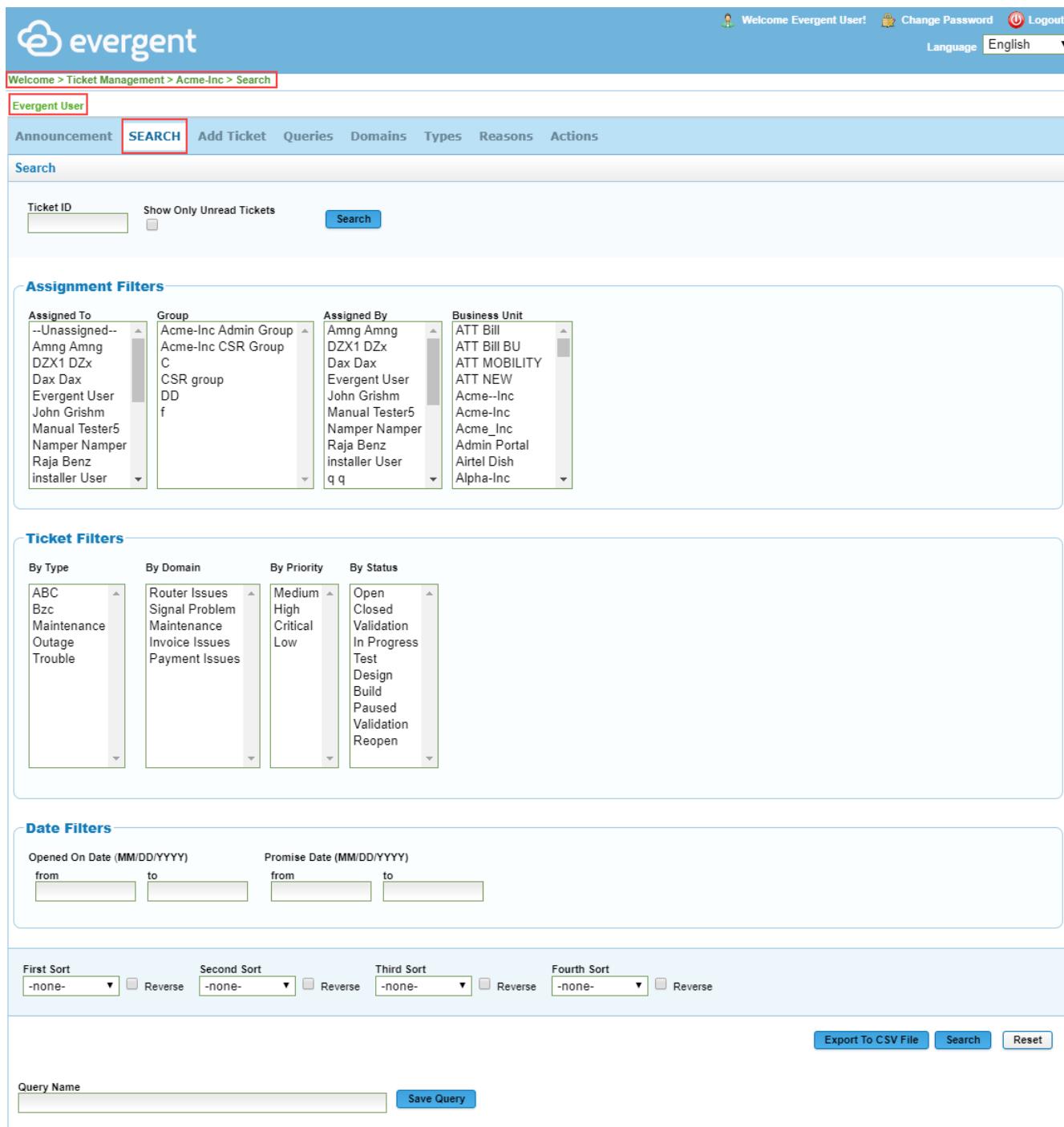
Welcome > Ticket Management > Acme-Inc > Announcement

Evergent User

| ANNOUNCEMENT | | | | | | | | |
|--------------|---------------------------|----------------------|-------------|-------------|------------------|-------------|--------|--|
| Announcement | | | | | | | | |
| ID | Title | Assigned Group | Assigned To | Type | Sub Type | Create Date | Status | Action |
| 7626 | Signal Interruption issue | Acme-Inc Admin Group | -- | Maintenance | Signal Problem | 06/24/2016 | Open | <input checked="" type="checkbox"/> SELECT <input checked="" type="checkbox"/> CHILD TICKETS |
| 7630 | Test Outage Ticket 2 | Acme-Inc Admin Group | -- | Outage | Technical Outage | 07/1/2016 | Open | <input checked="" type="checkbox"/> SELECT <input checked="" type="checkbox"/> CHILD TICKETS |
| 7641 | Test Outage3_parent1 | Acme-Inc CSR Group | -- | Outage | POP Outage | 07/1/2016 | Open | <input checked="" type="checkbox"/> SELECT <input checked="" type="checkbox"/> CHILD TICKETS |
| 7700 | Dave1 | f | -- | Outage | | 11/2/2016 | Open | <input checked="" type="checkbox"/> SELECT <input checked="" type="checkbox"/> CHILD TICKETS |

- Users can view the list of outage tickets that are created for that business unit.
- On closing a parent ticket, the same comments are added to child tickets of that parent and get closed, but on closing a child ticket this will not be reflecting the parent ticket.

Search Screen

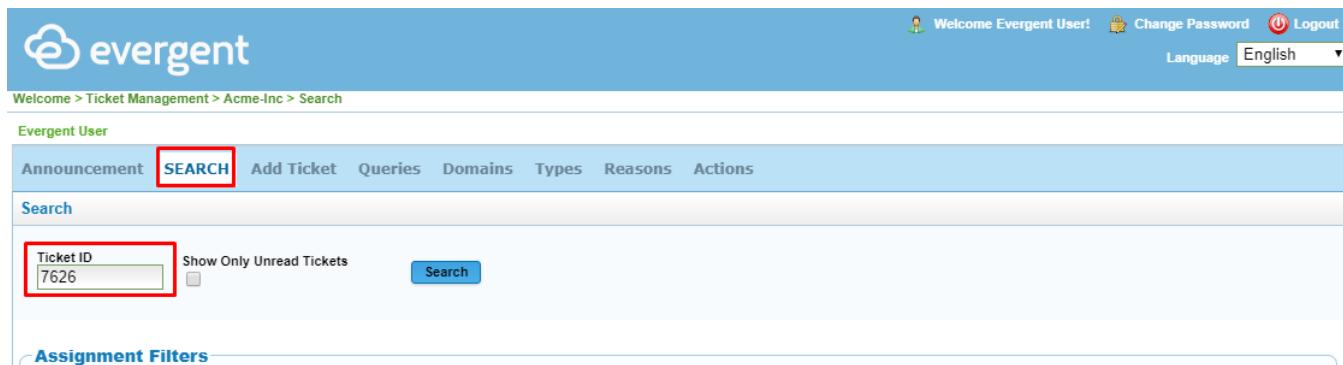


The screenshot shows the Evergent CRM Search screen with several filter sections:

- Assignment Filters:**
 - Assigned To: --Unassigned--, Amng Amng, DZX1 DZx, Dax Dax, Evergent User, John Grishm, Manual Tester5, Namper Namper, Raja Benz, installer User
 - Group: Acme-Inc Admin Group, Acme-Inc CSR Group, C, CSR group, f
 - Assigned By: Amng Amng, DZX1 DZx, Dax Dax, Evergent User, John Grishm, Manual Tester5, Namper Namper, Raja Benz, installer User, q q
 - Business Unit: ATT Bill, ATT Bill BU, ATT MOBILITY, ATT NEW, Acme--Inc, Acme_Inc, Admin Portal, Airtel Dish, Alpha-Inc
- Ticket Filters:**
 - By Type: ABC, Bzc, Maintenance, Outage, Trouble
 - By Domain: Router Issues, Signal Problem, Maintenance, Invoice Issues, Payment Issues
 - By Priority: Medium, High, Critical, Low
 - By Status: Open, Closed, Validation, In Progress, Test, Design, Build, Paused, Validation, Reopen
- Date Filters:**
 - Opened On Date (MM/DD/YYYY) from _____ to _____
 - Promise Date (MM/DD/YYYY) from _____ to _____
- Sorting:**
 - First Sort: -none-, Reverse
 - Second Sort: -none-, Reverse
 - Third Sort: -none-, Reverse
 - Fourth Sort: -none-, Reverse
- Buttons:**
 - Export To CSV File
 - Search
 - Reset
- Query Name:** _____
- Save Query:** _____

Searching for a Trouble Ticket by Ticket ID

- Navigate to the ticket management opening screen of a Business Unit and select the **Search** tab.
- Enter the trouble ticket number in the **Ticket ID** field.



Welcome > Ticket Management > Acme-Inc > Search

Evergent User

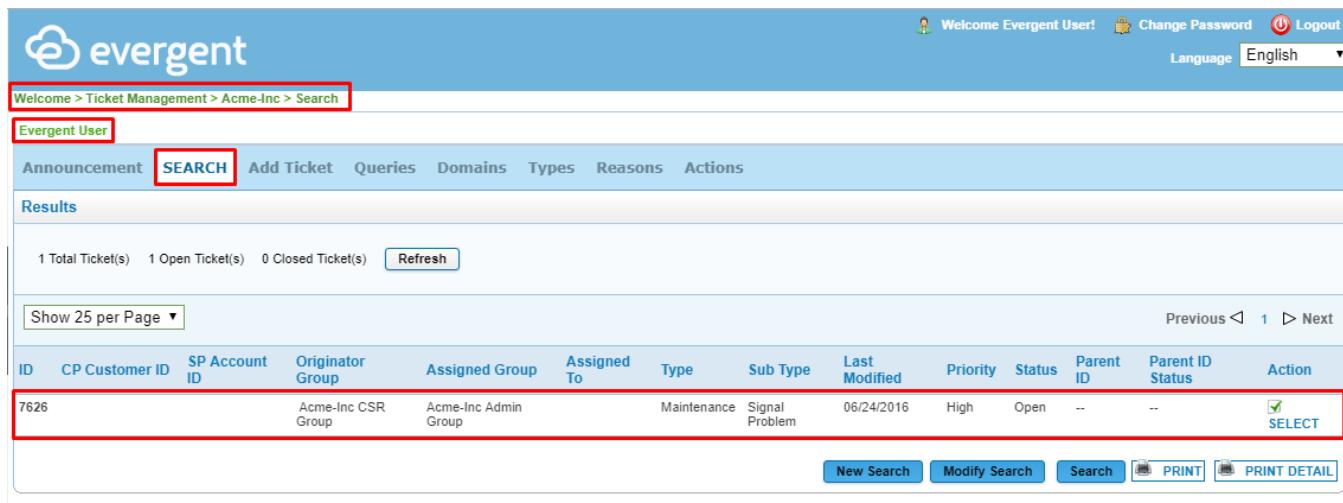
Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Search

Ticket ID Show Only Unread Tickets **Search**

Assignment Filters

- Click the **Search** button.
- The trouble ticket for the matching ‘Ticket ID’ will appear in the **Results** screen as shown below:



Welcome > Ticket Management > Acme-Inc > Search

Evergent User

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Results

1 Total Ticket(s) 1 Open Ticket(s) 0 Closed Ticket(s)

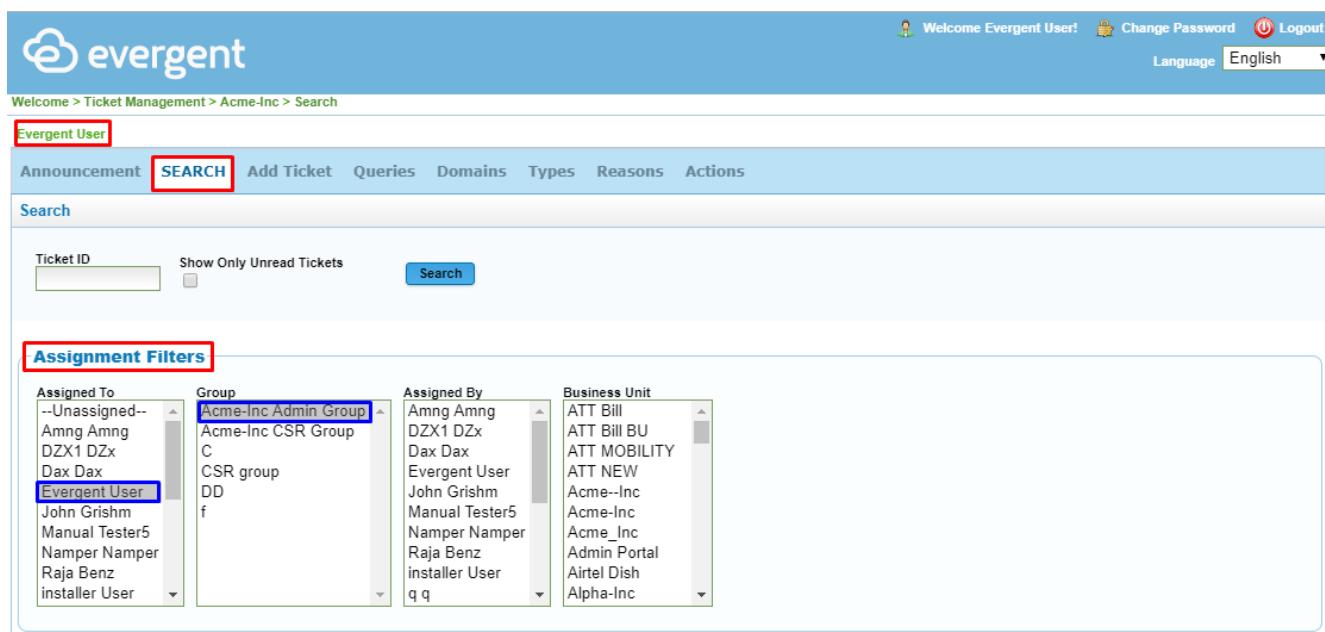
Show 25 per Page ▾ Previous < 1 > Next

| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|----------------|--------------------|----------------------|----------------|-------------|-------------|----------------|---------------|----------|--------|-----------|------------------|---|
| 7626 | | Acme-Inc CSR Group | Acme-Inc Admin Group | | | Maintenance | Signal Problem | 06/24/2016 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

- Click the **Select** inline button corresponding to the ticket to view or modify the ticket details.

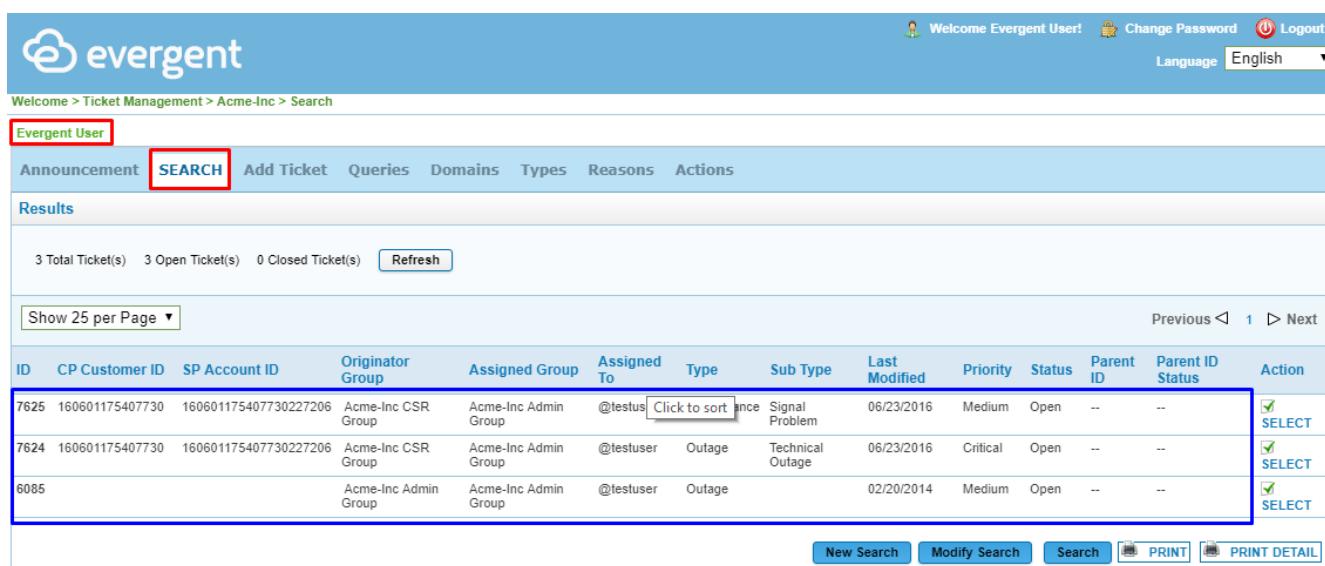
The **CP Customer ID/ SP Account ID** values will be displayed only when the ticket is created from the account through Account Management application.

- You can search for trouble tickets based on whom the ticket is assigned to.
- Click the **Search** tab.



The screenshot shows the Evergent CRM search interface. At the top, there are links for Welcome, Change Password, and Logout, along with a Language selection set to English. Below the header, the breadcrumb navigation shows Welcome > Ticket Management > Acme-Inc > Search. The main menu includes Announcement, SEARCH (which is highlighted with a red box), Add Ticket, Queries, Domains, Types, Reasons, and Actions. The search form has fields for Ticket ID and a checkbox for Show Only Unread Tickets, with a Search button. Below the search form is a section titled "Assignment Filters" (also highlighted with a red box). This section contains four dropdown menus: "Assigned To" (listing users like Amng Amng, DZX1 DZx, Dax Dax, etc.), "Group" (listing groups like Acme-Inc Admin Group, Acme-Inc CSR Group, etc.), "Assigned By" (listing users like Amng Amng, DZX1 DZx, Dax Dax, etc.), and "Business Unit" (listing business units like ATT Bill, ATT Bill BU, ATT MOBILITY, ATT NEW, etc.).

- Select one or more usernames in one or more of the fields <**Assigned To**>, <**Group**>, <**Assigned By**>, and <**Business Unit**>. The more fields you select, the narrower your search. You may select more than one username in each field by holding down the <**Ctrl**> key.
- Click the <**Search**> button at the bottom of the screen.
- A list of trouble tickets matching your criteria will be displayed in the **Results** screen; showing the ticket details including the **Ticket ID (ID)**, **CP Customer ID**, **SPAccountId**, **Originator Group**, **Assigned Group**, **Assigned To**, **Type**, **SubType**, **LastModified** date of the ticket, **Priority**, **Status**, **Parent Id**, and **Parent ID Status**.



The screenshot shows the Evergent CRM results interface. At the top, there are links for Welcome, Change Password, and Logout, along with a Language selection set to English. Below the header, the breadcrumb navigation shows Welcome > Ticket Management > Acme-Inc > Search. The main menu includes Announcement, SEARCH (which is highlighted with a red box), Add Ticket, Queries, Domains, Types, Reasons, and Actions. The results section is titled "Results". It displays a table of tickets with columns: ID, CP Customer ID, SP Account ID, Originator Group, Assigned Group, Assigned To, Type, Sub Type, Last Modified, Priority, Status, Parent ID, Parent ID Status, and Action. The first three rows of the table are highlighted with a blue border. Each row has a "SELECT" checkbox in the last column. At the bottom of the results table are buttons for New Search, Modify Search, Search, Print, and Print Detail.

Customer Registration Number (Reg#) and Customer Plan Information (Plan/ CAP) will be displayed only for tickets associated with customer accounts (also known as account tickets)

- Click the < Select> inline button corresponding to a trouble ticket to view or modify the ticket details.

 **evergent**

Welcome > Ticket Management > Acme-Inc > Search

Evergent User

| Announcement | SEARCH | Add Ticket | Queries | Domains | Types | Reasons | Actions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|--|------------------------|-------------------------------|-------|----------------------|------------------------|-----------------------|----------------------|--|-----------------------|----------------------|---------------------------|------------------|----------------------------------|--|--|--|--------------------------------|---------------------------|----------------------------|----------------------|------------------|--|------------|--|--|--|--|--|---|---|--|------------------------|-------------------------------|--|--|------------------------------------|--|--|--|--|------------------------------------|-----------------------|-------------------------------|----------------|--|--|--|--|--|--|--|--|---|--|--|--|--|--|--|--|--|--|--|--|--|--|----------------------|------------------------|
| Technical issue with Equipment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Previous | | | | | | 1 of 3 ticket(s) | Next | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <tr> <td>Ticket Number 7625</td> <td>By Manual Tester5</td> <td>SP Account ID 160601175407730227206</td> <td>Account Henry Hook</td> <td>Opened On 6/23/16</td> </tr> <tr> <td>Business Unit Acme-Inc</td> <td>Time Zone GMT</td> <td>Group* Acme-Inc Admin Group ▾</td> <td colspan="3"></td> </tr> <tr> <td>Assigned To Evergent User ▾</td> <td>Attach Workflow -none-</td> <td>Domain Signal Problem ▾</td> <td>Priority Medium ▾</td> <td>Status Open ▾</td> <td></td> </tr> <tr> <td>On 6/23/16</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Promise Date (MM/DD/YYYY) <input type="text"/></td> <td>Actual Hours (HHMM) <input type="text"/></td> <td>Estimated Hours (HHMM) <input type="text"/></td> <td>Type* Maintenance ▾</td> <td>Sub Type* Signal Problem ▾</td> <td></td> </tr> <tr> <td>Forward Email To <input type="text"/> Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm</td> <td>Outage <input type="checkbox"/></td> <td colspan="4"></td> </tr> <tr> <td>Reason Hardware Configuration ▾</td> <td>Action ActionOne ▾</td> <td>Solved By Group --Choose--</td> <td colspan="3">Impacted Users</td> </tr> <tr> <td colspan="6"> Comment History ----- Modified By Evergent User Modification date and time: Thu Jun 23, 2016 at 00:34 PM GMT Equipment setup configuration is blocked. Need technician to setup the load... Action: ActionOne Reason: Signal Problem Title: Technical issue with Equipment </td> </tr> <tr> <td colspan="8"> Comments <input type="text"/> </td> </tr> <tr> <td colspan="6"></td> <td>Save</td> <td>Cancel</td> </tr> </table> | | | | | | | | Ticket Number 7625 | By Manual Tester5 | SP Account ID 160601175407730227206 | Account Henry Hook | Opened On 6/23/16 | Business Unit Acme-Inc | Time Zone GMT | Group* Acme-Inc Admin Group ▾ | | | | Assigned To Evergent User ▾ | Attach Workflow -none- | Domain Signal Problem ▾ | Priority Medium ▾ | Status Open ▾ | | On 6/23/16 | | | | | | Promise Date (MM/DD/YYYY) <input type="text"/> | Actual Hours (HHMM) <input type="text"/> | Estimated Hours (HHMM) <input type="text"/> | Type* Maintenance ▾ | Sub Type* Signal Problem ▾ | | Forward Email To <input type="text"/> Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm | Outage <input type="checkbox"/> | | | | | Reason Hardware Configuration ▾ | Action ActionOne ▾ | Solved By Group --Choose-- | Impacted Users | | | Comment History ----- Modified By Evergent User Modification date and time: Thu Jun 23, 2016 at 00:34 PM GMT Equipment setup configuration is blocked. Need technician to setup the load... Action: ActionOne Reason: Signal Problem Title: Technical issue with Equipment | | | | | | Comments <input type="text"/> | | | | | | | | | | | | | | Save | Cancel |
| Ticket Number 7625 | By Manual Tester5 | SP Account ID 160601175407730227206 | Account Henry Hook | Opened On 6/23/16 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Business Unit Acme-Inc | Time Zone GMT | Group* Acme-Inc Admin Group ▾ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Assigned To Evergent User ▾ | Attach Workflow -none- | Domain Signal Problem ▾ | Priority Medium ▾ | Status Open ▾ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| On 6/23/16 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Promise Date (MM/DD/YYYY) <input type="text"/> | Actual Hours (HHMM) <input type="text"/> | Estimated Hours (HHMM) <input type="text"/> | Type* Maintenance ▾ | Sub Type* Signal Problem ▾ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Forward Email To <input type="text"/> Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm | Outage <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Reason Hardware Configuration ▾ | Action ActionOne ▾ | Solved By Group --Choose-- | Impacted Users | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Comment History ----- Modified By Evergent User Modification date and time: Thu Jun 23, 2016 at 00:34 PM GMT Equipment setup configuration is blocked. Need technician to setup the load... Action: ActionOne Reason: Signal Problem Title: Technical issue with Equipment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Comments <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | Save | Cancel | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Attachments

No Attachments.

[Add](#)

You can move from trouble ticket to trouble ticket in a list by clicking the <[Previous](#)> or <[Next](#)> inline buttons located at the top of the trouble ticket you are viewing.

Click the <[Cancel](#)> button to return to the previous screen without saving any changes.

Click the <[Save](#)> button to save any changes made by you.

Click the < EMBED PBrush > [Print PDF](#) button to print the current ticket details.

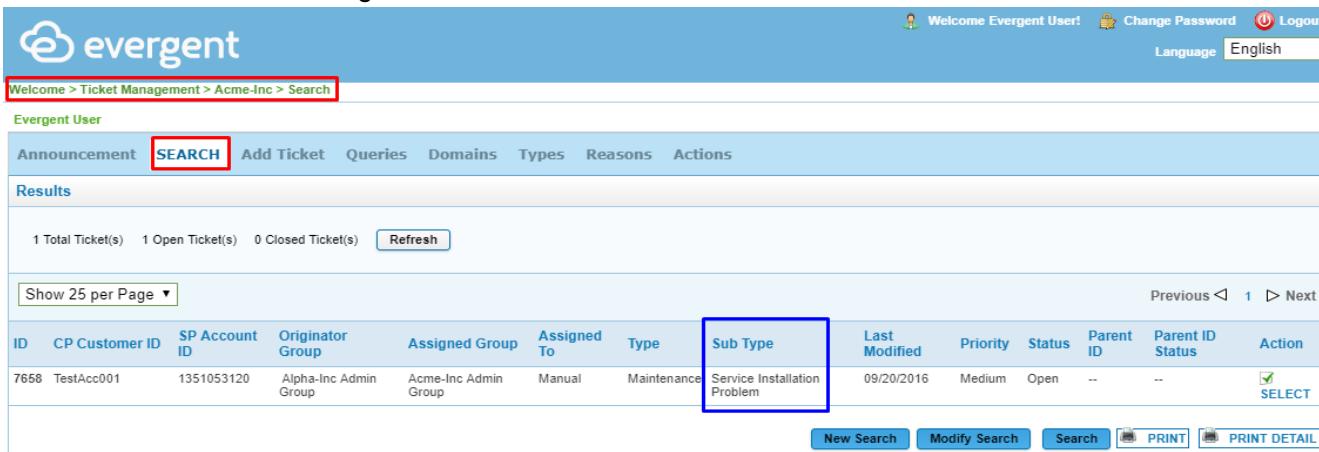
- Navigate to the **Search** tabbed screen of a Business Unit.
- Select one or more of the ticket types you are looking for, in the <By Type>, <By Domain>, <By Priority>, and/or <By Status> fields. You can select <By Sub Type>; if and only if the **Sub Type** is

defined for the selected **Type**. you may select more than one check box for combination search criteria also.

Ticket Filters

| By Type | By SubType | By Domain | By Priority | By Status |
|--|--|--|-----------------------------------|--|
| ABC Bzc Maintenance Outage Trouble | Service Installation Problem Signal Problem | Router Issues Signal Problem Maintenance Invoice Issues Payment Issues | Medium High Critical Low | Open Closed Validation In Progress Test Design Build Paused Validation Reopen |

- Click the <Search> button at the bottom of the screen.
- A list of trouble tickets matching your selected criteria will be displayed on the <Results> screen as shown in the following screen:



Welcome > Ticket Management > Acme-Inc > Search

Welcome Evergent User! Change Password Logout
Language English ▾

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Results

1 Total Ticket(s) 1 Open Ticket(s) 0 Closed Ticket(s) Refresh

Show 25 per Page ▾ Previous ⏪ 1 ⏩ Next

| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|----------------|---------------|-----------------------|----------------------|-------------|-------------|------------------------------|---------------|----------|--------|-----------|------------------|--|
| 7658 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Maintenance | Service Installation Problem | 09/20/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

New Search Modify Search Search  

- Click the < Select> inline button corresponding to a ticket to view or modify its details.

Searching for a Trouble Ticket by Date Filters

- You can also search for trouble tickets by date range.
- Navigate to the <Search> tabbed screen of a Business Unit.
- In the <Date Filters> section, enter the <Opened on Date> ranges and/or the <Promised Date> ranges by specifying the date in the **MM/DD/YYYY** format.

Date Filters

| | | | |
|---|----------------|--|-----------|
| Opened On Date (MM/DD/YYYY) from 7/1/2016 | to 7/2/2016 | Promise Date (MM/DD/YYYY) from [] | to [] |
|---|----------------|--|-----------|

First Sort: -none- ▾ Reverse Second Sort: -none- ▾ Reverse Third Sort: -none- ▾ Reverse Fourth Sort: -none- ▾ Reverse

Search (highlighted with a red box and arrow)

Query Name: Save Query

Export To CSV File

Reset

- Click the <Search> button at the bottom of the screen.
- A list of trouble tickets matching your criteria will be displayed on the <Results> screen.

Welcome > Ticket Management > Acme-Inc > Search

Evergent User (highlighted with a red box)

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Results (highlighted with a blue box)

8 Total Ticket(s) 3 Open Ticket(s) 5 Closed Ticket(s) Refresh

Show 25 per Page ▾ Previous < 1 > Next

| ID | CP Customer ID | SP Account ID ↑ | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|-----------------|-----------------------|--------------------|----------------------|-------------|---------|------------------|---------------|----------|--------|-----------|------------------|--|
| 7630 | KK04 | 1475382656 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | Technical Outage | 07/1/2016 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7636 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7633 | 160624105441548 | 160624105441548227238 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | | 07/1/2016 | High | Closed | 7630 | Open | <input checked="" type="checkbox"/> SELECT |
| 7638 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | POP Outage | 07/1/2016 | Medium | Closed | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7639 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | POP Outage | 07/1/2016 | Medium | Closed | 7638 | Closed | <input checked="" type="checkbox"/> SELECT |
| 7640 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | POP Outage | 07/1/2016 | Medium | Closed | 7638 | Closed | <input checked="" type="checkbox"/> SELECT |
| 7641 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc CSR Group | | Outage | POP Outage | 07/1/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7637 | | | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/1/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

New Search Modify Search Search  PRINT  PRINT DETAIL

- You can click the < Select> inline button corresponding to a trouble ticket to view or modify its details.

Displaying Unread Trouble Tickets Only

- Unread tickets are those that you have not accessed yet or have not modified, since you last read the ticket.
- You can view the unread trouble tickets by selecting the <Show Only Unread Tickets> check box under the <Search> section as shown on the following screen:

Evergent

Welcome > Ticket Management > Acme-Inc > Search

Evergent User **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Search

Ticket ID Show Only Unread Tickets **Search**

Assignment Filters

| Assigned To | Group | Assigned By | Business Unit |
|----------------|----------------------|----------------|---------------|
| --Unassigned-- | Acme-Inc Admin Group | Amng Amng | ATT Bill |
| Amng Amng | Acme-Inc CSR Group | DZX1 DZx | ATT Bill BU |
| DZX1 DZx | C | Dax Dax | ATT MOBILITY |
| Dax Dax | CSR group | Evergent User | ATT NEW |
| Evergent User | DD | John Grishm | Acme-Inc |
| John Grishm | f | Manual Tester5 | Acme_Inc |
| Manual Tester5 | | Namper Namper | Admin Portal |
| Namper Namper | | Raja Benz | Airtel Dish |
| Raja Benz | | installer User | Alpha-Inc |
| installer User | | q q | |

Ticket Filters

| By Type | By Domain | By Priority | By Status |
|-------------|----------------|-------------|-------------|
| ABC | Router Issues | Medium | Open |
| Bzc | Signal Problem | High | Closed |
| Maintenance | Maintenance | Critical | Validation |
| Outage | Invoice Issues | Low | In Progress |
| Trouble | Payment Issues | | Test |

Date Filters

Opened On Date (MM/DD/YYYY) from to Promise Date (MM/DD/YYYY) from to

First Sort Reverse Second Sort Reverse Third Sort Reverse Fourth Sort Reverse

Query Name **Save Query** **Export To CSV File** **Search** **Reset**

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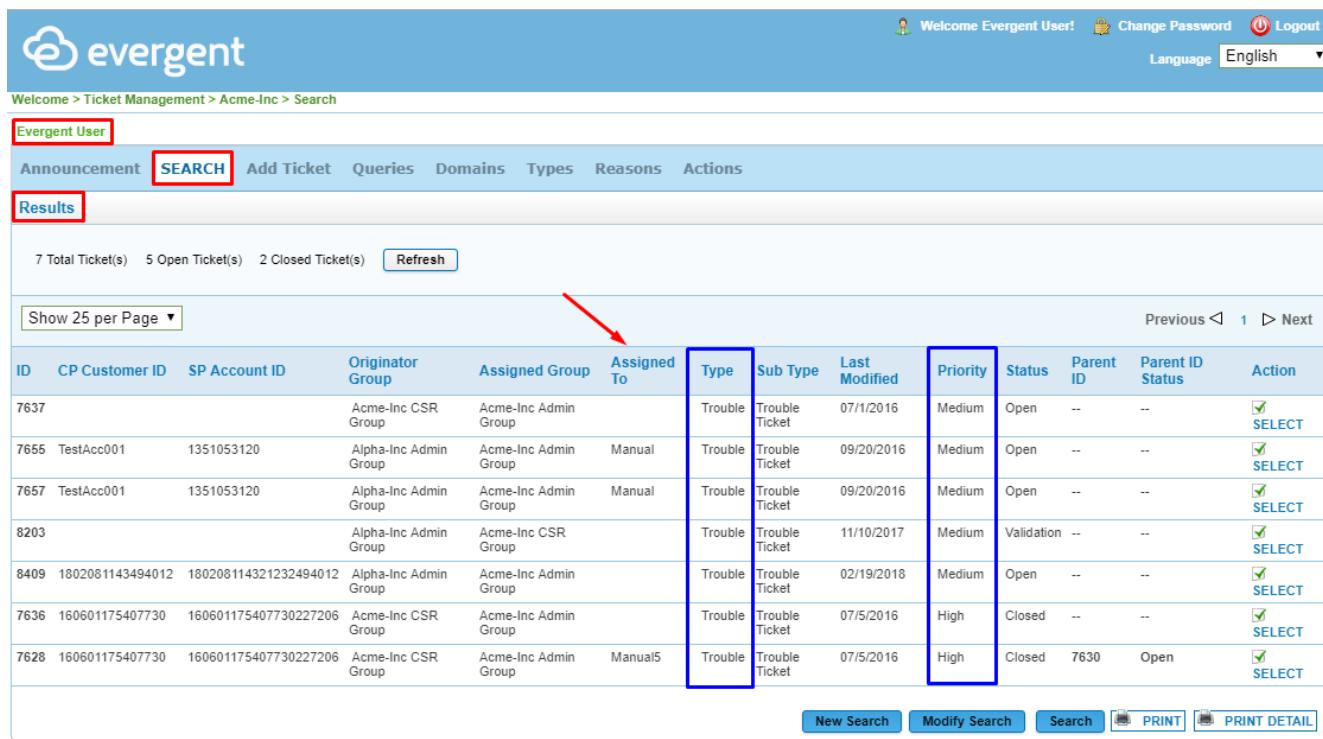
- You can also check this check box in addition to any of the search criteria you have already selected.

You can also perform a combined search using more than one or a combination of the search filters. You can use this to narrow your search.

- You can select the order in which you want the results of your search to appear.

- From the sort drop-down list boxes located below the <Date Filters> section in the <Search> screen; specify any one or the entire <First Sort>, <Second Sort>, <Third Sort>, <Fourth Sort> search criteria.
- If you want the search results to be displayed in reverse alphabetical or numerical order, click the <reverse> check box next to the respective sort drop-down list boxes in the search criteria that you want to display in reverse order.
- You can also combine the sort order along with the different filters to match your search criteria as a combination search.

- After specifying your search criteria, click the <Search> button at the bottom of the screen.
- Your search results will then be displayed in the order you specified as shown on the following screen:



Welcome > Ticket Management > Acme-Inc > Search

Evergent User

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Results

7 Total Ticket(s) 5 Open Ticket(s) 2 Closed Ticket(s) Refresh

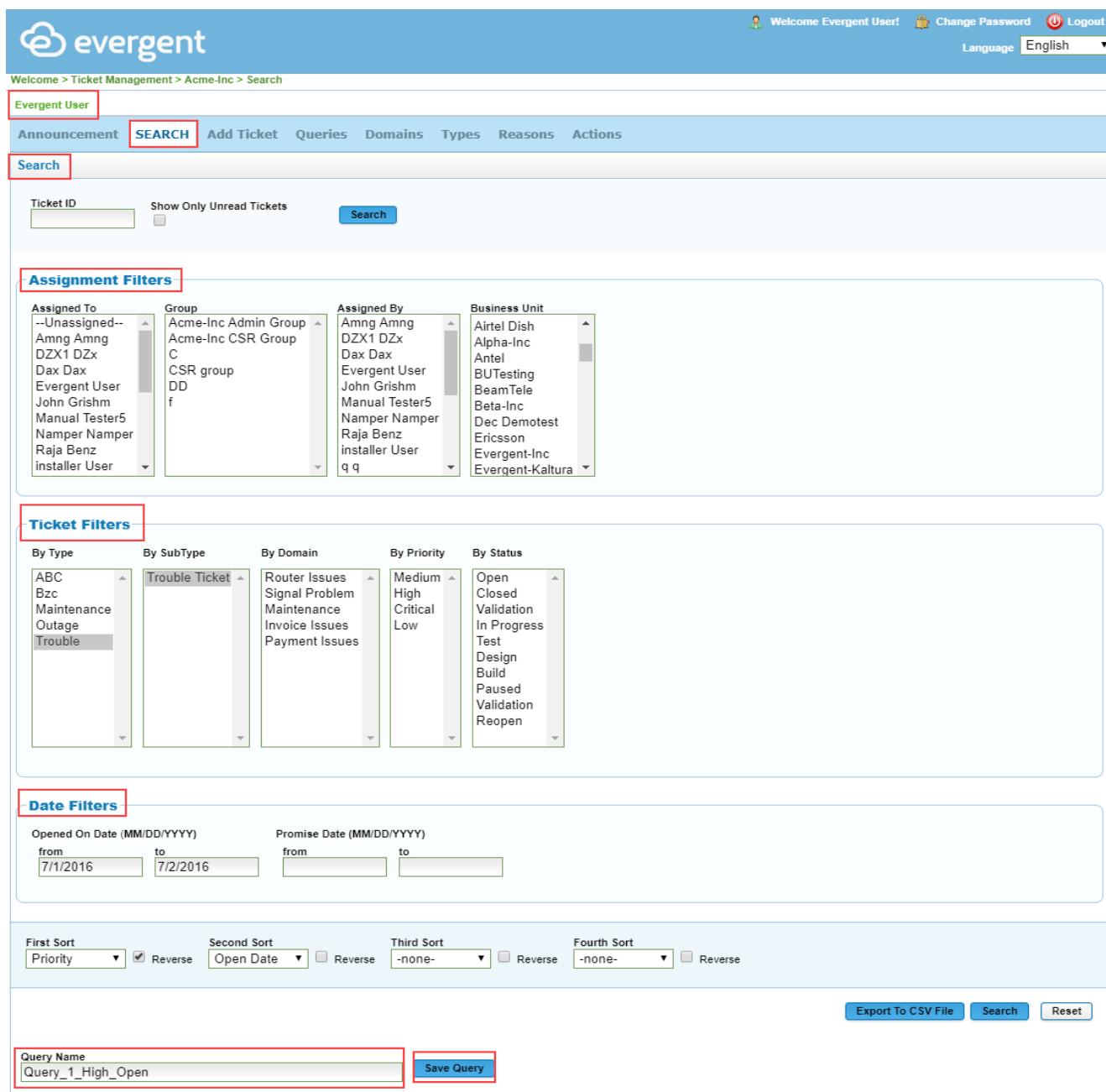
| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|------------------|-----------------------|-----------------------|----------------------|-------------|---------|----------------|---------------|----------|------------|-----------|------------------|--|
| 7637 | | | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/1/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7655 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Trouble | Trouble Ticket | 09/20/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7657 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Trouble | Trouble Ticket | 09/20/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 8203 | | | Alpha-Inc Admin Group | Acme-Inc CSR Group | | Trouble | Trouble Ticket | 11/10/2017 | Medium | Validation | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 8409 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 02/19/2018 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7636 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7628 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | Manual5 | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | 7630 | Open | <input checked="" type="checkbox"/> SELECT |

Show 25 per Page ▾ Previous ◀ 1 ▷ Next

New Search Modify Search Search  

You can also click the <Reset> button in the <Search> screen, to clear all the search criteria you have selected for search.

- Once you have selected all your search criteria in the <Search> screen, you can create a query name that will save your specifications.
- Indicate all your search criteria in the <Search> screen.
- Enter a name for your query in the <Query Name> field.



Assignment Filters

- Assigned To: -Unassigned--
Amng Amng
DZX1 DZx
Dax Dax
Evergent User
John Grishm
Manual Tester5
Namper Namper
Raja Benz
installer User
- Group: Acme-Inc Admin Group
Acme-Inc CSR Group
C
CSR group
DD
f
- Assigned By: Amng Amng
DZX1 DZx
Dax Dax
Evergent User
John Grishm
Manual Tester5
Namper Namper
Raja Benz
installer User
- Business Unit: Airtel Dish
Alpha-Inc
Antel
BUTesting
BeamTele
Beta-Inc
Dec Demotest
Ericsson
Evergent-Inc
Evergent-Kaltura

Ticket Filters

| By Type | By SubType | By Domain | By Priority | By Status |
|--|----------------|--|-----------------------------------|--|
| ABC Bzc Maintenance Outage Trouble | Trouble Ticket | Router Issues Signal Problem Maintenance Invoice Issues Payment Issues | Medium High Critical Low | Open Closed Validation In Progress Test Design Build Paused Validation Reopen |

Date Filters

Opened On Date (MM/DD/YYYY) from 7/1/2016 to 7/2/2016 Promise Date (MM/DD/YYYY) from _____ to _____

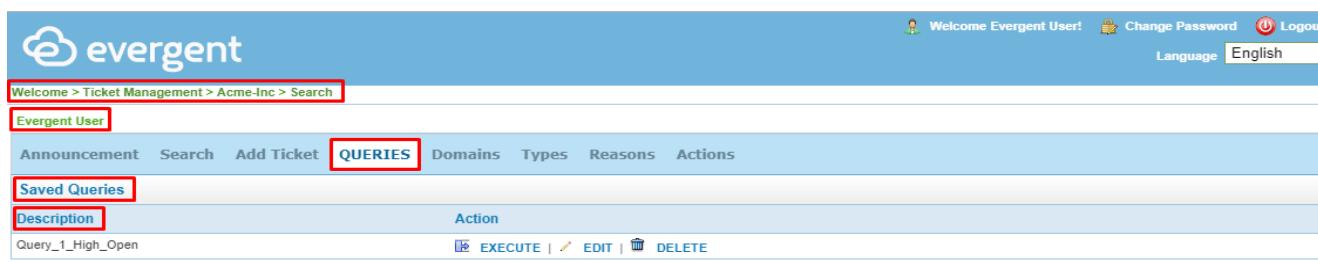
First Sort: Priority Second Sort: Open Date Third Sort: -none- Fourth Sort: -none-

Reverse Reverse Reverse Reverse

Export To CSV File Search Reset

Query Name: **Query_1_High_Open** Save Query

- Click the <Save Query> button to save the query.
- Clicking on the ‘Save Query’ button will navigate to the <Queries> tabbed screen displaying the newly saved query as shown in the following screen:



Saved Queries

| Description | Action |
|-------------------|-------------------------|
| Query_1_High_Open | EXECUTE EDIT DELETE |

Printing a Trouble Ticket

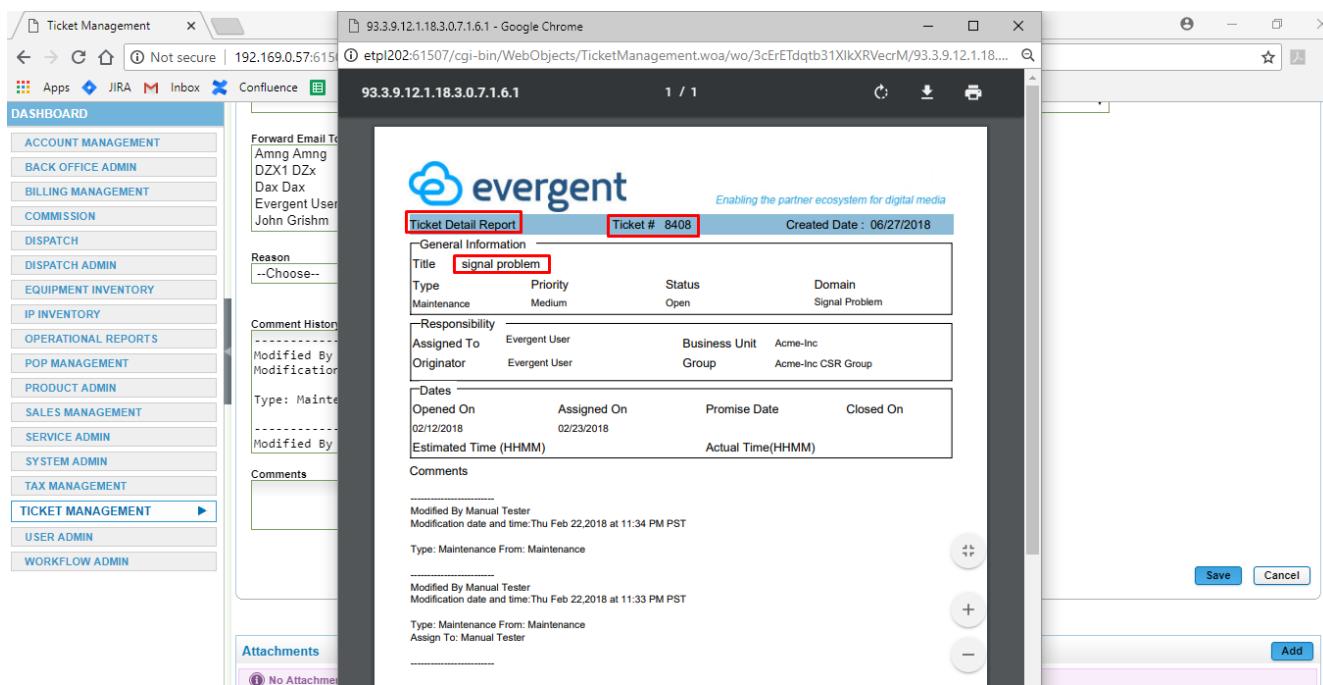
- Navigate to the <Search> tabbed screen of a business unit, where you wish to print a trouble ticket.
- Specify the search criteria that you want to print for some specific trouble tickets.
- From the search <Results> screen, click the < Select> inline button corresponding to the trouble ticket you want to print.
- The **Ticket detail** screen is then displayed as shown in the following screen:

Welcome > Ticket Management > Acme-Inc > Search

Evergent User

| Announcement | SEARCH | Add Ticket | Queries | Domains | Types | Reasons | Actions |
|--|---|--|-----------------------|-----------------------------|-------|--|---------|
| + Ticket Work Order Click to view WorkFlowOrders | | | | | | | |
| + Ticket Workflow Click to view WorkFlows | | | | | | | |
| signal problem | | | | | | | |
| Previous | | 2 of 4 ticket(s) | | | | Next | |
| | | | | | | <input type="button" value="PRINT PDF"/>  | |
| Ticket Number 8408 | By Evergent User | SP Account ID 180208114321232494012 | Account Tester one | Opened On 2/12/18 | | | |
| Business Unit Acme-Inc | Time Zone PST | Group* Acme-Inc CSR Group | | | | | |
| Assigned To --Unassigned-- | Domain Signal Problem | Priority Medium | Status Open | | | | |
| On 2/23/18 | | | | | | | |
| Promise Date (MM/DD/YYYY) <input type="text"/> | Actual Hours (HHMM) <input type="text"/> | Estimated Hours (HHMM) <input type="text"/> | Type* Maintenance | Sub Type* Signal Problem | | | |
| Forward Email To Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm | Outage <input type="checkbox"/> | | | | | | |
| Reason --Choose-- | Solved By Group Acme-Inc CSR Group | Impacted Users | | | | | |
| Comment History <hr/> Modified By Manual Tester Modification date and time: Thu Feb 22, 2018 at 11:34 PM PST <hr/> Type: Maintenance From: Maintenance <hr/> Modified By Manual Tester | | | | | | | |
| Comments <input type="text"/> | | | | | | | |
| <input type="button" value="Save"/> <input type="button" value="Cancel"/> | | | | | | | |
| Attachments (i) No Attachments. | | | | | | | |

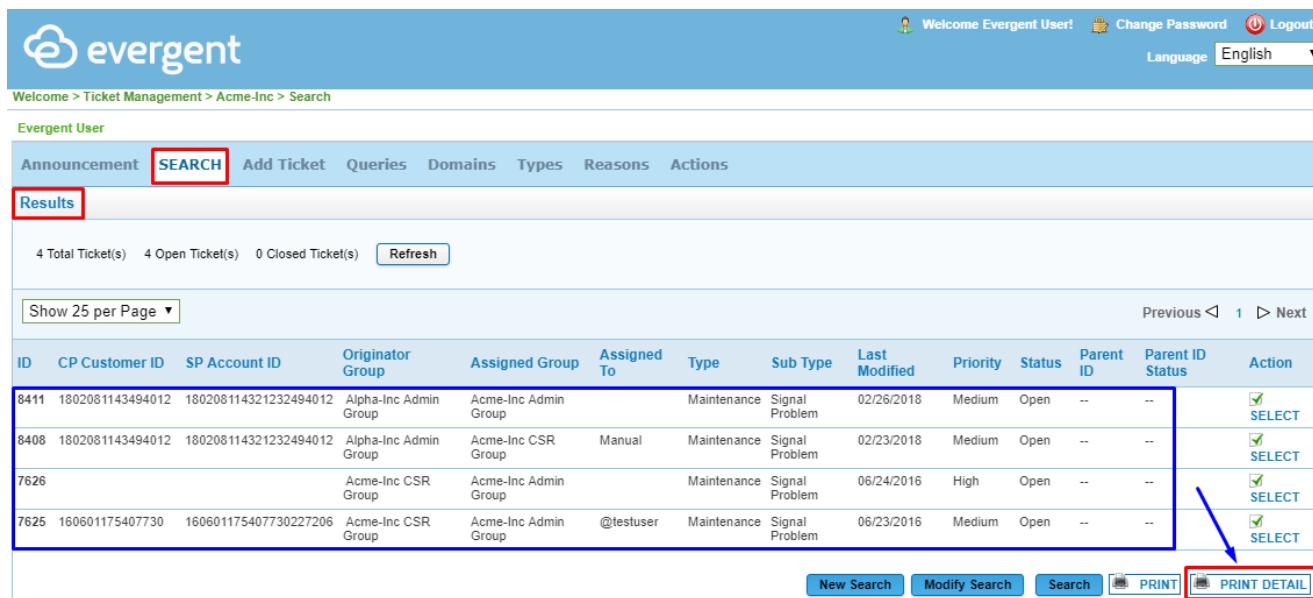
- Click the  **Print PDF** button in the top right of the ticket details screen to view the ticket details in a new **PDF report file** window.
- The **PDF report file window** with ticket details is displayed as shown on the following screen:



- Click the <Print> icon located in the PDF report file properties to send the trouble ticket details to the printer.
- Click the close <> icon in the top right corner to close the trouble ticket PDF report window.

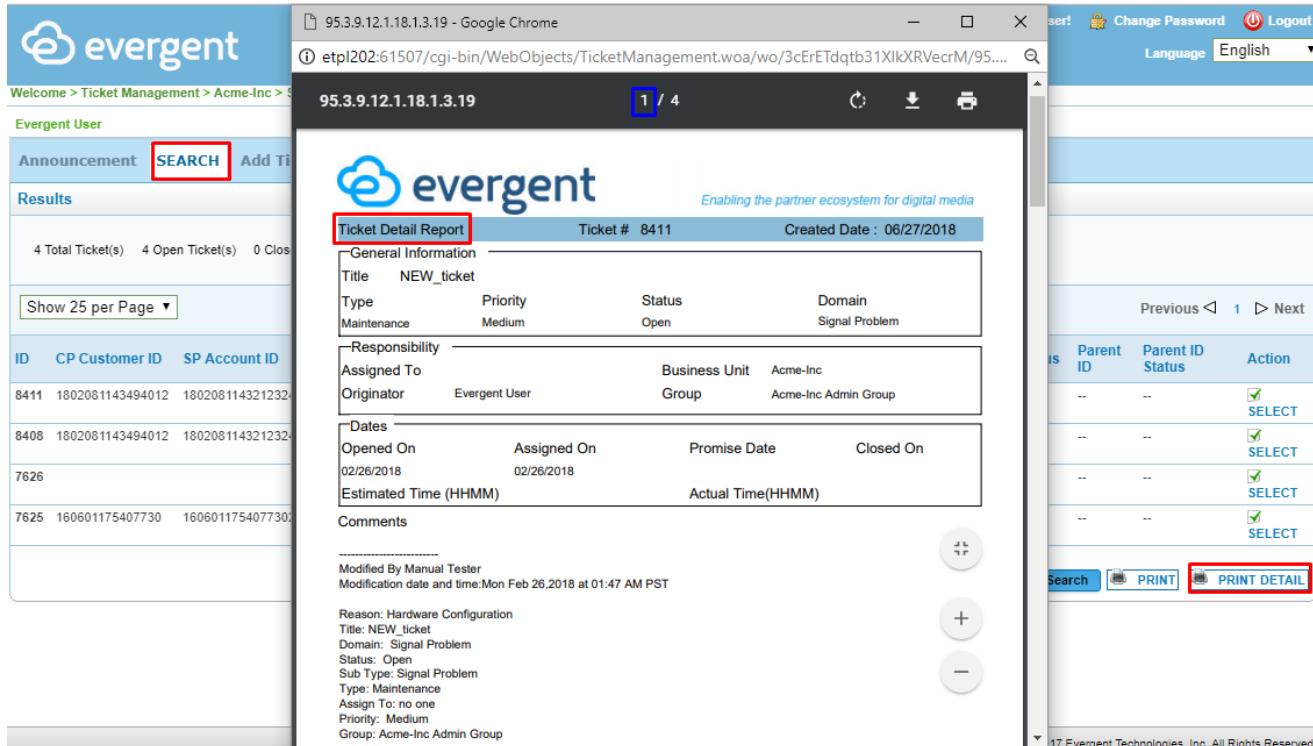
Printing a Group of Trouble Tickets

- Access the search <Results> screen that displays a list of trouble tickets based on any of the search criteria.



| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|------------------|-----------------------|-----------------------|----------------------|-------------|-------------|----------------|---------------|----------|--------|-----------|------------------|--|
| 8411 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc Admin Group | | Maintenance | Signal Problem | 02/26/2018 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 8408 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc CSR Group | Manual | Maintenance | Signal Problem | 02/23/2018 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7626 | | | Acme-Inc CSR Group | Acme-Inc Admin Group | | Maintenance | Signal Problem | 06/24/2016 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7625 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | @testuser | Maintenance | Signal Problem | 06/23/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

- Click the < Print Detail> button at the bottom of the search the **Results** screen to view all the tickets in a new PDF report file window.
- The **PDF report file** window then appears, displaying the details of all the trouble tickets in a page-wise navigation as shown in the following screen:

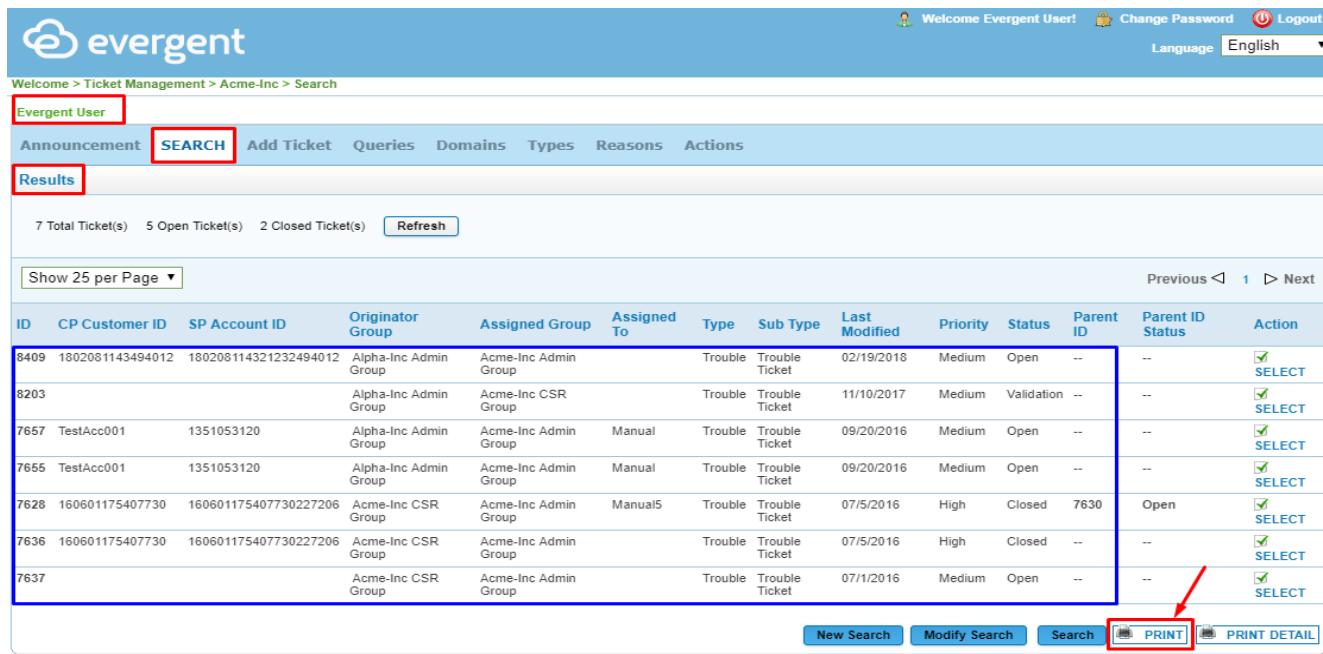


The screenshot shows the Evergent CRM interface. On the left, there's a search results page for 'Ticket Management > Acme-Inc > Search'. A red box highlights the 'SEARCH' button. The main area displays a list of tickets with columns for ID, CP Customer ID, and SP Account ID. A red box highlights the 'Ticket Detail Report' button at the top of the main content area. The right side shows a detailed view of a ticket (Ticket # 8411) with sections for General Information, Responsibility, Dates, and Comments. At the bottom of this detail view, there are 'PRINT' and 'PRINT DETAIL' buttons, with 'PRINT DETAIL' highlighted by a red box. The status bar at the bottom right says '17 Evergent Technologies, Inc. All Rights Reserved'.

- Click the print icon located in the PDF report file properties to send all the trouble ticket details to the printer. You may scroll down to view all the trouble tickets.
- Click the close  icon in the top right corner to close the PDF report window.

Printing a List of Trouble Tickets

- You can print a summary of the list of trouble tickets.
- Access the search <**Results**> screen displaying a list of trouble tickets based on any of the search criteria.



Evergent User

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Results

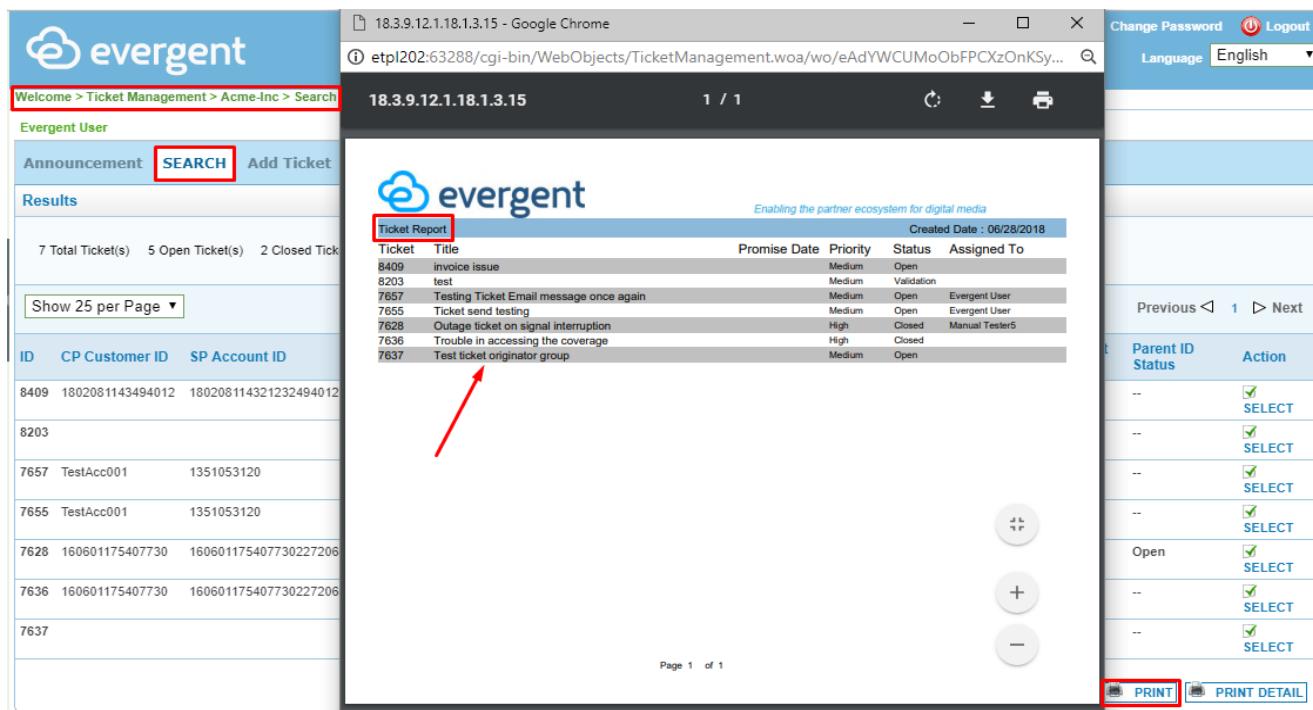
7 Total Ticket(s) 5 Open Ticket(s) 2 Closed Ticket(s) Refresh

Show 25 per Page ▾ Previous ◀ 1 ▶ Next

| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|------------------|-----------------------|-----------------------|----------------------|-------------|---------|----------------|---------------|----------|------------|-----------|------------------|--|
| 8409 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 02/19/2018 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 8203 | | | Alpha-Inc Admin Group | Acme-Inc CSR Group | | Trouble | Trouble Ticket | 11/10/2017 | Medium | Validation | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7657 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Trouble | Trouble Ticket | 09/20/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7655 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Trouble | Trouble Ticket | 09/20/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7628 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | Manual5 | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | 7630 | Open | <input checked="" type="checkbox"/> SELECT |
| 7636 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 7637 | | | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/1/2016 | Medium | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

New Search Modify Search Search **PRINT** **PRINT DETAIL**

- Once you have a list of trouble tickets displaying on your search results screen, click the **< Print>** button.
- A new **PDF report window** appears, displaying the summary of the trouble tickets as shown in the image below:



Welcome > Ticket Management > Acme-Inc > Search

Evergent User

Announcement **SEARCH** Add Ticket

Results

7 Total Ticket(s) 5 Open Ticket(s) 2 Closed Tick

Show 25 per Page ▾

| ID | CP Customer ID | SP Account ID |
|------|------------------|-----------------------|
| 8409 | 1802081143494012 | 180208114321232494012 |
| 8203 | | |
| 7657 | TestAcc001 | 1351053120 |
| 7655 | TestAcc001 | 1351053120 |
| 7628 | 160601175407730 | 160601175407730227206 |
| 7636 | 160601175407730 | 160601175407730227206 |
| 7637 | | |

Ticket Report Created Date : 06/28/2018

| Ticket | Title | Promise Date | Priority | Status | Assigned To |
|--------|---|--------------|----------|------------|----------------|
| 8409 | invoice issue | | Medium | Open | |
| 8203 | test | | Medium | Validation | |
| 7657 | Testing Ticket Email message once again | | Medium | Open | Evergent User |
| 7655 | Ticket send testing | | Medium | Open | Evergent User |
| 7628 | Outage ticket on signal interruption | | High | Closed | Manual Tester5 |
| 7636 | Trouble in accessing the coverage | | High | Closed | |
| 7637 | Test ticket originator group | | Medium | Open | |

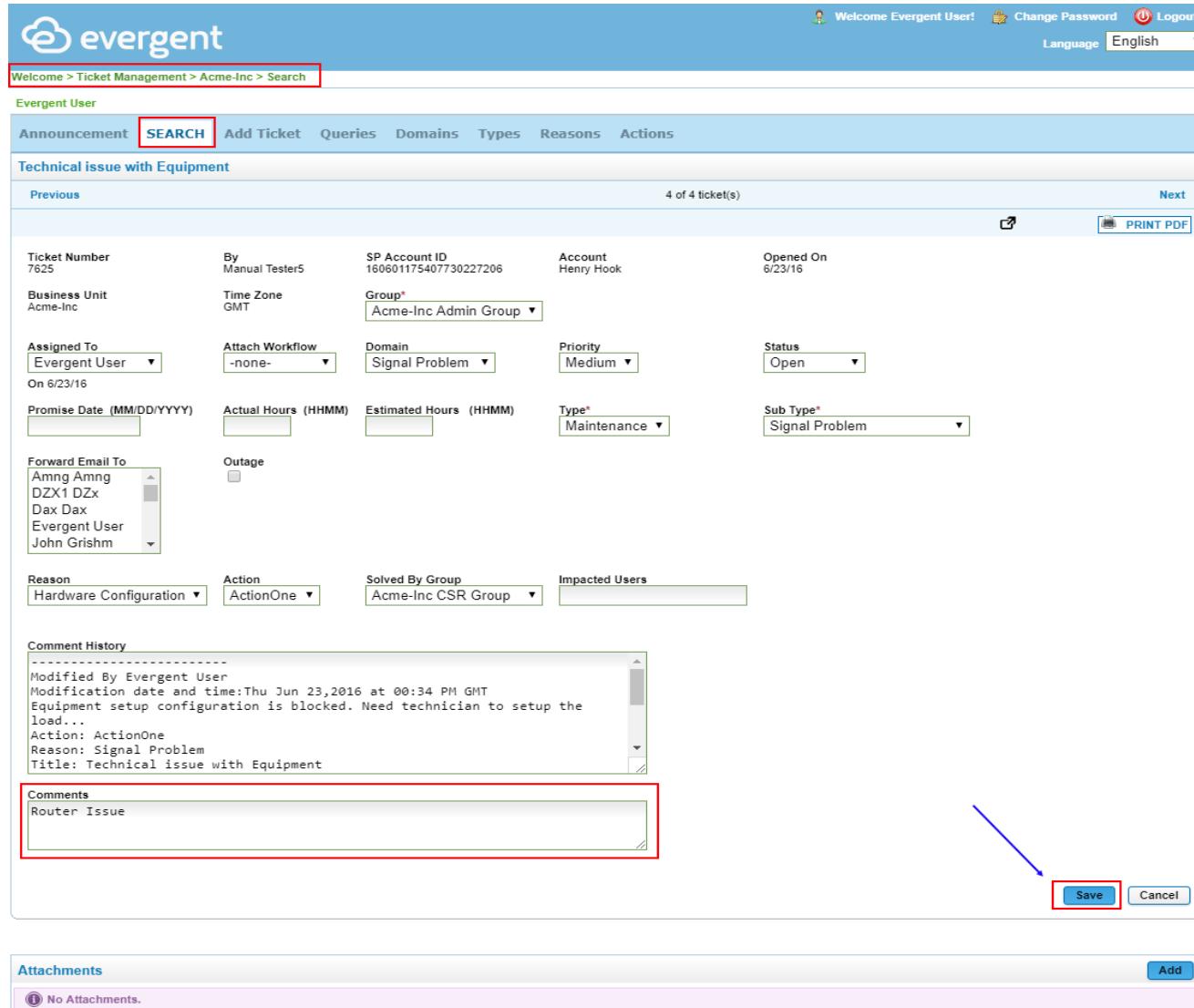
Page 1 of 1

PRINT PRINT DETAIL

- Click the **<print>** icon located at the top left corner of the PDF report file to send the trouble tickets summary to the printer.
- Click the close **<X>** icon in the top right corner to close the PDF report window.

Updating a Trouble Ticket

- Access the trouble ticket you want to update from the <Search> screen.
- Once you have selected the trouble ticket, update the necessary fields. You can indicate comments in the <Comments> section as shown in the following image:



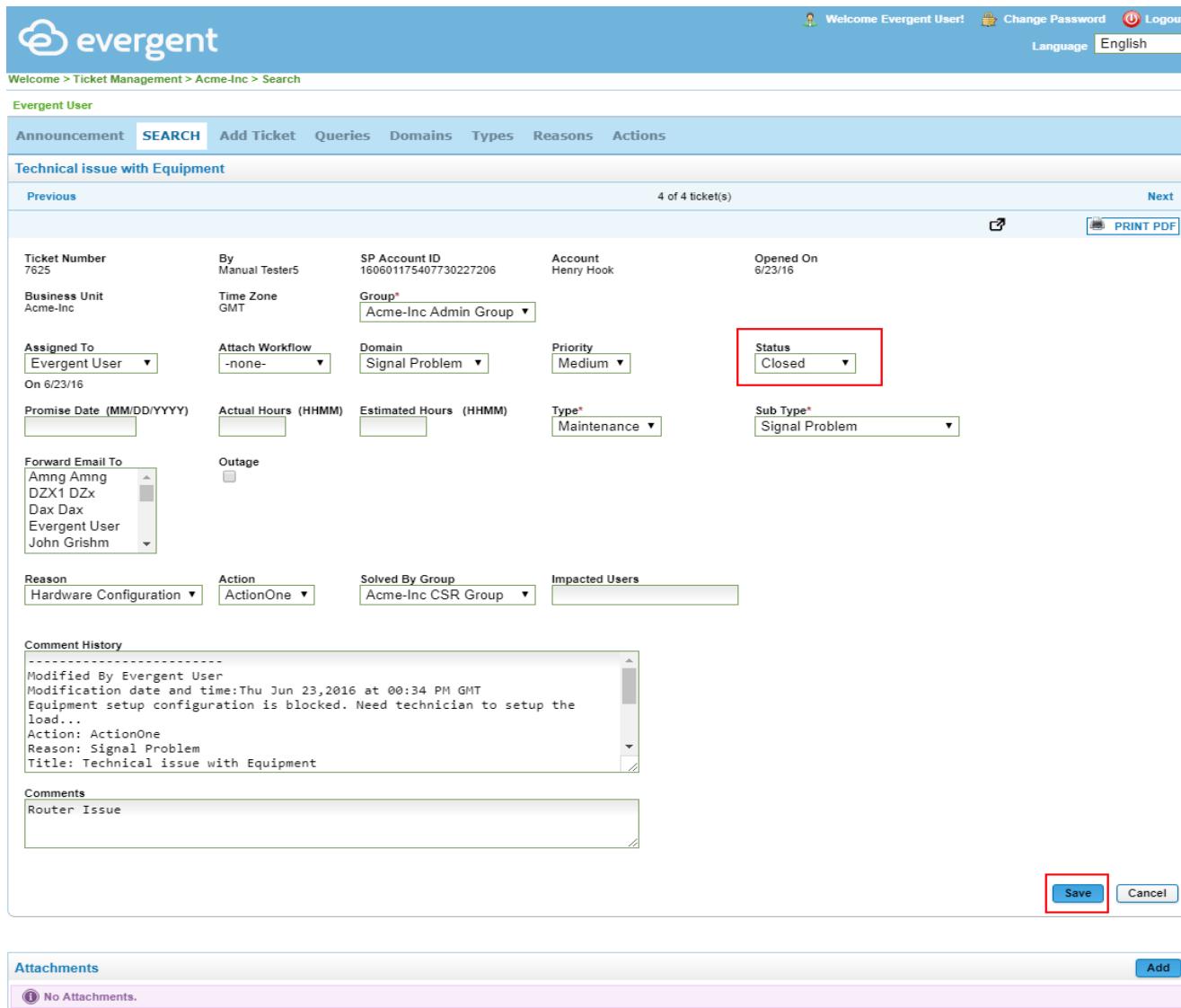
The screenshot shows the Evergent CRM interface for ticket management. A specific ticket for 'Technical issue with Equipment' (Ticket Number 7625) is selected. The 'Comments' field contains the text 'Router Issue'. The 'Save' button at the bottom right is highlighted with a red box, indicating where to click to save changes.

- Click the <Save> button to save the changes. Or click the <Cancel> button to discard.

Closing a Trouble Ticket

- Access the trouble ticket you want to close from the <Search> screen.
- Once you have selected the trouble ticket, update the necessary fields, and change the status to <Closed>.

- Indicate comments if any, in the <Comments> section.



Welcome > Ticket Management > Acme-Inc > Search

Evergent User

Announcement **SEARCH** Add Ticket Queries Domains Types Reasons Actions

Technical issue with Equipment

Previous 4 of 4 ticket(s) Next

Ticket Number 7625 **By** Manual Tester5 **SP Account ID** 160601175407730227206 **Account** Henry Hook **Opened On** 6/23/16

Business Unit Acme-Inc **Time Zone** GMT **Group*** Acme-Inc Admin Group

Assigned To Evergent User **Attach Workflow** -none- **Domain** Signal Problem **Priority** Medium **Status** Closed

Promise Date (MM/DD/YYYY) **Actual Hours (HHMM)** **Estimated Hours (HHMM)** **Type*** Maintenance **Sub Type*** Signal Problem

Forward Email To Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm

Outage

Reason Hardware Configuration **Action** ActionOne **Solved By Group** Acme-Inc CSR Group **Impacted Users**

Comment History

Modified By Evergent User
Modification date and time: Thu Jun 23, 2016 at 00:34 PM GMT
Equipment setup configuration is blocked. Need technician to setup the load...
Action: ActionOne
Reason: Signal Problem
Title: Technical issue with Equipment

Comments
Router Issue

Attachments **Add**
No Attachments.

Save **Cancel**

- Click the <Save> button to close the ticket.
- Or else, click the <Cancel> button to discard changes.

Pagination display of Trouble Ticket Results

- Navigate <Search> tabbed screen of a business unit.
- Specify any of the search criteria and click the <Search> button at the bottom of the screen.
- From the search **Results** screen, select any one of the pagination selections say, “**Show 25 per Page**” (or) “**Show 50 per Page**” (or) from the drop-down list box provided.
- On the search Results screen, when “**Show 25 per Page**” pagination is selected, will display a total of **25 tickets** per page along with page number hyperlinks as shown in the following screen:

Welcome Evergent User!  [Change Password](#) 
Language  English

Welcome > Ticket Management > Acme-Inc > Search

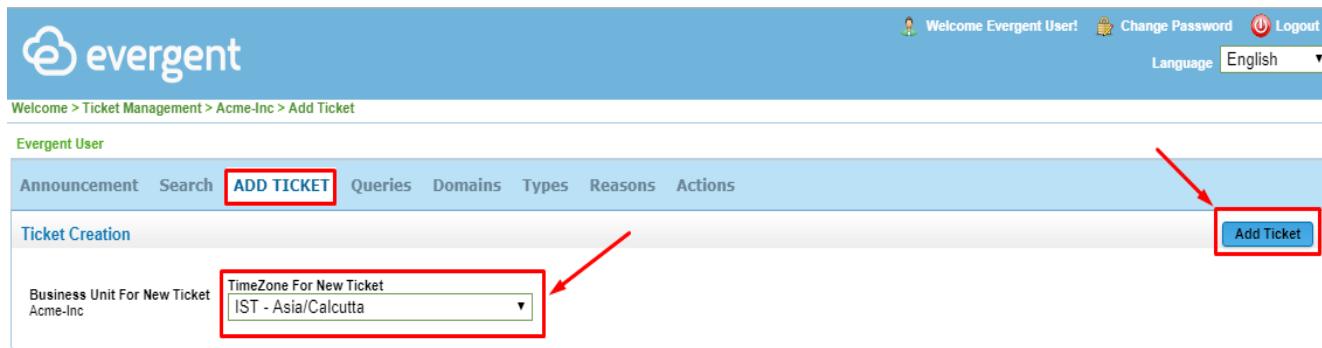
Evergent User

| Announcement | SEARCH | Add Ticket | Queries | Domains | Types | Reasons | Actions | | | | | | |
|---|-----------------------|-----------------------|-------------------------|-----------------------|--------------------|-------------|------------------------------|----------------------|-----------------|---------------|------------------|-------------------------|--|
| Results | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between; align-items: center;"> 20 Total Ticket(s) 15 Open Ticket(s) 5 Closed Ticket(s) Refresh </div> | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: flex-end; margin-top: 10px;"> Show 25 per Page ▾ Previous < 1 Next > </div> | | | | | | | | | | | | | |
| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
| 8411 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc Admin Group | | Maintenance | Signal Problem | 02/26/2018 | Medium | Open | -- | -- |  SELECT |
| 8410 | 1802081143494016 | 180208114321232494016 | Alpha-Inc Admin Group | Acme-Inc CSR Group | Manual | Outage | Technical Outage | 02/26/2018 | Medium | Open | -- | -- |  SELECT |
| 8409 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 02/19/2018 | Medium | Open | -- | -- |  SELECT |
| 8408 | 1802081143494012 | 180208114321232494012 | Alpha-Inc Admin Group | Acme-Inc CSR Group | Manual | Maintenance | Signal Problem | 02/23/2018 | Medium | Open | -- | -- |  SELECT |
| 8203 | | | Alpha-Inc Admin Group | Acme-Inc CSR Group | | Trouble | Trouble Ticket | 11/10/2017 | Medium | Validation | -- | -- |  SELECT |
| 7660 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual5 | Outage | Technical Outage | 09/20/2016 | Medium | Open | -- | -- |  SELECT |
| 7658 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Maintenance | Service Installation Problem | 09/20/2016 | Medium | Open | -- | -- |  SELECT |
| 7657 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Trouble | Trouble Ticket | 09/20/2016 | Medium | Open | -- | -- |  SELECT |
| 7655 | TestAcc001 | 1351053120 | Alpha-Inc Admin Group | Acme-Inc Admin Group | Manual | Trouble | Trouble Ticket | 09/20/2016 | Medium | Open | -- | -- |  SELECT |
| 7628 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | Manual5 | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | 7630 | Open |  SELECT |
| 7641 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc CSR Group | | Outage | POP Outage | 07/1/2016 | Medium | Open | -- | -- |  SELECT |
| 7640 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | POP Outage | 07/1/2016 | Medium | Closed | 7638 | Closed |  SELECT |
| 7639 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | POP Outage | 07/1/2016 | Medium | Closed | 7638 | Closed |  SELECT |
| 7638 | 10052015 | 313520592 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | POP Outage | 07/1/2016 | Medium | Closed | -- | -- |  SELECT |
| 7636 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/5/2016 | High | Closed | -- | -- |  SELECT |
| 7637 | | | Acme-Inc CSR Group | Acme-Inc Admin Group | | Trouble | Trouble Ticket | 07/1/2016 | Medium | Open | -- | -- |  SELECT |
| 7630 | KK04 | 1475382656 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | Technical Outage | 07/1/2016 | High | Open | -- | -- |  SELECT |
| 7626 | | | Acme-Inc CSR Group | Acme-Inc Admin Group | | Maintenance | Signal Problem | 06/24/2016 | High | Open | -- | -- |  SELECT |
| 7625 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | @testuser | Maintenance | Signal Problem | 06/23/2016 | Medium | Open | -- | -- |  SELECT |
| 7624 | 160601175407730 | 160601175407730227206 | Acme-Inc CSR Group | Acme-Inc Admin Group | @testuser | Outage | Technical Outage | 06/23/2016 | Critical | Open | -- | -- |  SELECT |

[New Search](#)
[Modify Search](#)
[Search](#)
 [PRINT](#)
 [PRINT DETAIL](#)

- Similarly, when “**Show 50 per Page**” pagination is selected, a total of **50 Group** records will be displayed per page along with page number hyperlinks.

Adding Tickets



Welcome > Ticket Management > Acme-Inc > Add Ticket

Evergent User

Announcement Search **ADD TICKET** Queries Domains Types Reasons Actions

Ticket Creation

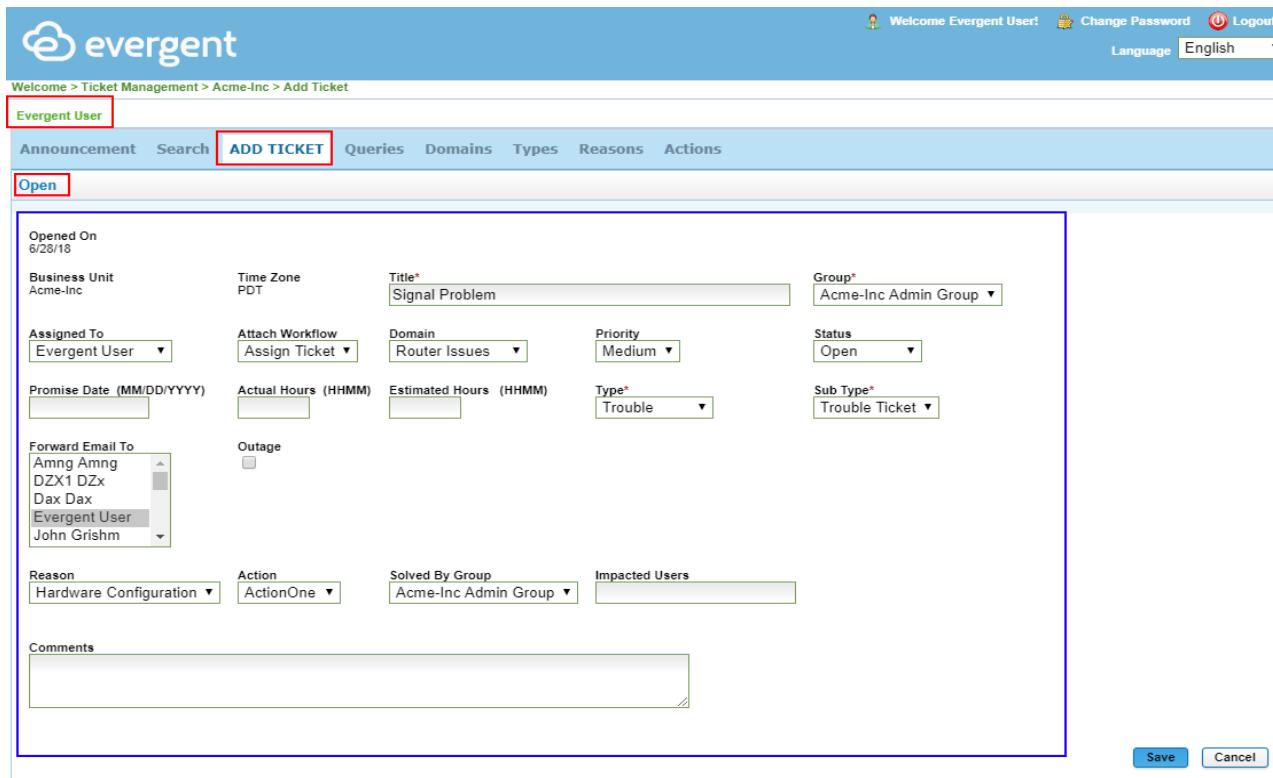
Business Unit For New Ticket
Acme-Inc

TimeZone For New Ticket
IST - Asia/Calcutta

Add Ticket

Creating a Trouble Ticket

- Click the **<Add Ticket>** tab.
- Select the time zone for the ticket from the **<TimeZone For New Ticket>** drop-down list box, if not already indicated, and click the **<Add Ticket>** button to add a new ticket.



Welcome > Ticket Management > Acme-Inc > Add Ticket

Evergent User

Announcement Search **ADD TICKET** Queries Domains Types Reasons Actions

Open

Opened On
6/28/18

Business Unit
Acme-Inc

Time Zone
PDT

Title*
Signal Problem

Group*
Acme-Inc Admin Group

Assigned To
Evergent User

Attach Workflow
Assign Ticket

Domain
Router Issues

Priority
Medium

Status
Open

Promise Date (MM/DD/YYYY)

Actual Hours (HHMM)

Estimated Hours (HHMM)

Type*
Trouble

Sub Type*
Trouble Ticket

Forward Email To
Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm

Outage

Reason
Hardware Configuration

Action
ActionOne

Solved By Group
Acme-Inc Admin Group

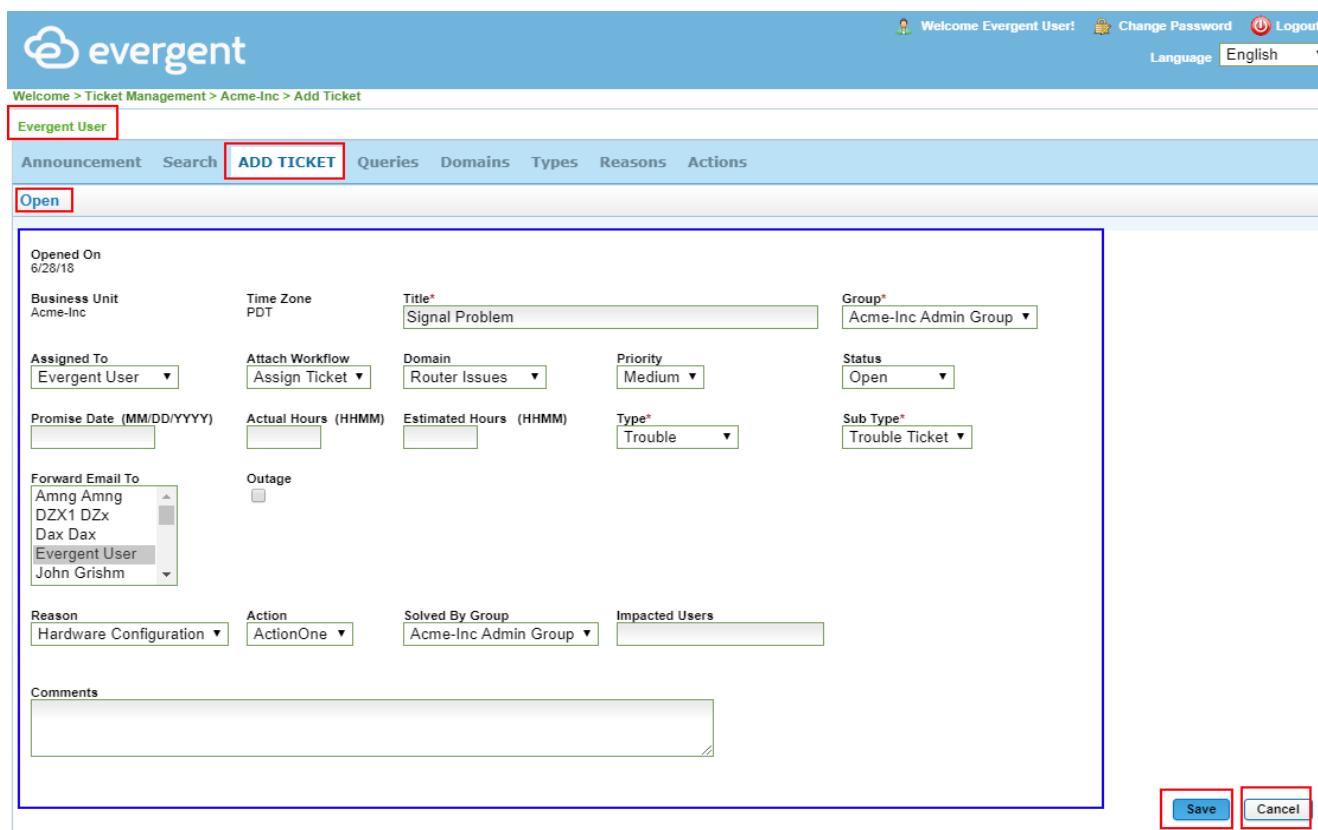
Impacted Users

Comments

Save Cancel

- In the **<Open>** screen that appears, indicate the subject of the ticket in the **<Title>** field.
- Select the **<Group>** to which the owner, who will be responsible for the ticket belonging to.

- In the **<Assigned To>** field, select the owner of the ticket. You may choose to indicate **<Unassigned>** and instead of indicating the responsible group only in the **<Group>** field. An email should be sent to the corresponding person selected in the list.
- You can attach the Workflow (if required) to resolve the trouble ticket by selecting from the **<Attach Workflow>** list.
- Select the trouble area of the ticket in the **<Domain>** field.
- Select the **<Priority>** of the problem as anyone of them from the list (Say **Critical/ High/ Medium/ Low**).
- Select the **<Status>** of the ticket from the list (Say, **Open/ Closed/ Validation/ In Progress/ Test/ Design/ Build/ Paused**).
- Enter the ticket resolution promising date to the customer in the **<Promise Date>** field, if applicable.
- Enter the number of **<Actual Hours>** taken to complete the trouble ticket is resolved.
- Enter the number of **<Estimated Hours>** to complete the trouble ticket if estimated.
- Indicate whether the ticket is a problem, change, requirement or discussion or maintenance, or any; from the **<Type>** drop-down list box.
- After selecting the **<Type>** of the ticket, you can choose to select any one of the sub-types of the selected ticket type from the **<Sub Type>** drop-down list box.
- Select the person who will be getting the copy of this ticket as an email for reference from the **<Forward Email To>** list box.
- Click the **<Outage>** check box if the ticket indicates an Outage ticket.
- Clicking on the **outage** check box will display the **Parent Outage Ticket** list box, where the list of parent outage tickets if already exist will be displayed in the list.
- Select any one of the ticket reasons from the **<Reason>** drop-down list box and the corresponding **<Action>** related to that trouble ticket reason (**If defined**).
- Detail the cause of the problem or change request in the **<Comments>** field.



Evergent User

Announcement Search **ADD TICKET** Queries Domains Types Reasons Actions

Open

Opened On
6/28/18

Business Unit
Acme-Inc

Time Zone
PDT

Title*
Signal Problem

Group*
Acme-Inc Admin Group

Assigned To
Evergent User

Attach Workflow
Assign Ticket

Domain
Router Issues

Priority
Medium

Status
Open

Promise Date (MM/DD/YYYY)

Actual Hours (HHMM)

Estimated Hours (HHMM)

Type*
Trouble

Sub Type*
Trouble Ticket

Forward Email To
Amng Amng
DZX1 DZx
Dax Dax
Evergent User
John Grishm

Outage

Reason
Hardware Configuration

Action
ActionOne

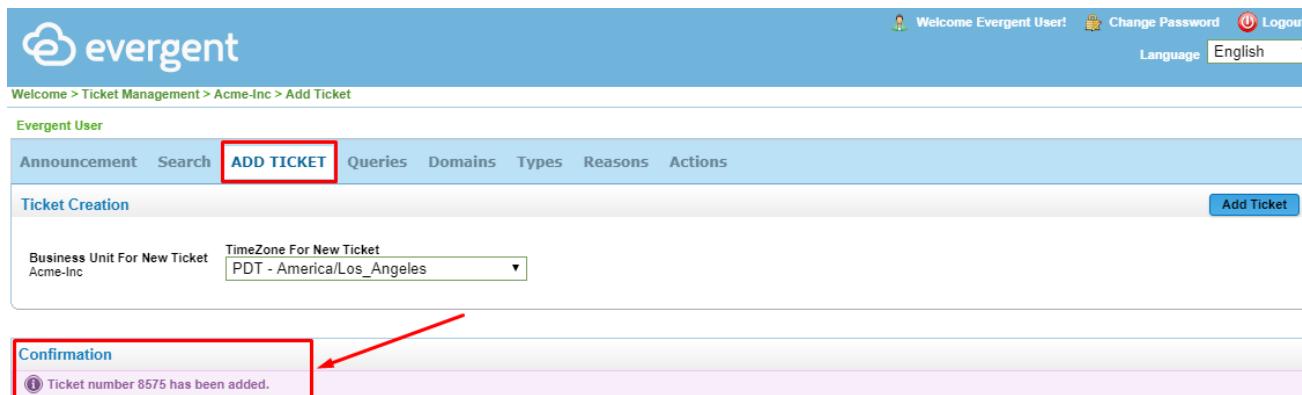
Solved By Group
Acme-Inc Admin Group

Impacted Users

Comments

Save **Cancel**

- Click the **<Save>** button to save the ticket and send the ticket to the responsible owner. Or click the **<Cancel>** button to abort.
- Clicking on the **<Save>** button will display your ticket number in the **<Confirmation>** section of the **<Ticket Creation>** screen as shown in the following screen:



Welcome > Ticket Management > Acme-Inc > Add Ticket

Evergent User

Announcement Search **ADD TICKET** Queries Domains Types Reasons Actions

Ticket Creation

Add Ticket

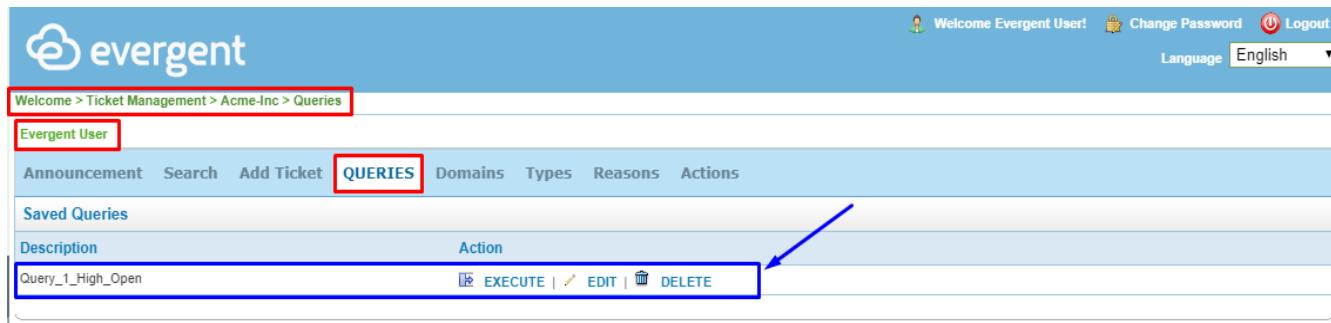
Business Unit For New Ticket
Acme-Inc

TimeZone For New Ticket
PDT - America/Los_Angeles

Confirmation

Ticket number 8575 has been added.

Queries



Welcome > Ticket Management > Acme-Inc > Queries

Evergent User

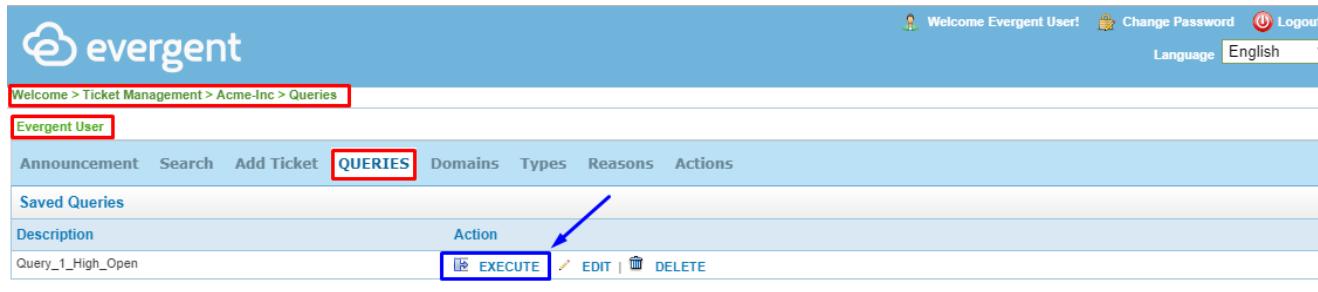
Announcement Search Add Ticket QUERIES Domains Types Reasons Actions

Saved Queries

| Description | Action |
|-------------------|---------------------------|
| Query_1_High_Open | EXECUTE EDIT DELETE |

You can dynamically sort the data displayed under the <**Saved Queries**> screen by their columns. You can sort the data either in ascending or descending order by clicking on the corresponding <**Description**> column heading hyperlink.

- Navigate to the <**Queries**> tab of the Business Unit.



Welcome > Ticket Management > Acme-Inc > Queries

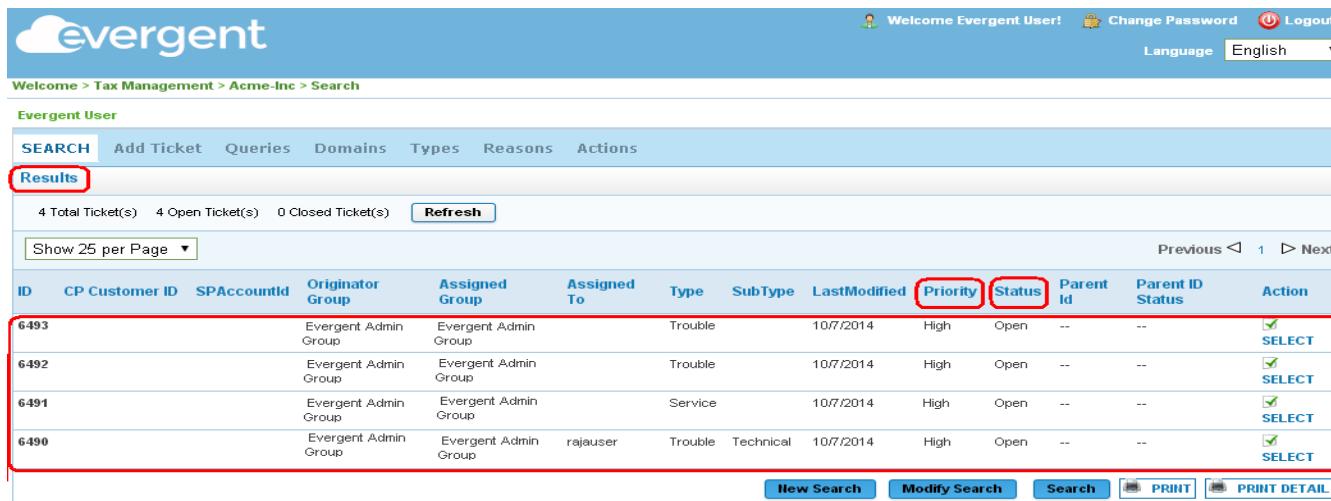
Evergent User

Announcement Search Add Ticket QUERIES Domains Types Reasons Actions

Saved Queries

| Description | Action |
|-------------------|---------------------------|
| Query_1_High_Open | EXECUTE EDIT DELETE |

- Click the < Execute> inline button corresponding to the query, where you wish to execute the saved search criteria.
- The search <**Results**> screen is then displayed with the search results as shown in the following screen:



Welcome > Tax Management > Acme-Inc > Search

Evergent User

SEARCH Add Ticket Queries Domains Types Reasons Actions

Results

4 Total Ticket(s) 4 Open Ticket(s) 0 Closed Ticket(s) Refresh

Show 25 per Page ▾ Previous ◀ 1 ▶ Next

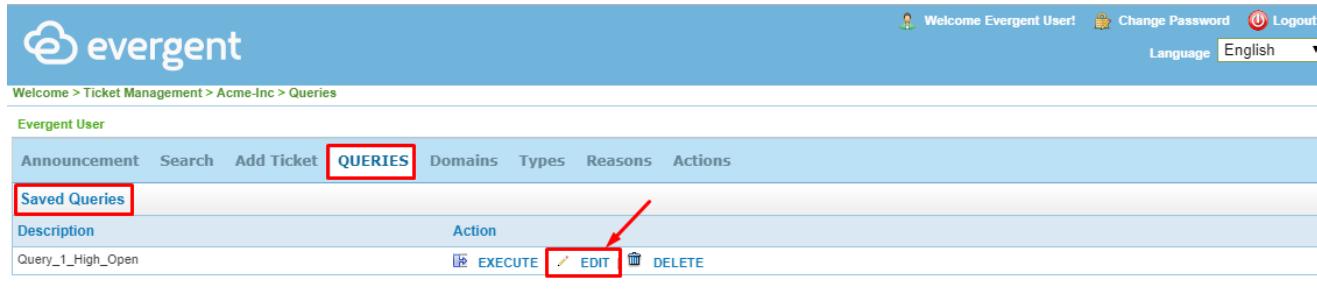
| ID | CP Customer ID | SPAccountID | Originator Group | Assigned Group | Assigned To | Type | SubType | LastModified | Priority | Status | Parent Id | Parent ID Status | Action |
|------|----------------|-------------|----------------------|----------------------|-------------|---------|-----------|--------------|----------|--------|-----------|------------------|--|
| 6493 | | | Evergent Admin Group | Evergent Admin Group | | Trouble | | 10/7/2014 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 6492 | | | Evergent Admin Group | Evergent Admin Group | | Trouble | | 10/7/2014 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 6491 | | | Evergent Admin Group | Evergent Admin Group | | Service | | 10/7/2014 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |
| 6490 | | | Evergent Admin Group | Evergent Admin Group | rajauser | Trouble | Technical | 10/7/2014 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

New Search Modify Search Search PRINT PRINT DETAIL

- You can also edit the existing saved query search criteria by clicking on the <**Modify Search**> button from the search <**Results**> screen or by clicking on the < Edit> inline button corresponding to the query from the <**Queries**> tab.
- Once you have modified the query search criteria, you can save the query with a different name or save with the same name.

Updating a Query

- Navigate to the <**Queries**> tabbed screen of a Business Unit.
- Locate the query you wish to modify.



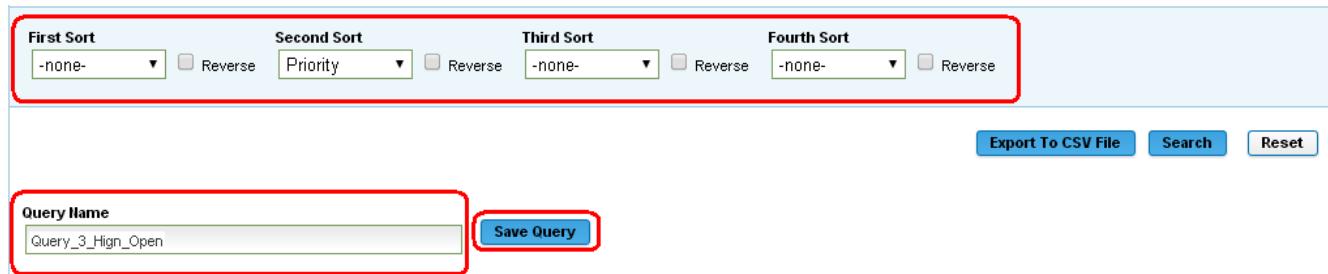
Welcome > Ticket Management > Acme-Inc > Queries

Evergent User

Announcement Search Add Ticket **QUERIES** Domains Types Reasons Actions

| Saved Queries | | Action |
|-------------------|---|--------|
| Description | Action | |
| Query_1_High_Open |  EXECUTE  EDIT  DELETE | |

- Click the < Edit> inline button corresponding to the query you wish to modify.
- This will navigate you to the <**Search**> tabbed screen displaying the saved search criteria of the edited query.
- Make your desired changes to the search criteria.
- You can also change the <**Query Name**> if you want.



First Sort Second Sort Third Sort Fourth Sort

-none- Reverse Priority -none- Reverse -none- Reverse -none- Reverse

Export To CSV File Search Reset

Query Name

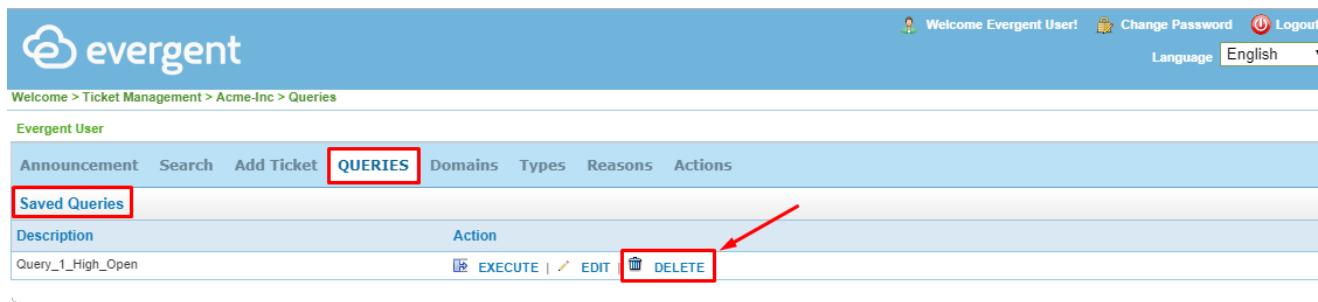
Query_3_High_Open

Save Query

- Click the <**Save Query**> button to save changes.
- Or else, you can just simply discard changes to the query by navigating to any other tabs or refreshing the search screen.

Removing a Query

- Navigate to the <**Queries**> tabbed screen of a Business Unit.
- Locate the query you wish to delete.



Welcome > Ticket Management > Acme-Inc > Queries

Evergent User

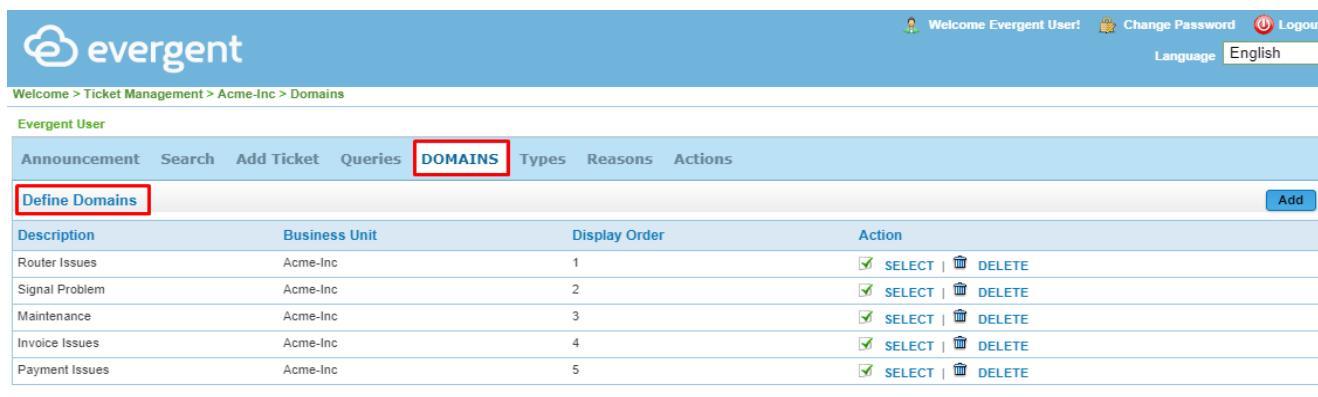
Announcement Search Add Ticket **QUERIES** Domains Types Reasons Actions

Saved Queries

| Description | Action |
|-------------------|--|
| Query_1_High_Open | EXECUTE EDIT DELETE |

- Click the **< Delete>** inline button corresponding to the query you wish to delete.
- The selected query will be deleted from the list.

Domains



Welcome > Ticket Management > Acme-Inc > Domains

Evergent User

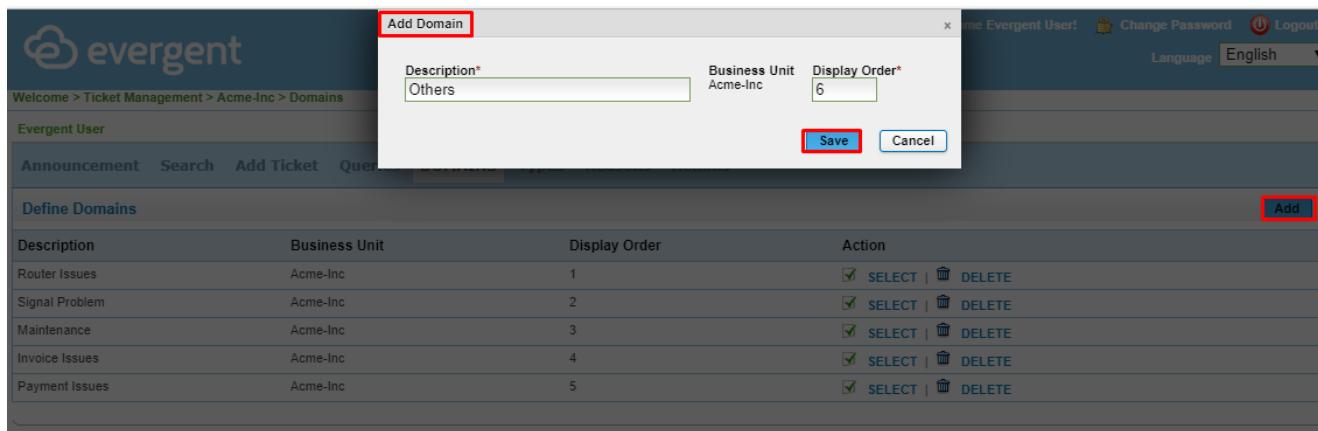
Announcement Search Add Ticket Queries **DOMAINS** Types Reasons Actions

Define Domains [Add](#)

| Description | Business Unit | Display Order | Action |
|----------------|---------------|---------------|---|
| Router Issues | Acme-Inc | 1 | <input checked="" type="checkbox"/> SELECT DELETE |
| Signal Problem | Acme-Inc | 2 | <input checked="" type="checkbox"/> SELECT DELETE |
| Maintenance | Acme-Inc | 3 | <input checked="" type="checkbox"/> SELECT DELETE |
| Invoice Issues | Acme-Inc | 4 | <input checked="" type="checkbox"/> SELECT DELETE |
| Payment Issues | Acme-Inc | 5 | <input checked="" type="checkbox"/> SELECT DELETE |

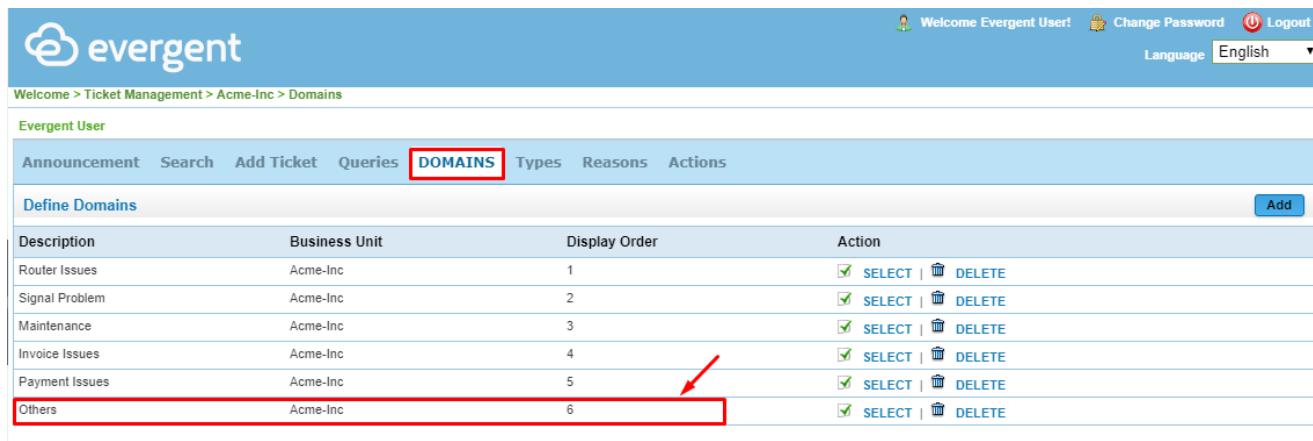
You can dynamically sort the data displayed under the **<Define Domains>** screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (say, **Description**, **Display Order**).

- Navigate to the **<Domains>** tabbed screen of a Business Unit.
- Click the **<Add>** button to add a new domain.
- In the **<Add Domain>** pop-up model dialog box that appears, fill the necessary fields.



The screenshot shows the 'Add Domain' dialog box overlaid on the main 'Define Domains' screen. The dialog box contains fields for 'Description*' (set to 'Others') and 'Display Order*' (set to '6'). Below these are 'Save' and 'Cancel' buttons. The main screen shows a table of existing domains like 'Router Issues' and 'Signal Problem'. An 'Add' button is visible in the top right corner of the main table area.

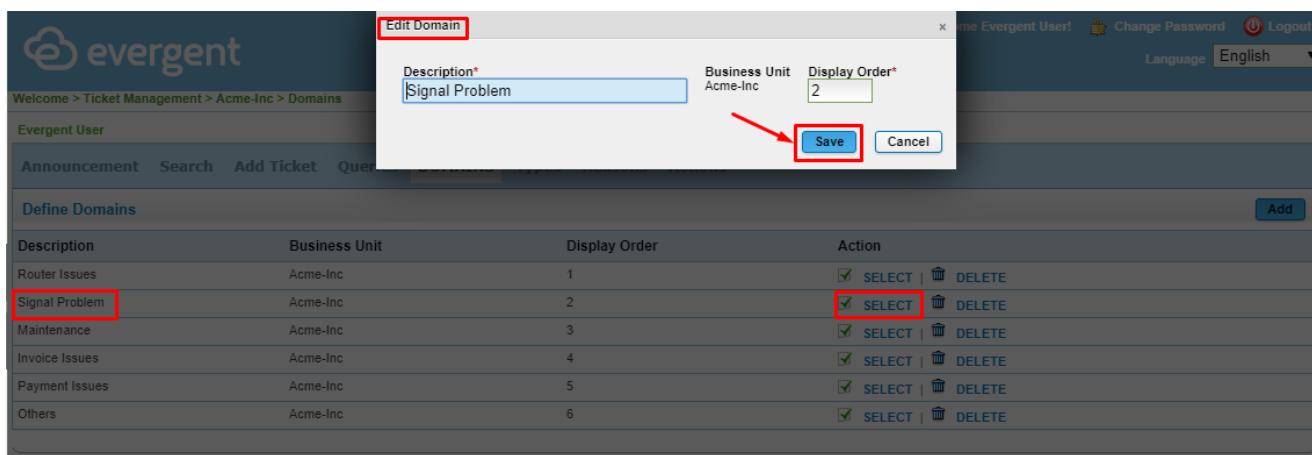
- Enter the <Description> of the new domain.
- Enter a number in the <Display Order> field indicating the position of the new domain such that it will be displayed in the order in the <By Domain> type in <Ticket Filters> section of the <Search> screen and in the <Ticket Detail> screen.
- Click the <Save> button to save the new domain. Or else, click the <Cancel> button to discard.
- Clicking on the <Save> button will navigate back to the **Domains** screen, displaying the newly saved domain as shown in the following screen:



The screenshot shows the 'Define Domains' screen with the 'DOMAINS' tab selected. A red arrow points to the 'Others' row in the table, which has a display order of 6. The table includes columns for Description, Business Unit, Display Order, and Action (with 'SELECT' and 'DELETE' options). The 'Add' button is visible in the top right corner of the table area.

Modifying a Domain

- Navigate to the <Domains> tabbed screen of a Business Unit, where you want to modify.
- Click the < Select> inline button corresponding to the domain that you wish to modify.
- In the <Edit Domain> pop-up model dialog box that appears, update the necessary fields.



Edit Domain

| | | |
|----------------|---------------|----------------|
| Description* | Business Unit | Display Order* |
| Signal Problem | Acme-Inc | 2 |

Save **Cancel**

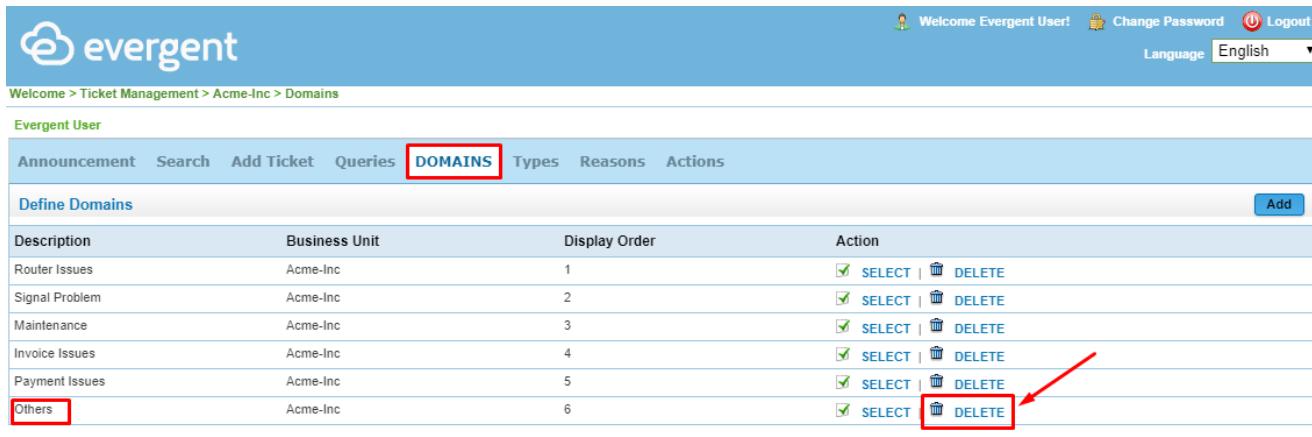
Define Domains

| Description | Business Unit | Display Order | Action |
|----------------|---------------|---------------|---|
| Router Issues | Acme-Inc | 1 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Signal Problem | Acme-Inc | 2 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Maintenance | Acme-Inc | 3 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Invoice Issues | Acme-Inc | 4 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Payment Issues | Acme-Inc | 5 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Others | Acme-Inc | 6 | <input checked="" type="checkbox"/> SELECT  DELETE |

- Click the <Save> button to save the changes.
- Or click the <Cancel> button to discard.

Removing a Domain

- Navigate to the <Domains> tabbed screen of a Business Unit.
- Locate the domain you wish to delete.



Welcome Evergent User!  Change Password 

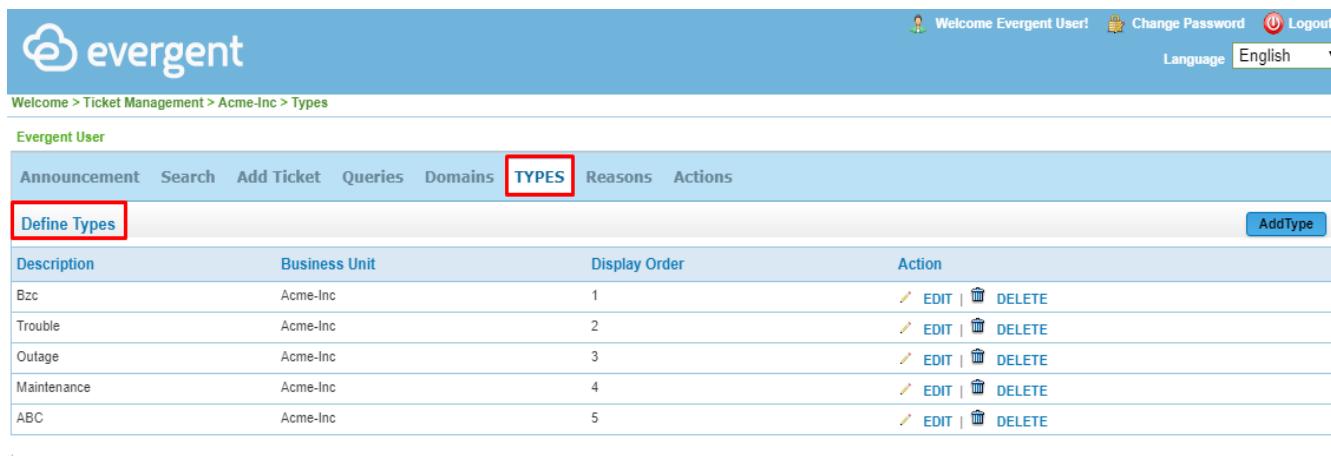
Language English

Define Domains

| Description | Business Unit | Display Order | Action |
|----------------|---------------|---------------|---|
| Router Issues | Acme-Inc | 1 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Signal Problem | Acme-Inc | 2 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Maintenance | Acme-Inc | 3 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Invoice Issues | Acme-Inc | 4 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Payment Issues | Acme-Inc | 5 | <input checked="" type="checkbox"/> SELECT  DELETE |
| Others | Acme-Inc | 6 | <input checked="" type="checkbox"/> SELECT  DELETE |

- Click the < Delete > inline button corresponding to the domain you wish to delete.
- The selected domain will be deleted from the list, if and only if, it is not associated with at least one ticket in the system of that respective business unit.

Types



Welcome > Ticket Management > Acme-Inc > Types

Evergent User

| Announcement | Search | Add Ticket | Queries | Domains | TYPES | Reasons | Actions |
|---------------------|---------------|---------------|---------|---------|---|---------|---------|
| Define Types | | | | | | | |
| Description | Business Unit | Display Order | | | Action | | |
| Bzc | Acme-Inc | 1 | | | EDIT DELETE | | |
| Trouble | Acme-Inc | 2 | | | EDIT DELETE | | |
| Outage | Acme-Inc | 3 | | | EDIT DELETE | | |
| Maintenance | Acme-Inc | 4 | | | EDIT DELETE | | |
| ABC | Acme-Inc | 5 | | | EDIT DELETE | | |

You can dynamically sort the data displayed under the <**Define Types**> screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Description** and **Display Order**).

- Navigate to the <Types> tabbed screen of a business unit.

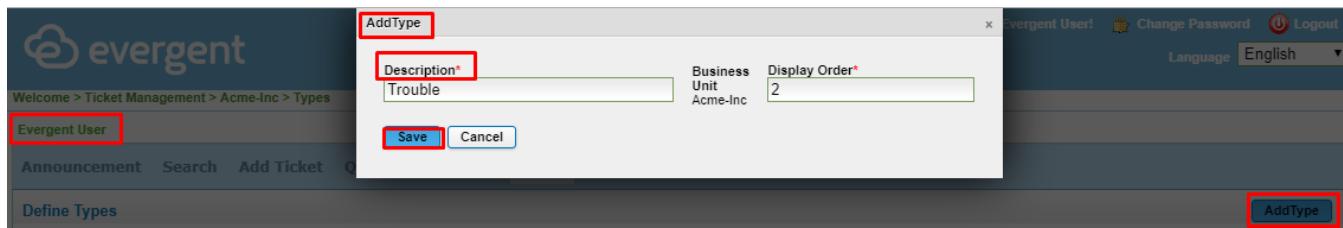


Welcome > Ticket Management > Acme-Inc > Types

Evergent User

| Announcement | Search | Add Ticket | Queries | Domains | TYPES | Reasons | Actions |
|---------------------|--------|------------|---------|---------|--------------|---------|---------|
| Define Types | | | | | | | |
| AddType | | | | | | | |

- Click the <Add Type> button to add a new type.



Welcome > Ticket Management > Acme-Inc > Types

Evergent User

AddType

| | |
|---------------------|----------|
| Description* | Trouble |
| Business Unit | Acme-Inc |
| Display Order* | 2 |

AddType

- In the <Add Type> pop-up model dialog box that appears, fill in the necessary fields.
- Enter description in the <Description> field.
- Enter a number in the <Display Order> field indicating the position of the new **type** such that it will be displayed in the order in the <Types> type in <Ticket Filters> section of the <Search> screen and in the <Ticket Detail> screen.

- Click the <Save> button to save the new **type**. Or else click the <Cancel> to discard.
- You can define any number of Types you wish to define for the Business Unit.

Modifying Types

- Navigate to the <Types> tabbed screen of a Business Unit, where you want to modify.



Welcome > Ticket Management > Acme-Inc > Types

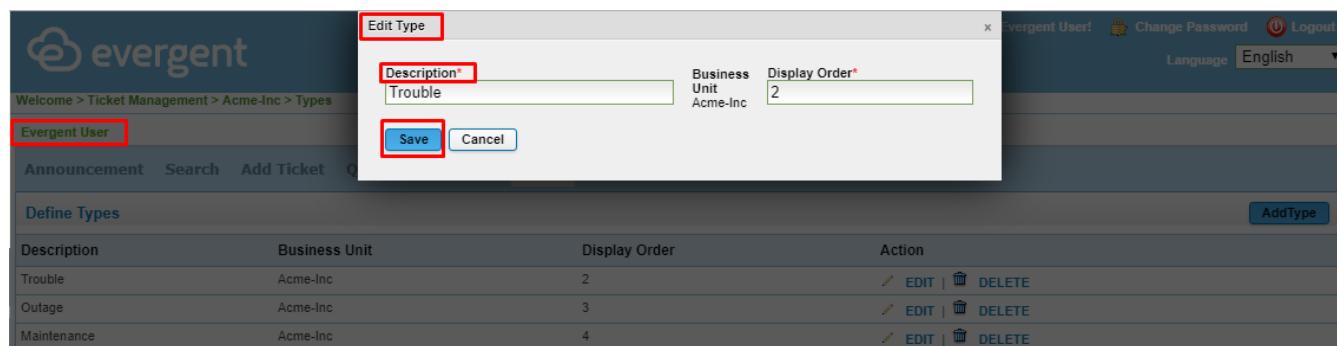
Evergent User

Announcement Search Add Ticket Queries Domains **TYPES** Reasons Actions

Define Types

| Description | Business Unit | Display Order | Action |
|-------------|---------------|---------------|--------------|
| Trouble | Acme-Inc | 2 | EDIT DELETE |
| Outage | Acme-Inc | 3 | EDIT DELETE |
| Maintenance | Acme-Inc | 4 | EDIT DELETE |

- Click the < Edit> inline button corresponding to the **type** that you wish to modify.
- In the <Edit Type> pop-up model dialog box that appears, update the necessary fields.



Welcome > Ticket Management > Acme-Inc > Types

Evergent User

Announcement Search Add Ticket Q

Edit Type

Description* Trouble

Business Unit Acme-Inc

Display Order* 2

Save Cancel

Define Types

| Description | Business Unit | Display Order | Action |
|-------------|---------------|---------------|--------------|
| Trouble | Acme-Inc | 2 | EDIT DELETE |
| Outage | Acme-Inc | 3 | EDIT DELETE |
| Maintenance | Acme-Inc | 4 | EDIT DELETE |

- You can make changes to the <Description> and <Display Order> fields.
- Click the <Save> button to save the **type**. Or else click the <Cancel> to discard.

Removing a Type

- Navigate to the <Types> tabbed screen of a Business Unit, where you wish to remove the types.



Welcome > Ticket Management > Acme-Inc > Types

Evergent User

Announcement Search Add Ticket Queries Domains **TYPES** Reasons Actions

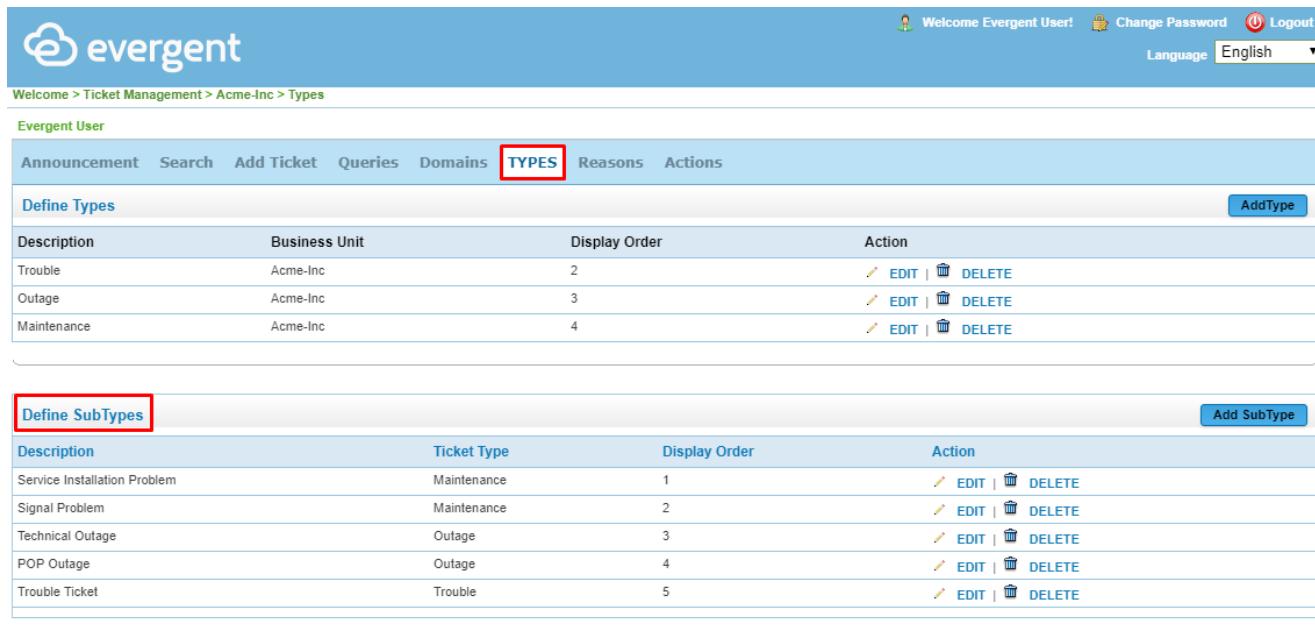
Define Types

| Description | Business Unit | Display Order | Action |
|-------------|---------------|---------------|---|
| Trouble | Acme-Inc | 2 | EDIT DELETE |
| Outage | Acme-Inc | 3 | EDIT DELETE |
| Maintenance | Acme-Inc | 4 | EDIT DELETE |

AddType

- Click the < Delete > inline button where you wish to remove the Type.
- The selected **Type** will be deleted from the list, if and only if, it is not associated with any ticket in the system of that respective business unit.

Subtypes



Welcome > Ticket Management > Acme-Inc > Types

Evergent User

Announcement Search Add Ticket Queries Domains **TYPES** Reasons Actions

Define Types

| Description | Business Unit | Display Order | Action |
|-------------|---------------|---------------|---|
| Trouble | Acme-Inc | 2 | EDIT DELETE |
| Outage | Acme-Inc | 3 | EDIT DELETE |
| Maintenance | Acme-Inc | 4 | EDIT DELETE |

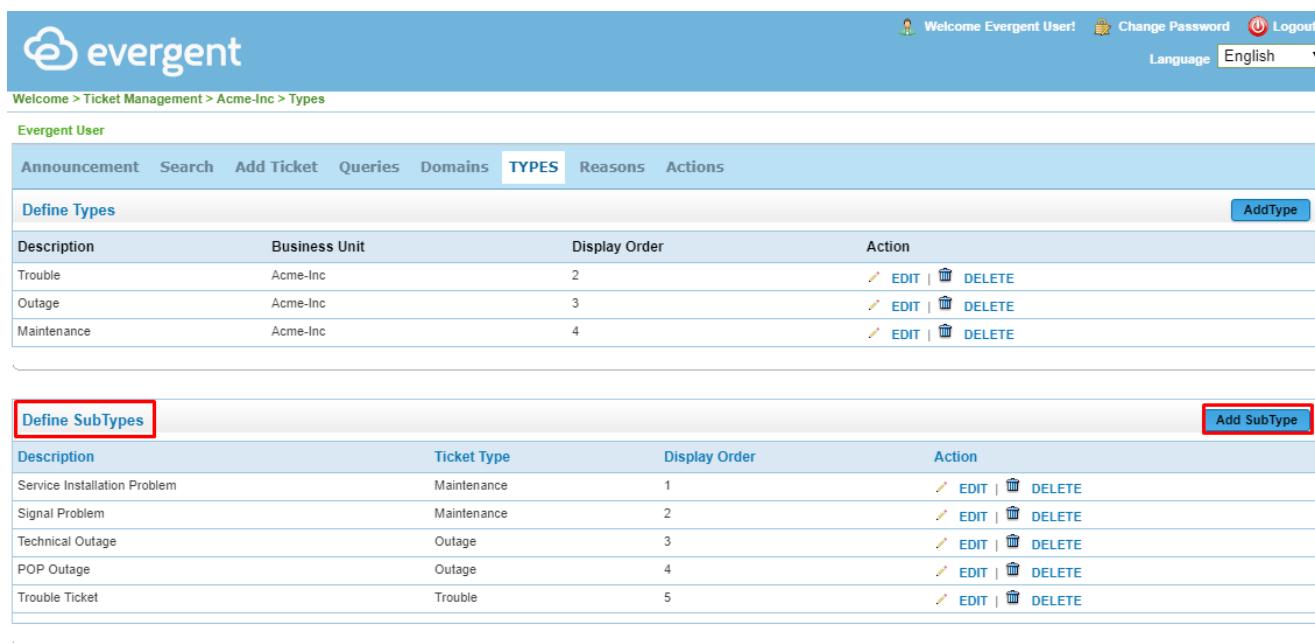
Define SubTypes

| Description | Ticket Type | Display Order | Action |
|------------------------------|-------------|---------------|---|
| Service Installation Problem | Maintenance | 1 | EDIT DELETE |
| Signal Problem | Maintenance | 2 | EDIT DELETE |
| Technical Outage | Outage | 3 | EDIT DELETE |
| POP Outage | Outage | 4 | EDIT DELETE |
| Trouble Ticket | Trouble | 5 | EDIT DELETE |

Add SubType

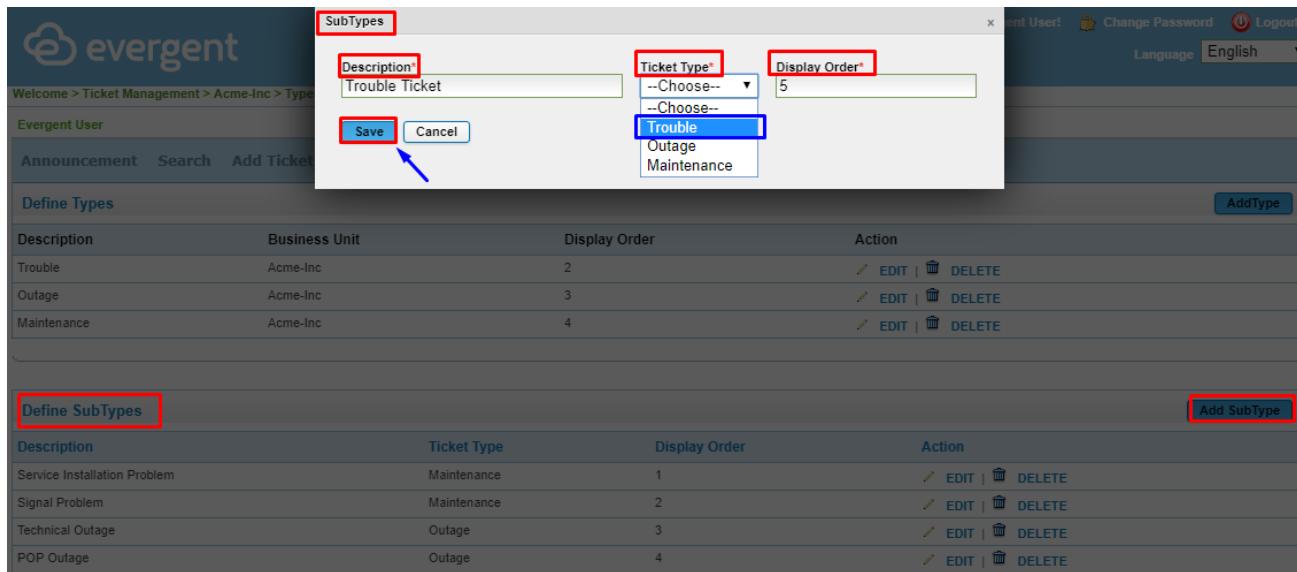
You can dynamically sort the data displayed under the <**Define SubTypes**> section screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Description**, **Ticket Type** and **Display Order**).

- Navigate to the <Types> tabbed screen of a Business Unit.



The screenshot shows the 'Ticket Management > Acme-Inc > Types' section. At the top right, there are links for 'Welcome Evergent User!', 'Change Password', and 'Logout'. A language selection dropdown shows 'Language English'. Below this, a navigation bar includes 'Announcement', 'Search', 'Add Ticket', 'Queries', 'Domains', 'TYPES' (which is highlighted in blue), 'Reasons', and 'Actions'. A sub-header 'Define Types' is followed by a table with columns: Description, Business Unit, Display Order, and Action. Three rows are listed: 'Trouble' (Business Unit: Acme-Inc, Display Order: 2), 'Outage' (Business Unit: Acme-Inc, Display Order: 3), and 'Maintenance' (Business Unit: Acme-Inc, Display Order: 4). Each row has 'EDIT' and 'DELETE' links. An 'AddType' button is at the top right of this table. Below this is another table titled 'Define SubTypes' with columns: Description, Ticket Type, Display Order, and Action. It lists five subtypes under 'Ticket Type' 'Maintenance': 'Service Installation Problem' (Display Order: 1), 'Signal Problem' (Display Order: 2), 'Technical Outage' (Display Order: 3), 'POP Outage' (Display Order: 4), and 'Trouble Ticket' (Display Order: 5). Each row has 'EDIT' and 'DELETE' links. An 'Add SubType' button is at the top right of this table.

- Click the <Add Sub Type> button to define ticket Sub-Type to a ticket type that is already defined.

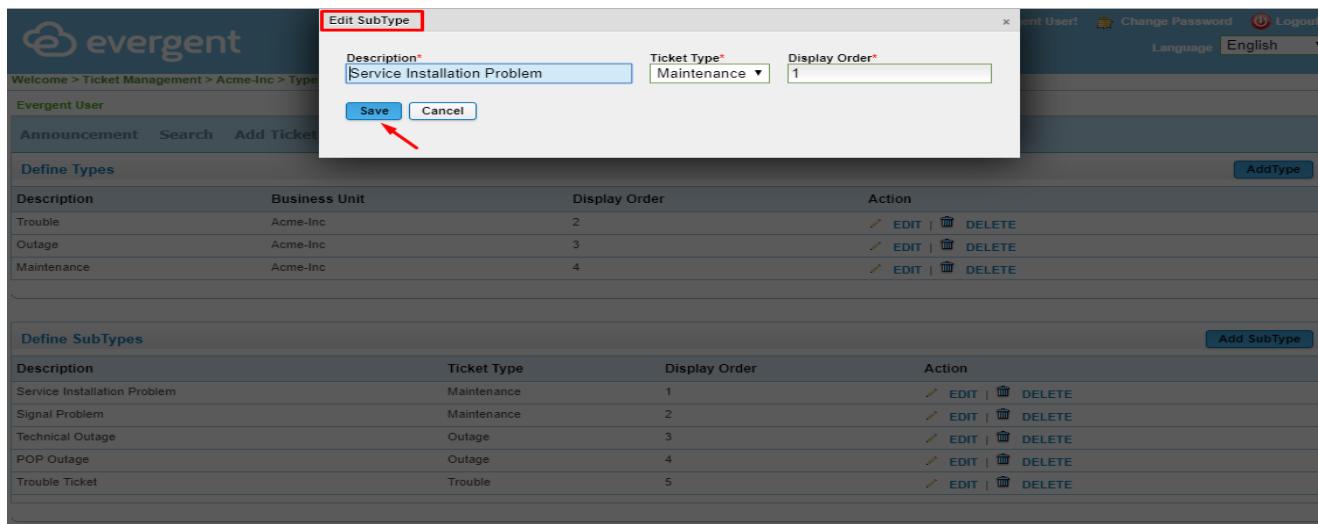


The screenshot shows the 'SubTypes' dialog box over the main 'Define SubTypes' table. The dialog box has fields for 'Description' (containing 'Trouble Ticket'), 'Ticket Type*' (a dropdown menu showing 'Trouble' selected, 'Outage', and 'Maintenance'), and 'Display Order' (containing '5'). It also has 'Save' and 'Cancel' buttons. A blue arrow points from the 'Save' button to the 'Save' button in the dialog box. The main table below has the same structure as the one in the previous screenshot, listing five subtypes under 'Ticket Type' 'Maintenance'.

- In the Add <Subtypes> pop-up dialog box that appears, enter the description in the <Description> field.
- Enter a number in the <Display Order> field indicating the position of the new **Subtype** such that it will be displayed in the order in the <Sub Types> list box under <Ticket Filters> section of the <Search> screen, and in the <Ticket Details> screen.
- Select the type of the ticket from the <Ticket Type> drop-down list box for which you want to add the **Sub Type**.
- Click the <Save> button to save the subtype. Or else, click the <Cancel> button to discard saving.

Modifying a Sub Type

- Navigate to the <Types> tabbed screen of a Business Unit, where you wish to modify the **Sub Type**.
- Click the < Edit> inline button corresponding to the **Sub Type** that you wish to modify.
- In the <Edit Sub Type> pop-up model dialog box that appears, update the necessary fields.

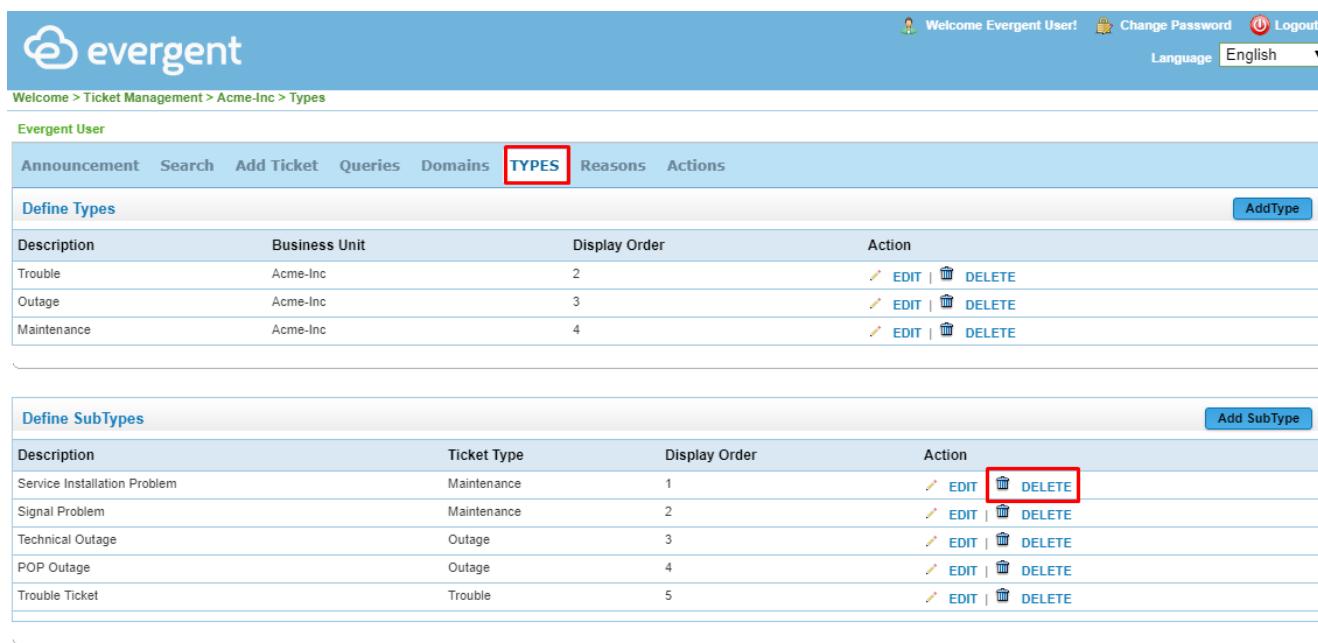


The screenshot shows the Evergent CRM interface. At the top, there's a navigation bar with links like 'Welcome', 'Ticket Management', 'Acme-Inc', and 'Logout'. Below the navigation is a header 'Define Types' with columns: 'Description', 'Business Unit', 'Display Order', and 'Action'. There are three rows: 'Trouble' (Acme-Inc, 2, Actions), 'Outage' (Acme-Inc, 3, Actions), and 'Maintenance' (Acme-Inc, 4, Actions). Overlaid on this is a 'Edit SubType' dialog box with fields: 'Description' (Service Installation Problem), 'Ticket Type' (Maintenance), 'Display Order' (1), and two buttons at the bottom: 'Save' (highlighted with a red arrow) and 'Cancel'.

- You can change the <Description>, <Ticket type> and <Display Order> fields, if required.
- Click the <Save> button to save the changes, or else click the <Cancel> button to discard saving.

Removing a Sub Type

- Navigate to the <Types> tabbed screen of a business unit, where you wish to remove the **Sub Type**.
- Locate the <Sub Type> from the list, you wish to remove.



| Description | Business Unit | Display Order | Action |
|-------------|---------------|---------------|---|
| Trouble | Acme-Inc | 2 | EDIT DELETE |
| Outage | Acme-Inc | 3 | EDIT DELETE |
| Maintenance | Acme-Inc | 4 | EDIT DELETE |

| Define SubTypes | | | | Add SubType |
|------------------------------|-------------|---------------|---|-----------------------------|
| Description | Ticket Type | Display Order | Action | |
| Service Installation Problem | Maintenance | 1 | EDIT DELETE | |
| Signal Problem | Maintenance | 2 | EDIT DELETE | |
| Technical Outage | Outage | 3 | EDIT DELETE | |
| POP Outage | Outage | 4 | EDIT DELETE | |
| Trouble Ticket | Trouble | 5 | EDIT DELETE | |

- Click the <Delete> inline button corresponding to the **Sub Type**, you wish to **remove**.
- The selected **Subtype** will be deleted from the list, if and only if, it is not associated with at least one ticket in the system of that respective business unit.

Reason



| Reason | Business Unit | Display Order | Action |
|------------------------|---------------|---------------|---|
| Hardware Configuration | Acme-Inc | 1 | EDIT DELETE |
| Poor Installation | Acme-Inc | 2 | EDIT DELETE |
| Customer Untraceable | Acme-Inc | 3 | EDIT DELETE |

You can dynamically sort the data displayed under the <Define Reasons> screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Reason** and **Display Order**).

- Navigate to the <Reasons> tabbed screen of a business unit.



Welcome > Ticket Management > Acme-Inc > Reasons > Reason

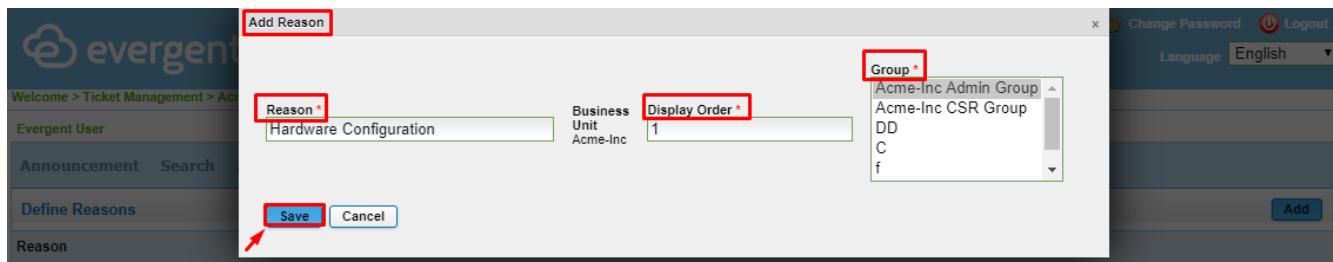
Evergent User

Announcement Search Add Ticket Queries Domains Types **REASONS** Actions

Define Reasons

| Reason | Business Unit | Display Order | Action |
|--------|---------------|---------------|--------|
|--------|---------------|---------------|--------|

- Click the **<Add>** button to add a new Reason.
- In the **<Add Reason>** pop-up model dialog box that appears, fill in the necessary fields.



Add Reason

Reason * Hardware Configuration

Business Unit Acme-Inc

Display Order * 1

Group *

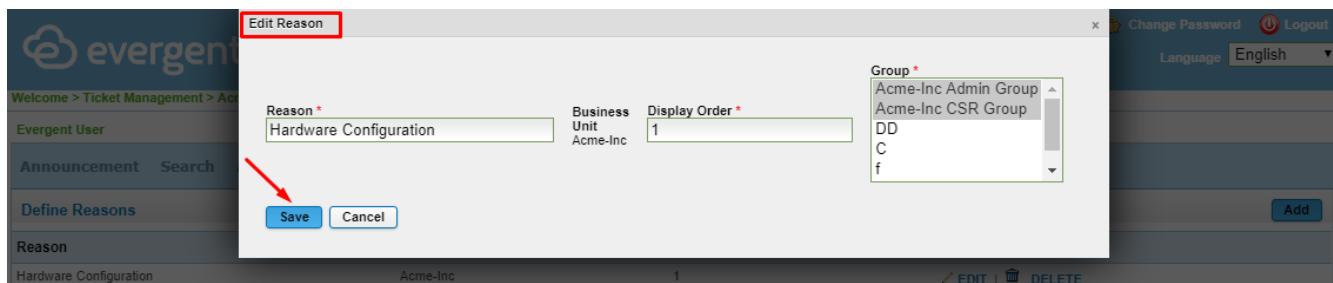
Acme-Inc Admin Group
Acme-Inc CSR Group
DD
C
f

Save Cancel Add

- Enter reason description in the **<Reason>** field.
- Enter a number in the **<Display Order>** field, indicating the display position of the new **Reason**, such that it will be displayed in the order in the **<Reason>** list box under the **<Ticket Details>** screen.
- Select one or more groups from the **<Group>** list box, such that the reason for the tickets logged are applicable for selection during add/ edit of ticket details.
- Click the **<Save>** button to save the reason. Or else, click the **<Cancel>** button to discard.

Modifying a Reason

- Navigate to the **<Reasons>** tabbed screen of a Business Unit, where you wish to modify the **Reason**.
- Click the **<Edit>** inline button corresponding to the **Reason**, you wish to modify.
- In the **<Edit Reason>** pop-up model dialog box that appears, update the necessary fields.



Edit Reason

Reason * Hardware Configuration

Business Unit Acme-Inc

Display Order * 1

Group *

Acme-Inc Admin Group
Acme-Inc CSR Group
DD
C
f

Save Cancel Add

- You can change the description of the reason in the **<Reason>** field and **<Display Order>** number.

- You can also select/ unselect the selected groups from the <**Group**> list box.
- Click the <**Save**> button to save the changes. Or else, click the <**Cancel**> button to discard the changes.

Removing a Reason

- Navigate to the <**Reasons**> tabbed screen of a Business Unit.
- Locate the **Reason** you wish to delete.



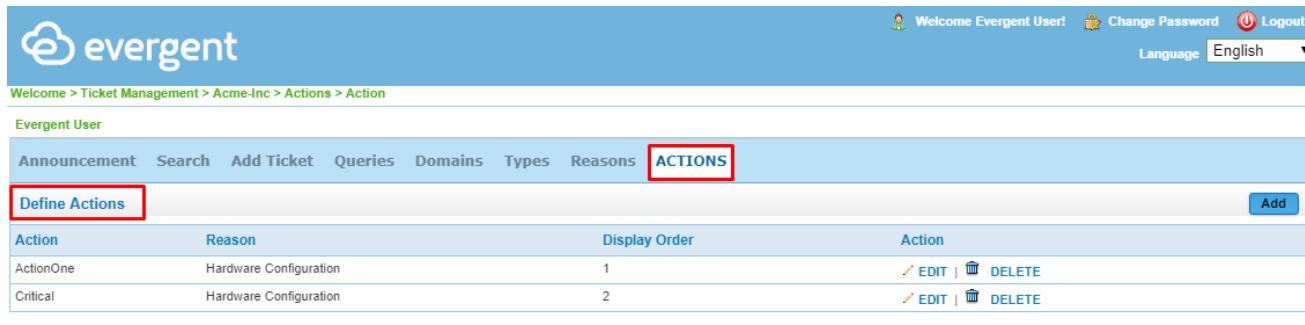
Welcome > Ticket Management > Acme-Inc > Reasons > Reason

Evergent User

| Reason | Business Unit | Display Order | Action |
|------------------------|---------------|---------------|---|
| Hardware Configuration | Acme-Inc | 1 | EDIT DELETE |
| Poor Installation | Acme-Inc | 2 | EDIT DELETE |
| Customer Untraceable | Acme-Inc | 3 | EDIT DELETE |

- Click the <**Delete**> inline button corresponding to the reason you wish to delete.
- The selected reason will be deleted from the list, if and only if, it is not associated with at least one ticket in the system of that respective business unit.

Actions



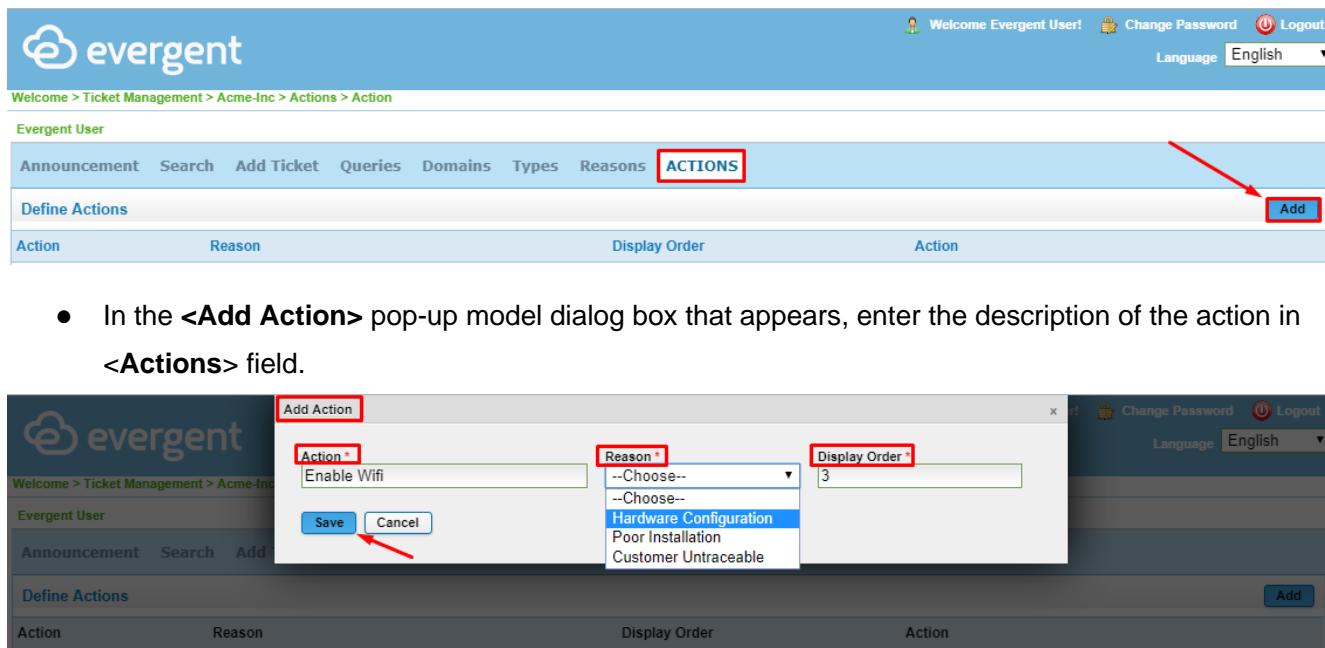
Welcome > Ticket Management > Acme-Inc > Actions > Action

Evergent User

| Action | Reason | Display Order | Action |
|-----------|------------------------|---------------|---|
| ActionOne | Hardware Configuration | 1 | EDIT DELETE |
| Critical | Hardware Configuration | 2 | EDIT DELETE |

You can dynamically sort the data displayed under the <**Define Actions**> by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Action**, **Reason** and **Display Order**).

- Navigate to the <**Actions**> tabbed screen of a Business Unit.
- Click the <**Add**> button to add a new **action**.



Welcome > Ticket Management > Acme-Inc > Actions > Action

Evergent User

Announcement Search Add Ticket Queries Domains Types Reasons **ACTIONS**

Define Actions

| Action | Reason | Display Order | Action |
|--------|--------|---------------|--------|
| | | | |

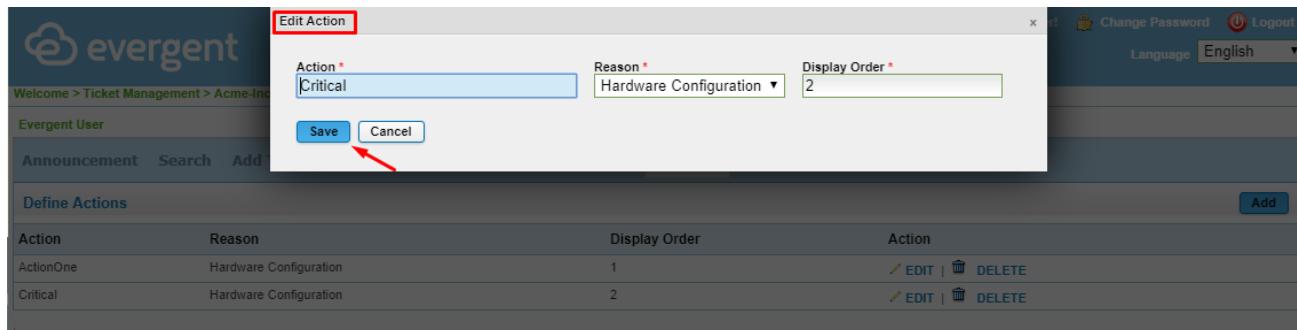
In the <Add Action> pop-up model dialog box that appears, enter the description of the action in <Actions> field.

Action *: Enable Wifi
Reason *: Hardware Configuration
Display Order: 3
Save Cancel

- In the <Add Action> pop-up model dialog box that appears, enter the description of the action in <Actions> field.
- Enter a number in the <Display Order> field indicating the display position of the new **Action**, such that it will be displayed in the order in the <Action> list box under the <Ticket Details> screen, depending on the selected **Reason** for the ticket.
- Select a Reason from the <Reasons> drop-down list box for the **action** you want to define.
- Click the <Save> button to save the Action. Or else, click the <Cancel> button to discard.

Modifying an Action

- Navigate to the <Actions> tabbed screen of a Business Unit, where you want to modify the **Action**.
- Click the < Edit> inline button corresponding to the **Action** that you wish to modify.
- In the <Edit Action> pop-up model dialog box that appears, update the necessary fields.



Welcome > Ticket Management > Acme-Inc > Actions > Action

Evergent User

Announcement Search Add

Define Actions

| Action | Reason | Display Order | Action |
|-----------|------------------------|---------------|---|
| ActionOne | Hardware Configuration | 1 |  EDIT  DELETE |
| Critical | Hardware Configuration | 2 |  EDIT  DELETE |

Edit Action

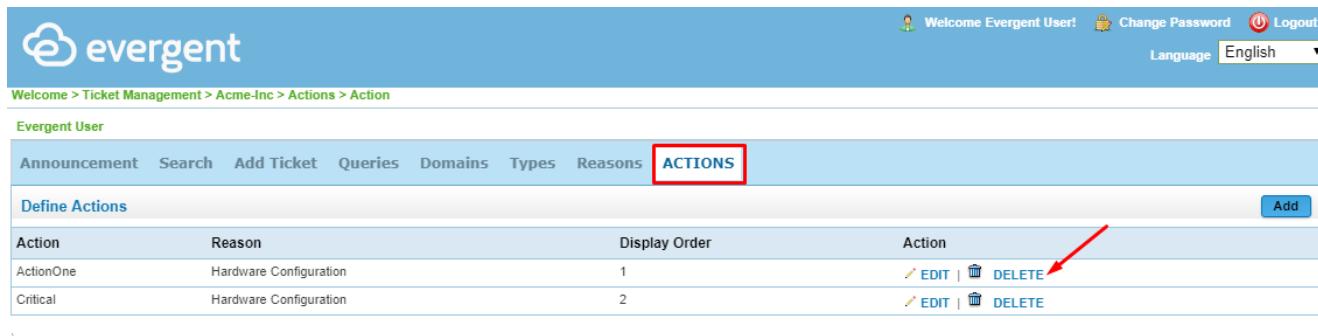
Action *: Critical
Reason *: Hardware Configuration
Display Order *: 2
Save Cancel

- Make necessary changes to the <Action> and <Display Order> fields.
- You can also change the reason for the action from the <Reason> drop-down list box.

- Click the <Save> button to save changes. Or else, click the <Cancel> button to abort saving the changes.

Removing an Action

- Navigate to the <Actions> tabbed screen of a Business Unit and locate the **Action**, you wish to delete.



Welcome > Ticket Management > Acme-Inc > Actions > Action

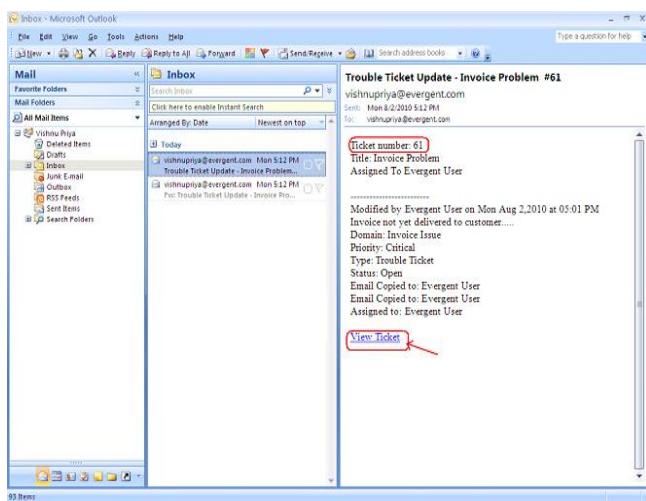
Evergent User

| Announcement | Search | Add Ticket | Queries | Domains | Types | Reasons | ACTIONS |
|----------------|------------------------|---------------|---------|---|-------|---------|------------|
| Define Actions | | | | | | | Add |
| Action | Reason | Display Order | | Action | | | |
| ActionOne | Hardware Configuration | 1 | | EDIT DELETE | | | |
| Critical | Hardware Configuration | 2 | | EDIT DELETE | | | |

- Click the <Delete> inline button corresponding to the **Action** you wish to delete.
- The selected **Action** will be deleted from the list if and only if it is not associated with at least one ticket in the system of that respective business unit.

Viewing a Ticket through Email

- Navigate to the <Add Ticket> screen.
- Follow the same procedure from steps **1 to 16**, in creating a new trouble ticket as mentioned in the **Creating a Trouble Ticket** section.
- Clicking on the <Save> button will navigate back to the <Add Ticket> screen displaying the ticket confirmation. At the same time, an email will be sent to the assigned user and to the users to whom the ticket details need to be forwarded.
- Check your email for any ticket confirmation.



- Click the <**View Ticket**> hyperlink in the ticket mail.
- A new explorer window appears, asking you to enter login credentials into the ticket system to view the ticket details as shown on the following screen:



- Enter your username and password in the <**Username**> and <**Password**> fields respectively and click the <**Submit**> button.
- The <**Results**> screen will now appear, displaying the ticket as shown below:

| ID | CP Customer ID | SP Account ID | Originator Group | Assigned Group | Assigned To | Type | Sub Type | Last Modified | Priority | Status | Parent ID | Parent ID Status | Action |
|------|----------------|---------------|--------------------|----------------------|-------------|--------|------------------|---------------|----------|--------|-----------|------------------|--|
| 7630 | KK04 | 1475382656 | Acme-Inc CSR Group | Acme-Inc Admin Group | | Outage | Technical Outage | 07/1/2016 | High | Open | -- | -- | <input checked="" type="checkbox"/> SELECT |

- Click the < Select> inline button corresponding to the ticket to view its details.
- The <**Ticket Details**> screen is then displayed with the details of the ticket.
- You can also make necessary changes to the ticket details or assign to another user of the same group or different group or forward the ticket details to different users in the list.
- Enter your comments in the <**Comments**> field for any suggestions.
- Click the <**Save**> button to save changes or click the <**Cancel**> button to discard.
- You can also print the ticket details by clicking on the < Print PDF> button located in the top right corner of the ticket details section as shown on the following screen.

evergent

[Welcome Evergent User!](#)

Language English ▾

Welcome > Ticket Management > Acme-Inc > Search

Evergent User

- [Announcement](#) **SEARCH** [Add Ticket](#) [Queries](#) [Domains](#) [Types](#) [Reasons](#) [Actions](#)
- [+ Ticket Work Order](#)
- [Click to view WorkFlowOrders](#)

- [+ Ticket Workflow](#)
- [Click to view WorkFlows](#)

Test Outage Ticket 2

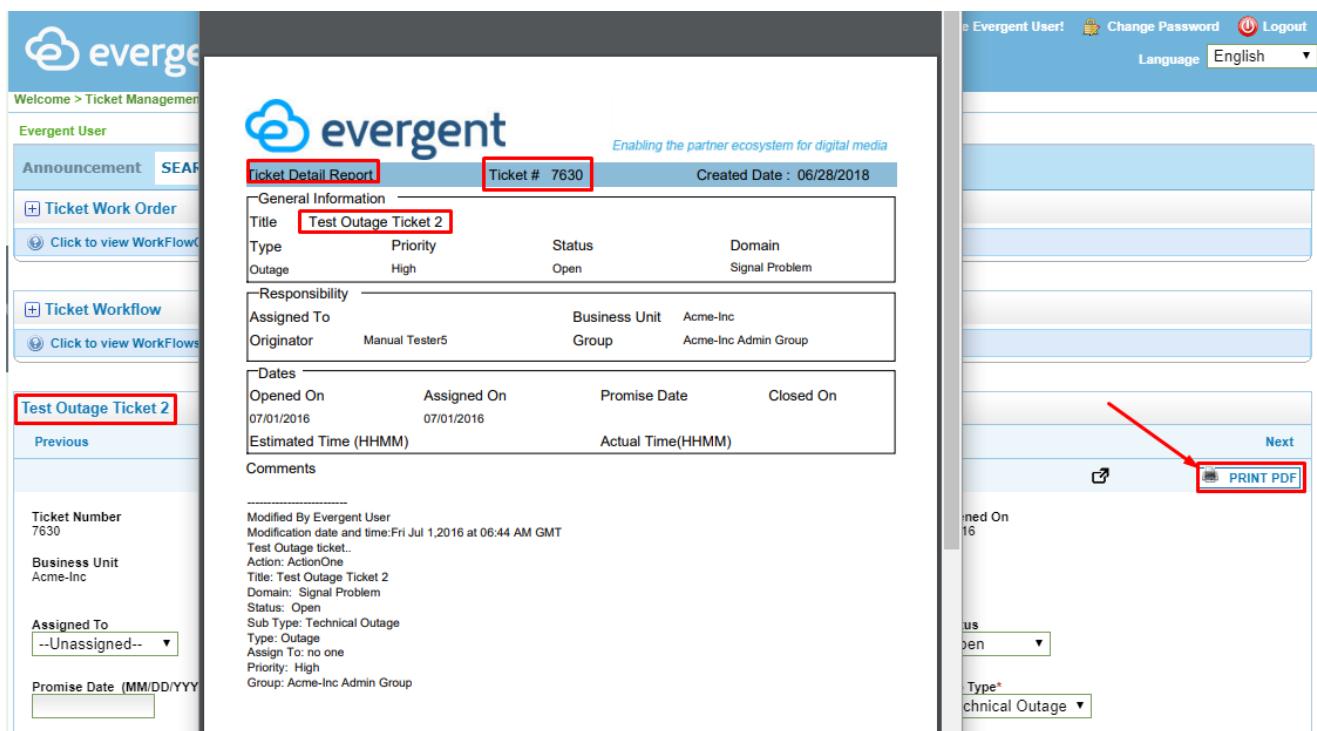
Previous
1 of 1 ticket(s)
Next

| | | | | | | | | | |
|--|--|---------------------|-------------------------------------|------------------------|------------------------|----------|-----------|-----------|--------------------|
| Ticket Number | 7630 | By | Manual Tester5 | SP Account ID | 1475382656 | Account | RAJA KK04 | Opened On | 7/1/16 |
| Business Unit | Acme-Inc | Time Zone | GMT | Group* | Acme-Inc Admin Group ▾ | Priority | High ▾ | Status | Open ▾ |
| Assigned To | --Unassigned-- ▾ | Domain | Signal Problem ▾ | Estimated Hours (HHMM) | | Type* | Outage ▾ | Sub Type* | Technical Outage ▾ |
| Promise Date (MM/DD/YYYY) | | Actual Hours (HHMM) | | Estimated Hours (HHMM) | | | | | |
| Forward Email To | Amng Amng DZX1 DZx Dax Dax Evergent User John Grishm ▾ | Outage | <input checked="" type="checkbox"/> | Parent Outage Ticket | -none- | | | | |
| Reason | --Choose-- ▾ | Solved By Group | --Choose-- ▾ | Impacted Users | | | | | |
| Comment History | | | | | | | | | |
| Modified By Evergent User Modification date and time:Fri Jul 1,2016 at 06:44 AM GMT Test Outage ticket.. Action: ActionOne Title: Test Outage Ticket 2 Domain: Signal Problem Status: Open | | | | | | | | | |
| Comments | | | | | | | | | |
| | | | | | | | | | |

Attachments

No Attachments.

- A new PDF report file window appears, displaying the ticket details as shown below:



Ticket Detail Report

Ticket # 7630

Created Date : 06/28/2018

General Information

| | | | | |
|----------------------|-------------|-----------------|---------------|----------------|
| Title | Type | Priority | Status | Domain |
| Test Outage Ticket 2 | Outage | High | Open | Signal Problem |

Responsibility

| | | |
|--------------------|----------------------|-----------------|
| Assigned To | Business Unit | Acme-Inc |
| Originator | Manual Tester5 | Group |

Dates

| | | | |
|------------------|--------------------|---------------------|------------------|
| Opened On | Assigned On | Promise Date | Closed On |
| 07/01/2016 | 07/01/2016 | | |

Estimated Time (HHMM)

Actual Time(HHMM)

Comments

Modified By Evergent User
Modification date and time:Fri Jul 1,2016 at 06:44 AM GMT
Test Outage ticket..
Action: ActionOne
Title: Test Outage Ticket 2
Domain: Signal Problem
Status: Open
Sub Type: Technical Outage
Type: Outage
Assign To: no one
Priority: High
Group: Acme-Inc Admin Group

Test Outage Ticket 2

Previous

Ticket Number
7630

Business Unit
Acme-Inc

Assigned To
--Unassigned--

Promise Date (MM/DD/YYYY)

PRINT PDF

- Click the **print** icon located in the top left corner of the PDF report window to send the ticket details to the printer.
- Click the **<X> close** icon located in the right top corner of the PDF report window to close the PDF report window.