Evergent CRM User Documentation (Beacon)

Version – 1.0

Last Updated: November – 2020

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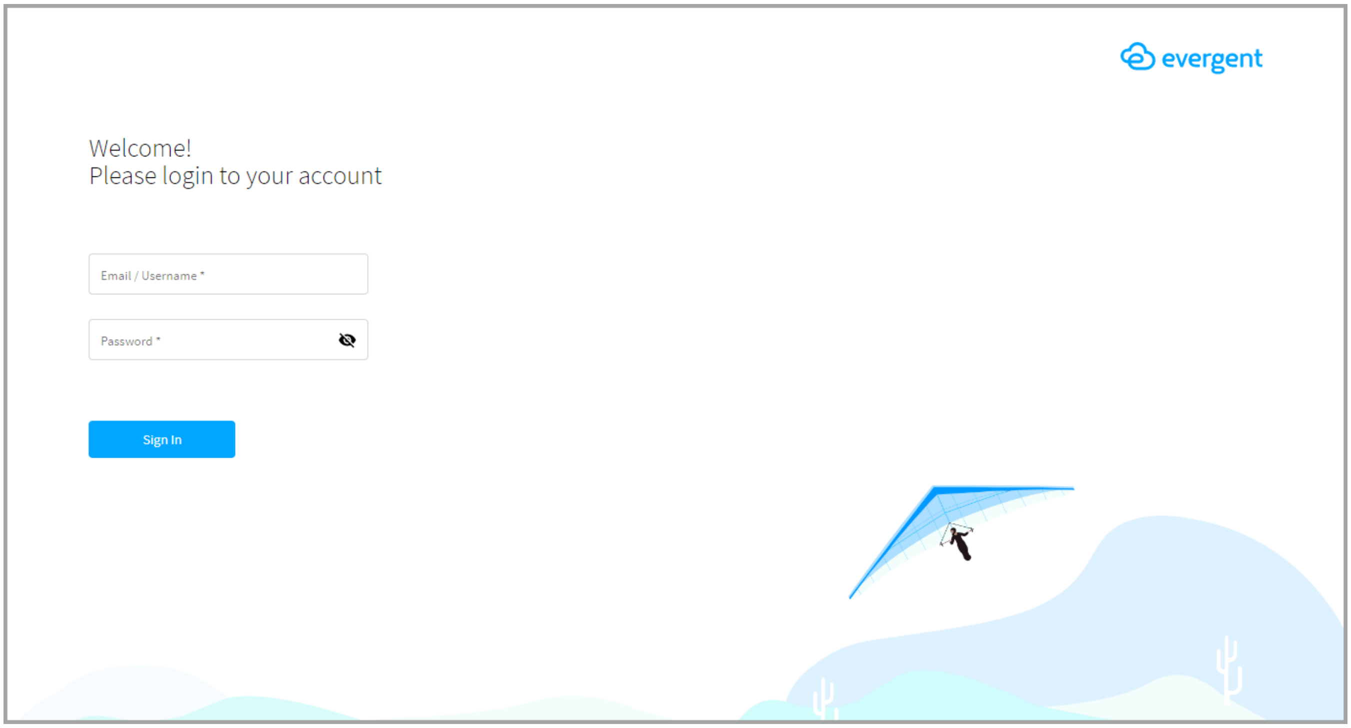
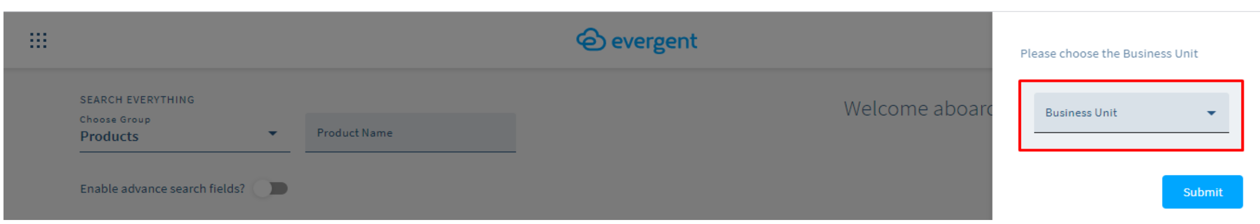
Account Management

Login to Account Management

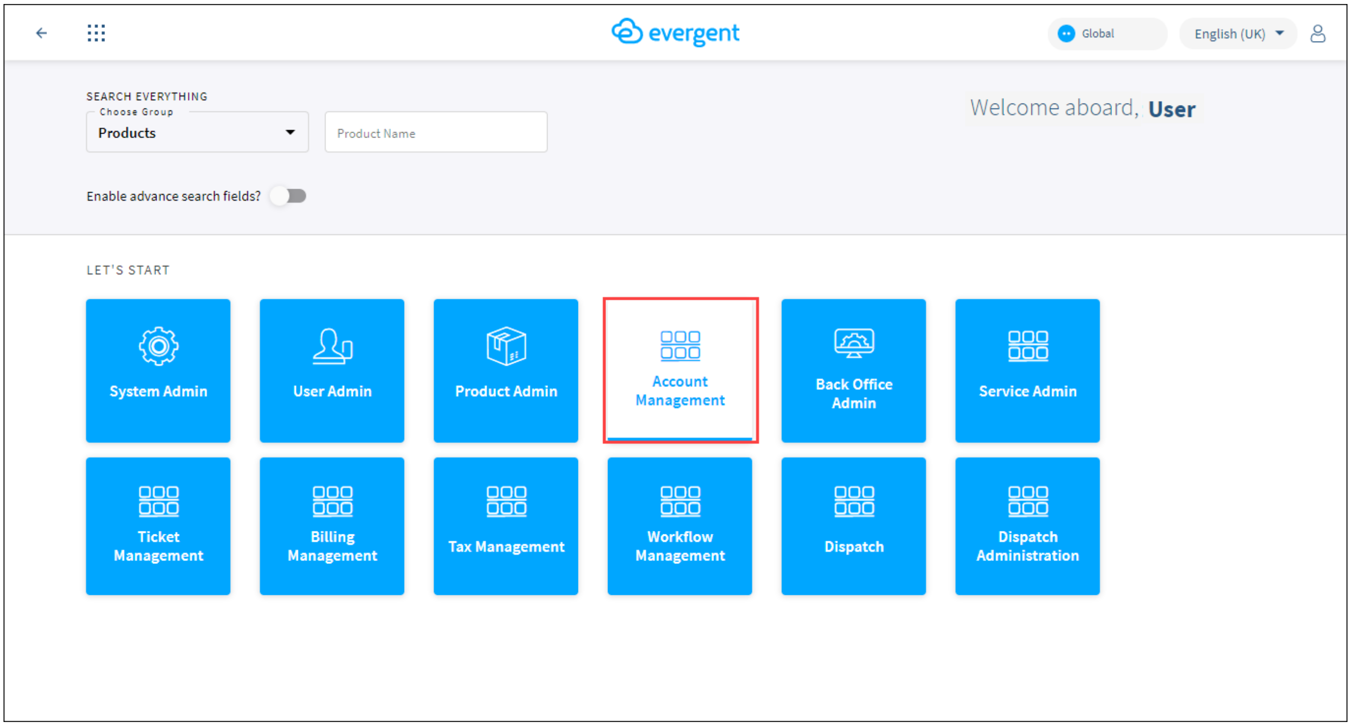
- Open a web browser, such as Internet Explorer / Mozilla Firefox / Google Chrome.
- In the address bar, enter the application URL as provided by Evergent.
- Enter the valid Email/Username and Password.
- Click the **Sign In** button. This will begin your Evergent session.



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



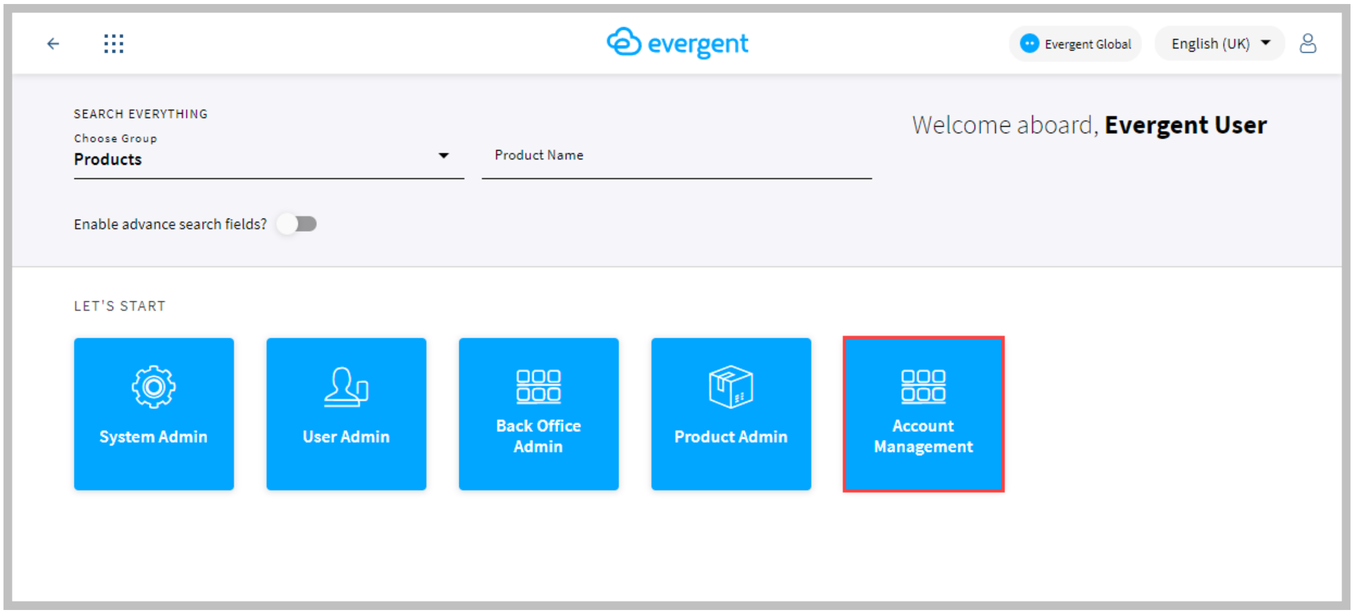
- Once a business unit is selected, the user is redirected to the dashboard Home screen, as shown below.
- Click the **Account Management** image button on the dashboard home screen to enter the Account Management application.



- On clicking the **Account Management** image button, the pop-up model 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.

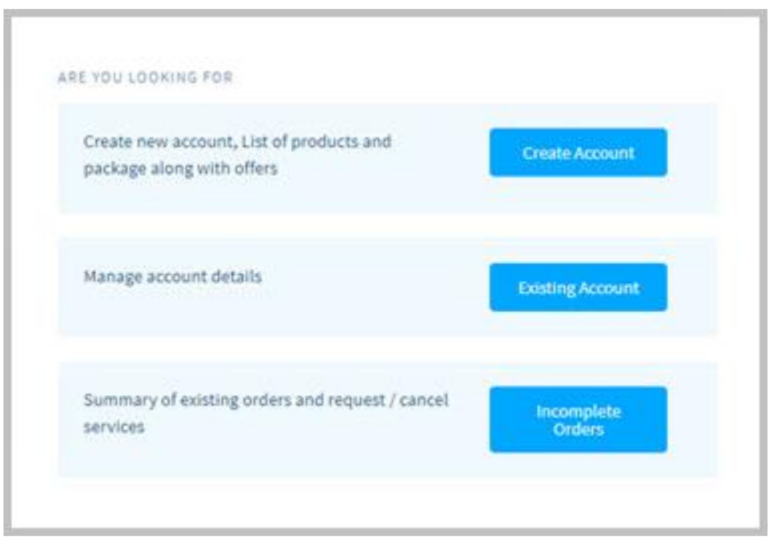
The Account Management module is used to maintain customer details, services, orders, billing and financial, etc. to build relationships with current and potential customers of Evergent.



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).

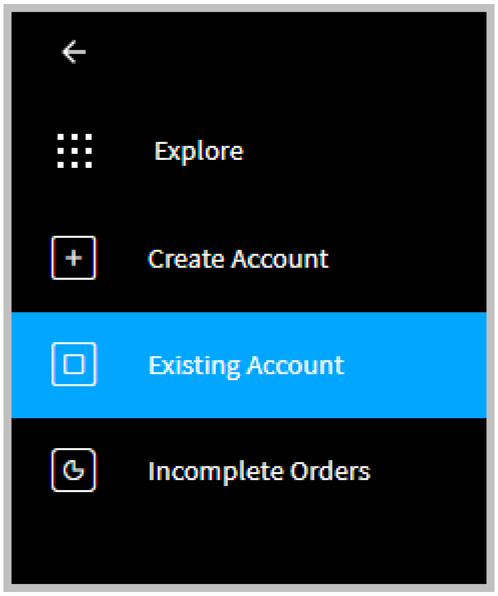
- Enable the toggle switch to see the SKU and Price Ranges fields.

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**.



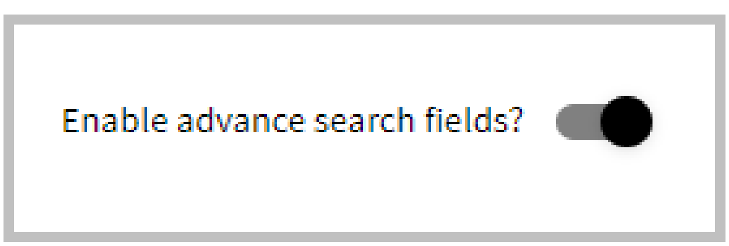
Account Search

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.

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



Note:

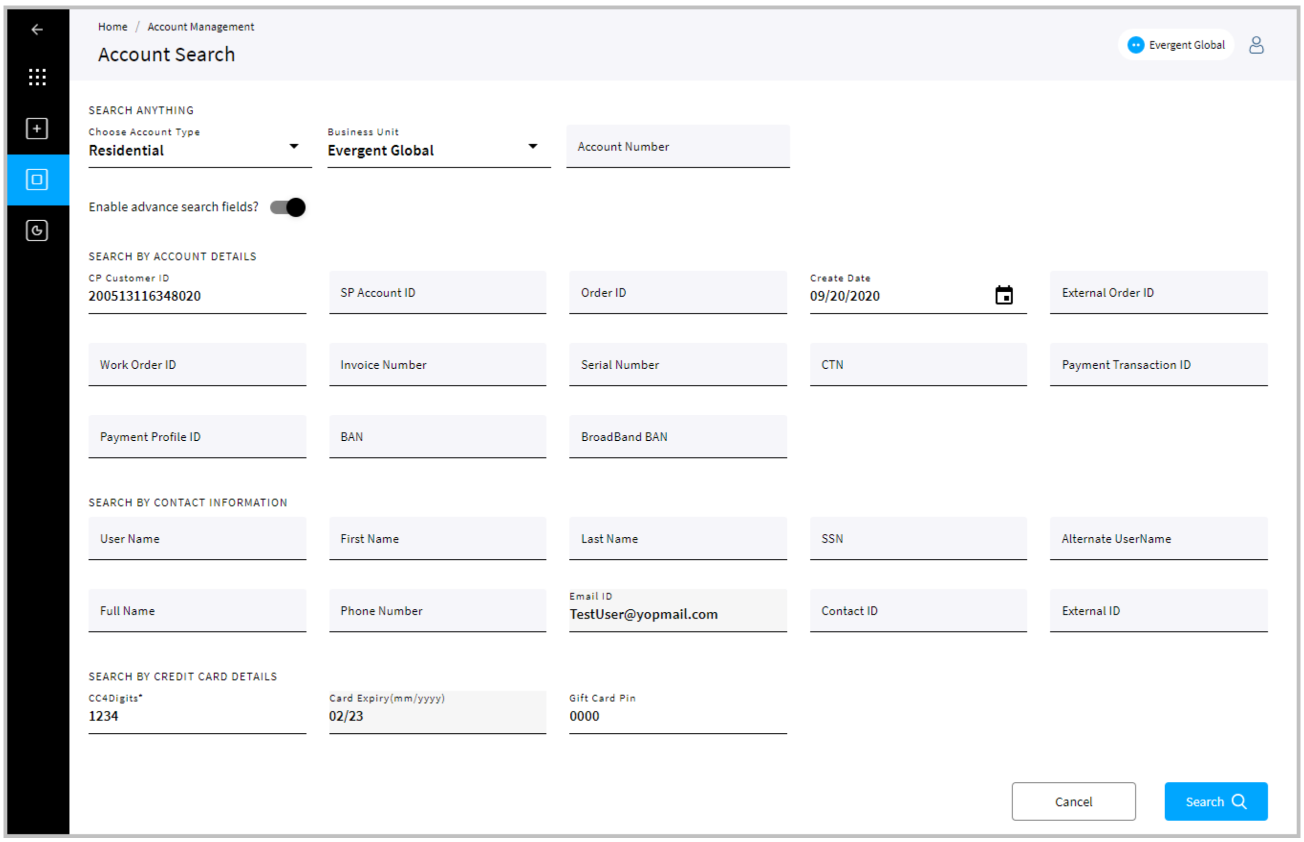
By default, the advanced search fields are enabled. To disable the advanced search fields, click the Advanced Search Fields toggle switch.

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

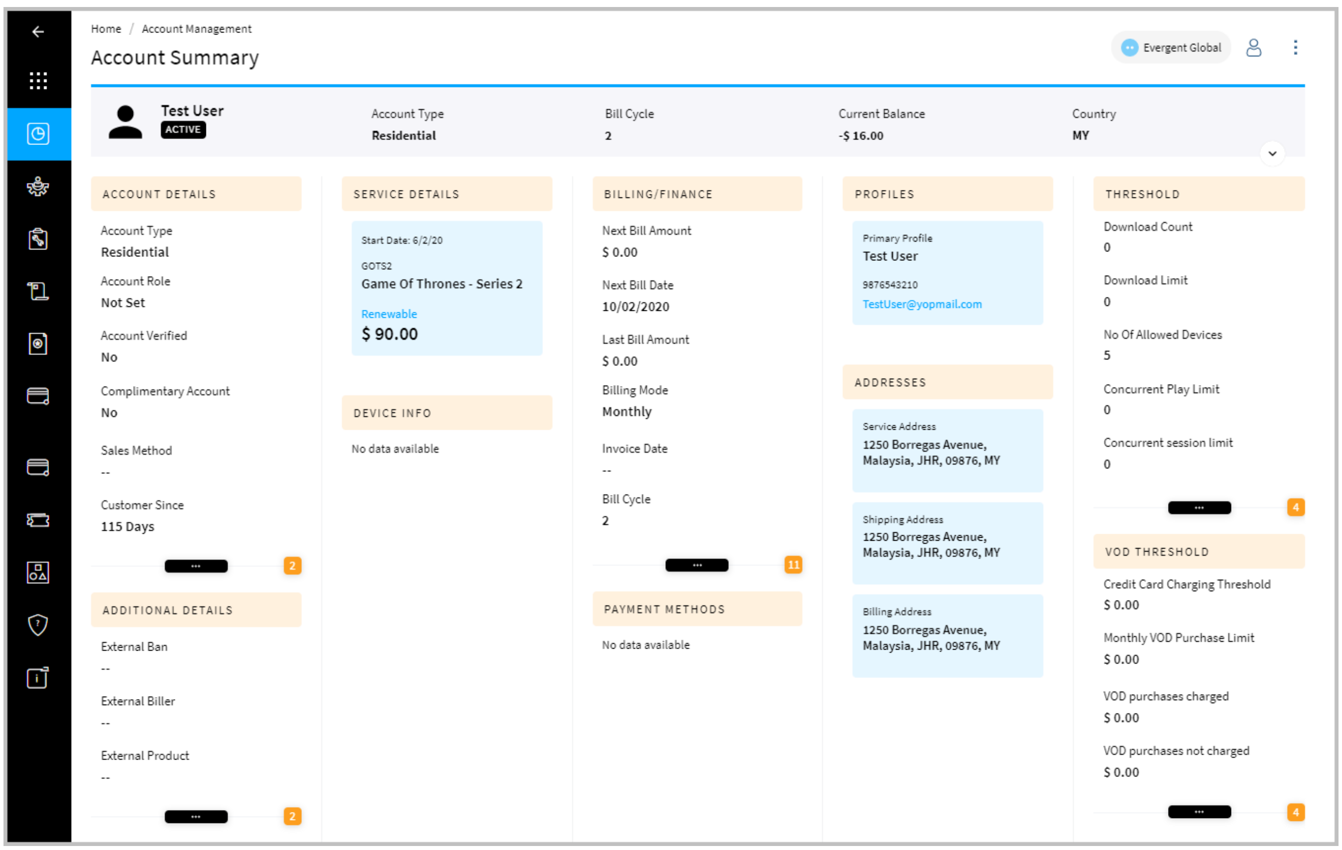


Field Name	Description
Select BusinessUnit	Search for a customer under a particular Business unit.
Account Number	Unique Account number of the customer-generated on successful registration in Evergent system.
CP Customer ID	Unique CP Customer ID of the customer in the Evergent system.

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.



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.

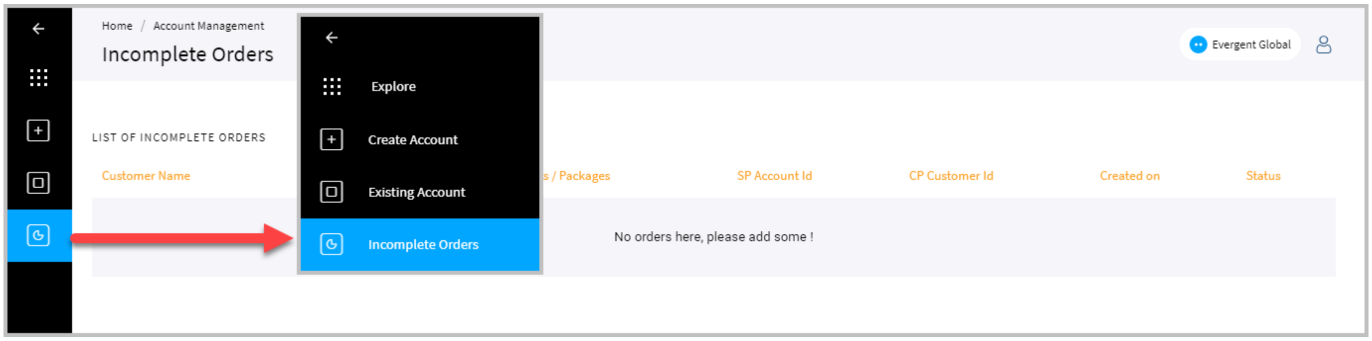
Bill Cycle	Indicates customer bill generation date.
Bill Delivery Type	Type of bill delivery opted by the customer.
Billing and Finance Section	
Last Bill Amount	Denotes customer last bill amount
Current Balance	Customer's current balance amount
Next Bill Amount	This indicates the next bill amount that 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 encashed 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 not 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

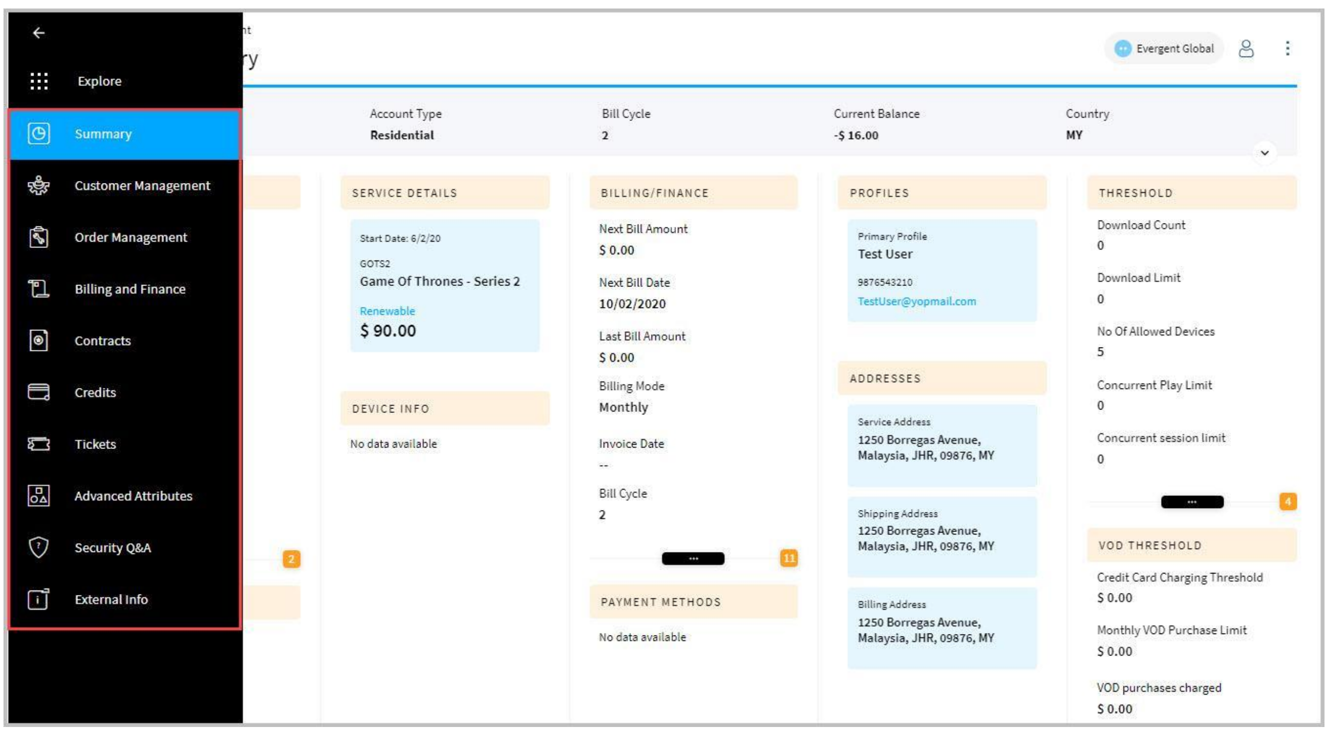
This section provides the ability in handling the fallout management where a CSR can search for pending orders and proceed to the order fulfillment flow.



Account Management – Tabs Overview

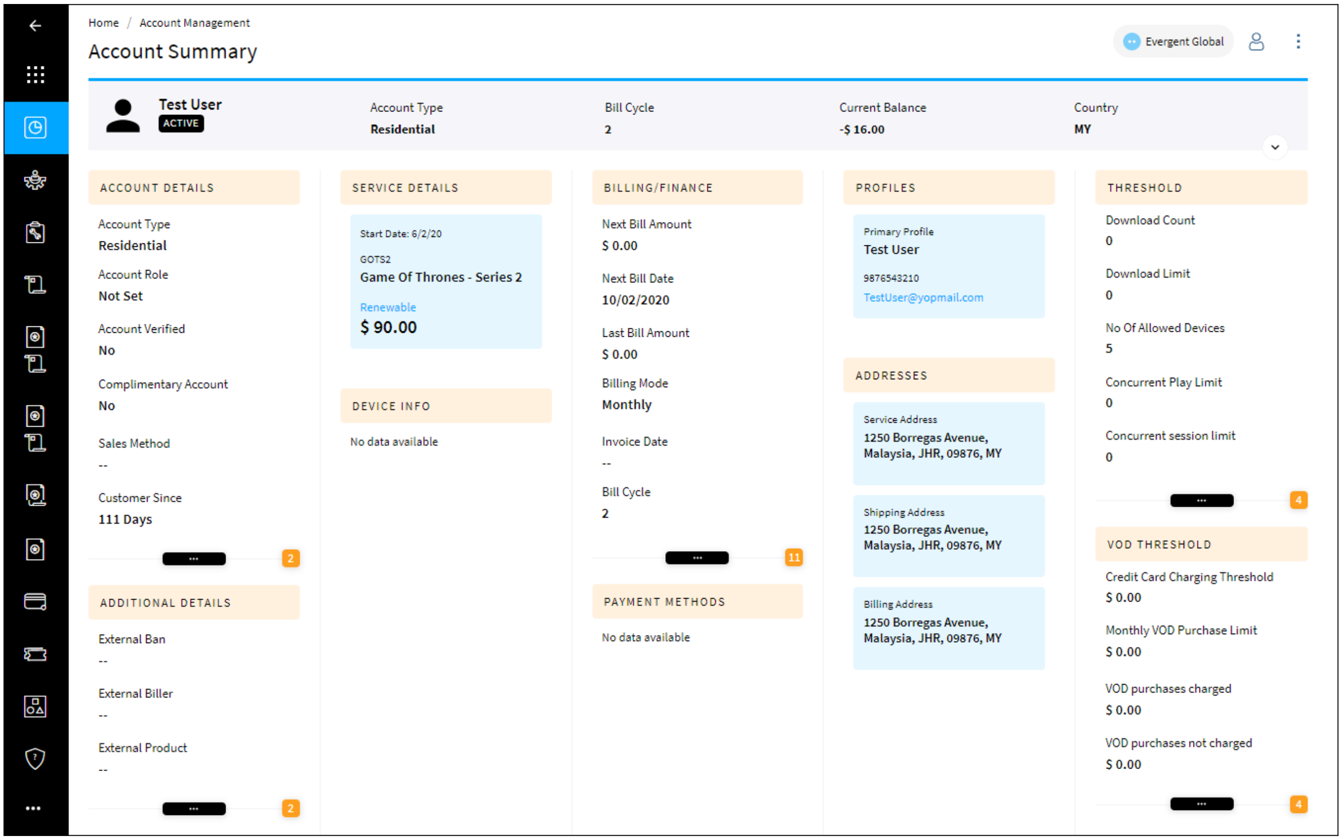
From Account Management, a user can view 360-degree customer account information across various tabs:

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



Summary

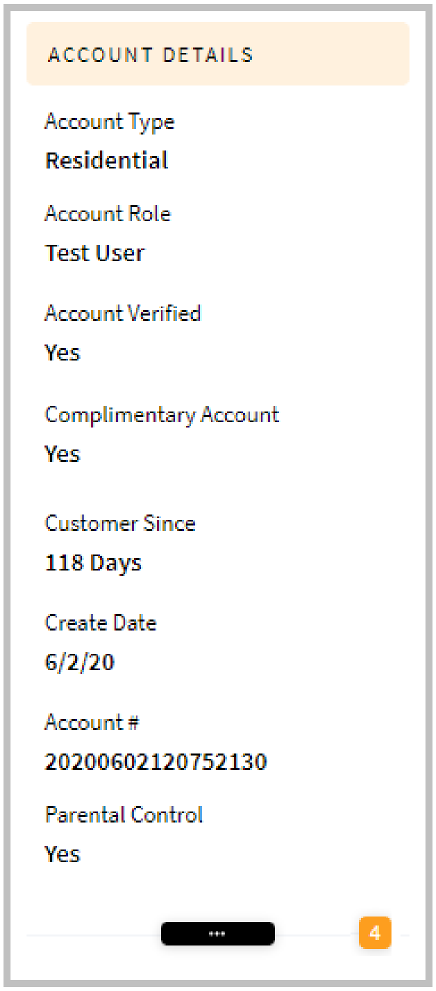
The Account Summary screen displays the complete data for all the project-related fields. From this screen, a user can access and control the account details, device info, billing/finance, additional details, service details, VOD threshold, profiles, addresses, threshold, and payment methods.



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 () to change the type of the account.
- Click the **Account Role** 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 () 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.



Note:

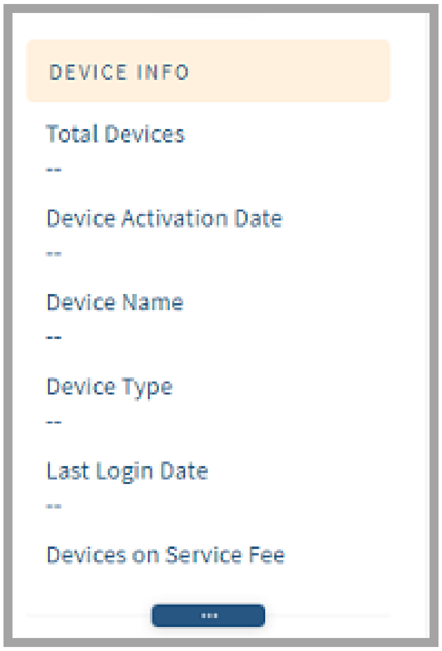
To see more options in the Account Details section, click the More icon () at the bottom of the section.

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

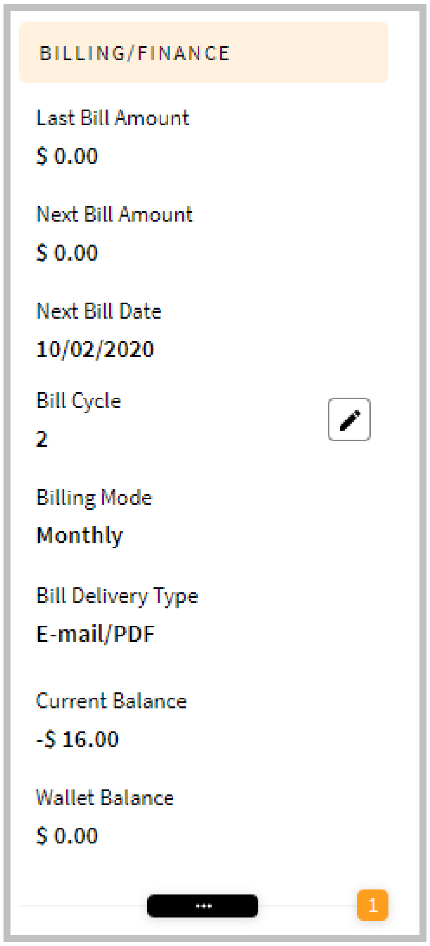
Device Info

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.



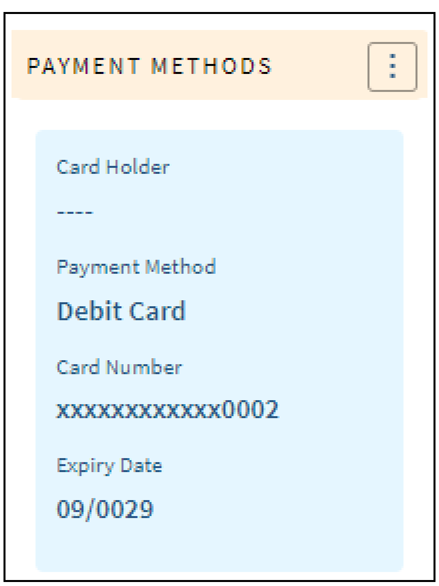
Billing/Finance

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.



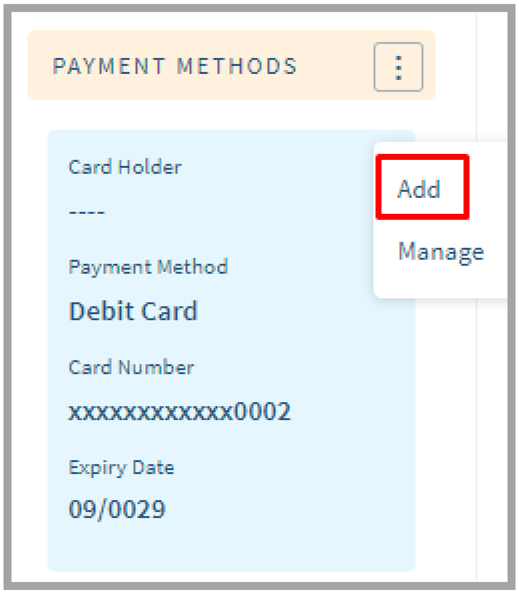
Payment Methods

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



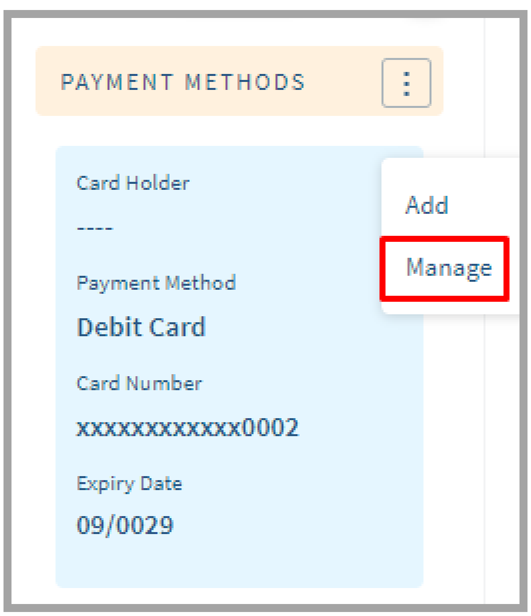
Add a New Payment

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.



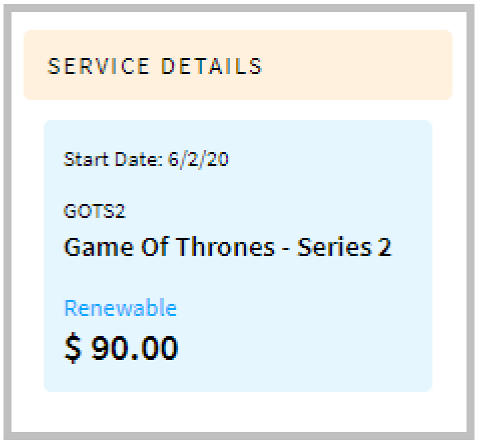
Manage Payments

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

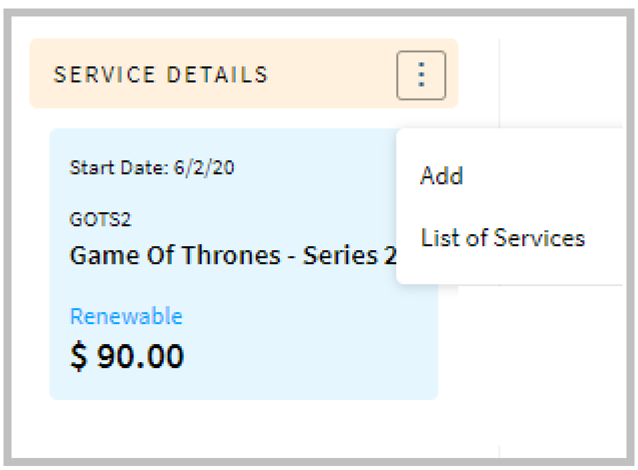
This Service Details section displays the service summary details of a user account.



Add a New Service

To add a new service, do the following:

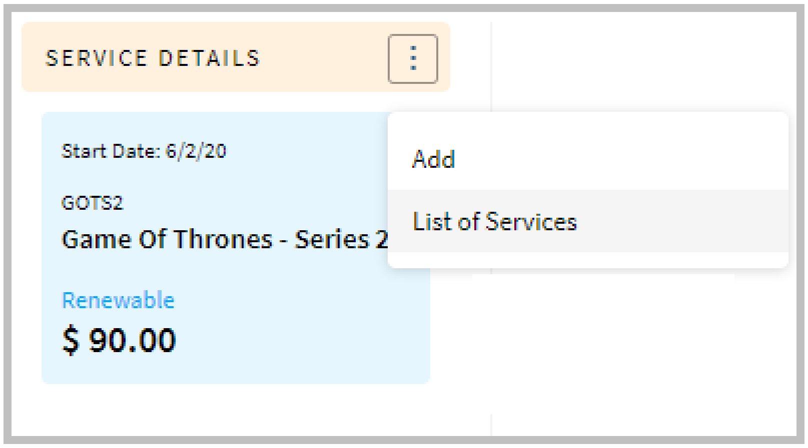
- Click the ⋮ icon in the **Service Details** section and click **Add**.



- 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.

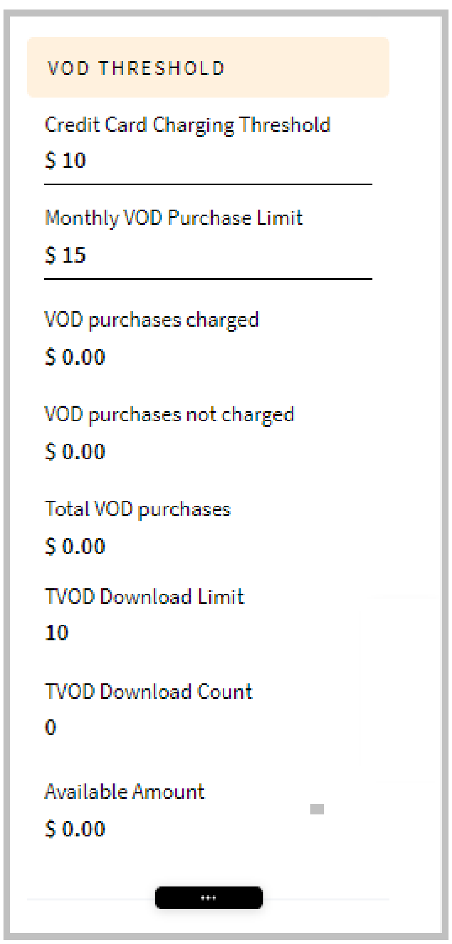
List a Services

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

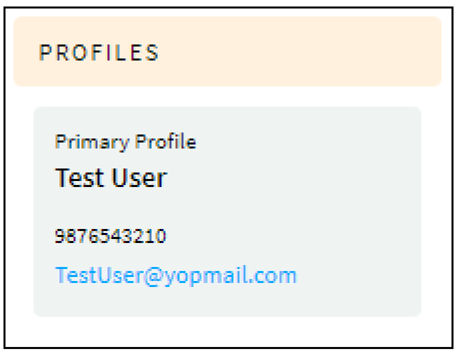
The VOD Threshold section provides the VOD details that are linked to the customer account.



- **Monthly VOD Purchase Limit:** The amount provided for monthly VOD Purchase Limit in System Admin. We can edit this value by clicking on the ( ) 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

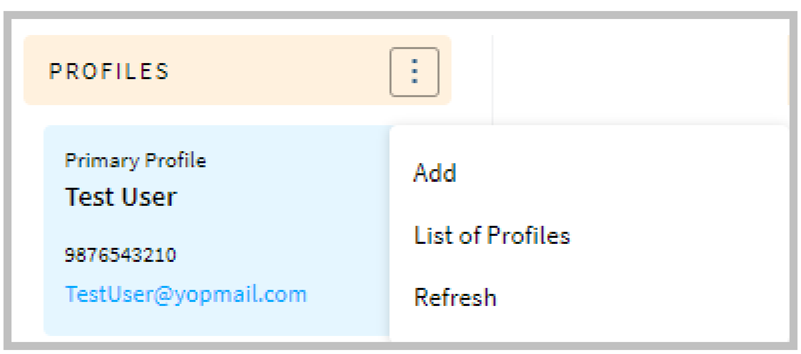
The Profiles section provides the list of contacts that are added to the customer account.



Add a New Profile

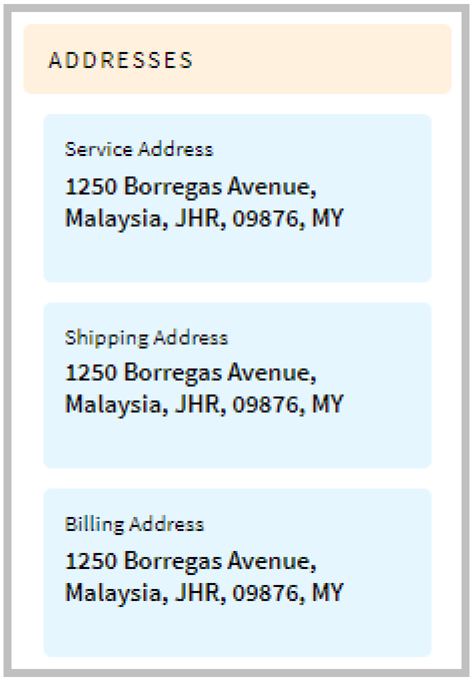
To add a new profile, click the ( ) icon in the **Profiles** section, and click **Add**. The user will be navigated to the New Profile screen in the Profiles section under Customer Management. Enter all the required details in the New Profile screen and click **Create**.

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



Addresses

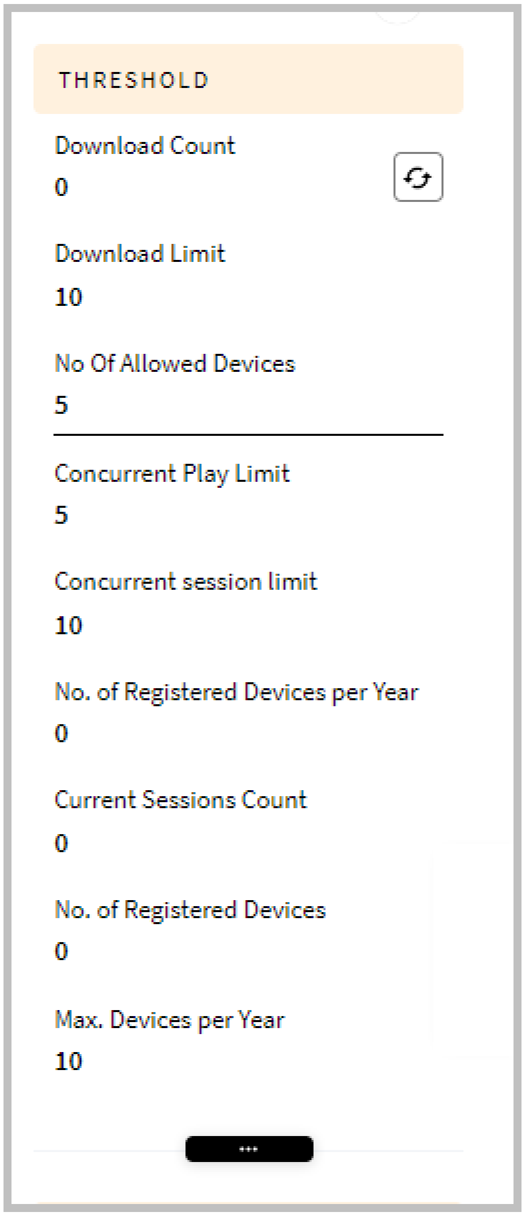
The Addresses section displays the Service address, Shipping Address, and Billing Address that are added in the Addresses section under Customer Management.



Threshold

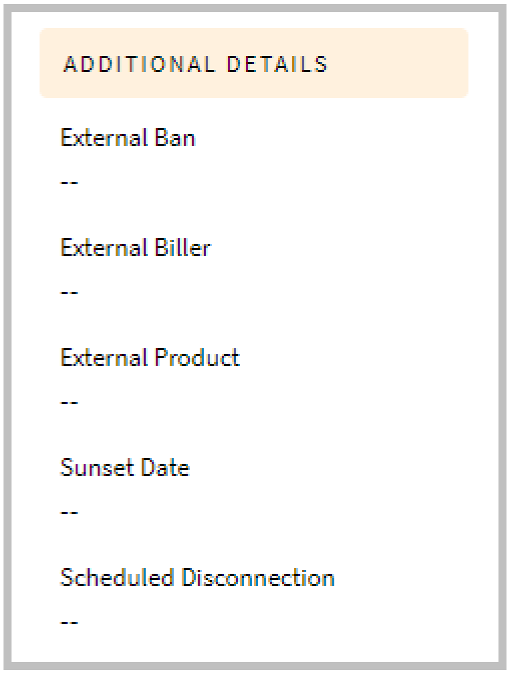
The Threshold section provides details like Download Limit, Concurrent session limit, Download Count, No. of Registered Devices per Year, Current Sessions Count, No. of Registered Devices, Credit Card Charging Threshold, and Max. Devices per Year.

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



Additional Details

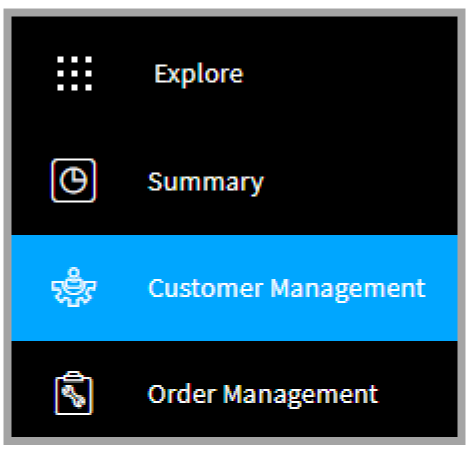
The additional details section provides details like External Ban, External Biller, External Product, Sunset Date, Scheduled Disconnection.



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.

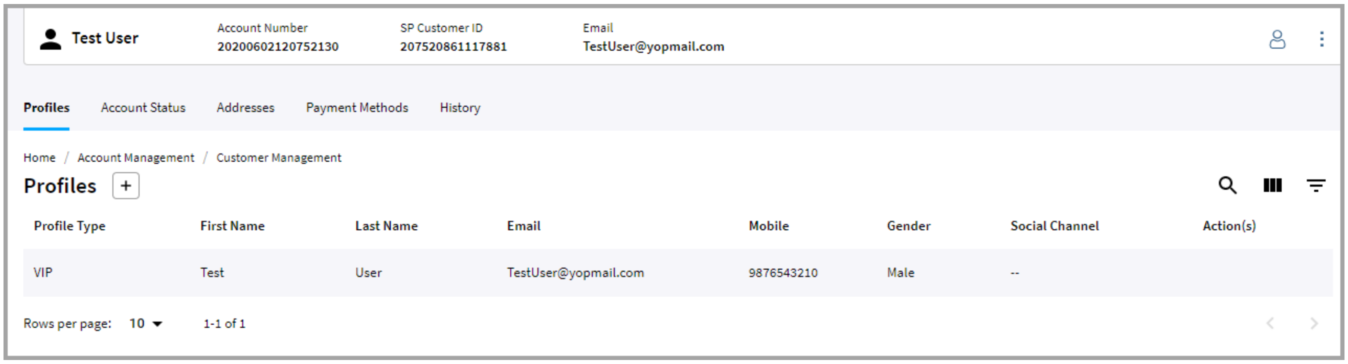


The following are the functionalities that can be provisioned by the user on the Customer Management tab:

- 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.

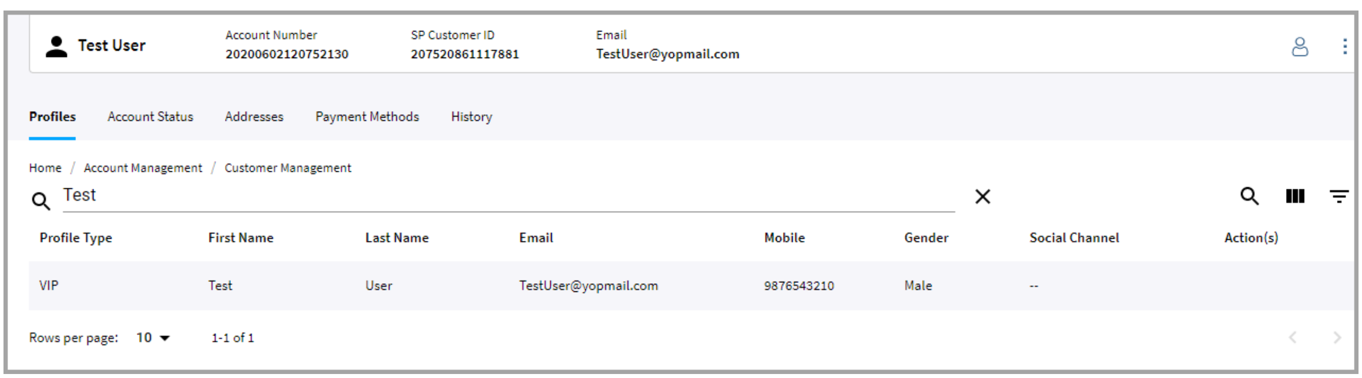


Note: Earlier (CCB 2.0), the Profiles were known as Contacts.

Search a Profile

To search a profile, do the following:

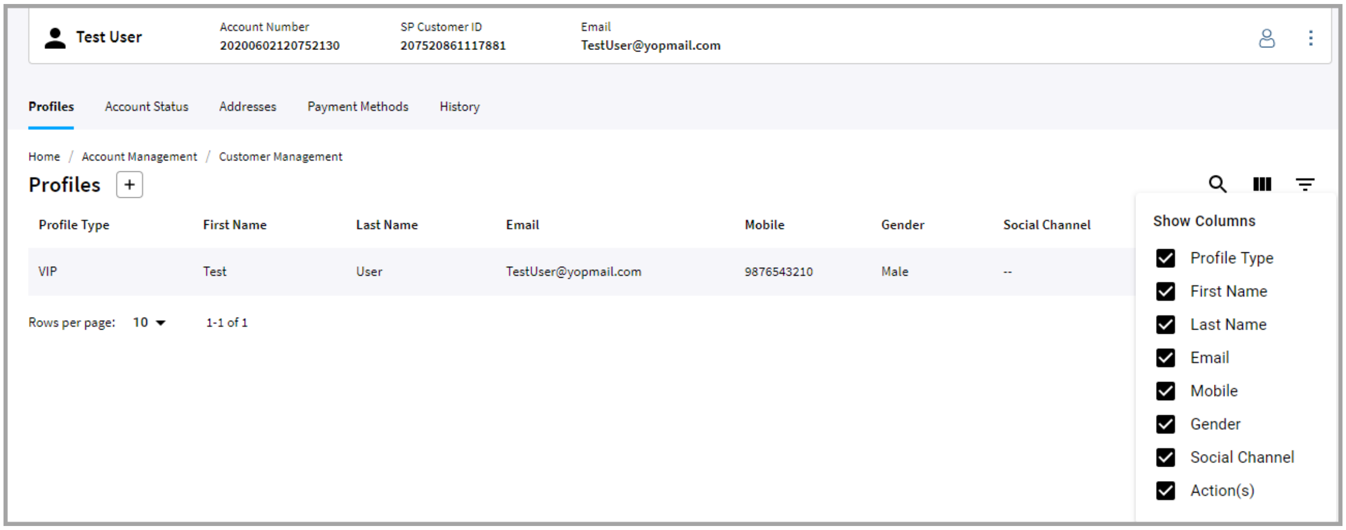
- Navigate to the **Profiles** section under the Customer Management tab.
- Click the **Search** icon ( ).
- In the **Search** field, type the value that you want to search for a profile.



Select Column Headings for Profiles

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

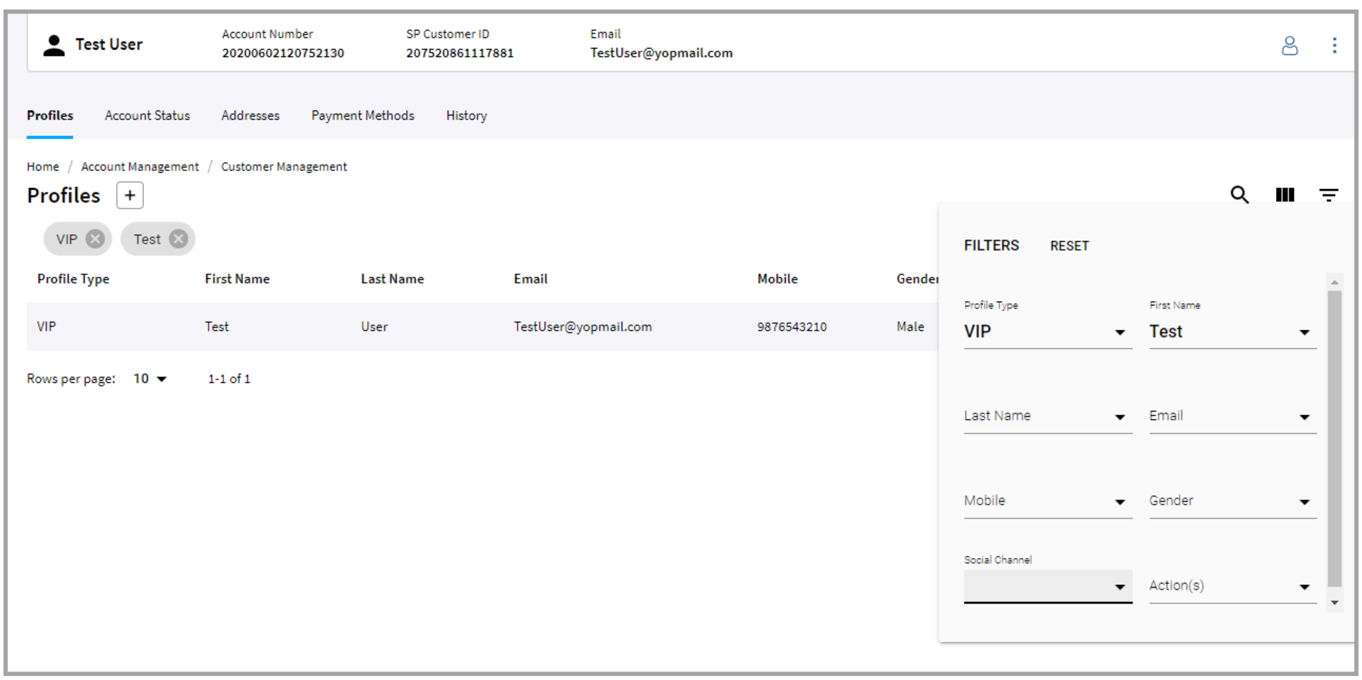
- Navigate to the **Profiles** section under the Customer Management tab.
- Click the **View Columns** icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Profiles Column Headings.



Filtering Profiles

To filter the profiles, do the following:

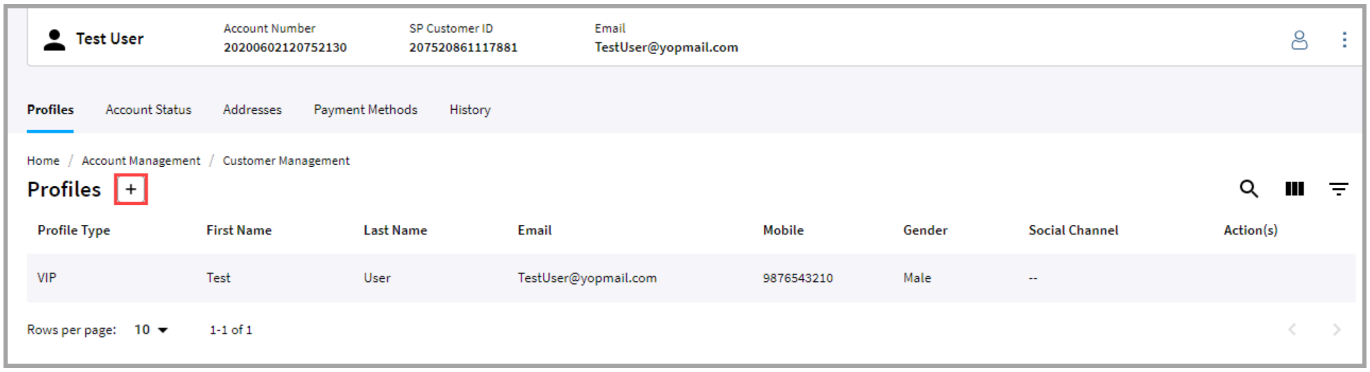
- Navigate to the **Profiles** section under the Customer Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific profiles.
- To clear the filter table, click the **RESET** button.



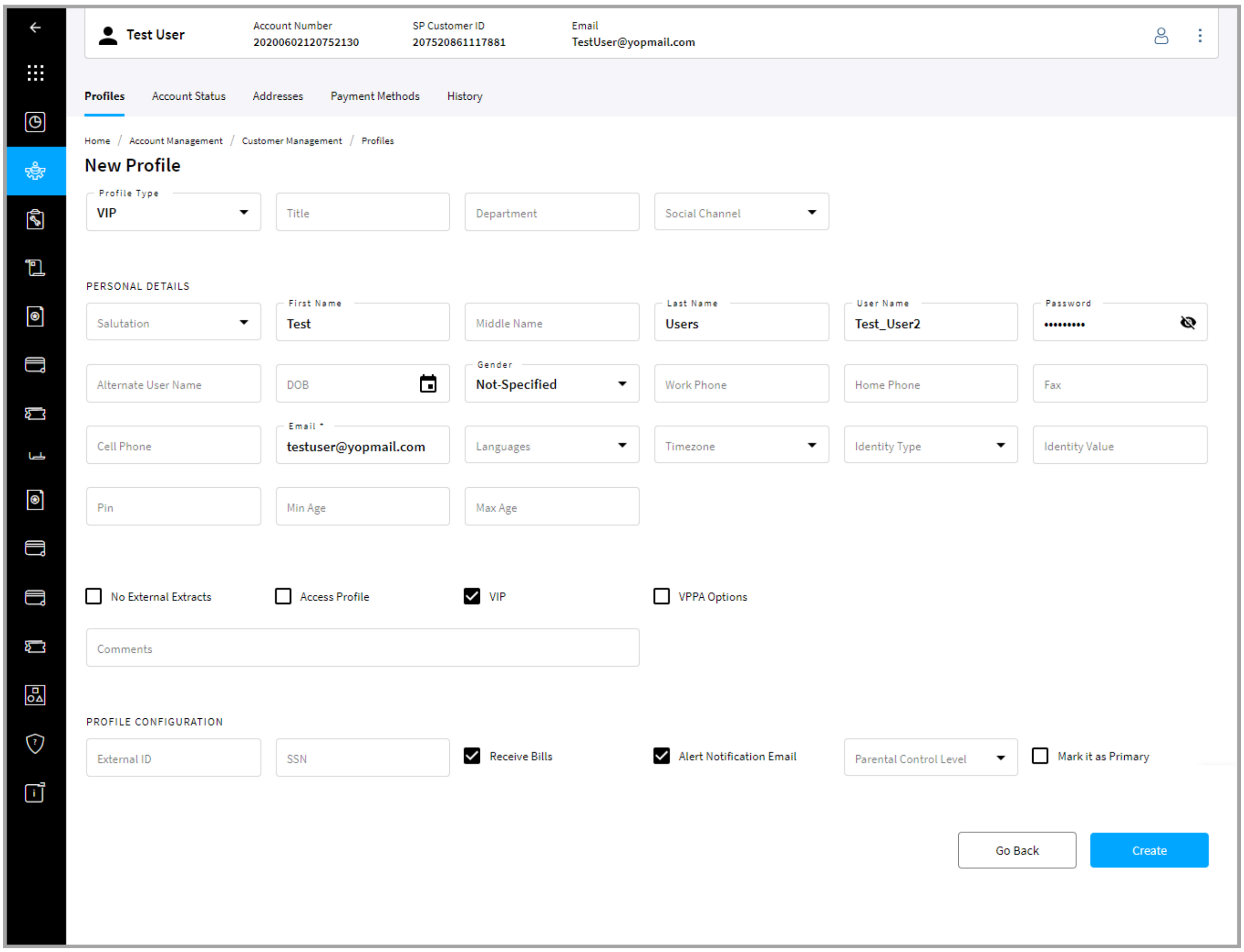
Adding a Profile

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.

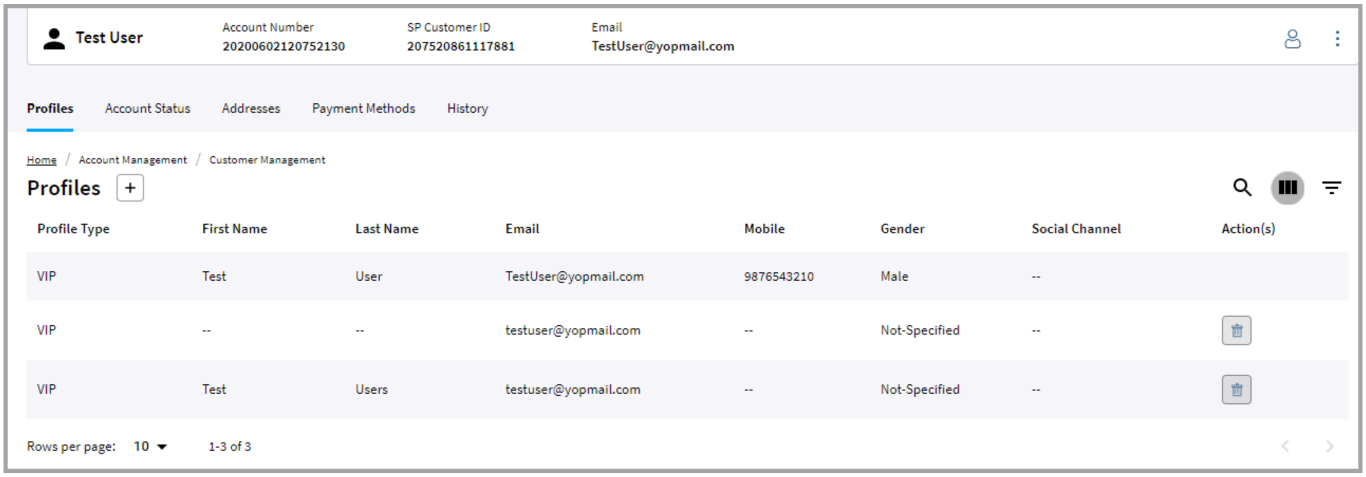


- On the **New Profile** screen, fill in the mandatory and required details of new contact information.



- 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:



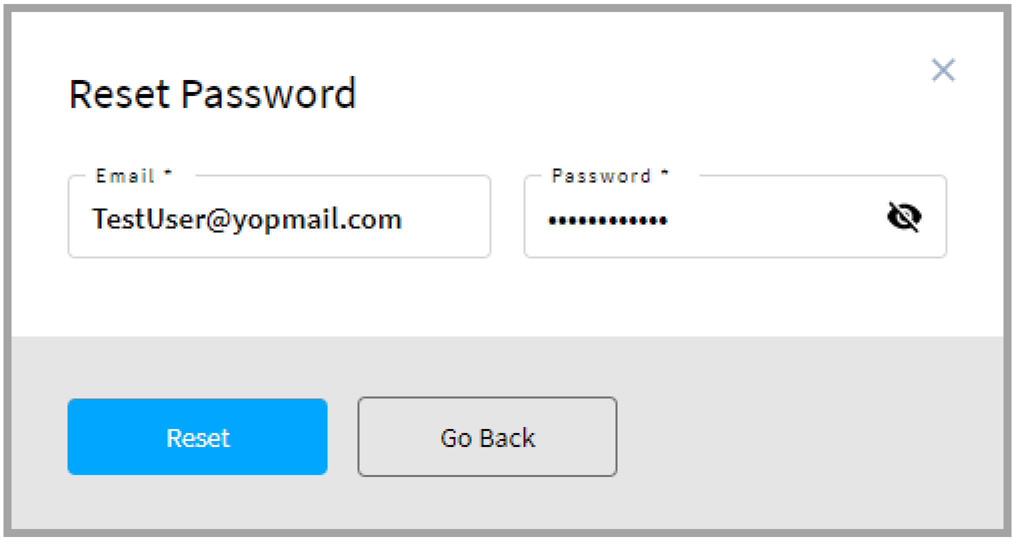
- You can add multiple contacts to an account.

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.

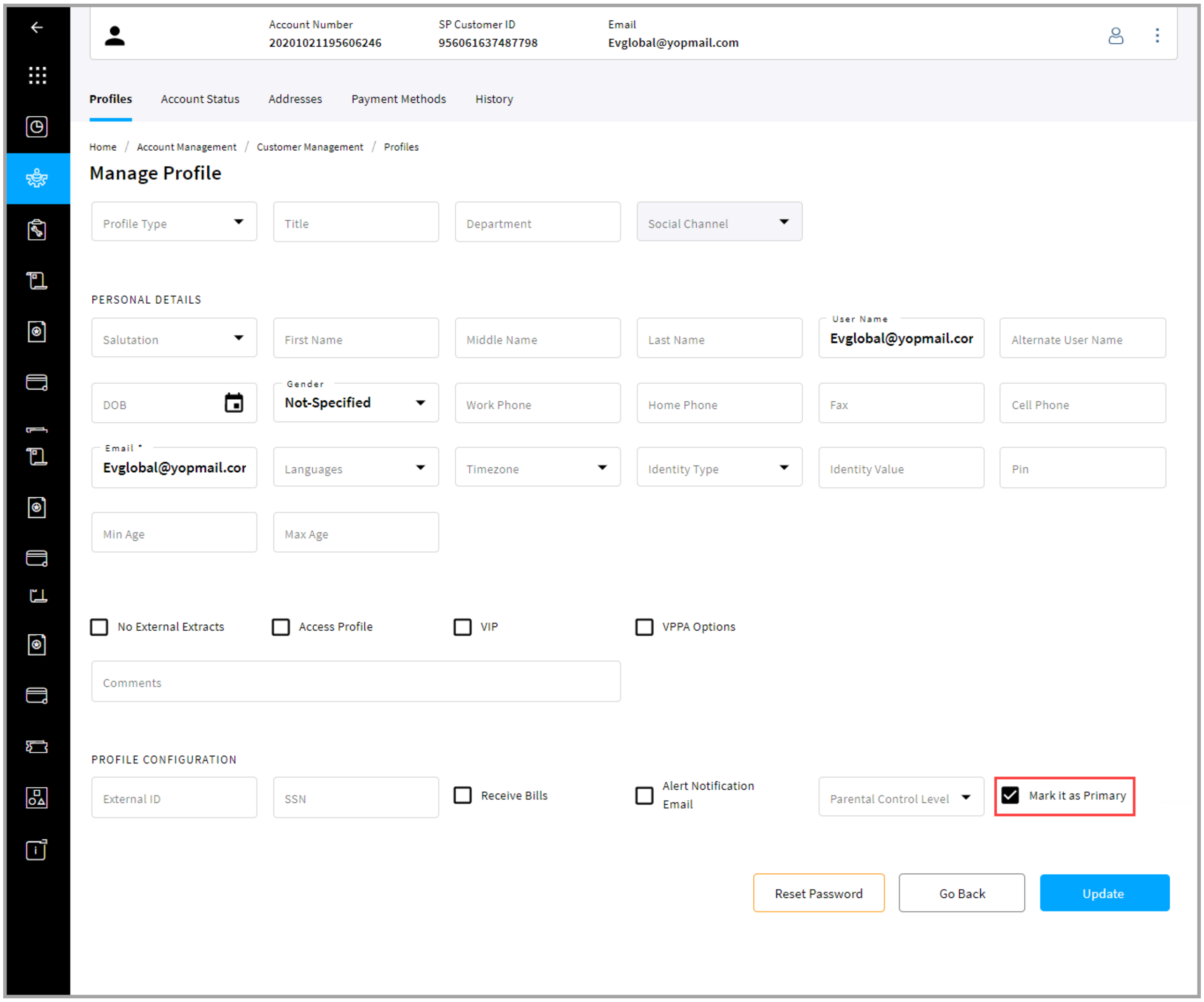
Reset Password

- 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.



Make a Profile as a Primary Contact

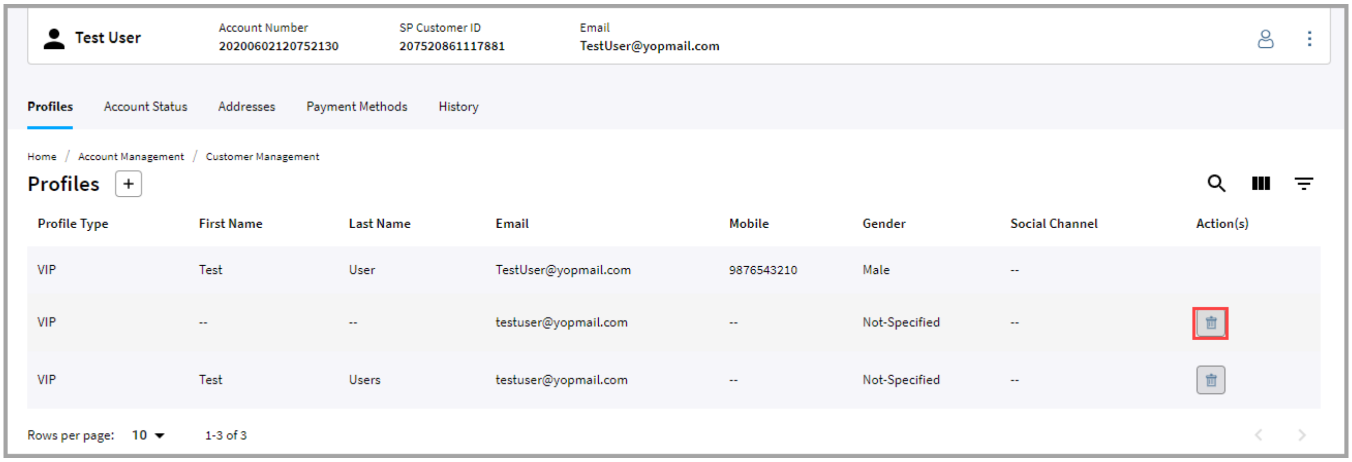
- Navigate to the **Profiles** section under the Customer Management tab.
- Click the profile that you want to make it as a primary contact.
- In the Profile Configuration section under the **Manage Profile** screen, click **Mark it as Primary.**



- The 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

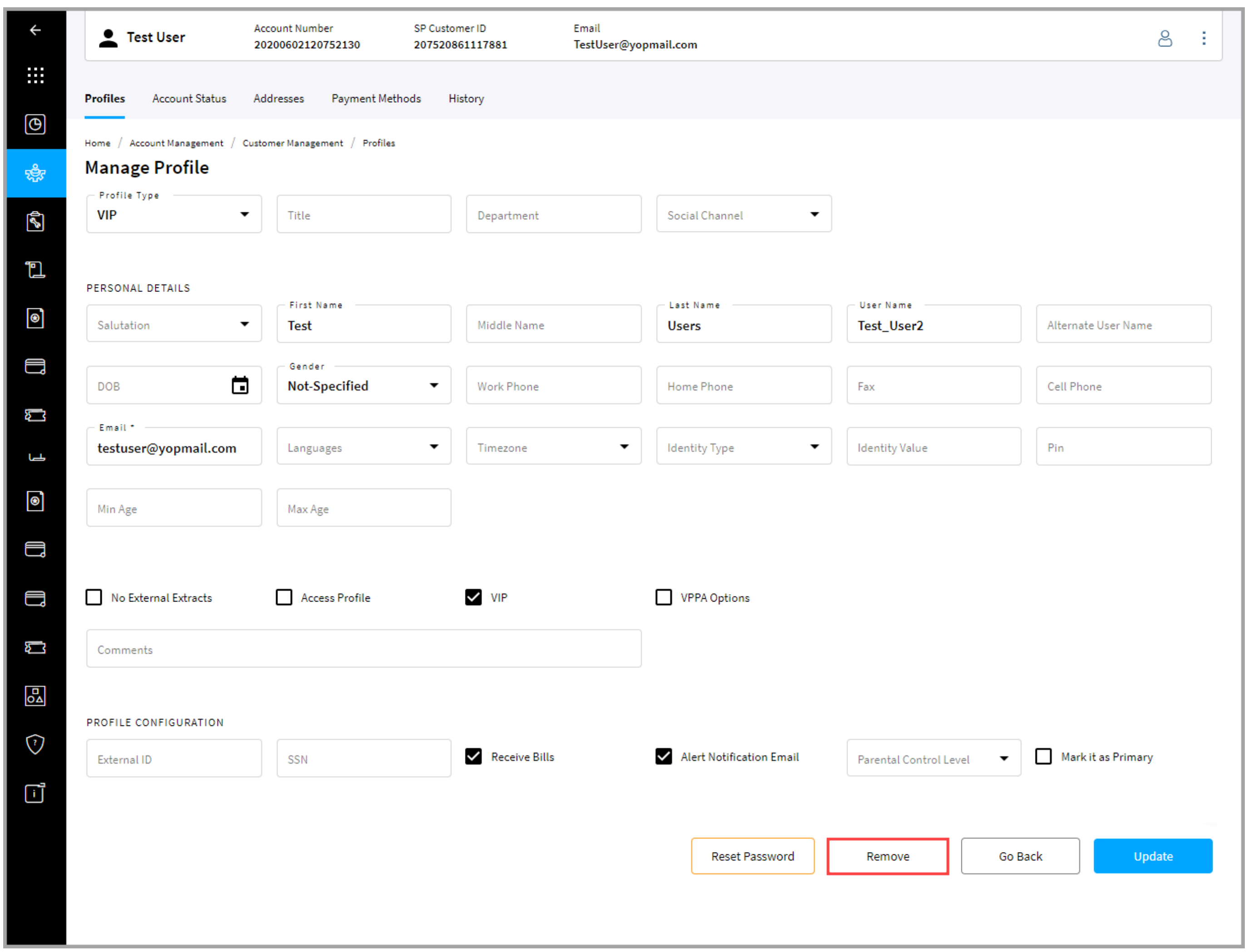
- Navigate to the **Profiles** section under the Customer Management tab.



- 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.



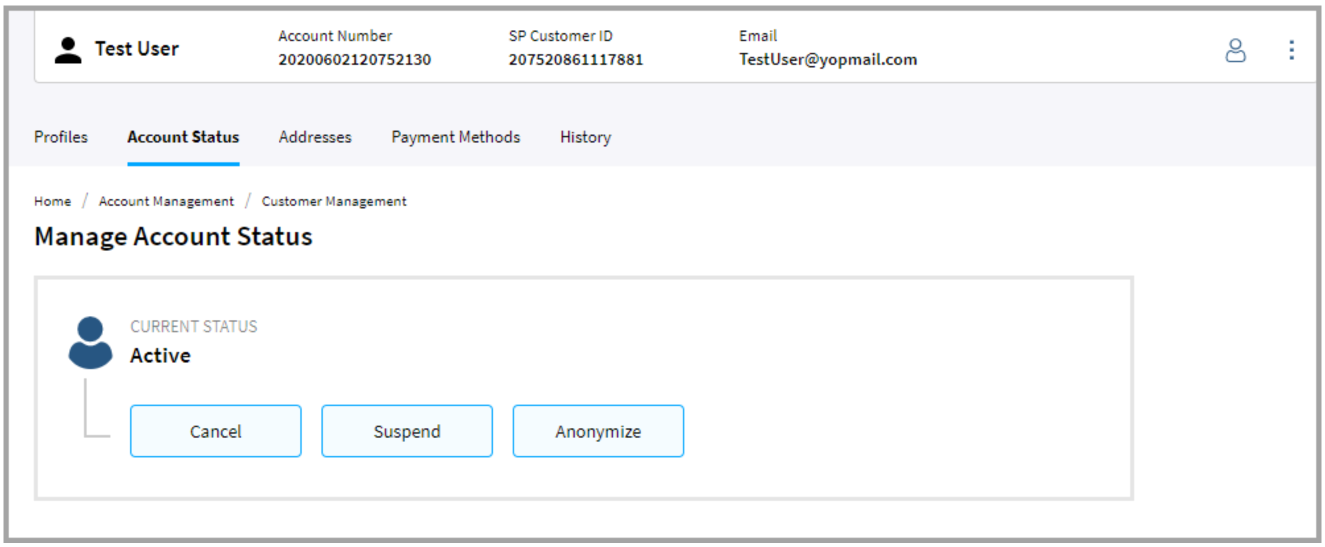
- The Manage Profile screen is displayed. Click the **Remove** button at the bottom of the screen.
- The selected contact will be removed from the list.

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.

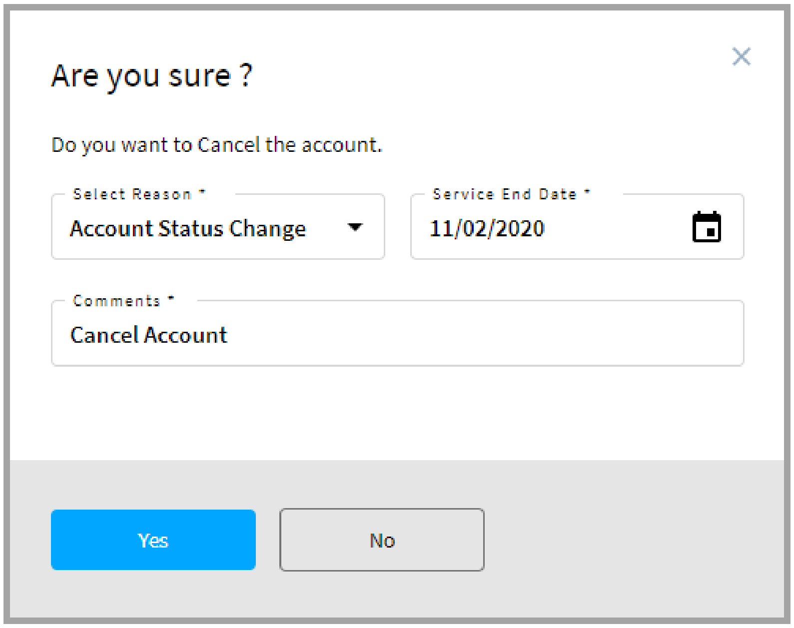


Managing Account Status

Canceling an Account

To cancel an account, do the following:

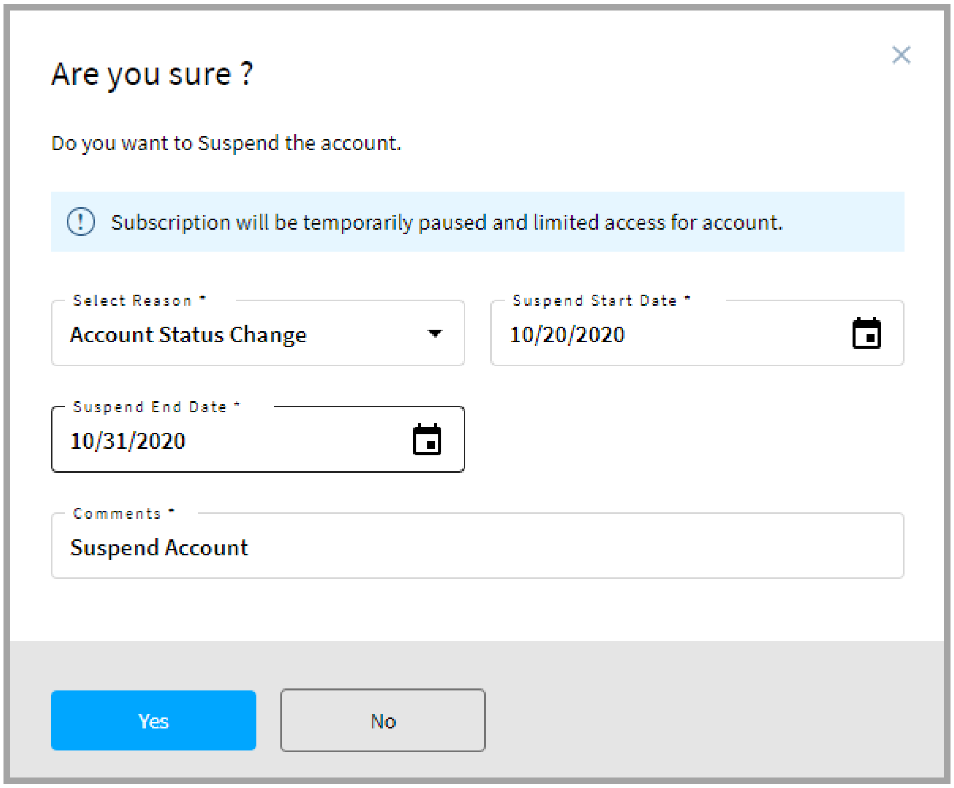
- Click the **Account Status** hyperlink under the Customer Management tab.
- The Manage Account Status screen appears.
- Click the **Cancel** button to cancel the account.
- Select the reason for canceling the account from the **Select Reason** drop-down list.
- Select the **Service End Date** and enter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



Suspending an Account

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

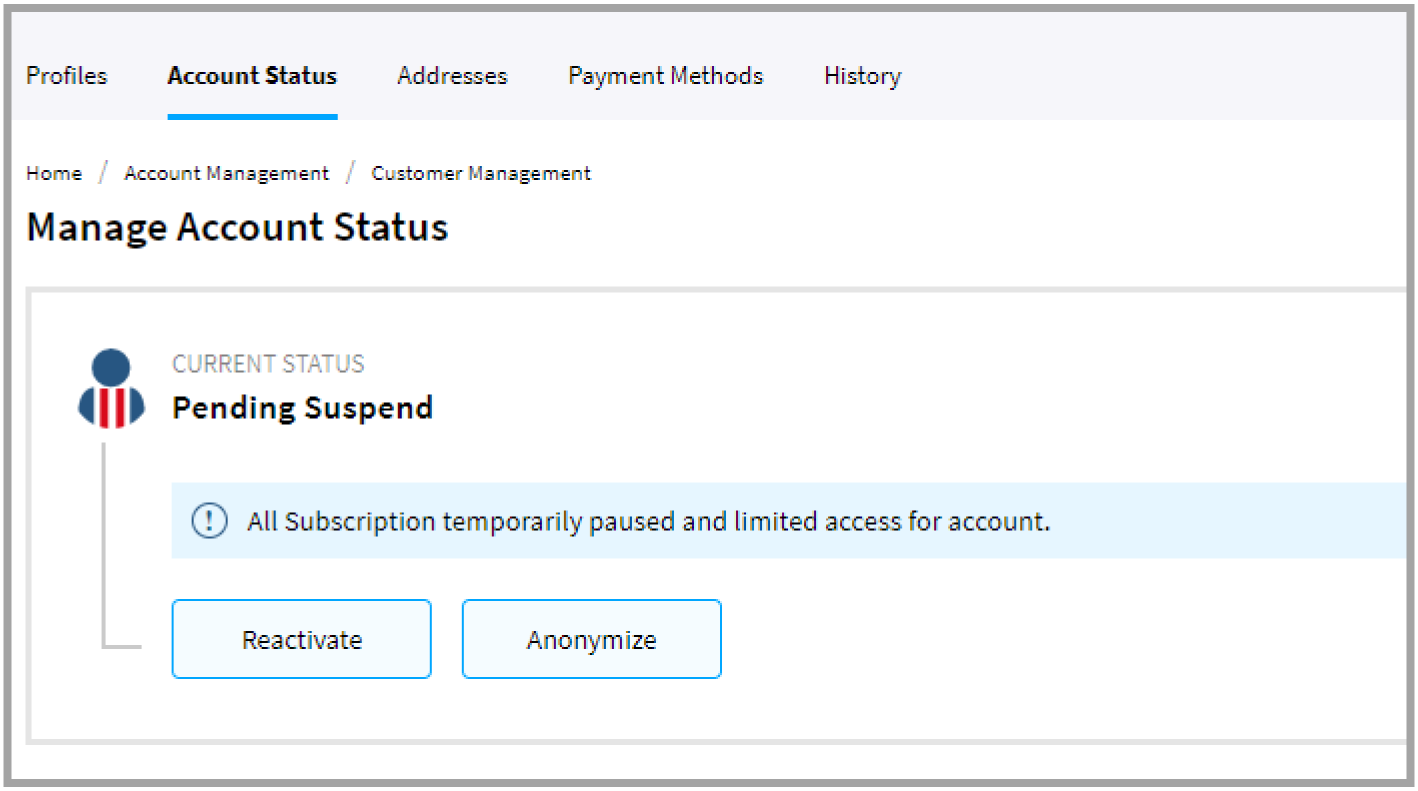
- Click the **Account Status** hyperlink under the Customer Management tab.
- The **Manage Account Status** screen appears.
- Click the **Suspend** button to suspend the account.
- Select the reason for suspending the account from the **Select Reason** drop-down list.
- Select the Suspend Start Date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



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.



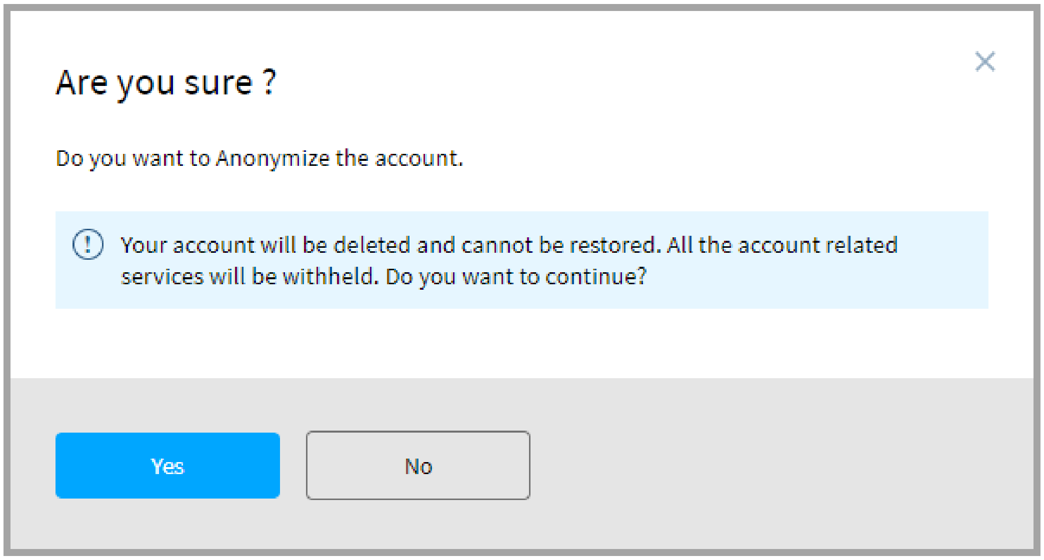
Anonymizing User Account

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:

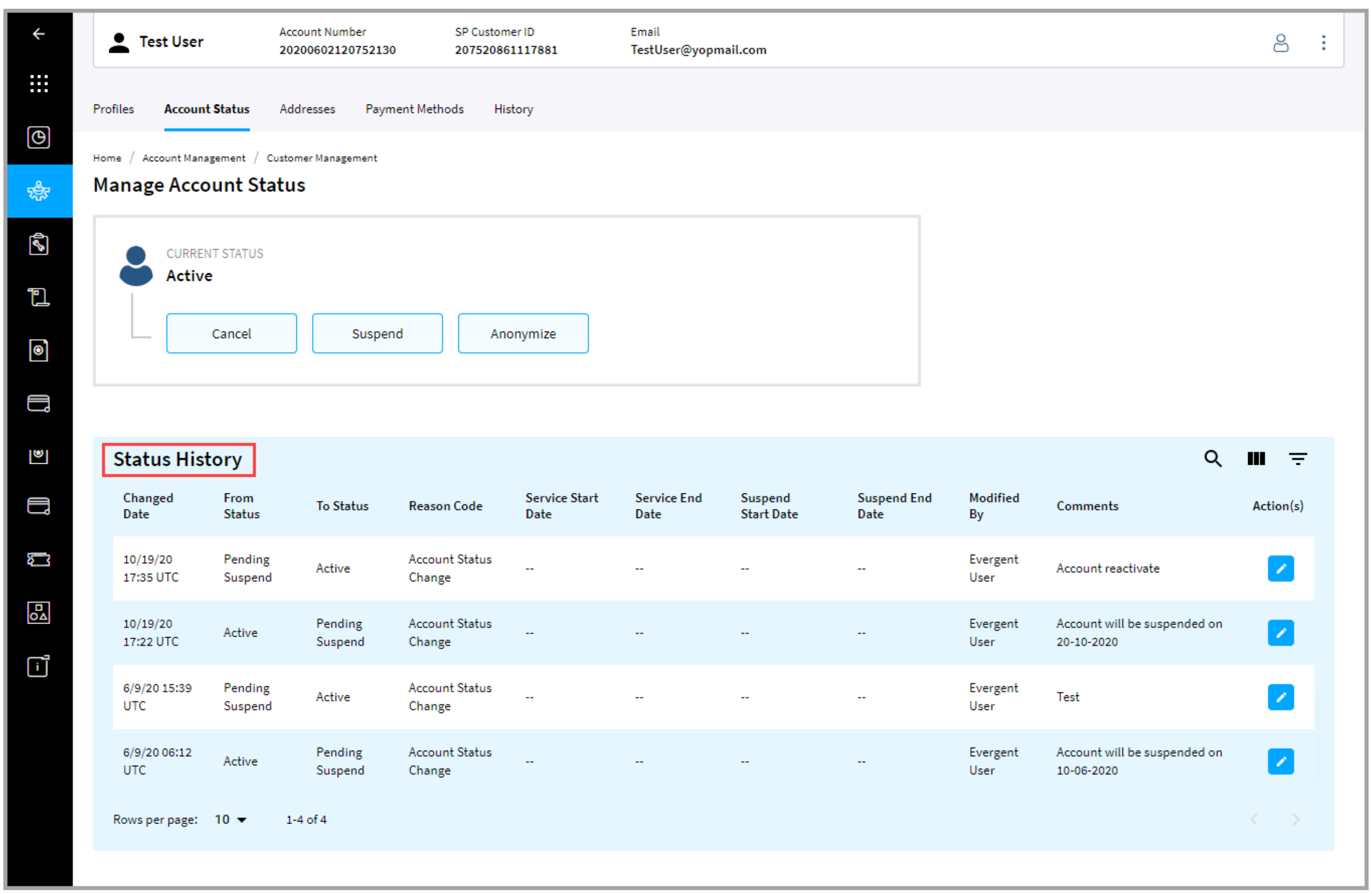
- Click the **Account Status** hyperlink under the Customer Management tab.
- The Manage Account Status screen appears.
- Click the **Anonymize** button to delete the account related services.
- Click **Yes** to delete the account or else click **No.**



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.

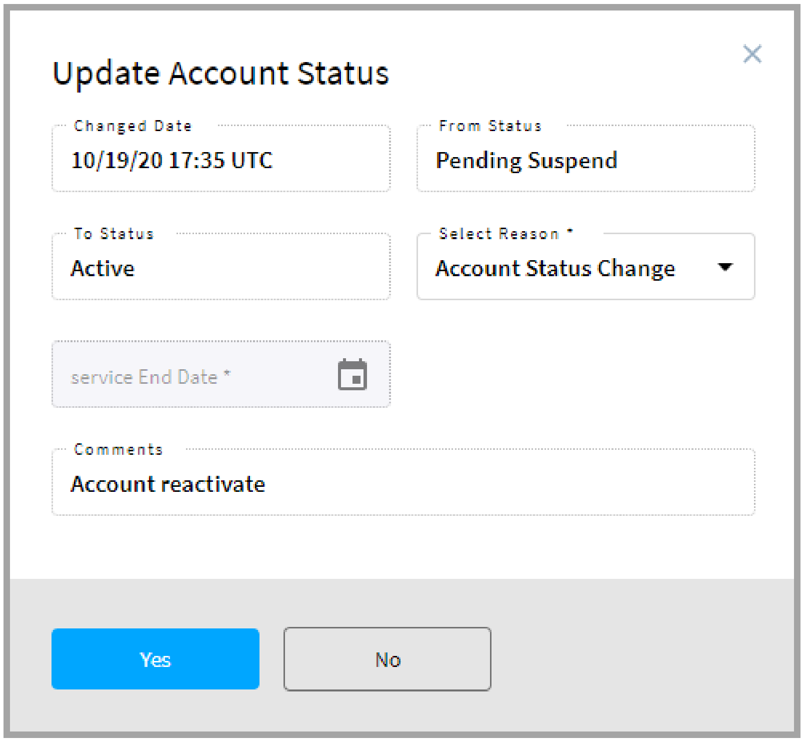


- The status history is displayed at the bottom of the screen if an account status changes occur.

Updating the Account Status

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

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



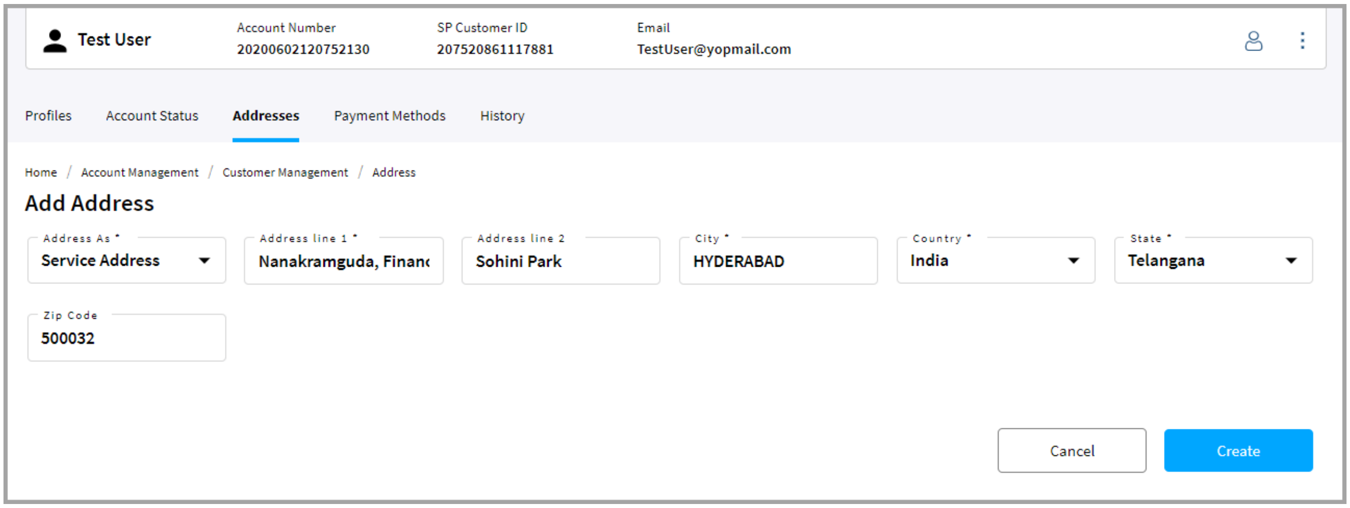
Addresses

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.

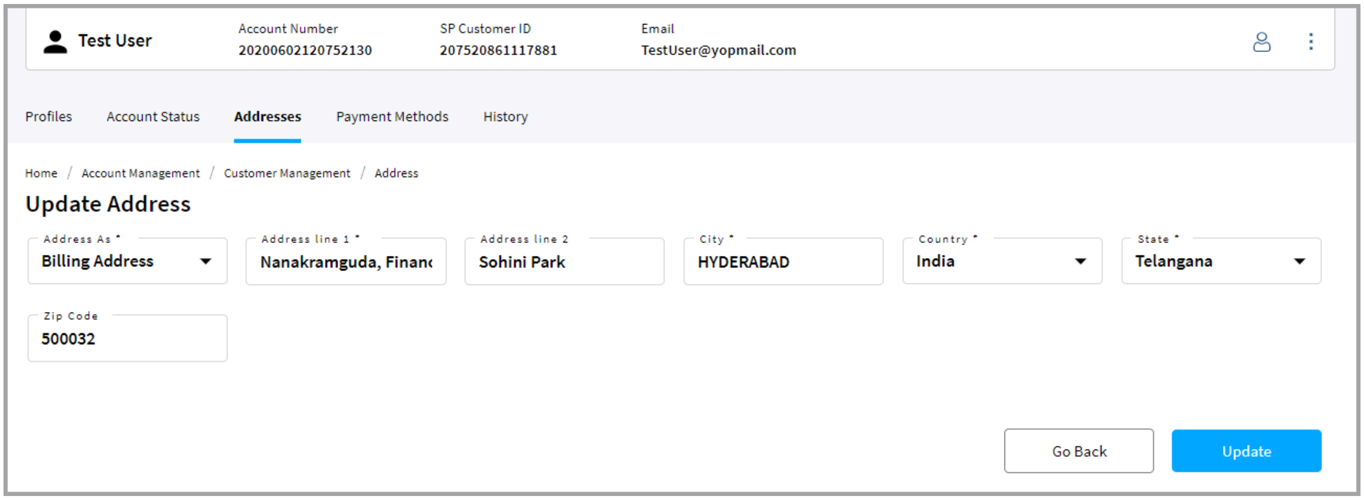


- Click **Address As** to select the address type as Service Address, Shipping Address, or Billing Address from the available drop-down list.
- Enter the address details in the **Address Line 1**, and **Address Line 2** fields.
- Select a city from the available the **City** list.
- Select a country 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**.



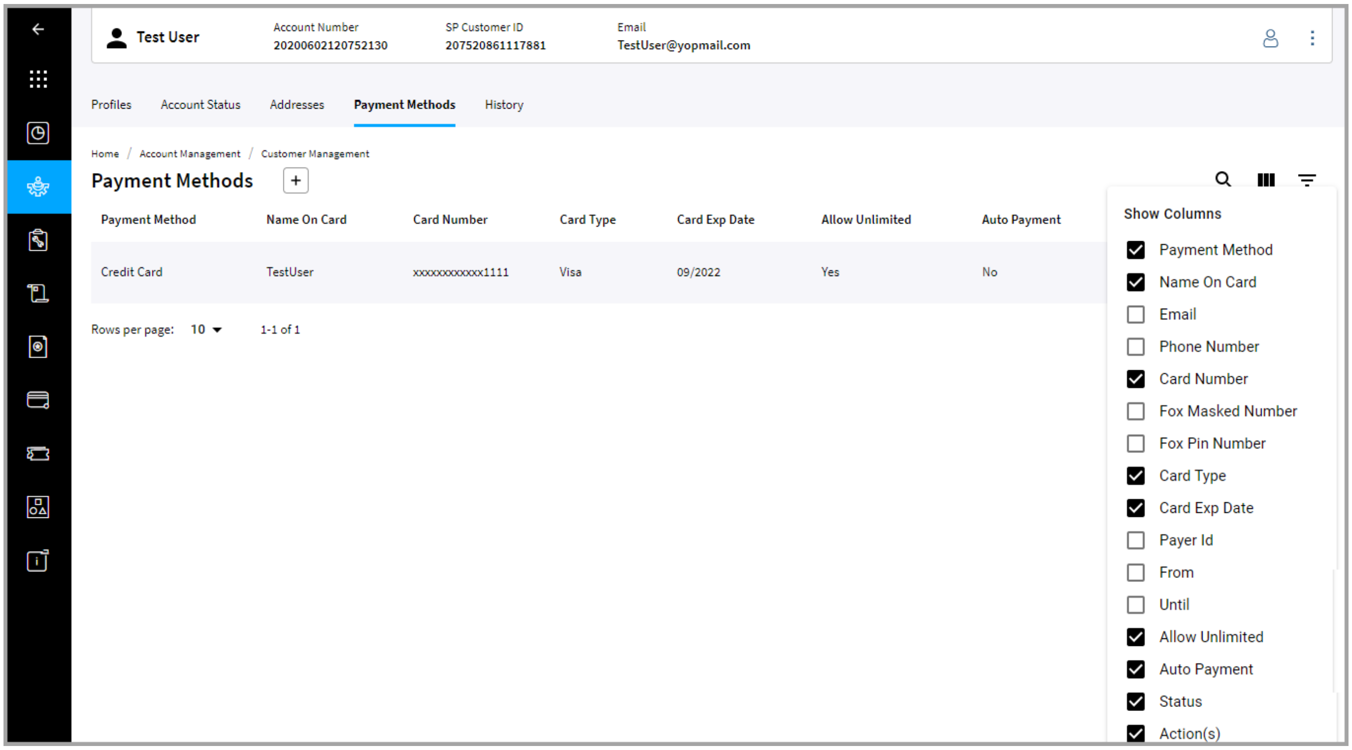
Payment Methods

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:

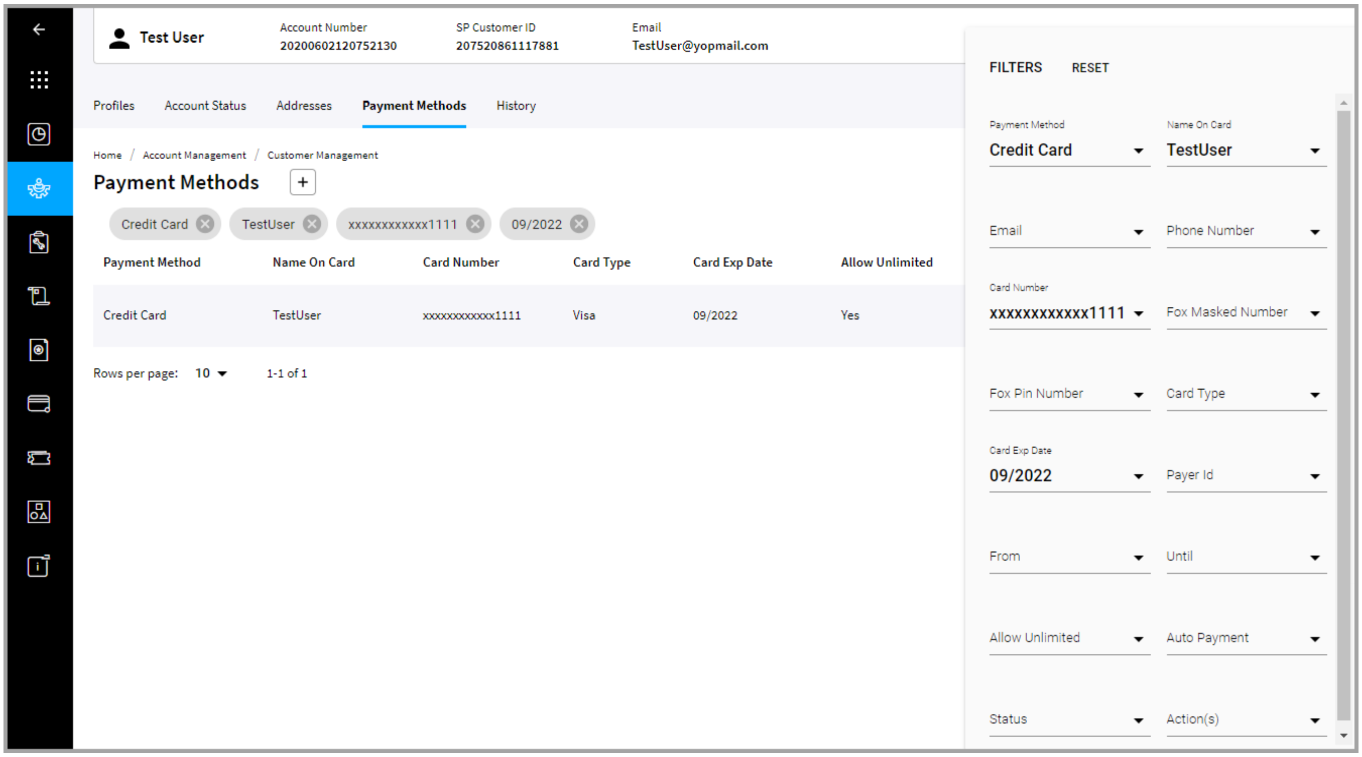
- Click the **Payment Methods** hyperlink under the Customer Management tab.
- Click the **View Columns** icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Payment Methods column headings.



Filtering Payment Methods

To filter the payment method, do the following:

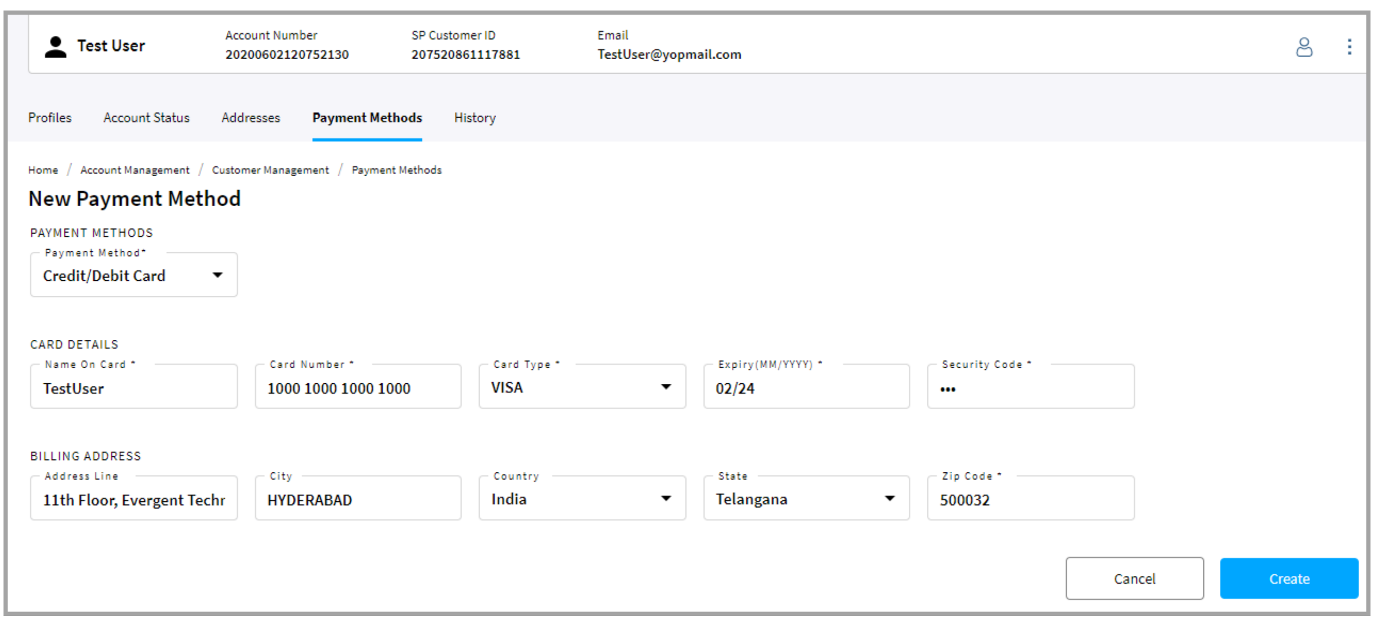
- Click the **Payment Methods** hyperlink under the Customer Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific payment method.
- To clear the filter table, click the **RESET** button.



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.

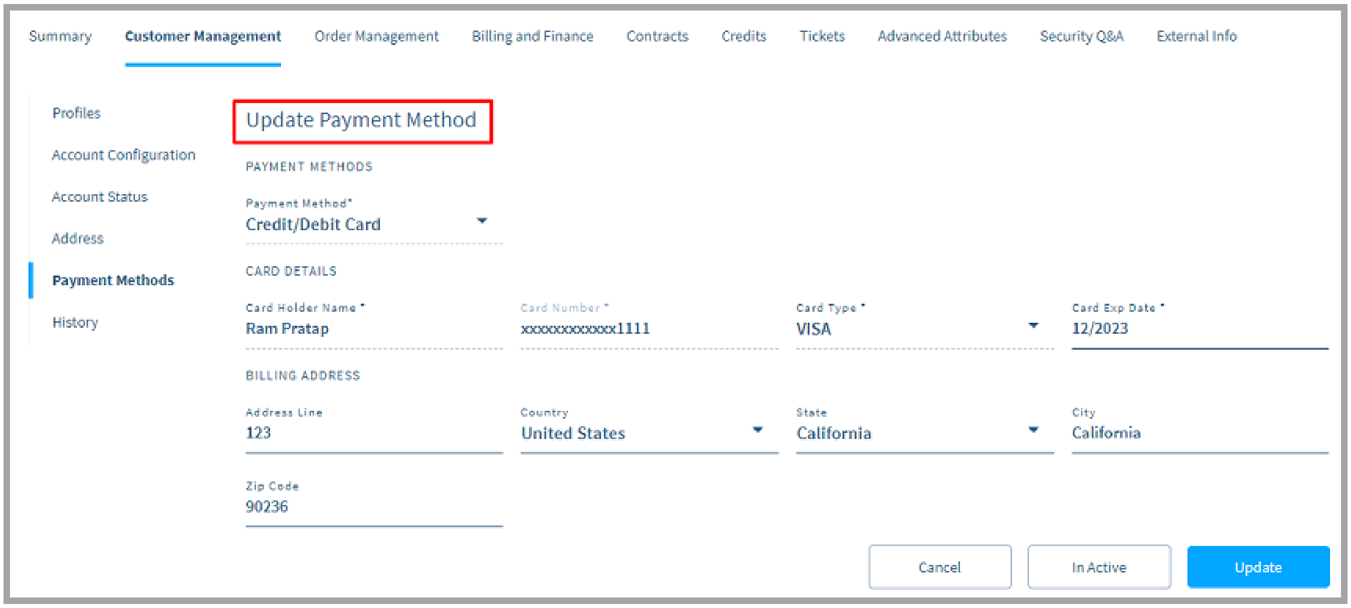


- Select the payment method as a **Credit/Debit Card** or **Klarna** type in the **Payment Method** section.
- If the payment method is selected as the Credit/Debit Card, then enter the card information in the provided fields:
    - Enter the card name in the **Name on Card** field in the Card Details 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.



- 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.

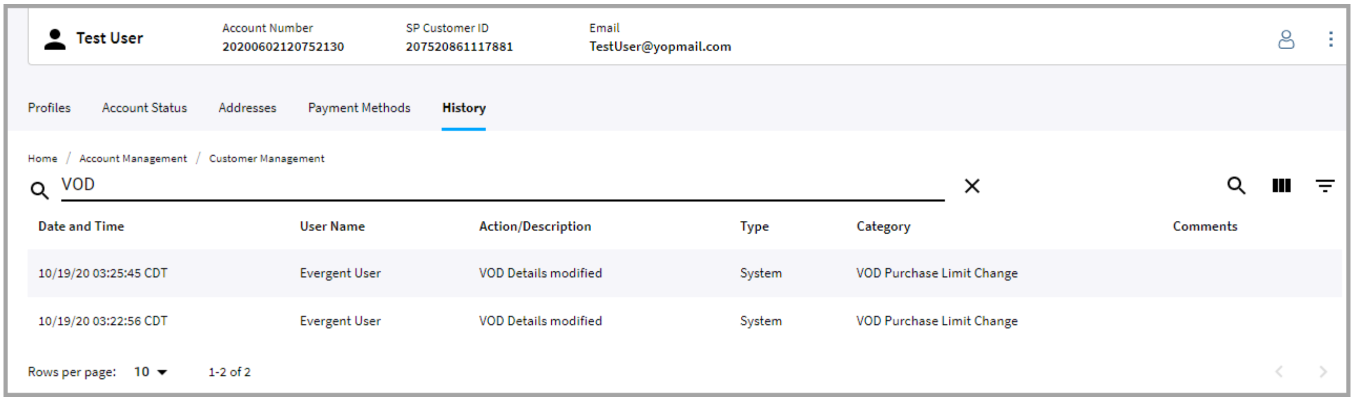
Some of the events generated through a batch process that is logged automatically are:

- 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:

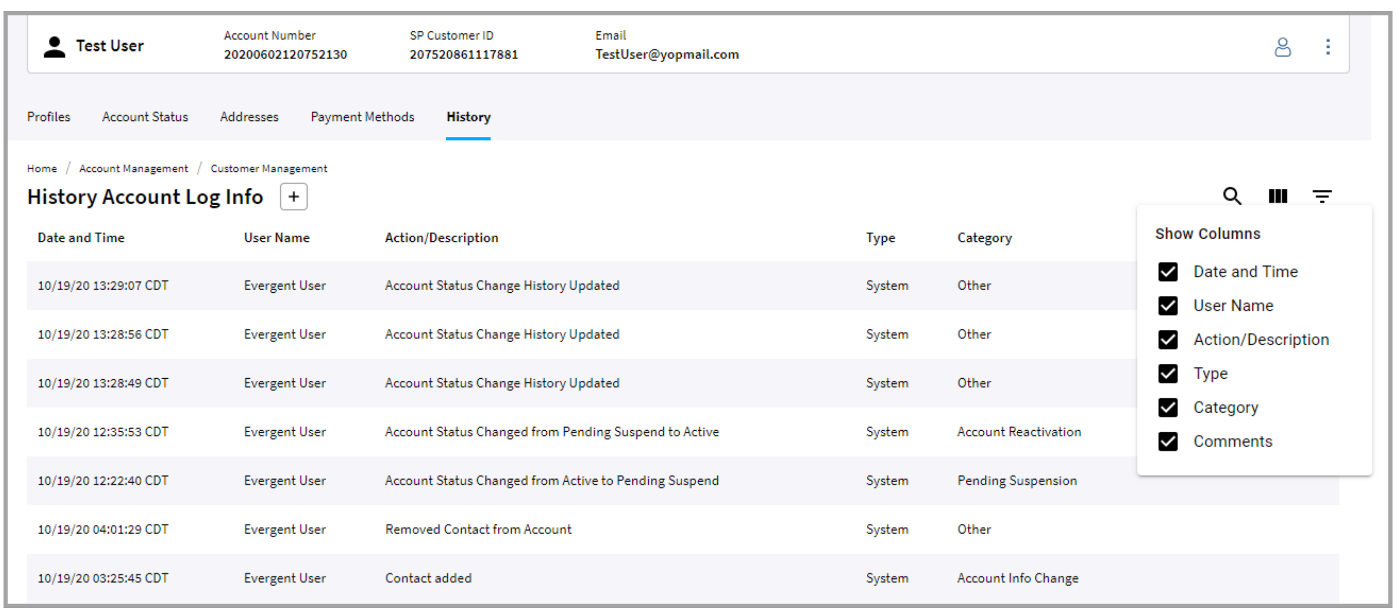
- Click the History hyperlink under the Customer Management tab.
- Click the Search icon ( ).
- In the Search field, type the value that you want to search for the event.



Selection of Column Headings for History

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

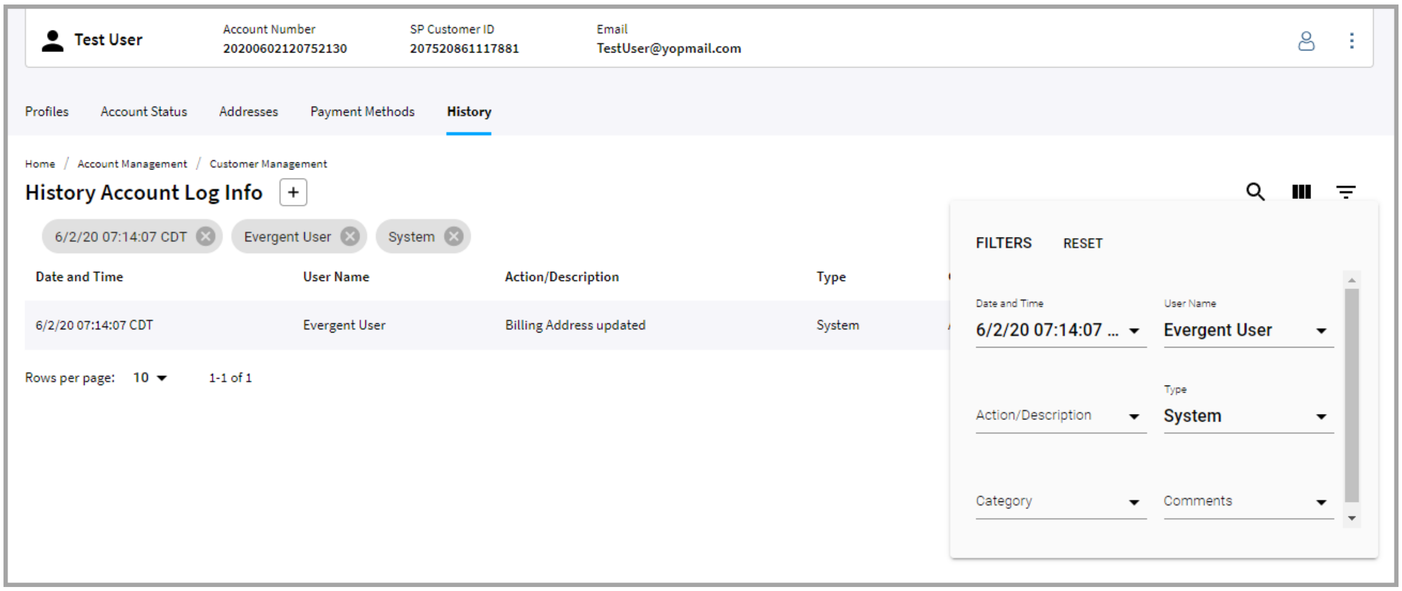
- Click the **History** hyperlink under the Customer Management tab.
- Click the View Columns icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the History column headings.



Filtering Events

To filter the events, do the following:

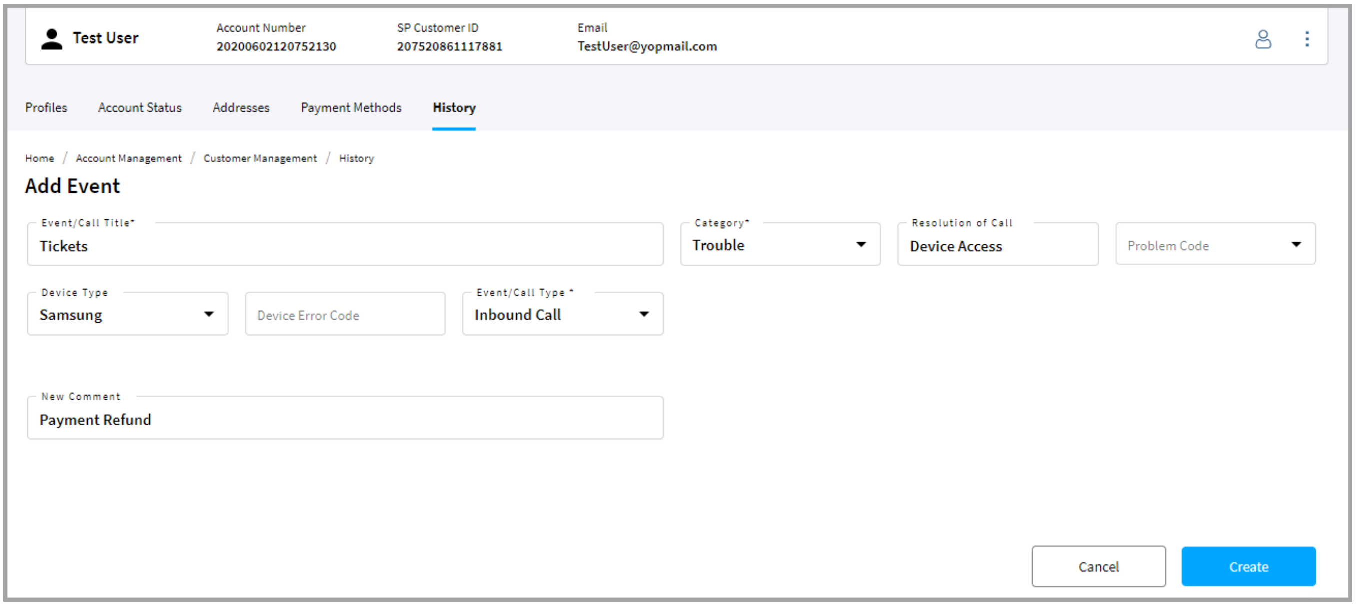
- Click the **History** hyperlink under the Customer Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific events.
- To clear the filter table, click the **RESET** button.



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.

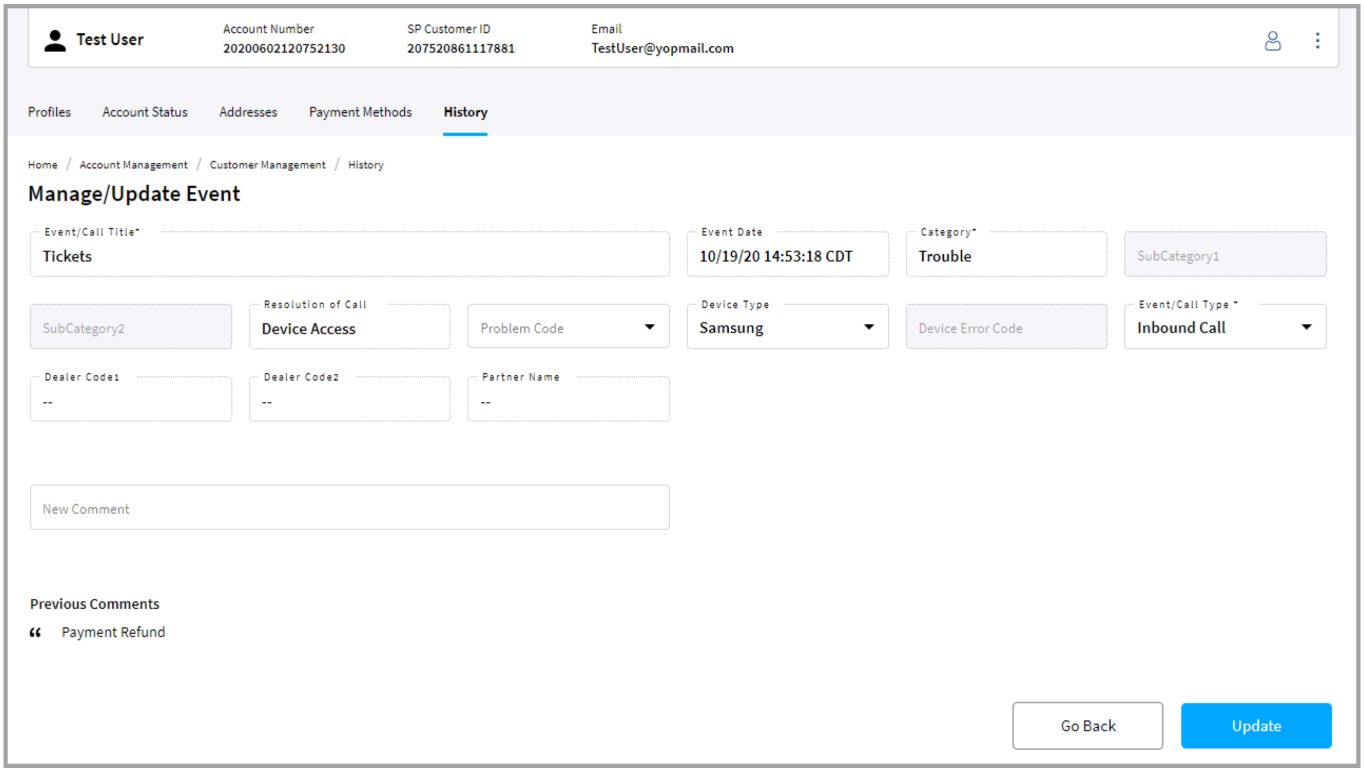
- Enter resolution of call in the **Resolution of Call** field.
- Select **Problem Code** and **Device Type** from the available drop-down list.
- Enter device error code in the **Device Error Code** field.
- Select the event type from the **Event/Call Type** drop-down list.
- Enter comments in the **New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

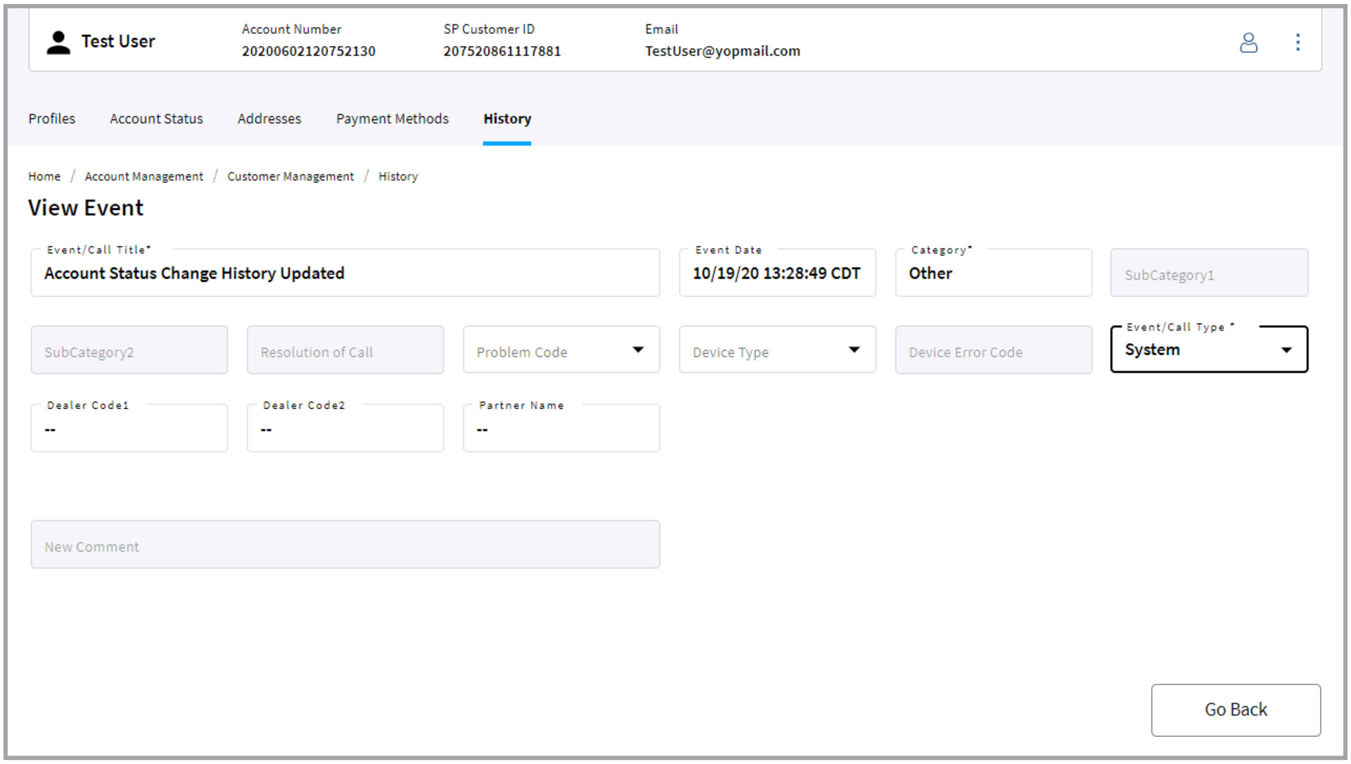


- Make the necessary changes to the event fields and click **Update** to make the changes to the event, or else click Cancel to discard the changes.

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.



- 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

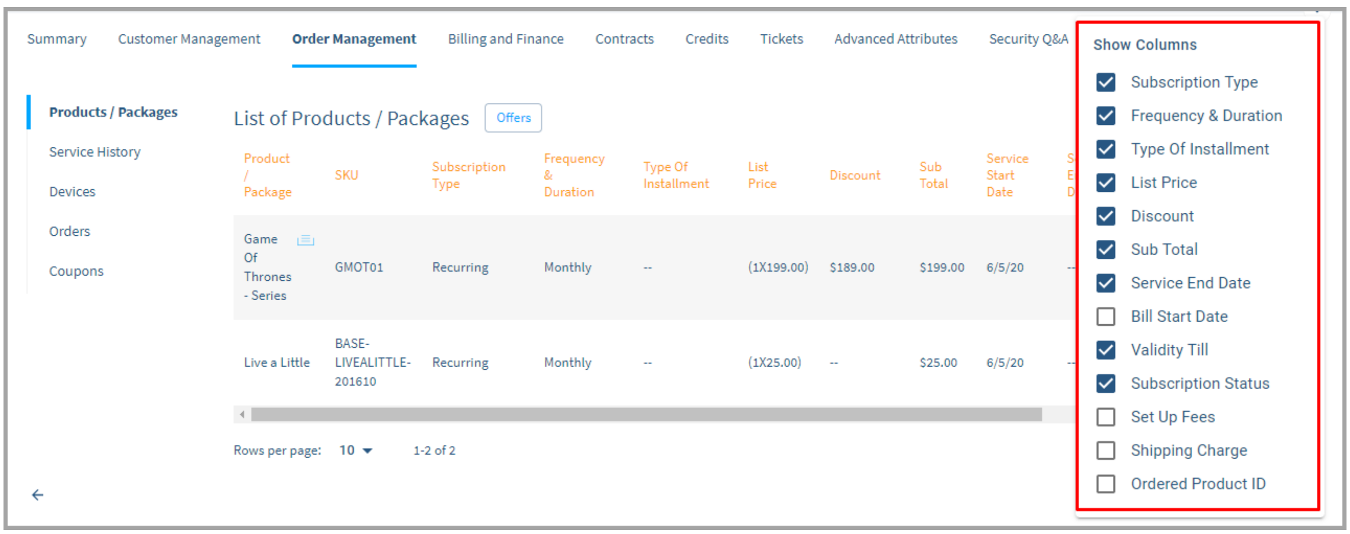
To search for a product/package, do the following:

- 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:

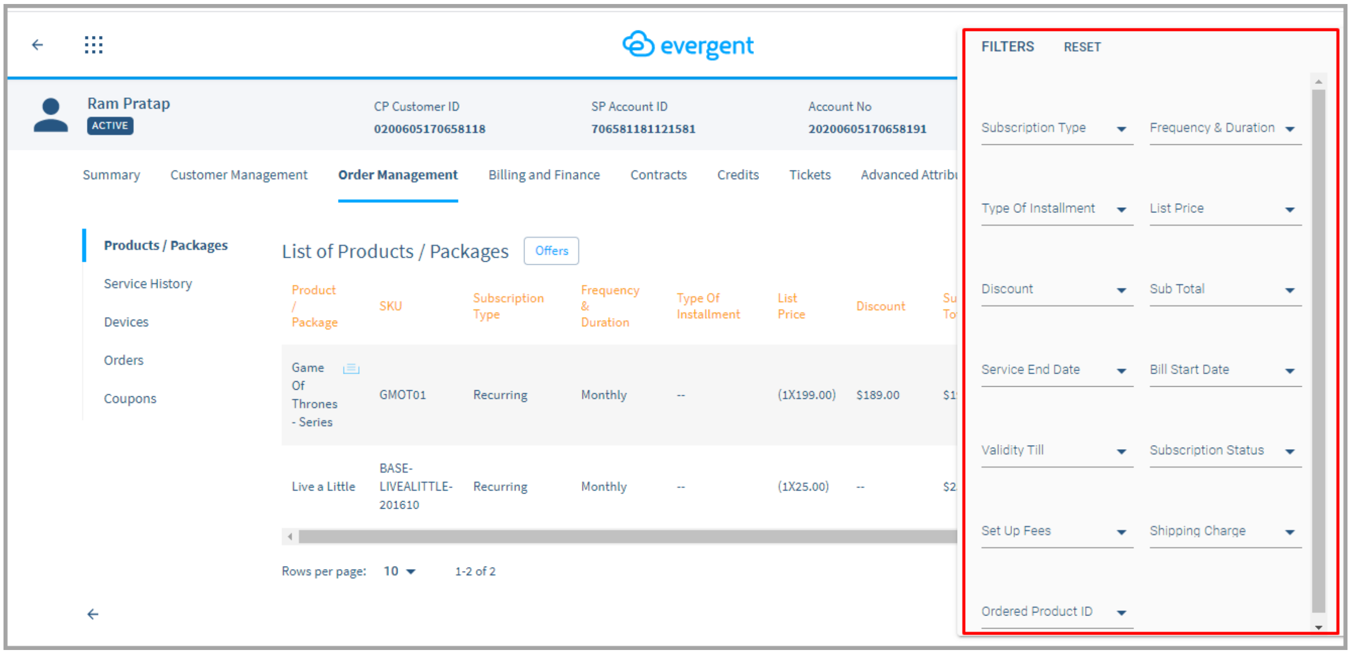
- Click the **Products/ Packages** hyperlink under the Order Management.
- Click the **View Columns** icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Products/ Packages Column Headings.



Filtering Products/Packages

To filter the product/package, do the following:

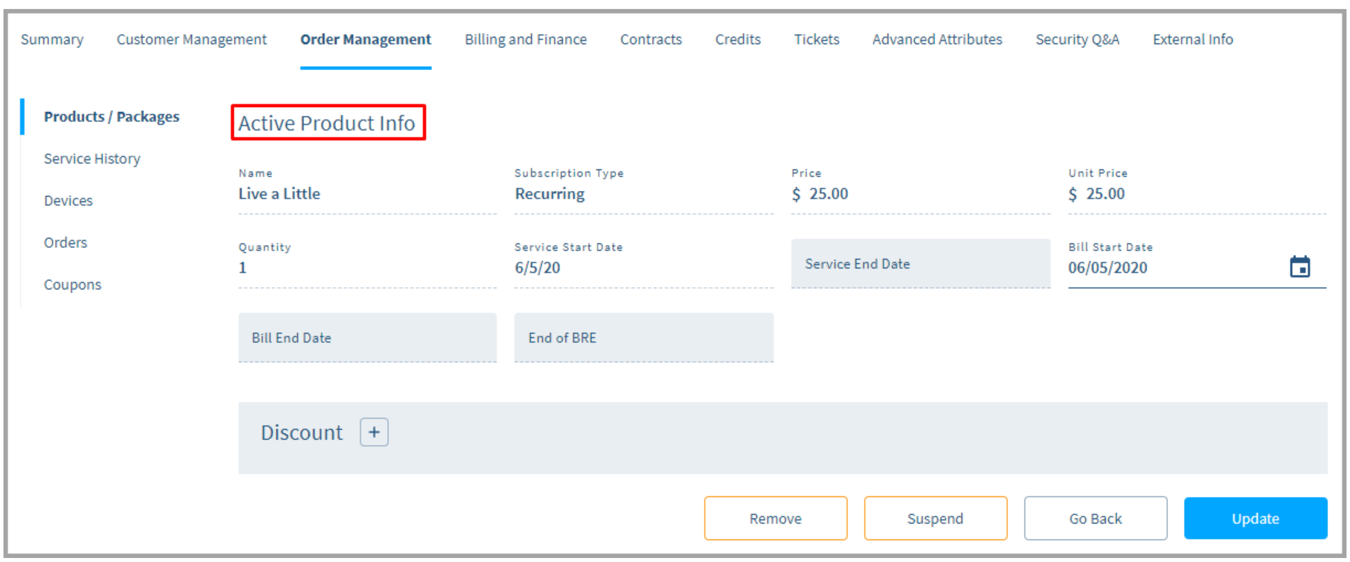
- Click the **Products/Packages** hyperlink under the Order Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific product/package.
- To clear the filter table, click the **RESET** button.



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.



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.

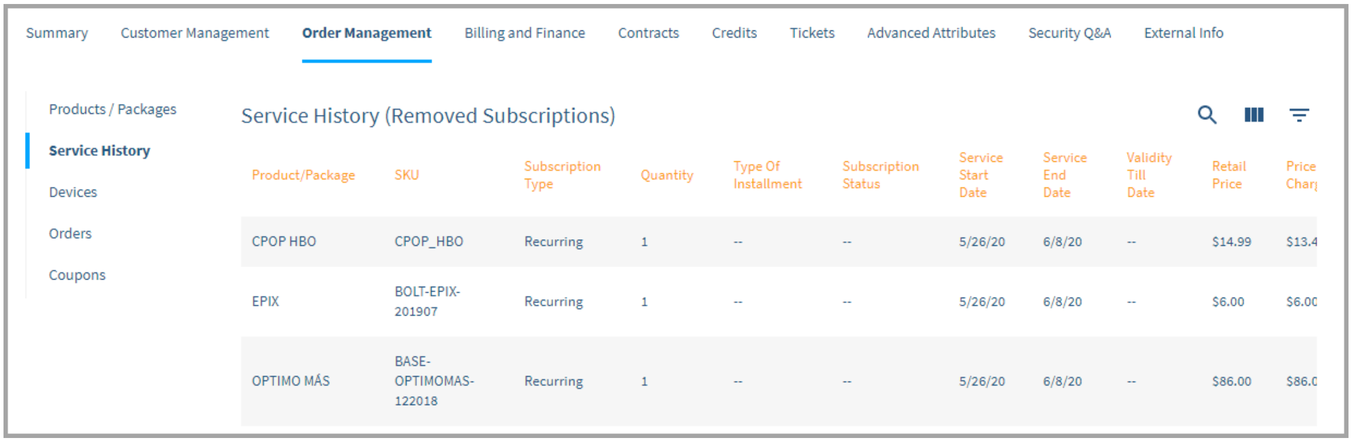
Removing a Package

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

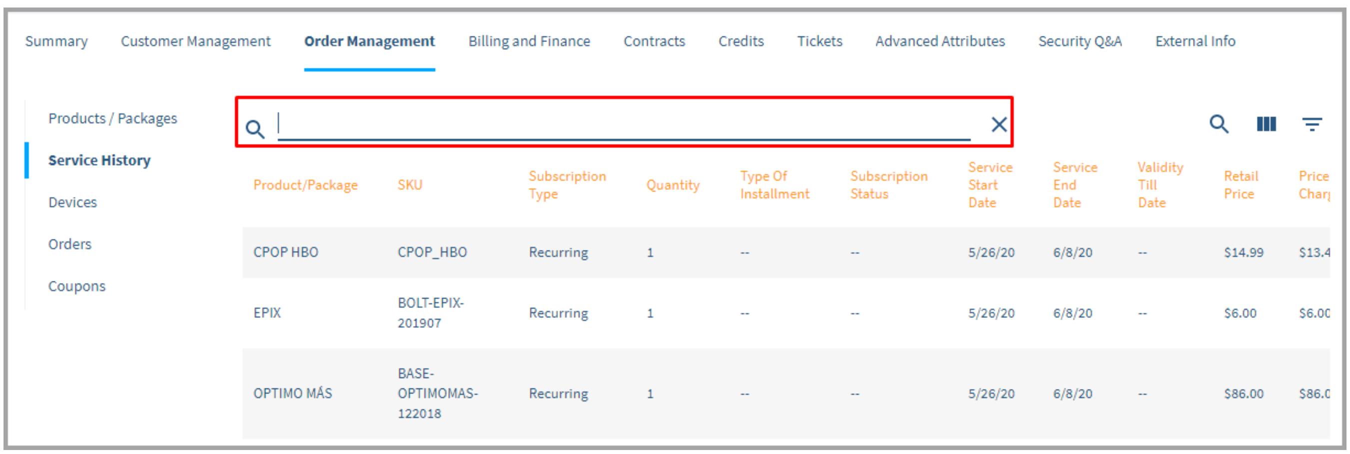
The service history is used to view the removed subscription products/packages from the customer account.



Searching a Service History

To search a Service History, do the following:

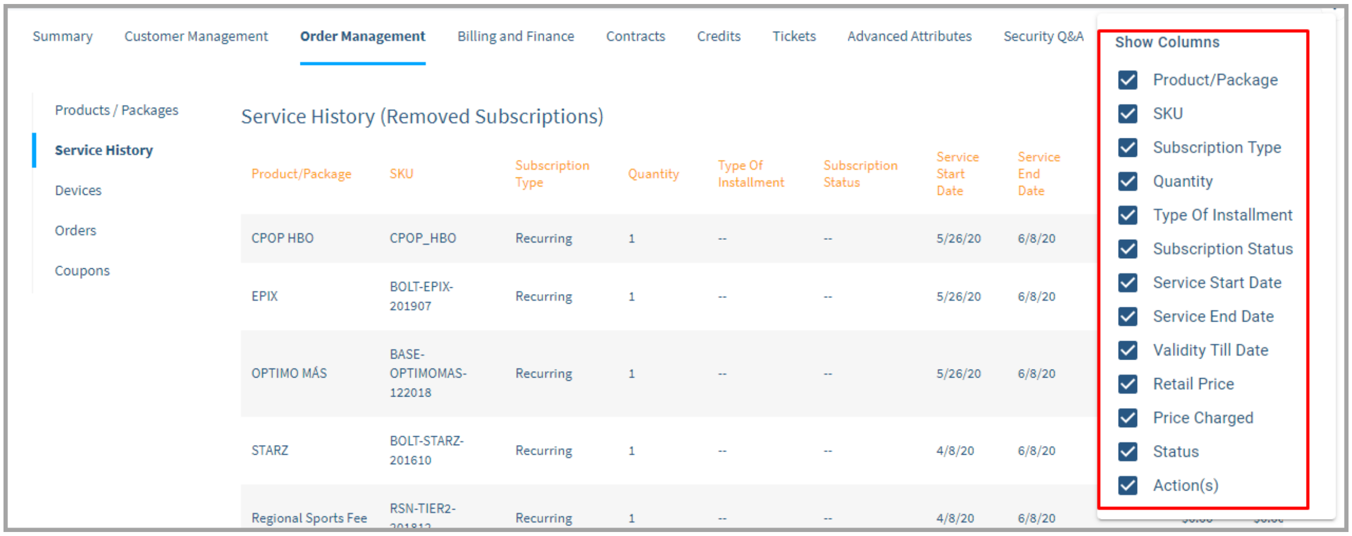
- Click the **Service History** hyperlink under the Order Management tab.
- Click the **Search** icon ( ).
- In the Search field, type the value that you want to search for the Service History.



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:

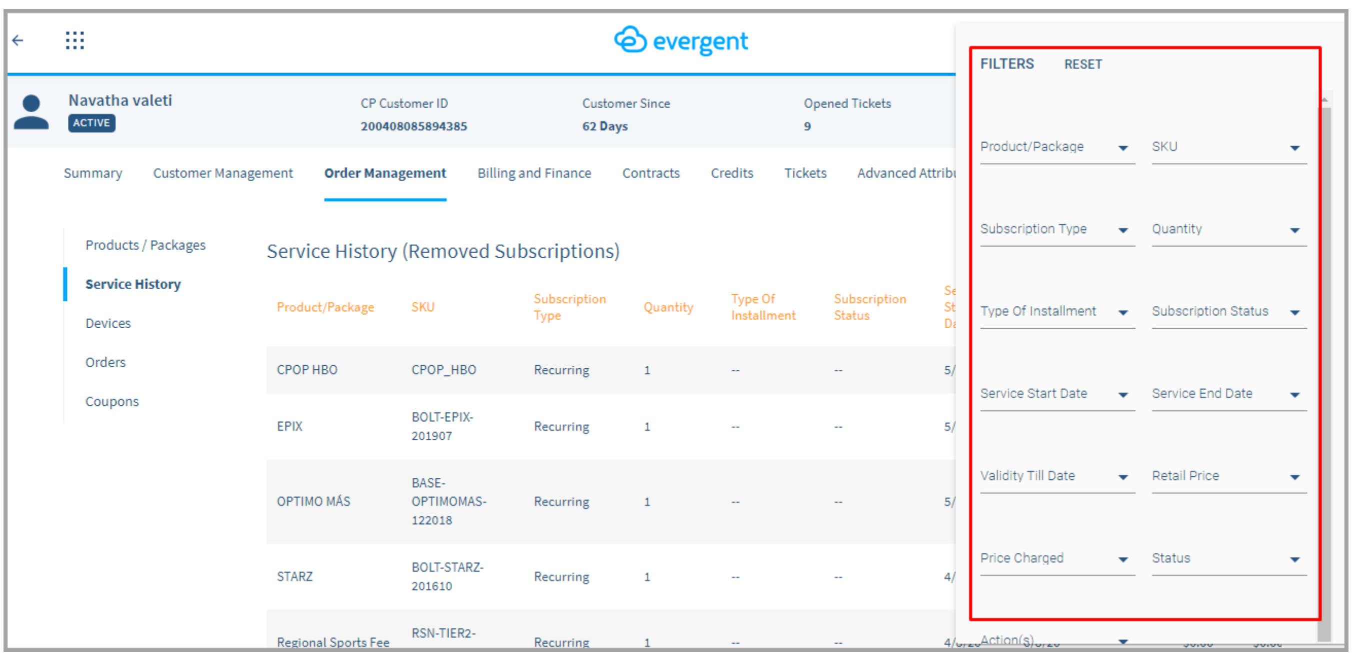
- Click the **Service History** hyperlink under the Order Management tab.
- Click the **View Columns** icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Service History Column Headings.



Filtering Service History

To filter the Service History, do the following:

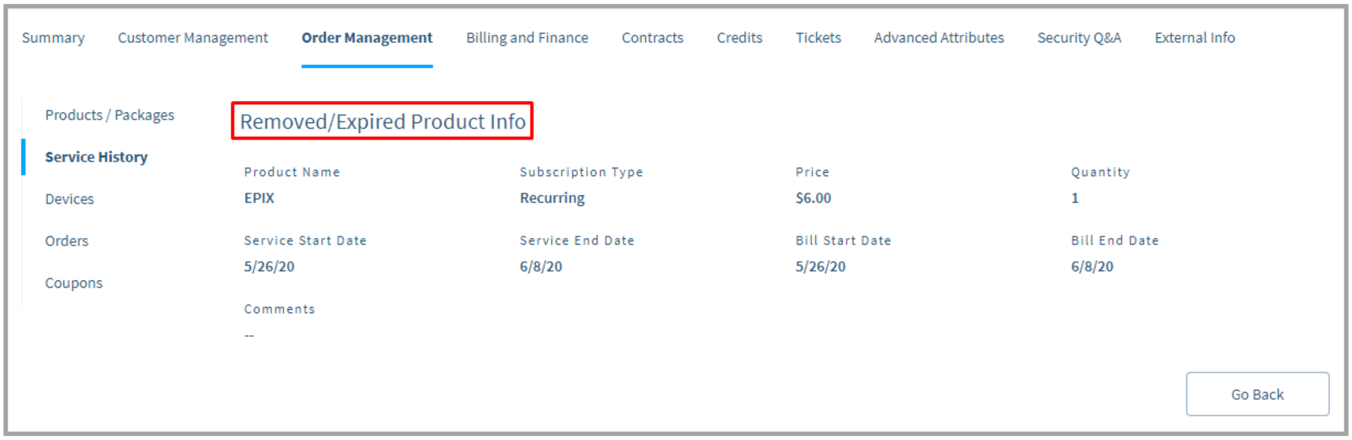
- Click the **Service History** hyperlink under the Order Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific Service History.
- To clear the filter table, click the **RESET** button.



Viewing a Product/Package in Service History

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

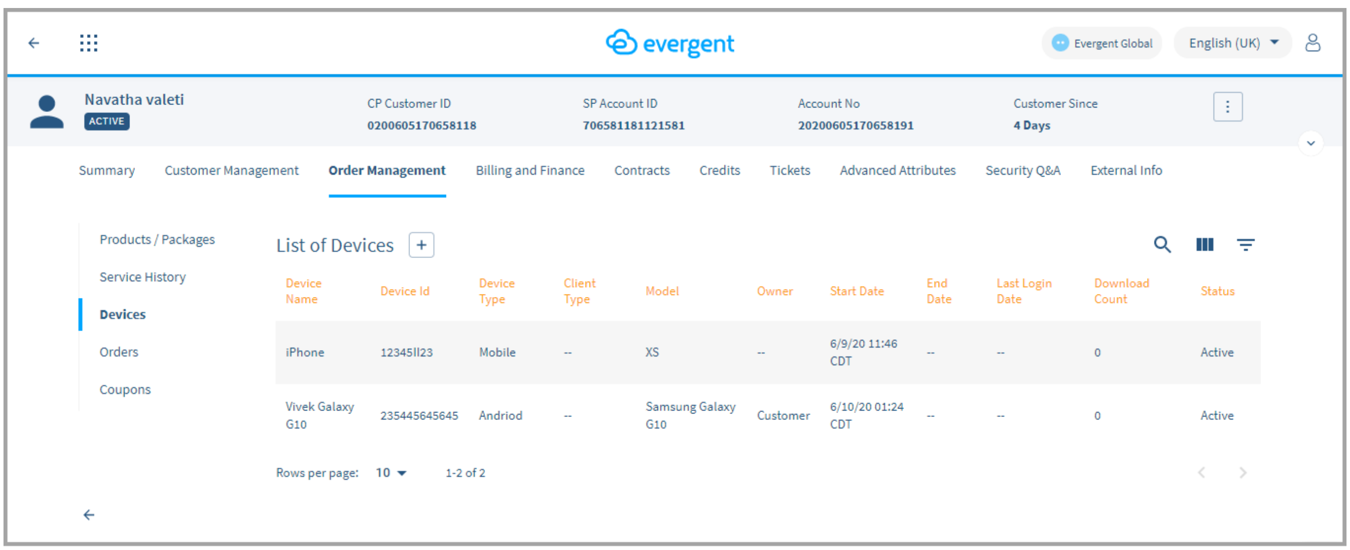
- Click the **Service History** hyperlink under the Order Management tab.
- Click the product/package which you want to view.
- The Removed/Expired Product Info screen is displayed as shown below.



- 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.

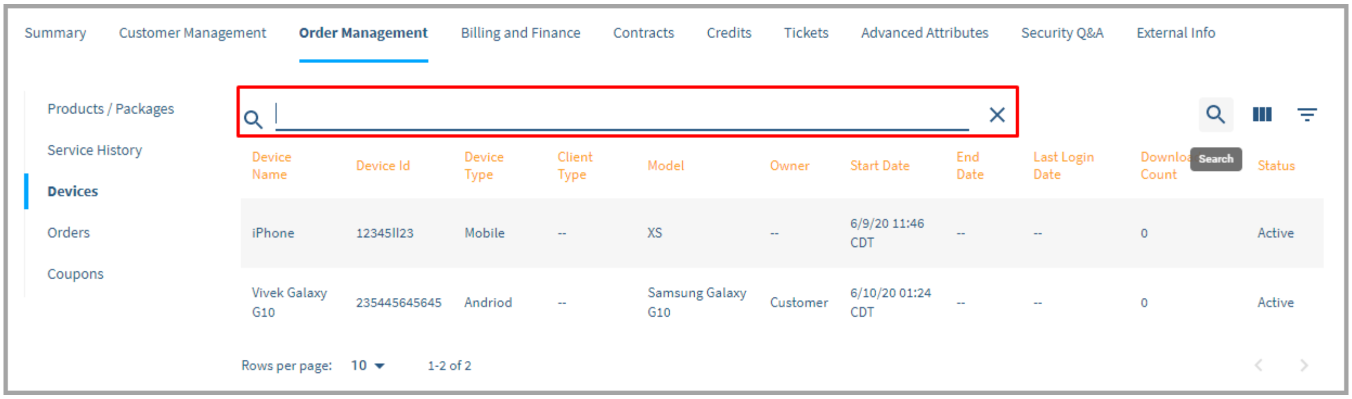


Searching a Device

To search a device, do the following:

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

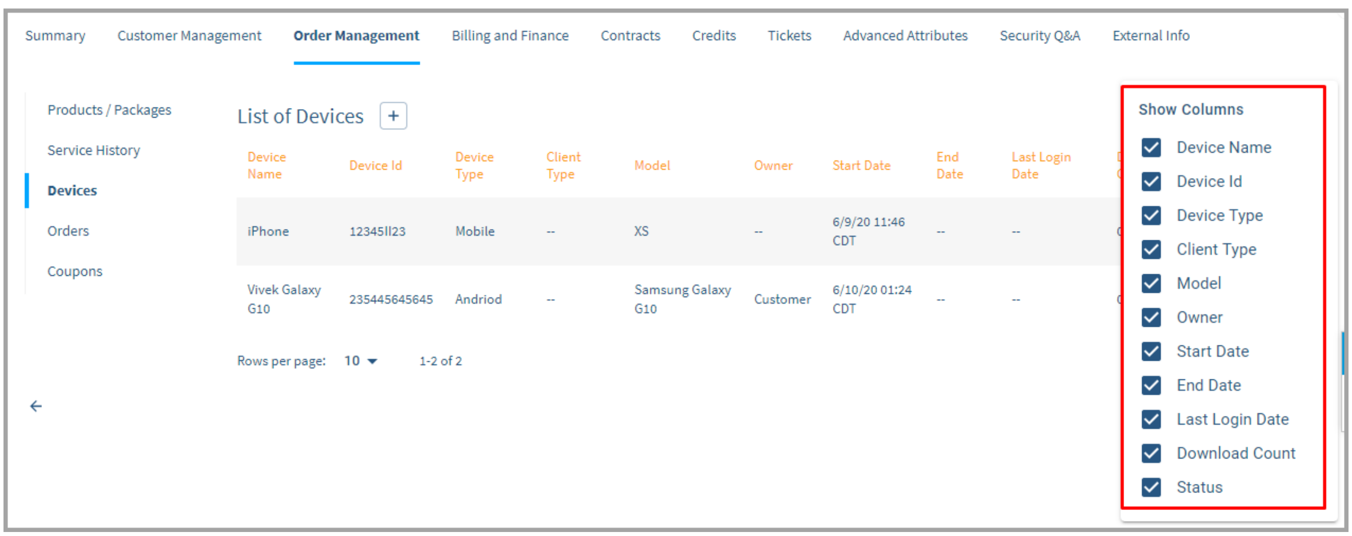
- In the Search field, type the value that you want to search for the device.



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 ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Devices Column Headings.

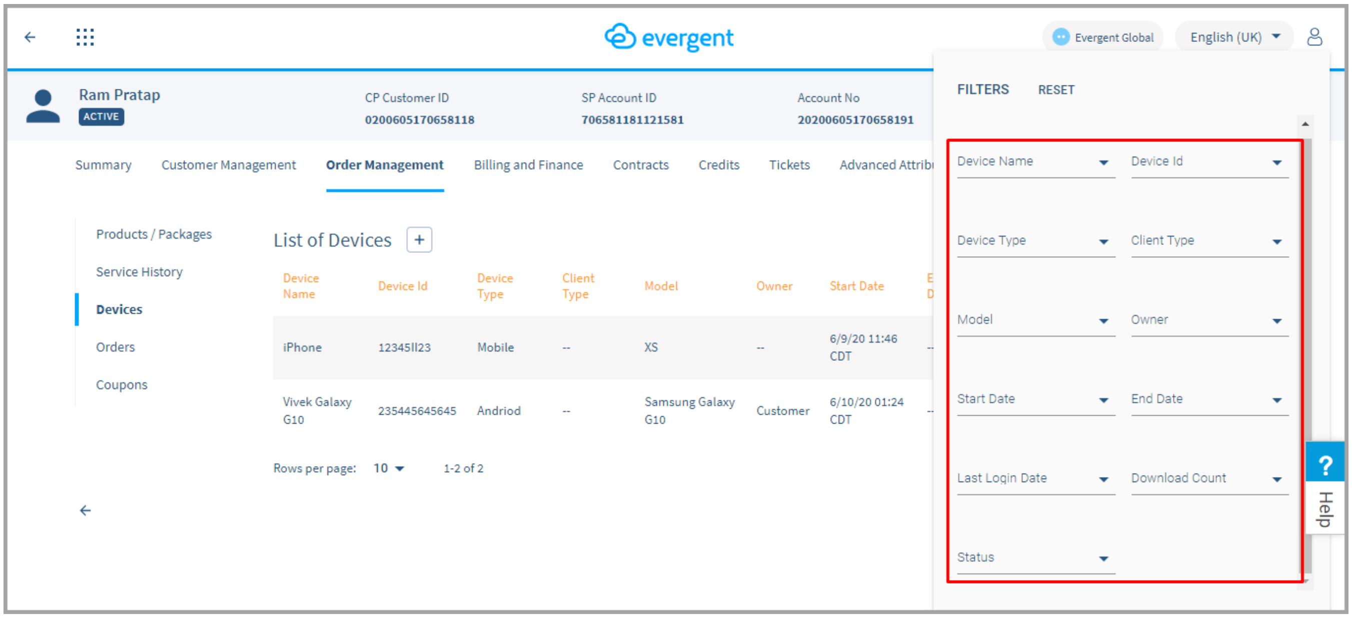


Filtering a Device

To filter the Device, do the following:

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

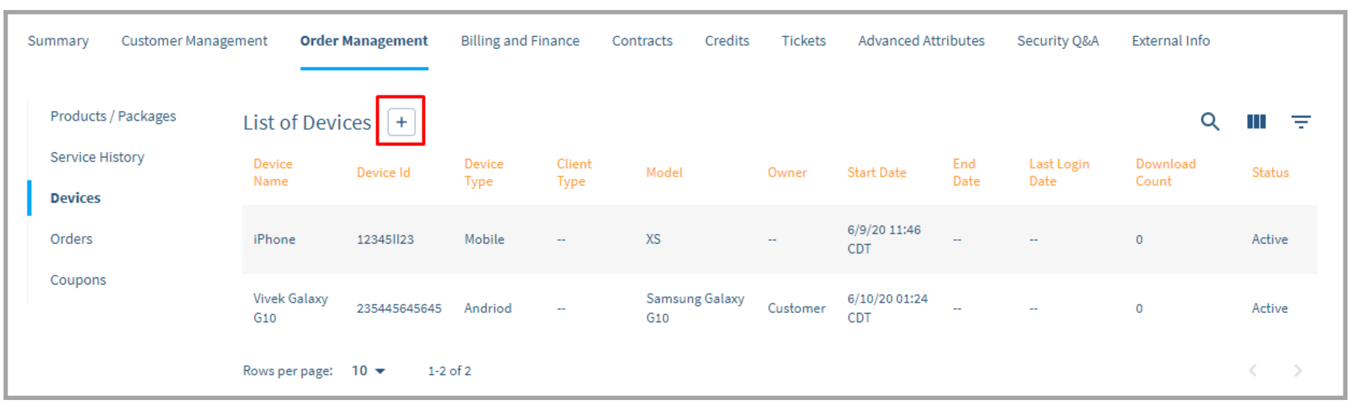
- To clear the Filters table, click the **RESET** button.



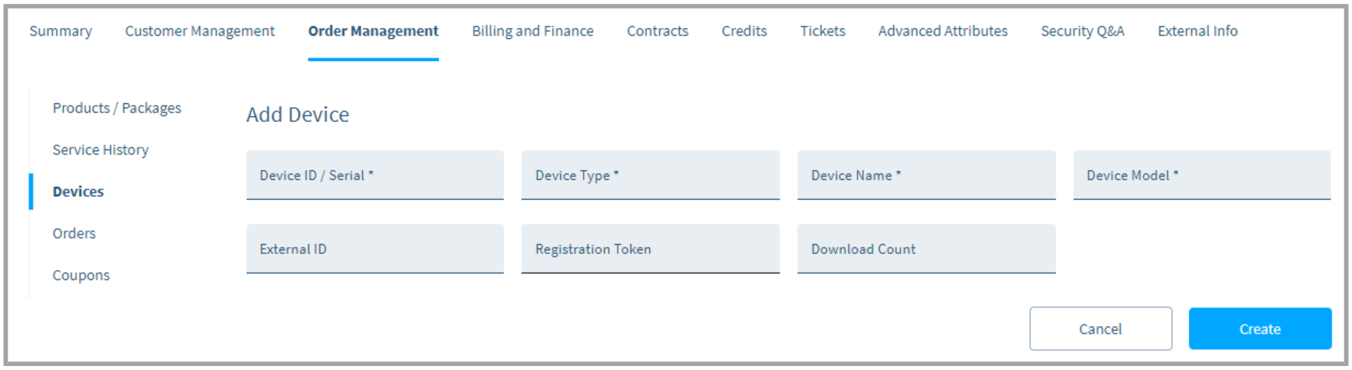
Adding a Device

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.



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

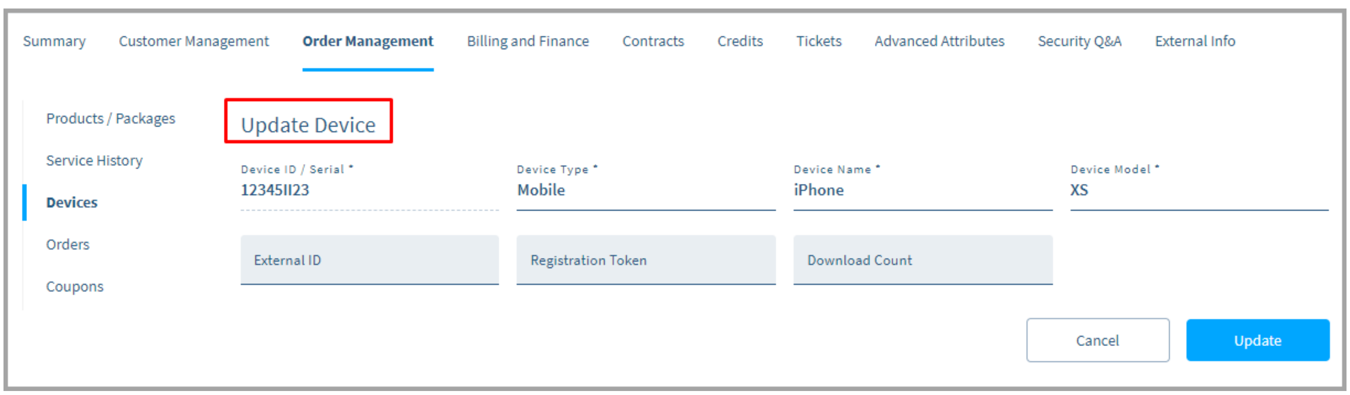


- Enter the details for Device ID / Serial number, Device Type, Device Name, Device Model, External ID, Registration Token, and Download Count.
- Click Create to add a device or click Cancel to cancel.

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.



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

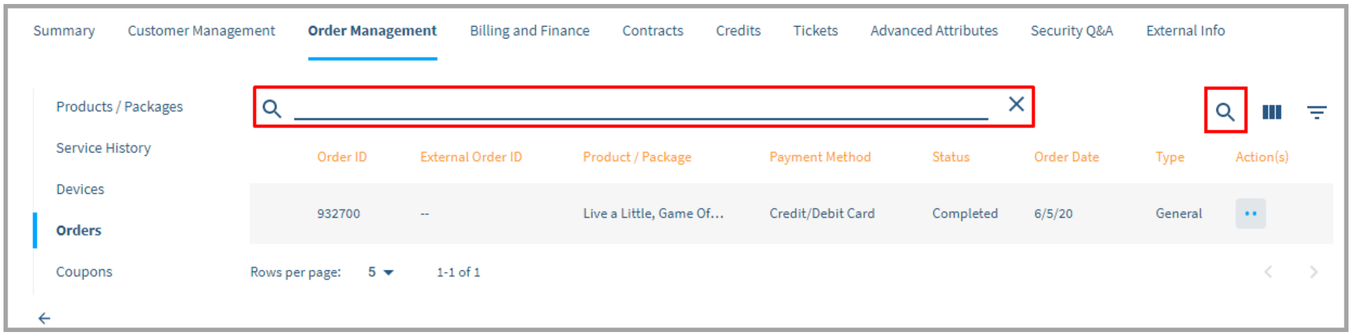
Orders

Searching an Order

To search for an order, do the following:

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

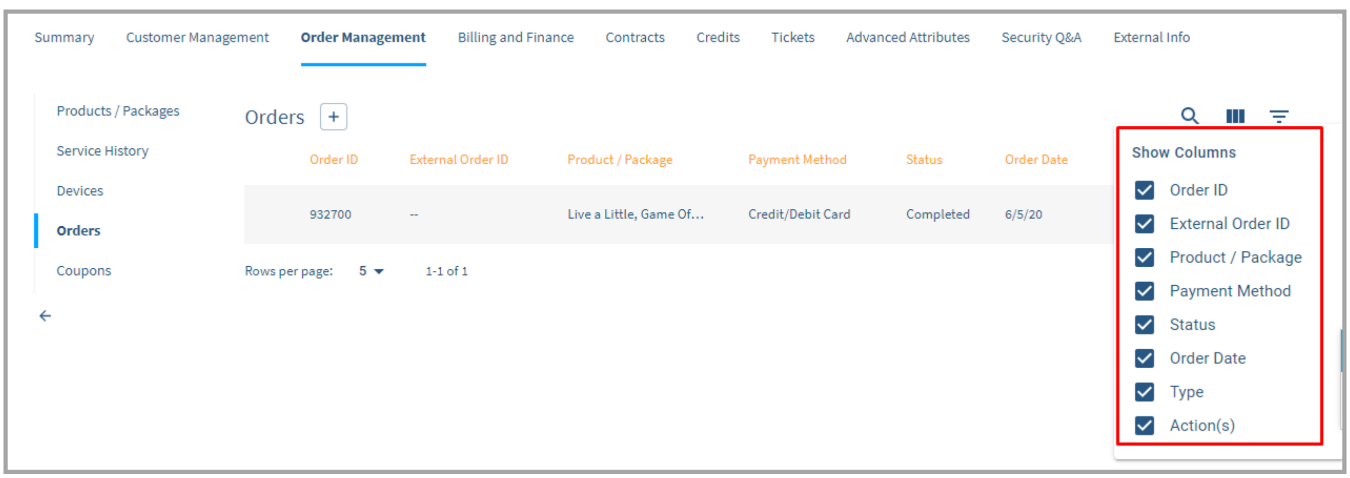
- Click the **Search** icon ( ).
- In the Search field, type the value that you want to search for the order.



Selection of Column Headings for an Order

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

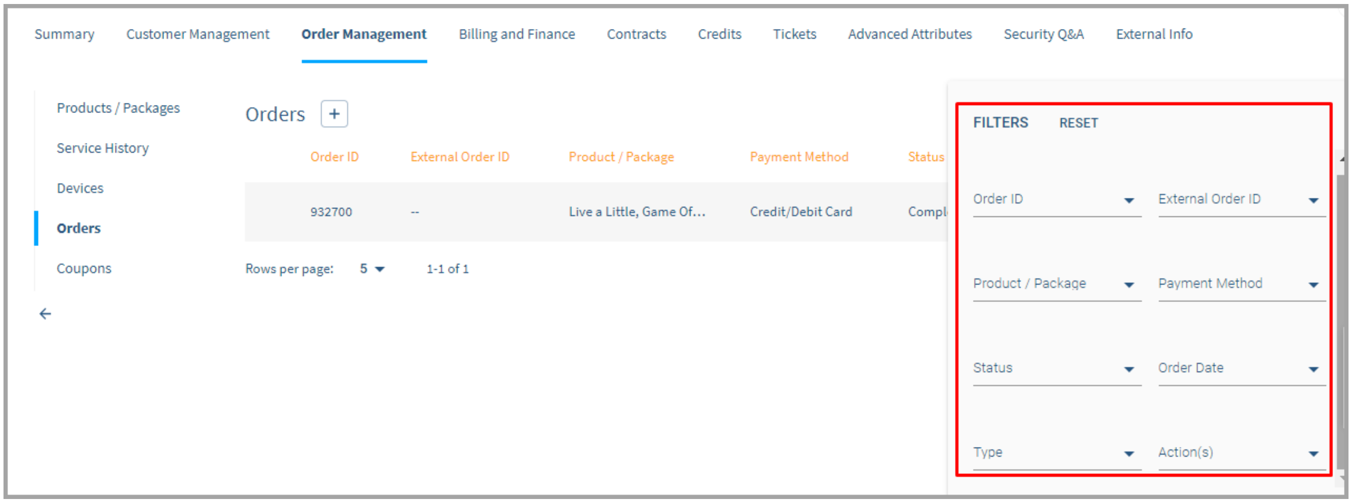
- Click the **Orders** hyperlink under the Order Management tab.
- Click the **View Columns** icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Orders Column Headings.



Filtering Orders

To filter the orders, do the following:

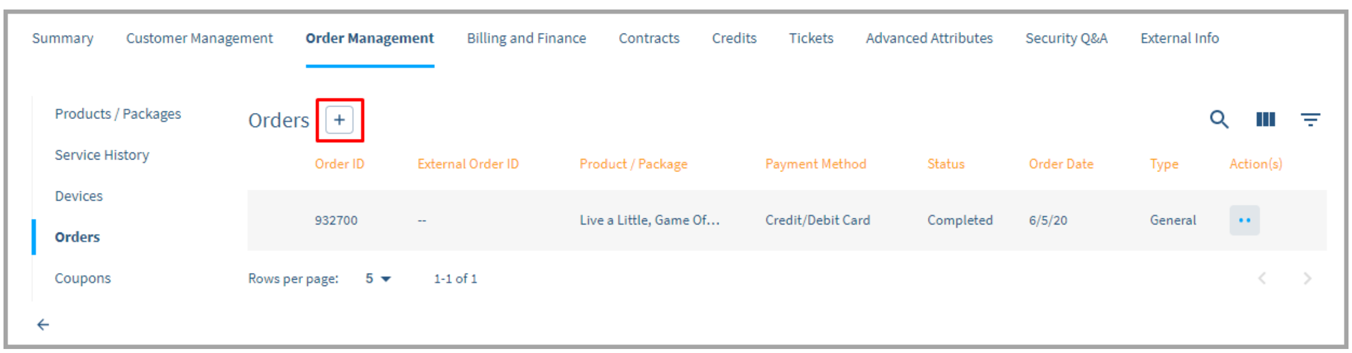
- Click the **Orders** hyperlink under the Order Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific order.
- To clear the Filter table, click the **RESET** button.



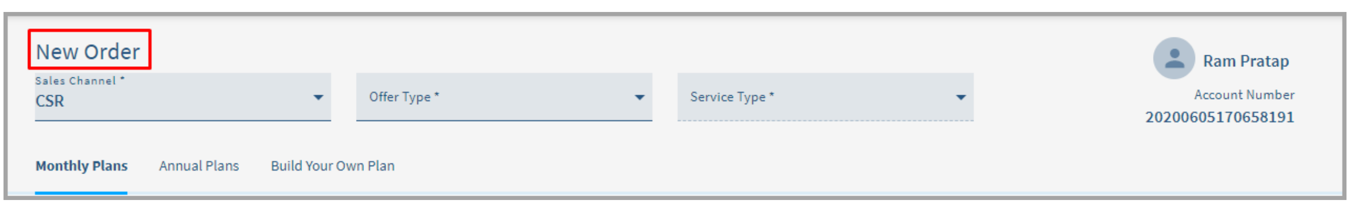
Placing an Order

To place an order, do the following:

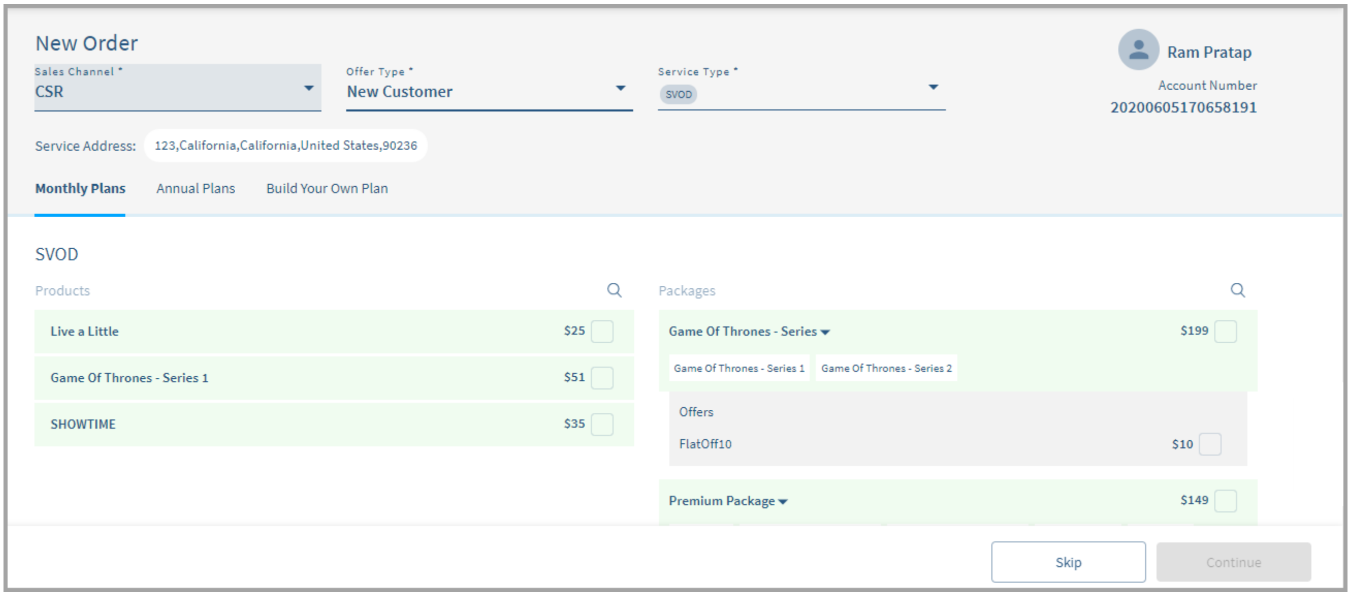
- Click the Orders hyperlink under the Order Management tab.
- Click the Add (+) icon to add a new order.



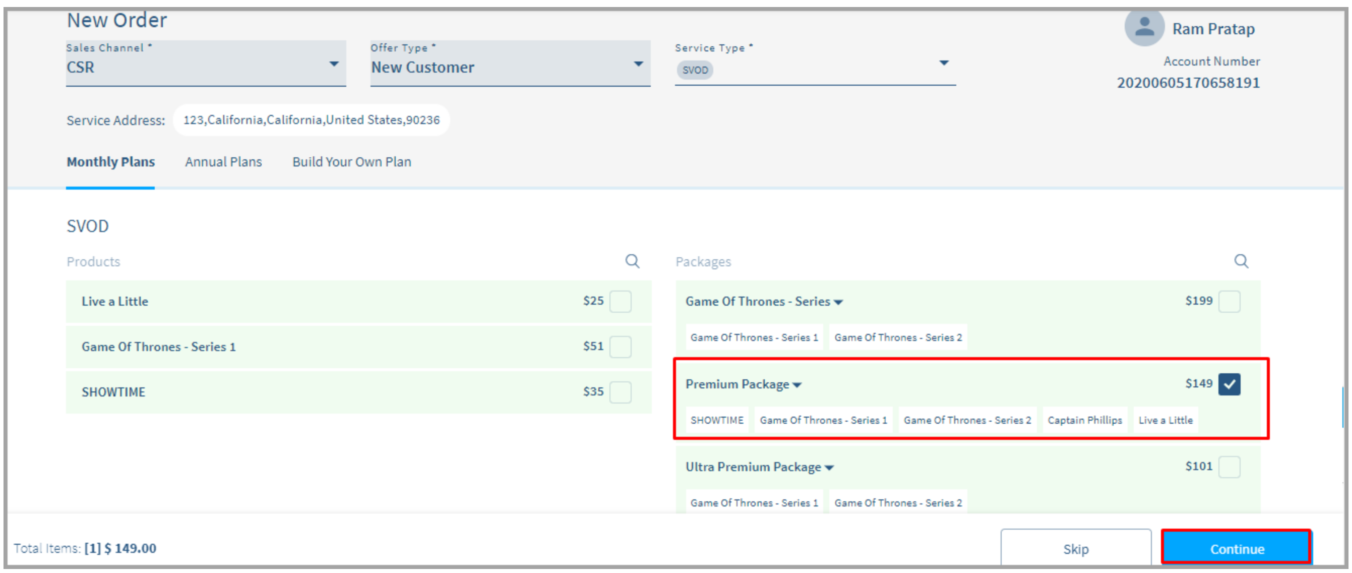
- The New Order screen is displayed as shown below.



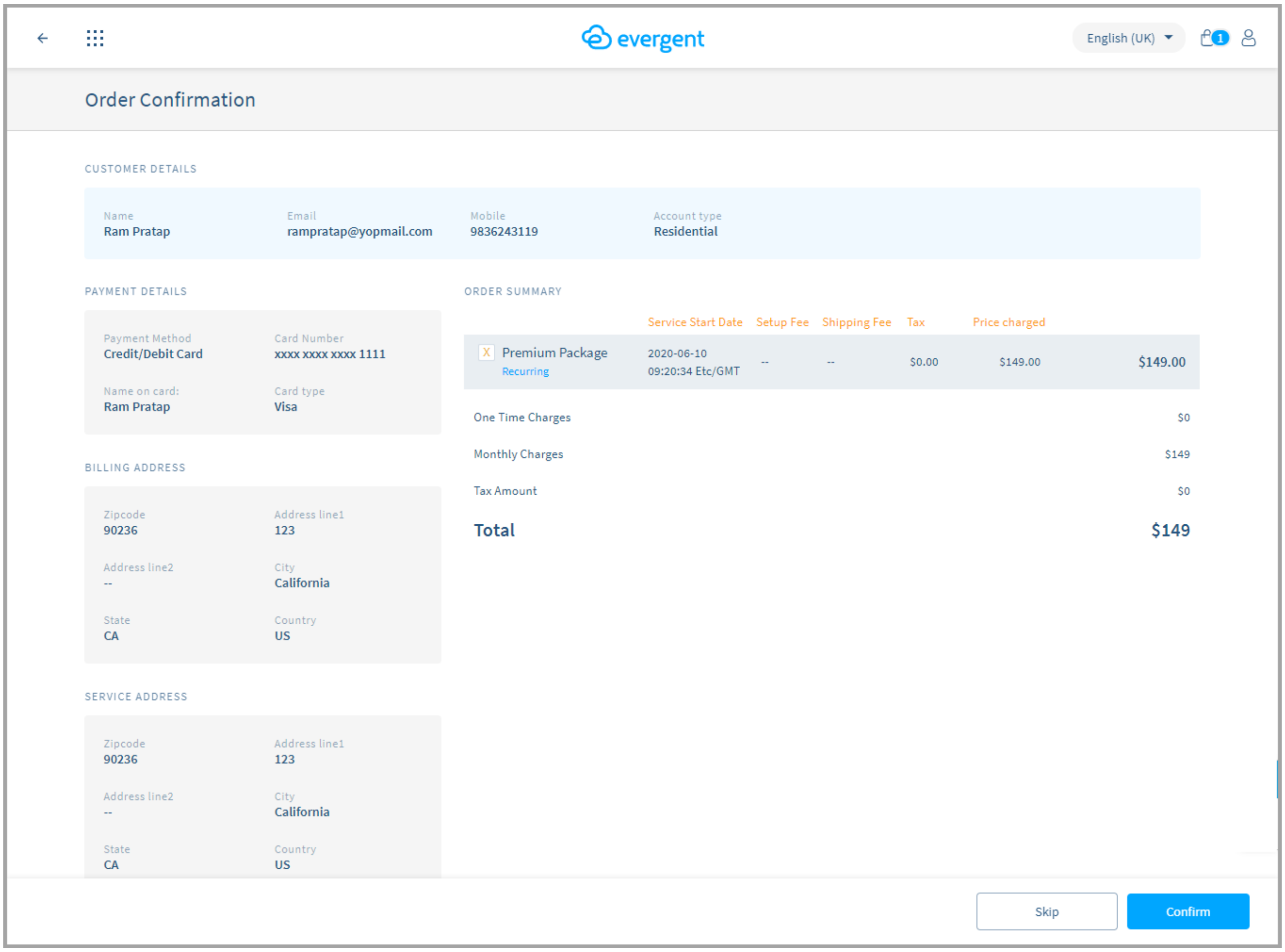
- Select the Sales Channel and Offer Type from the available drop-down list.
- The Service Type is displayed based on the Sales Channel and Offer Type selection.
- The available product and packages are displayed as shown below.



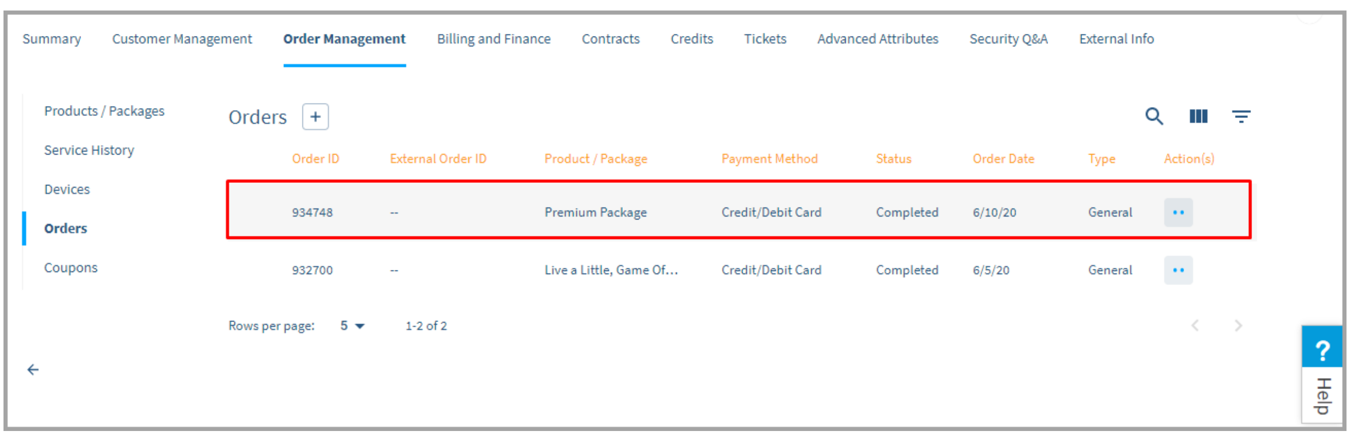
- Select the desired product/package from the list and click **Continue**.



- 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.



- 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.

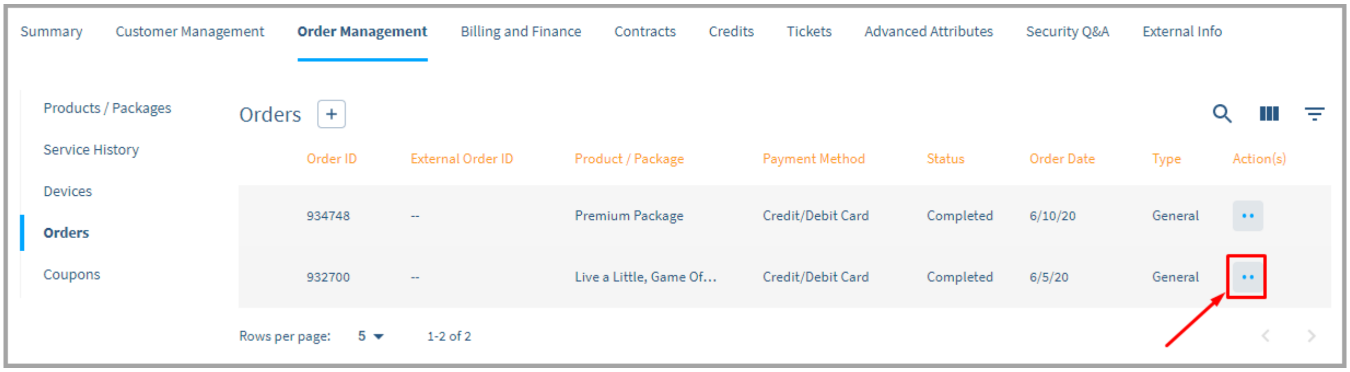


Viewing the Order Details

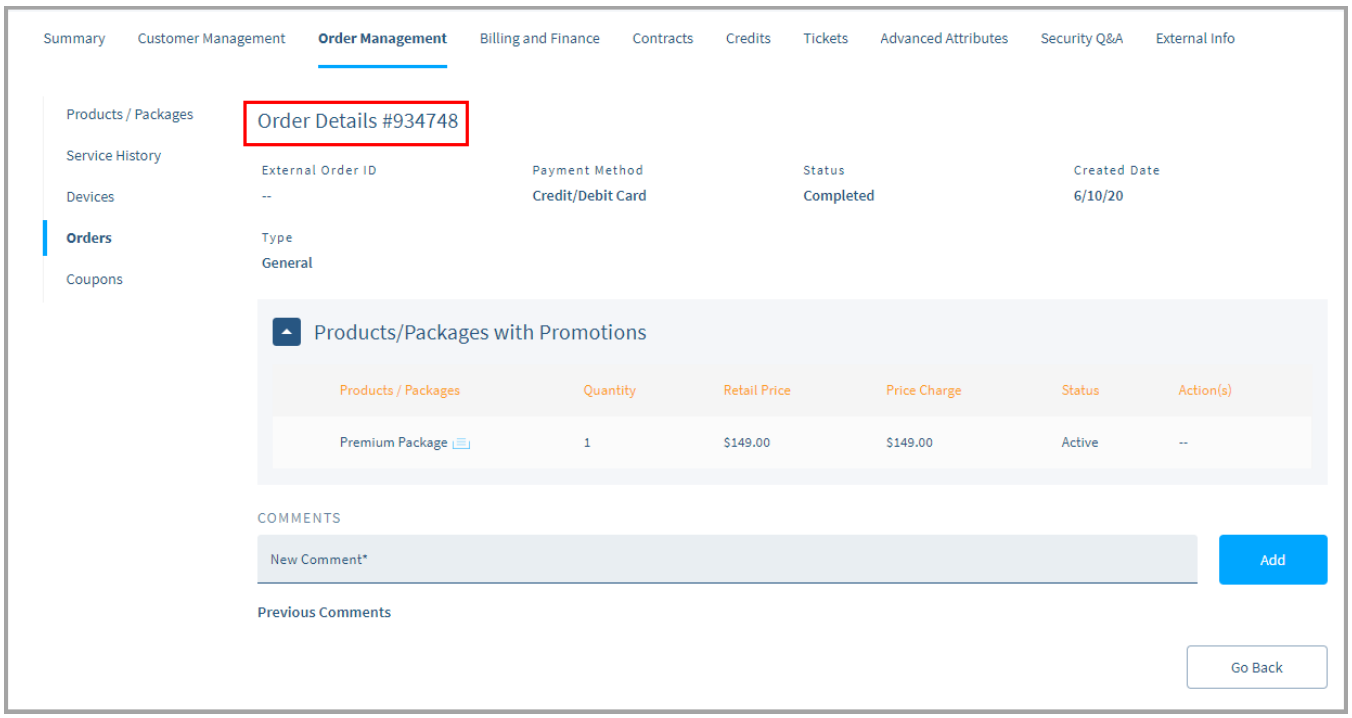
To view the order details, do the following:

- 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 Order Details screen is displayed as shown below.

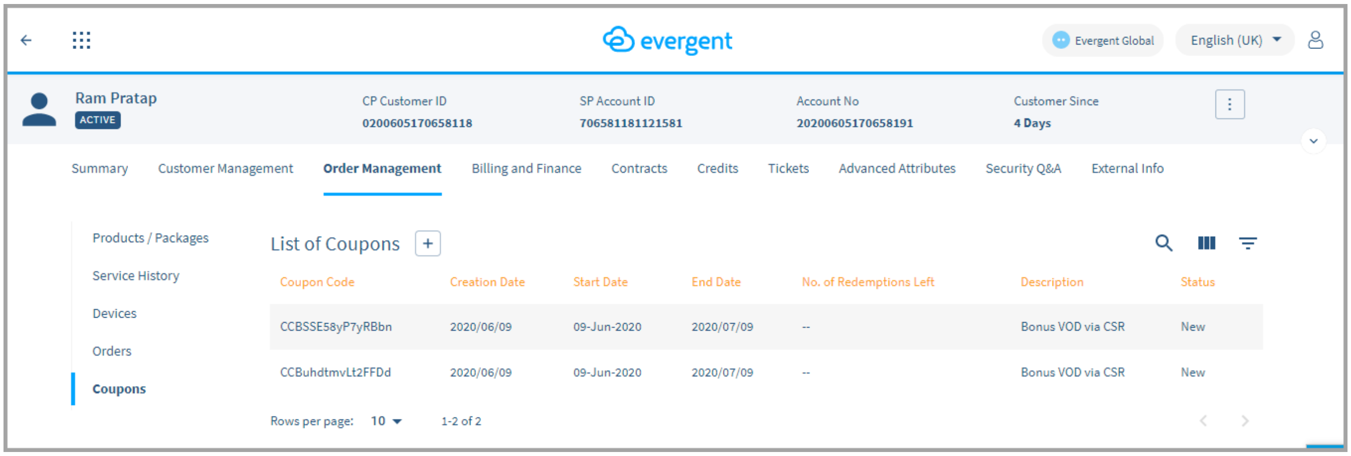


- Enter comments in the Comments text area and click the Add button to save the comments into comments history.
- To go to the previous Orders screen, click Go Back.

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.

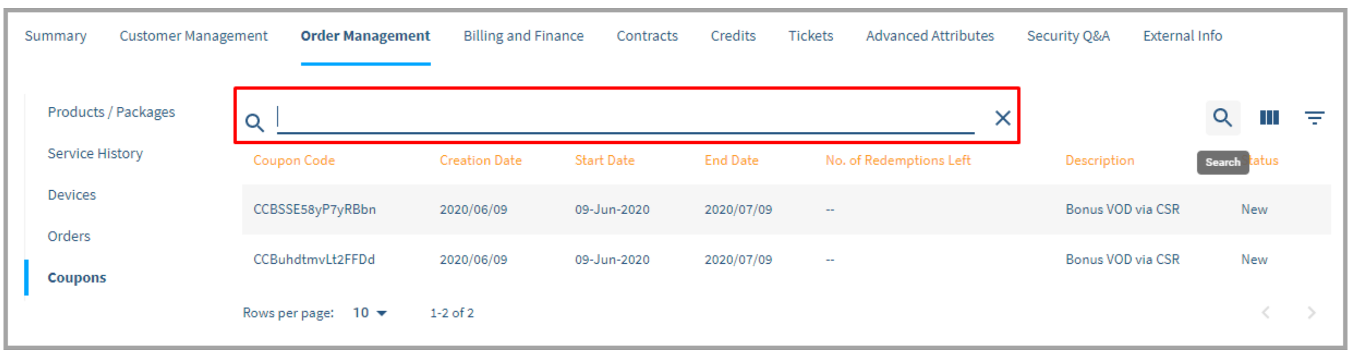
A CSR can generate a coupon, view the redeemed coupons, and expired coupons linked to an account by accessing the coupons tab from the Account Management module.



Searching for a Coupon

To search for a coupon, do the following:

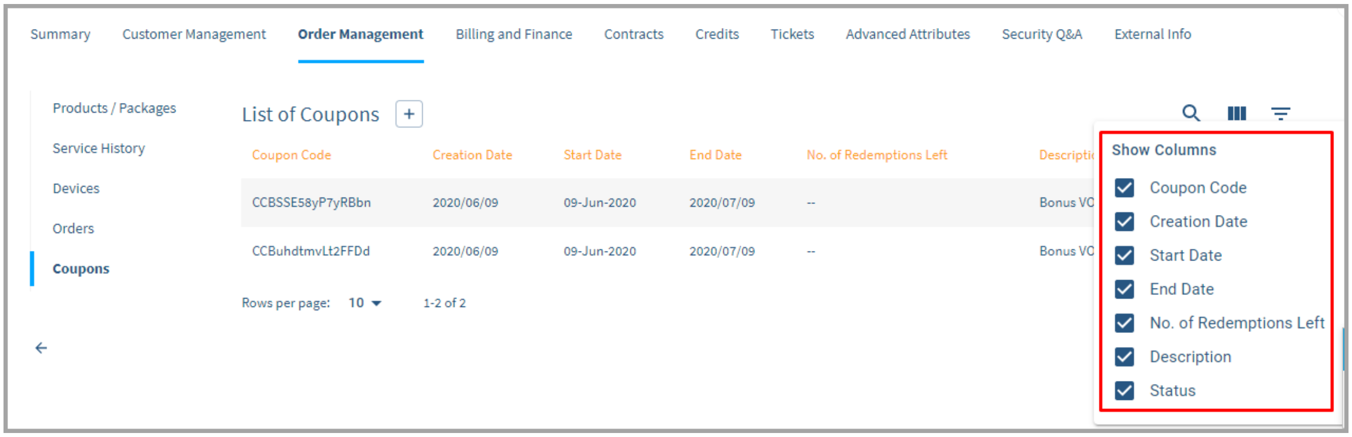
- Click the Coupons hyperlink under the Order Management tab.
- Click the Search icon ( ).
- In the Search field, type the value that you want to search for a coupon.



Selection of Column Headings for a Coupon

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

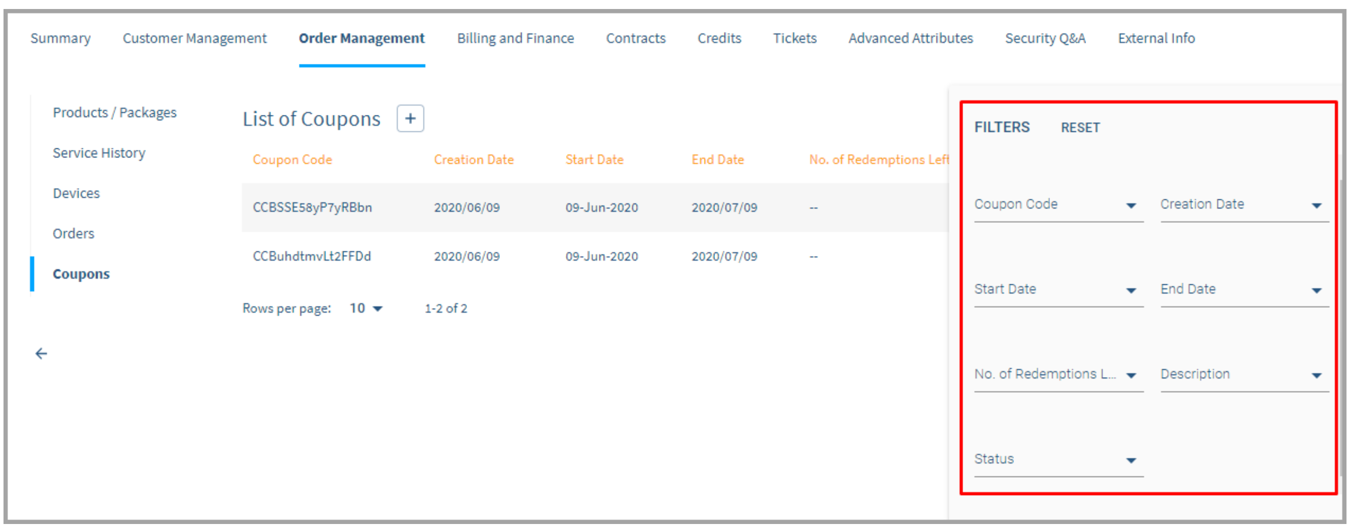
- Click the Coupons hyperlink under the Order Management tab.
- Click the **View Columns** icon ( ).
- In the **Show Columns** list, select the checkboxes that you want to view the Coupons Column Headings.



Filtering Coupons

To filter the coupons, do the following:

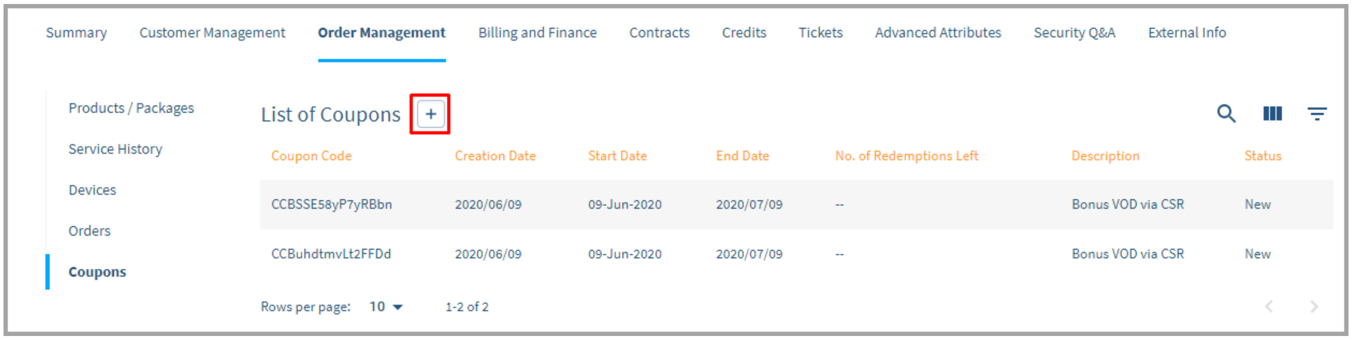
- Click the Coupons hyperlink under the Order Management tab.
- Click the **Filter Table** icon ( ).
- Select the criteria that you want to filter and view the specific coupon.
- To clear the filter table, click the **RESET** button.



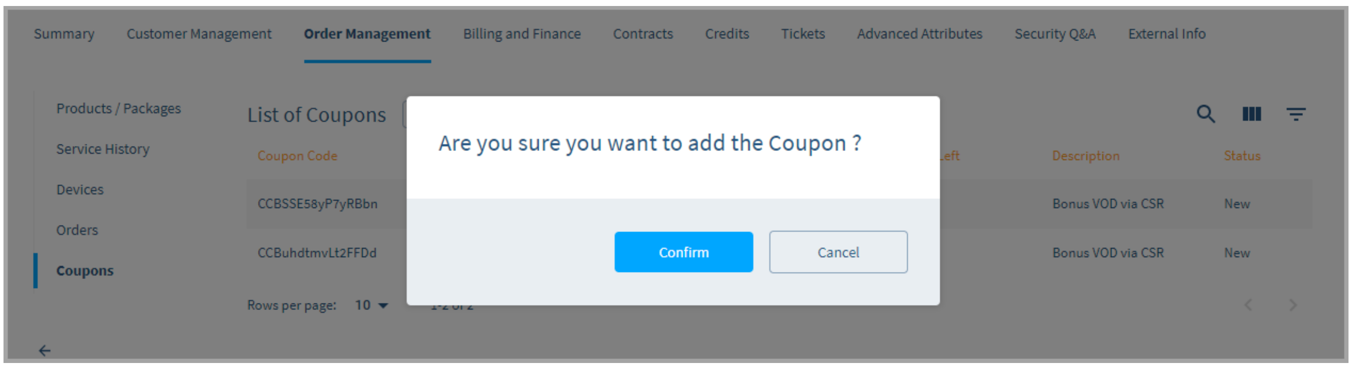
Adding a Coupon

To add a coupon, do the following:

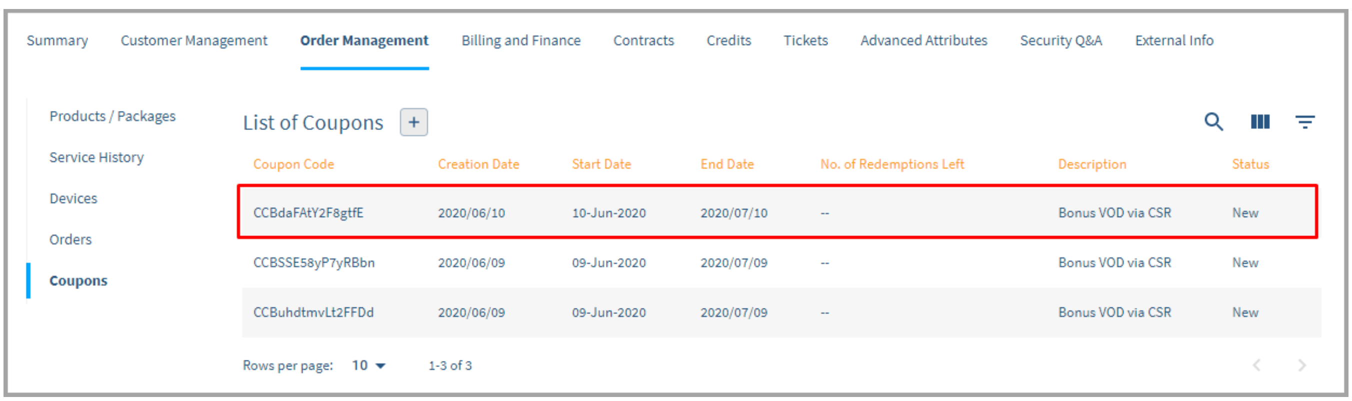
- Click the Coupons hyperlink on the left dashboard of the Order Management.
- Click the Add ( ) icon to add a coupon.



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



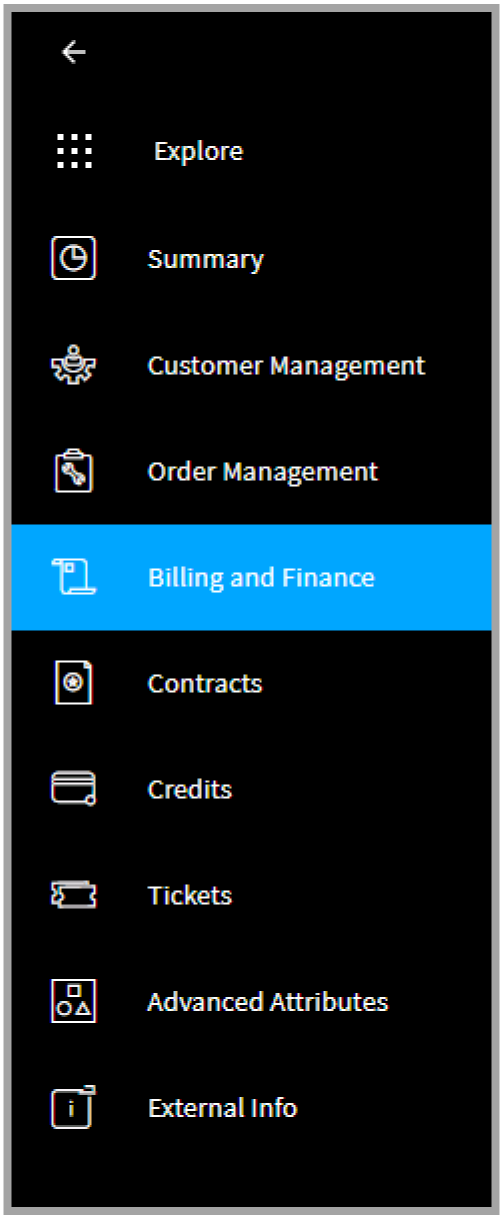
- Click Confirm to add the coupons, or else click Cancel.
- The added coupon is displayed in the Coupons section, as shown below.



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.

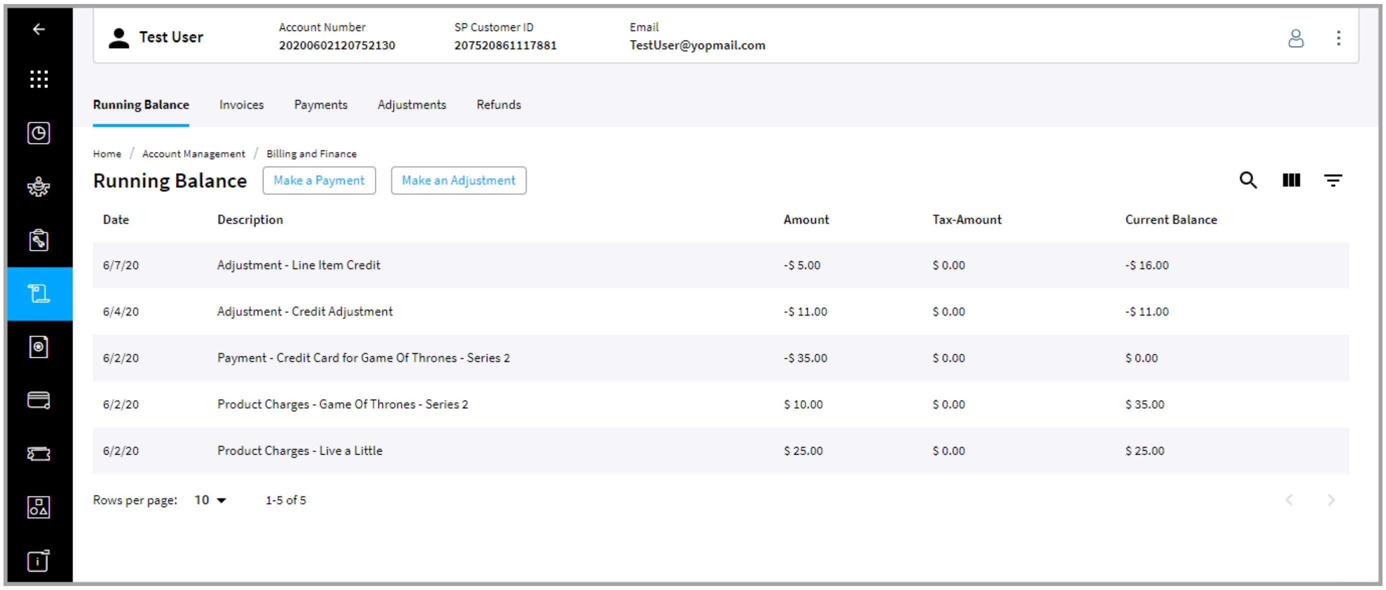


The following are the functionalities that can be provisioned by the user in the Billing and Finance tab:

- 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.

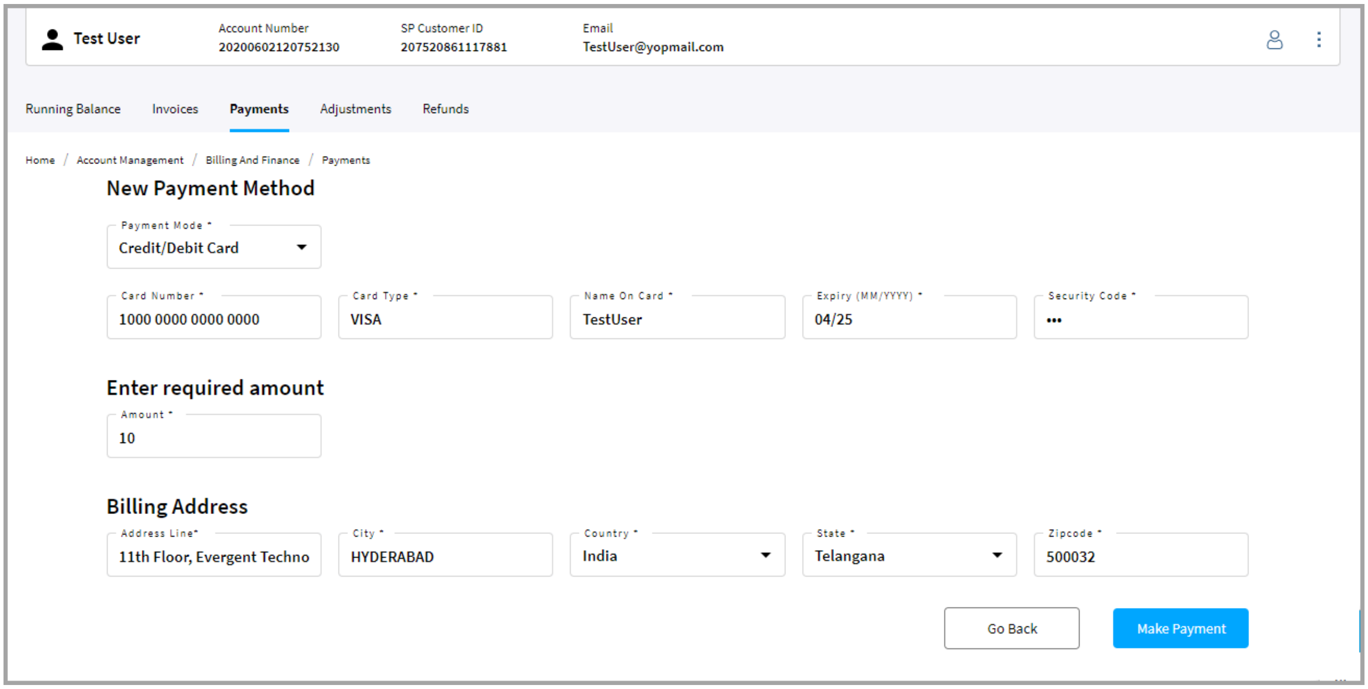


Make a Payment

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.

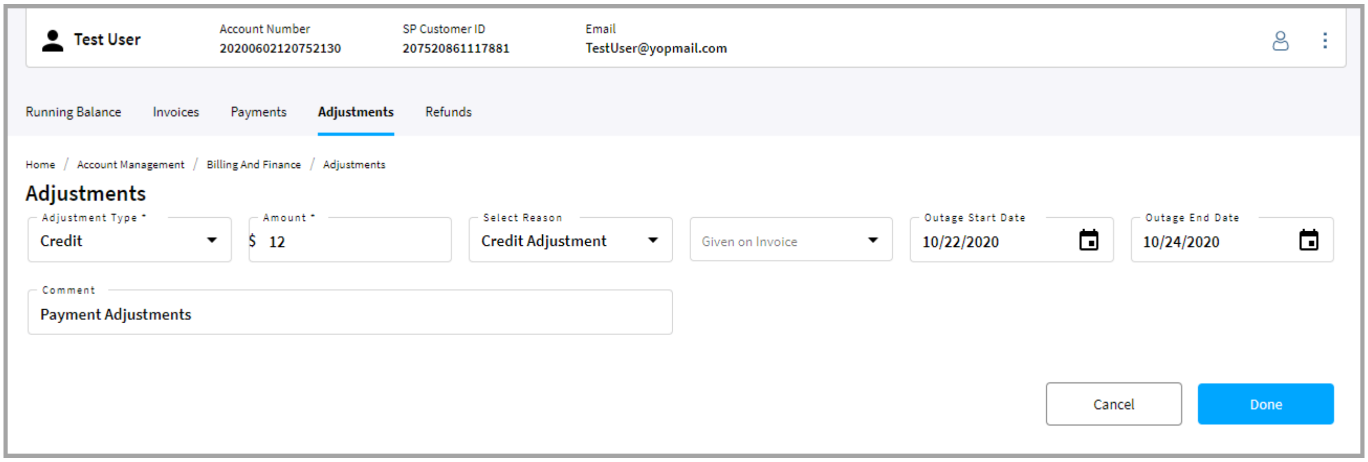


Adjustments

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.

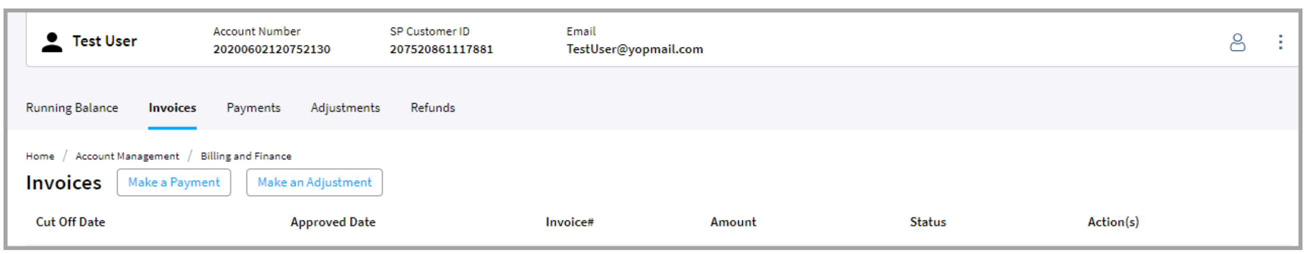


Write-off

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

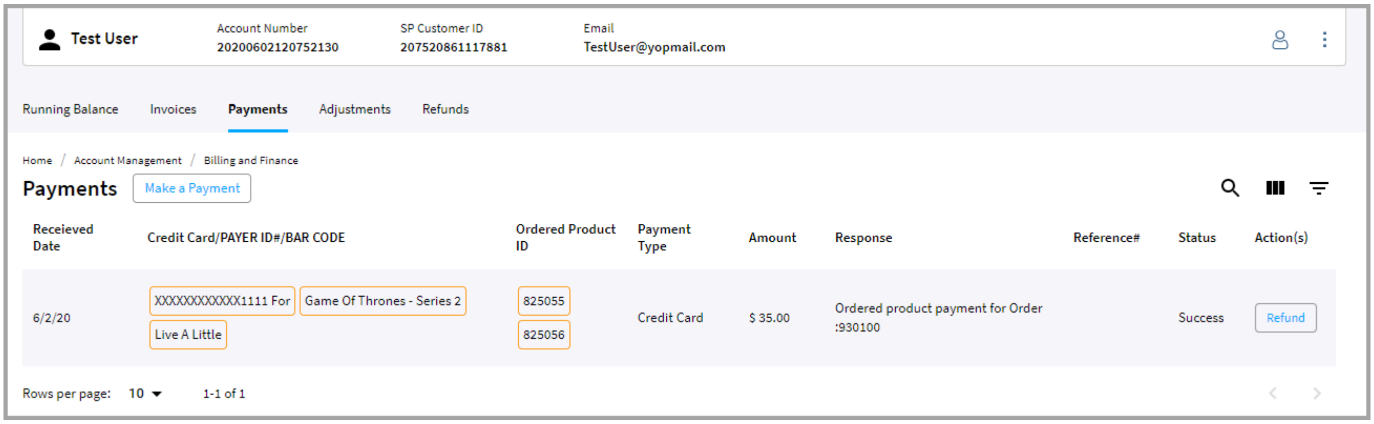
The invoices section shows all the general invoices created for an account. It shows in detail for each invoice.



- The 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

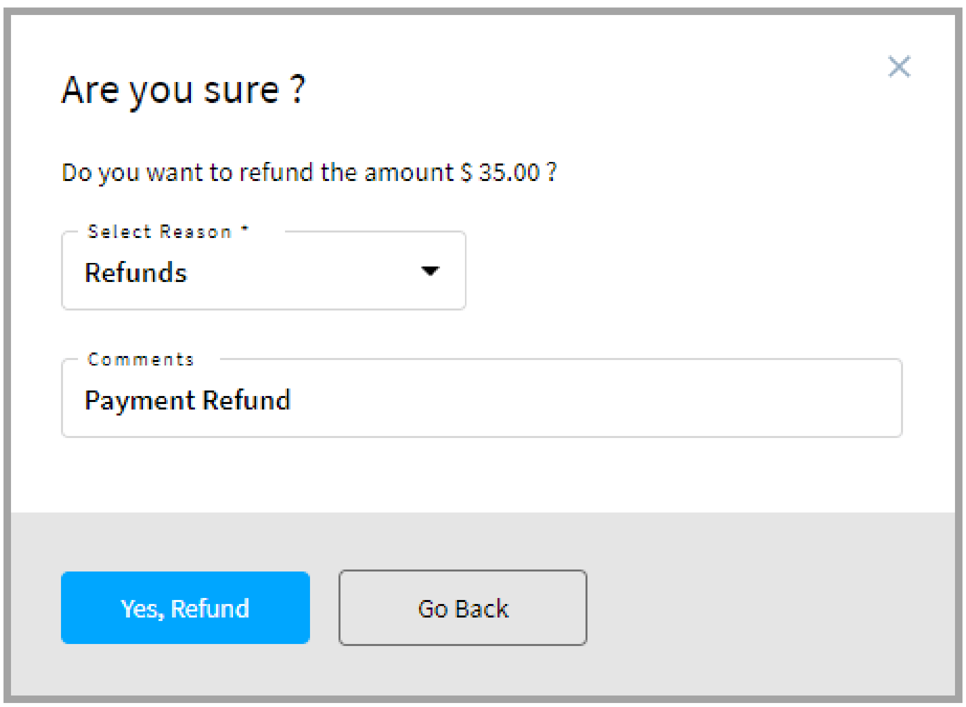
A user can create a new payment and view the existing customer payment history, which provides a record of credit card details, ordered product Id, the payment received date, amount, status, along with the option to refund the payment to the customer.



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.

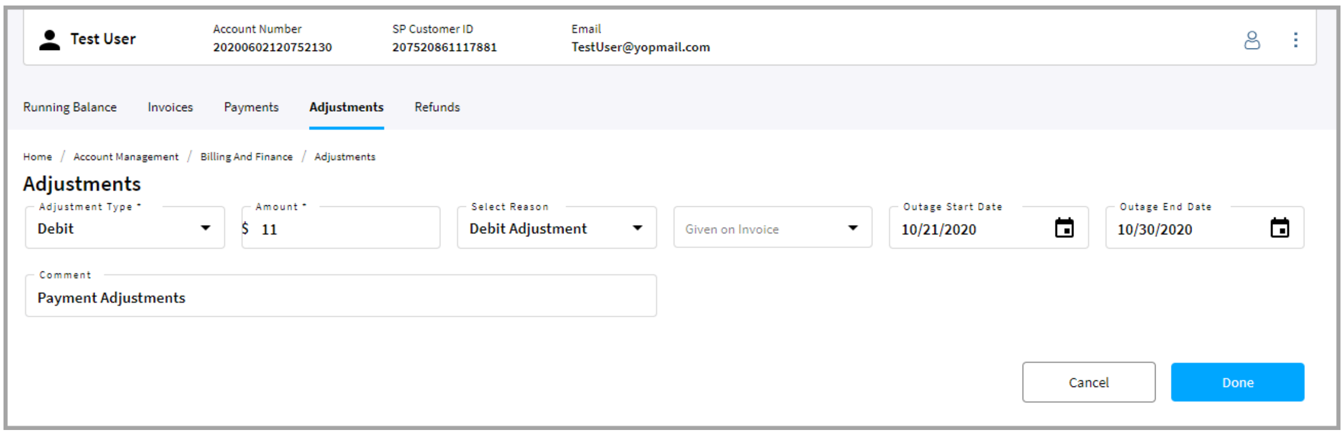
Adjustments

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.



- 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

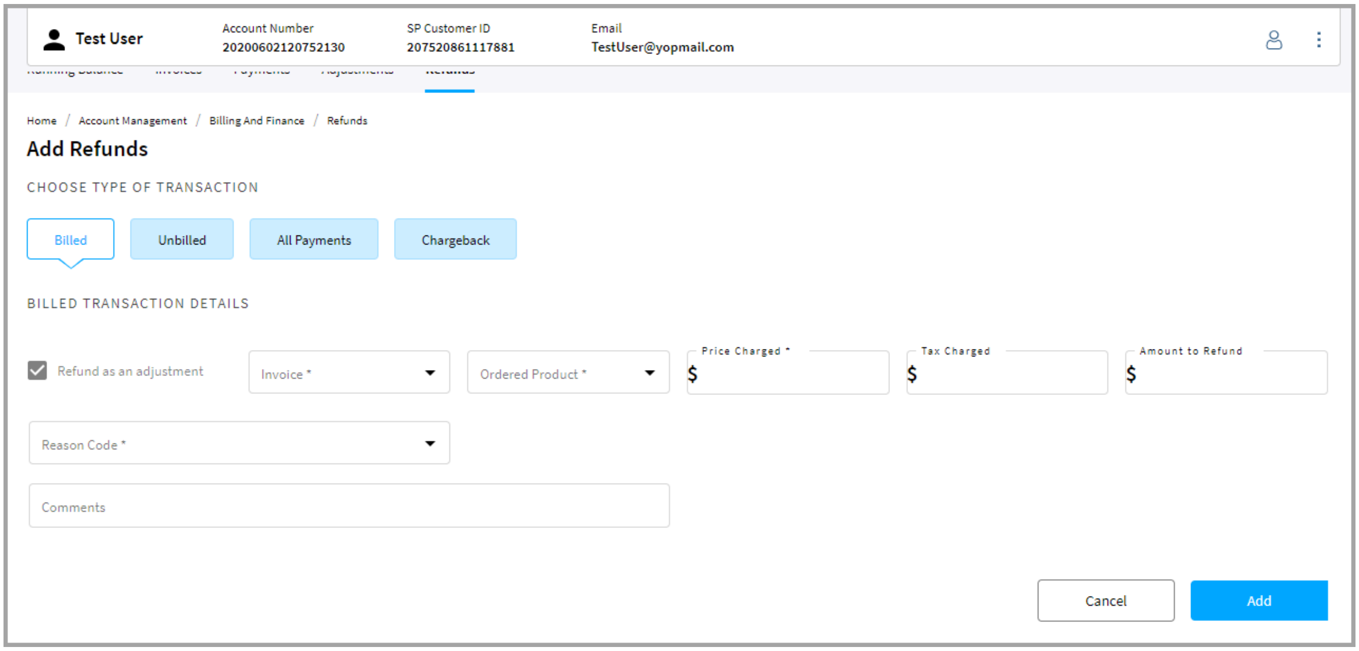
Refunds are calculated, whenever a service is removed or disconnected. From the disconnected/removed date, it will refund the amount for whatever duration it is billed.

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



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

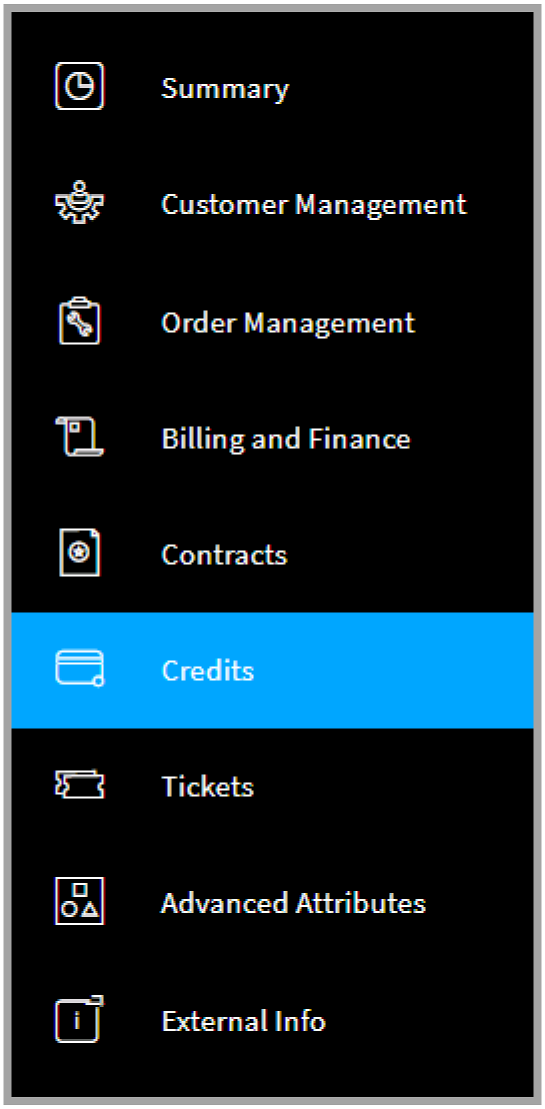
- On selecting the All-Payments transaction type from the **Type of Transaction** drop-down list.
- Select the payment from the list of available payments in the **Select Payment** drop-down list.
- Enter the tax amount in the **Tax Charged** field.
- Enter the refund amount in the **Amount to Refund** 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

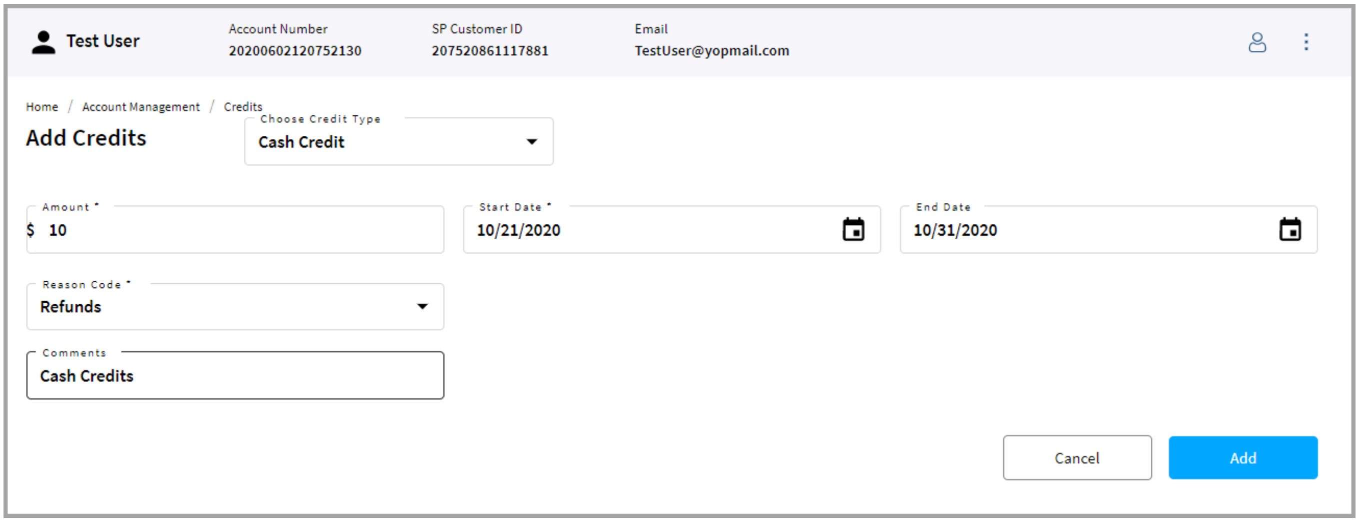
Credit is what businesses typically provided to a customer when the amount on an invoice or purchase is disputed or incorrect. This might be due to an admin error, or because the customer requires a full or partial refund.



Adding Cash Credits

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

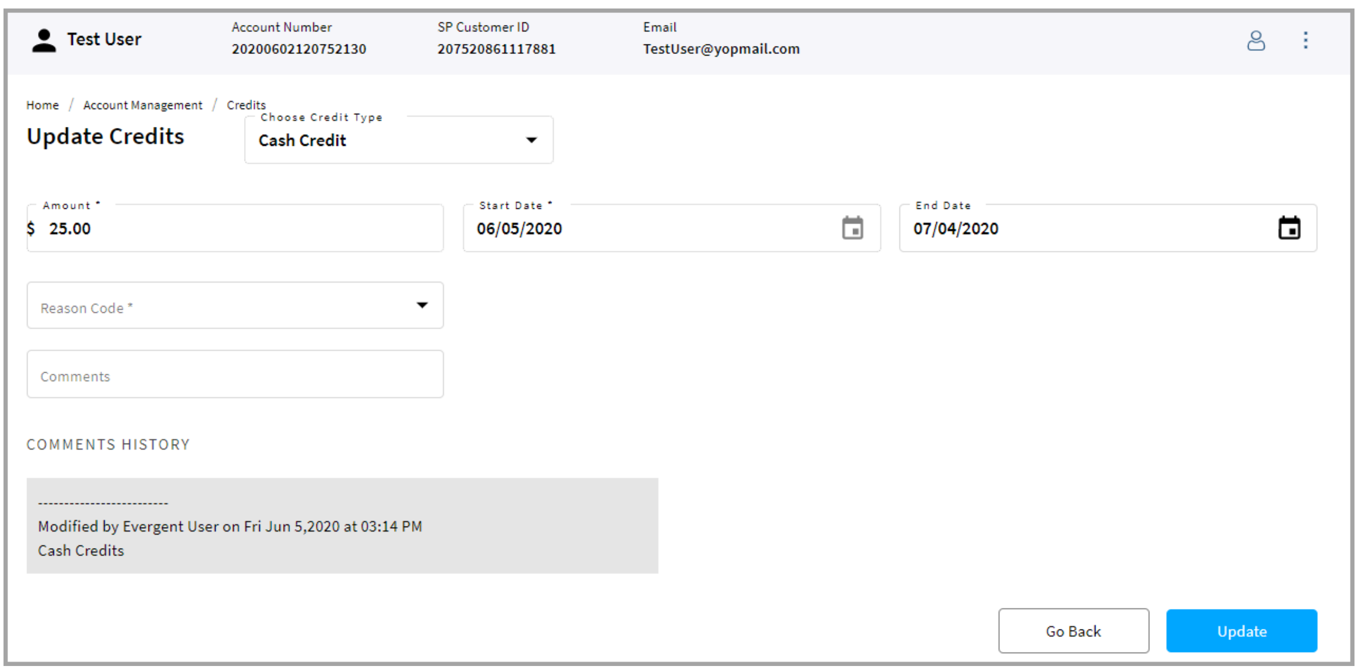
- On the **Credits** screen, click the Add (+) icon to add a new credit.
- The **Add Credits** screen appears.
- Click the **Choose Credit Type** drop-down list and select **Cash Credit**.
- Enter the credit amount in the **Amount** field.
- Select the start date and end date in the **Start Date** and **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.



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.

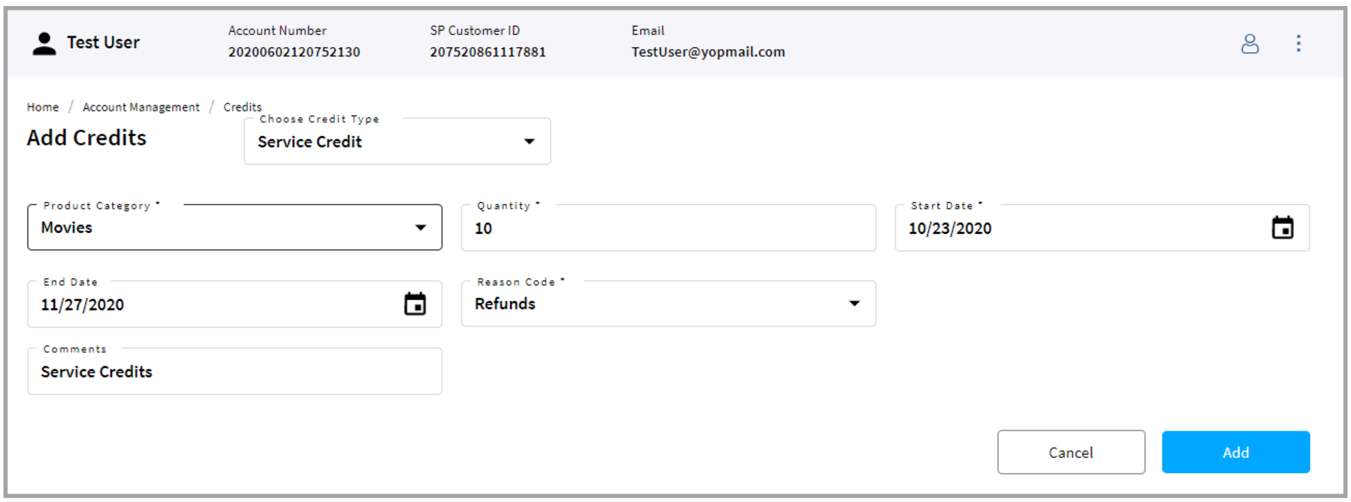


- Make the necessary changes to the required fields, and click the **Update** button to save the changes, else click the **Go Back** button to cancel.

Adding Service Credit

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

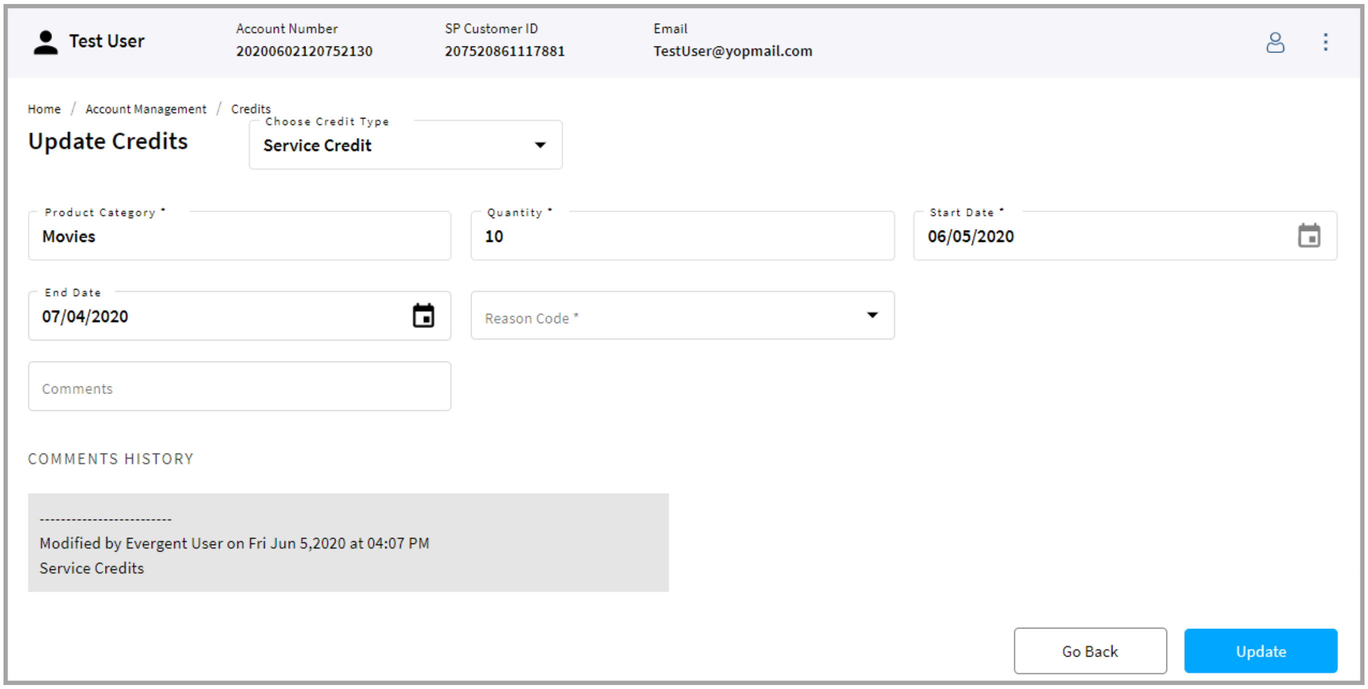
- On the **Credits** screen, click the Add ( ) icon to add a new service credit.
- The **Add Credits** screen appears.
- Click the **Choose Credit Type** drop-down list and select **Service Credit**.
- Select a product category from the **Product Category** drop-down list.
- Enter the quantity in the **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.



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.



- 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:

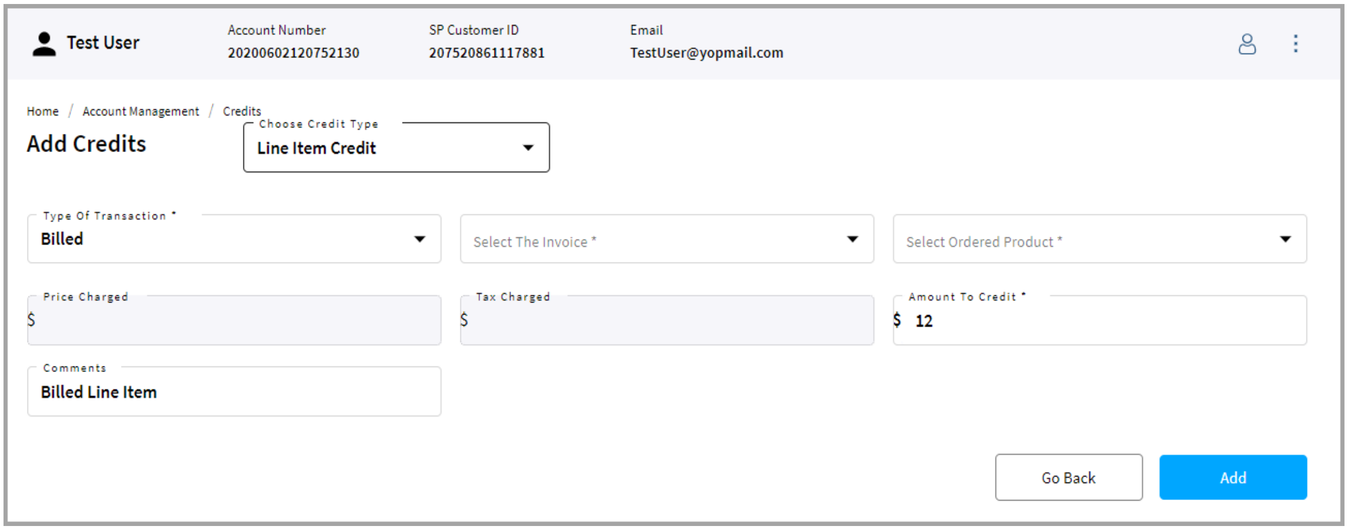
- On the **Credits** screen, click the Add (+) icon to add a new line-item credit.
- The **Add Credits** screen appears.
- Click the **Choose Credit Type** drop-down list and select the **Line-Item Credit**.
- Select a type in the **Type of Transaction** drop-down list.
    - Billed
    - Unbilled
 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

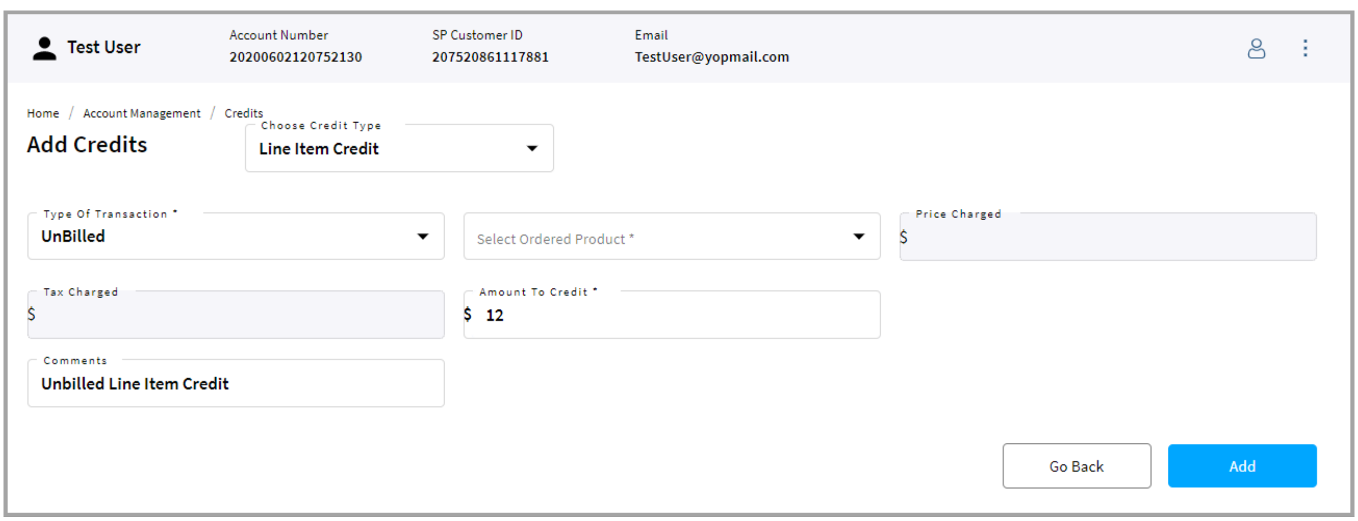
- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the service credit, else click the **Go Back** button to cancel.



Unbilled

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

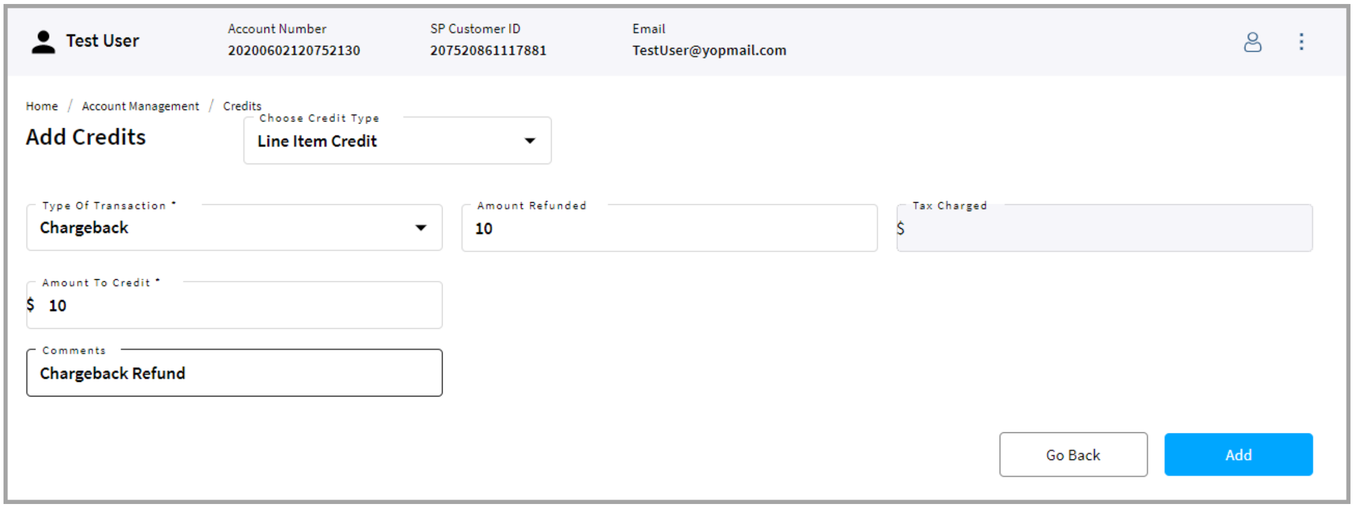
- Select a product from the **ordered Product** drop-down list.
- Enter the amount in the **Price Charged** field.
- Enter the amount in the **Amount to Credit** field.
- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add**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



Chargeback

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

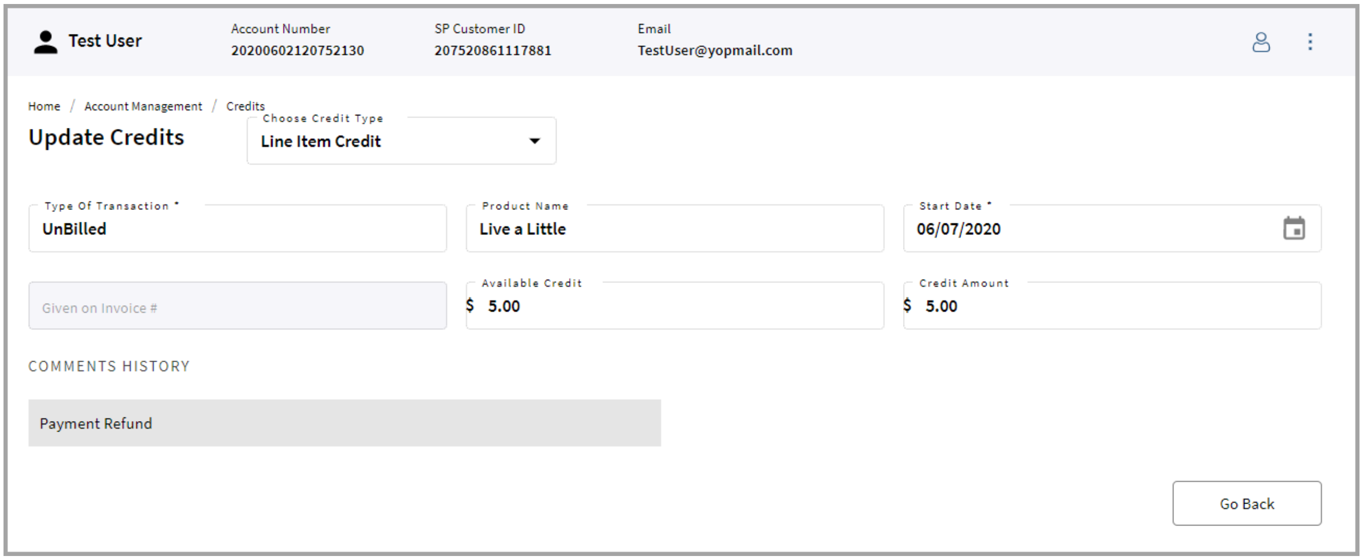
- Enter the amount in the **Amount Refunded** field.
- Enter the amount in the **Amount to Credit** field.
- Select a reason in the **Reason Code** from the drop-down list.
- Enter the comments in the **Comments** box.
- Click the **Add** button to add the service credit, else click the **Go Back** button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



Updating Line-Item Credits

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

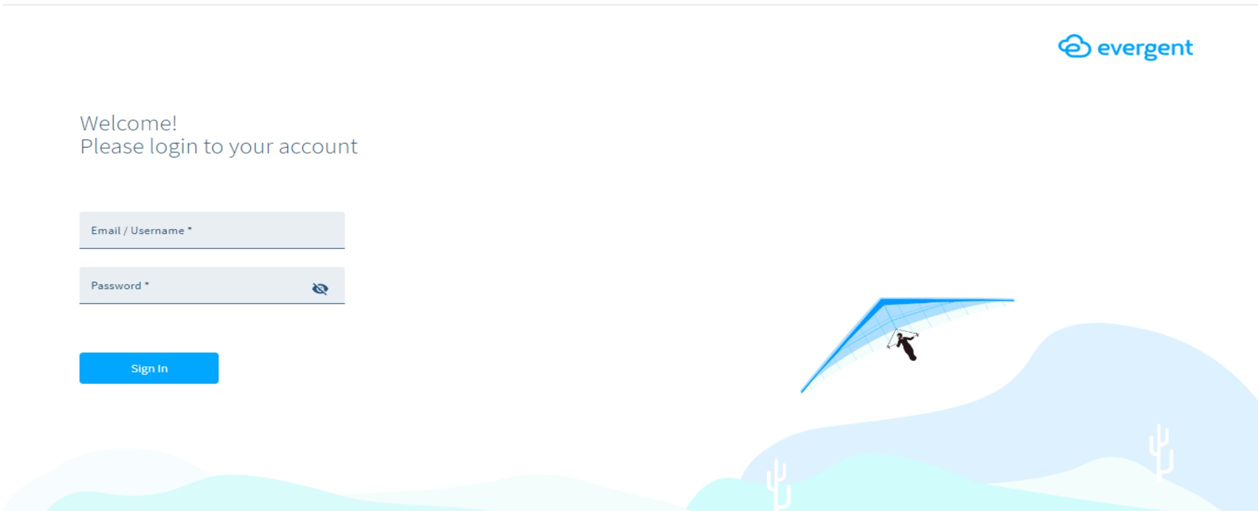
- Click the line-item record where you want to update the line item details on the Credits screen.
- Make the necessary changes to the required fields and click the **Update** button to save the changes, else click the **Go Back** button to cancel.


Test User
Account Number
20200602120752130
SP Customer ID
207520861117881
Email
TestUser@yopmail.com
Home / Account Management / Credits
Update Credits
Choose Credit Type
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

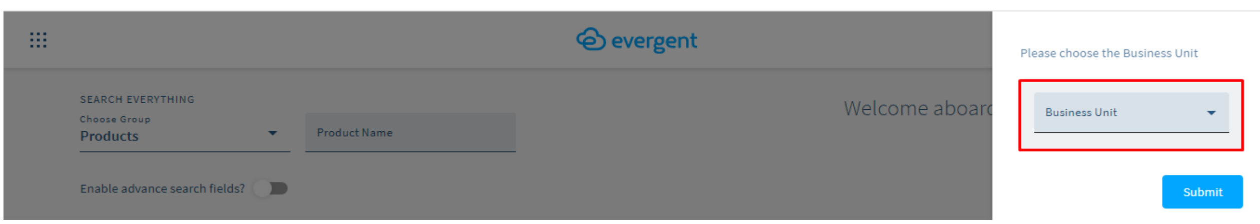
Back Office Admin

Login to Back Office Admin

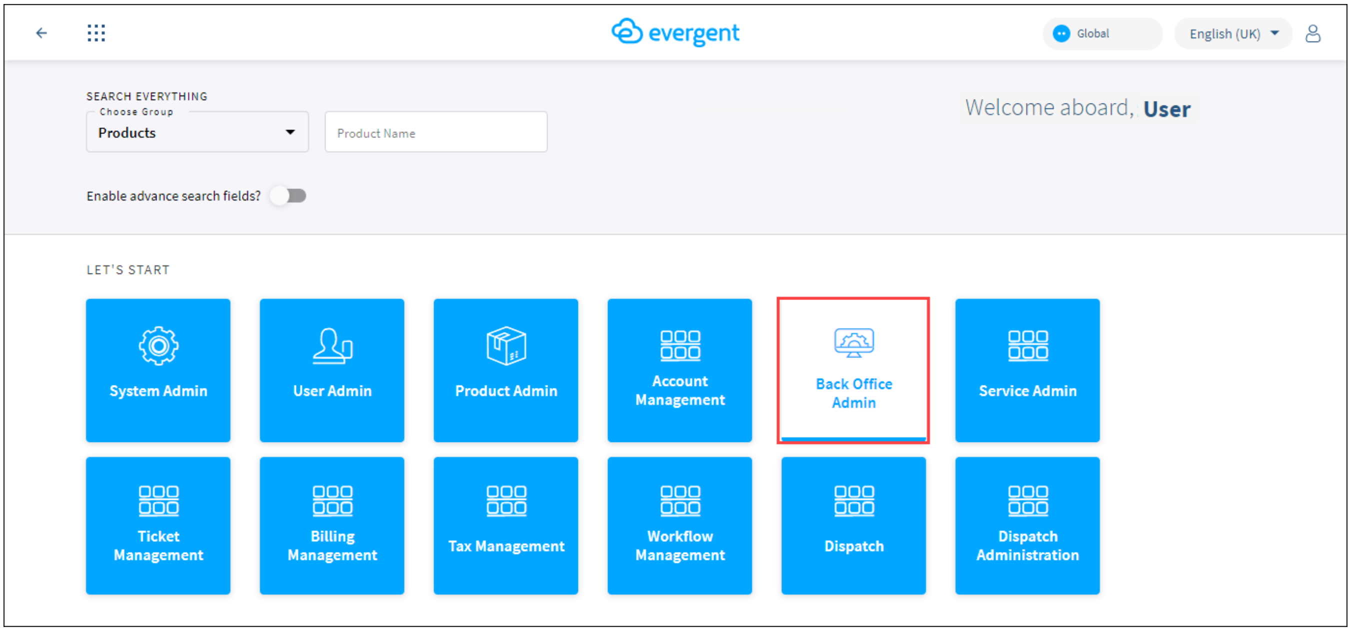
- Open a web browser, such as Internet Explorer / Mozilla Firefox / Google Chrome.
- In the address bar, enter the application URL as provided by Evergent.
- Enter the valid Email/Username and Password.
- Click the **Sign In** button. This will begin your Evergent session.



- 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.

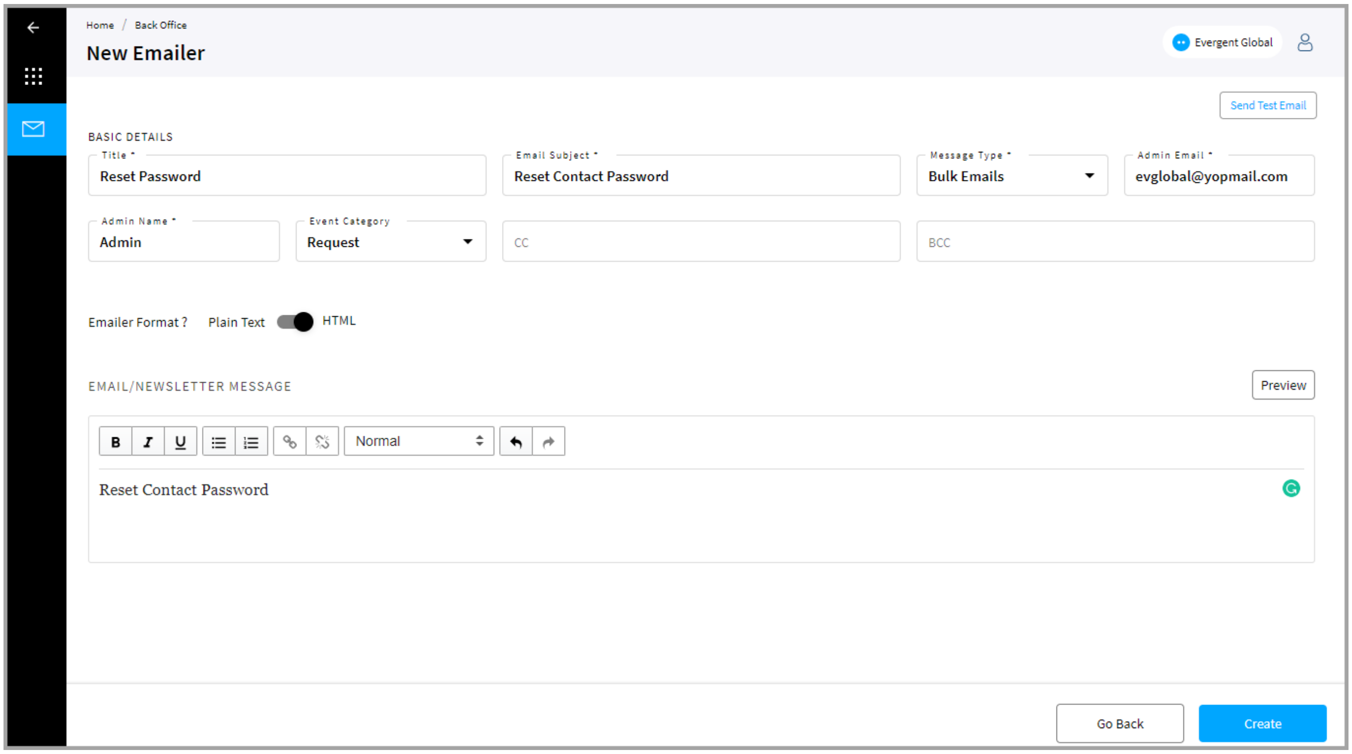
Emailers

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

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.



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**.

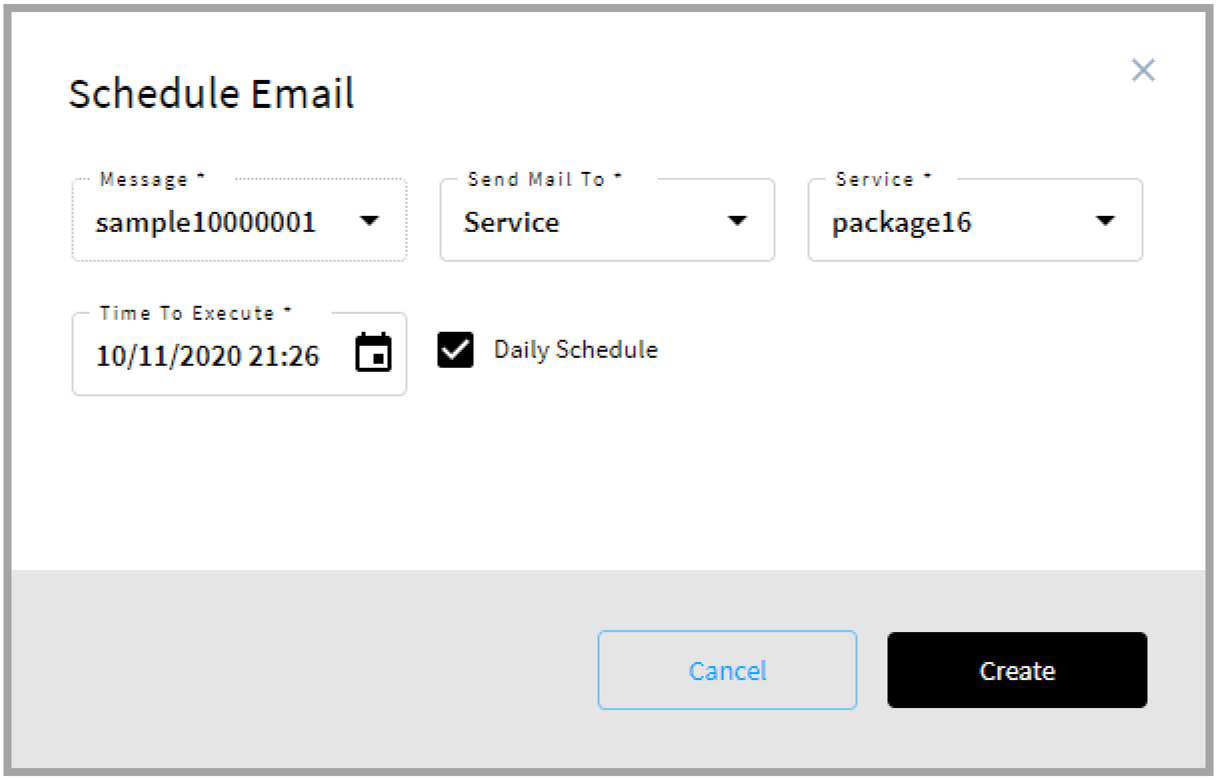
  Note:
  A user cannot modify the **Message Type** and **Event Category** fields on the Update Emailer screen.

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

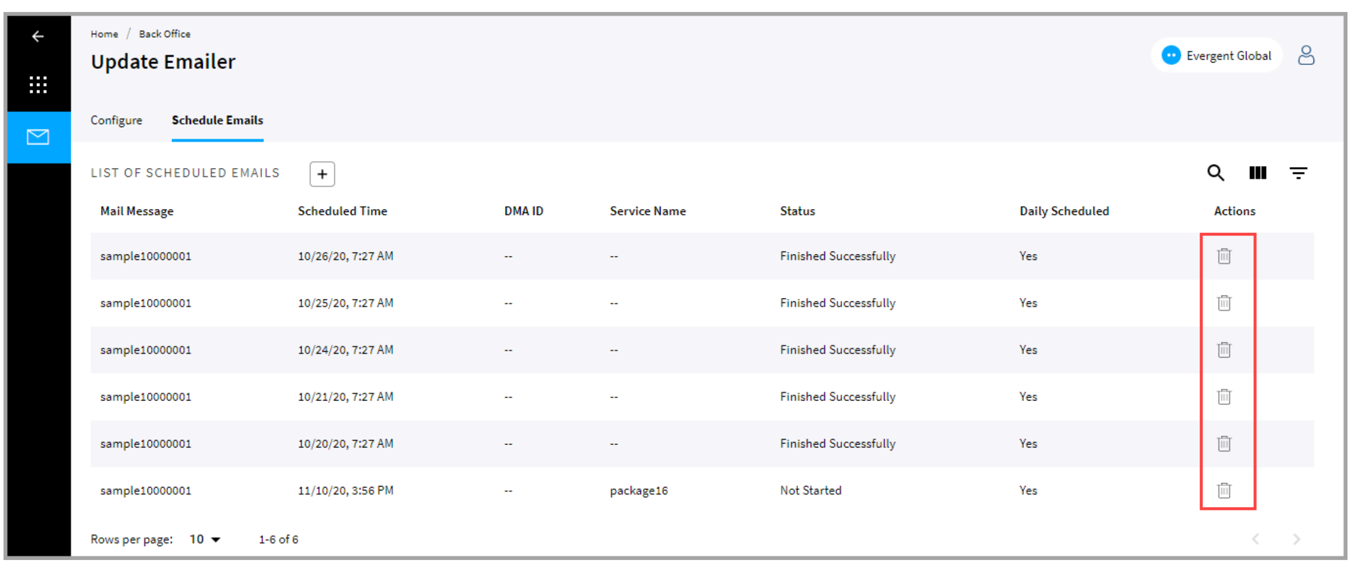
- On the **Emailers** screen, on the **Email Templates** tab, click the message type email as Bulk Emails.
- Click the **Schedule Emails** tab. The list of scheduled emails appears.
- To schedule an email, click the Add (+) icon.
- Enter the email id in the **Send Mail To** field.
- Click the **Time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



Deleting a Scheduled Email

To delete the scheduled emails, do the following:

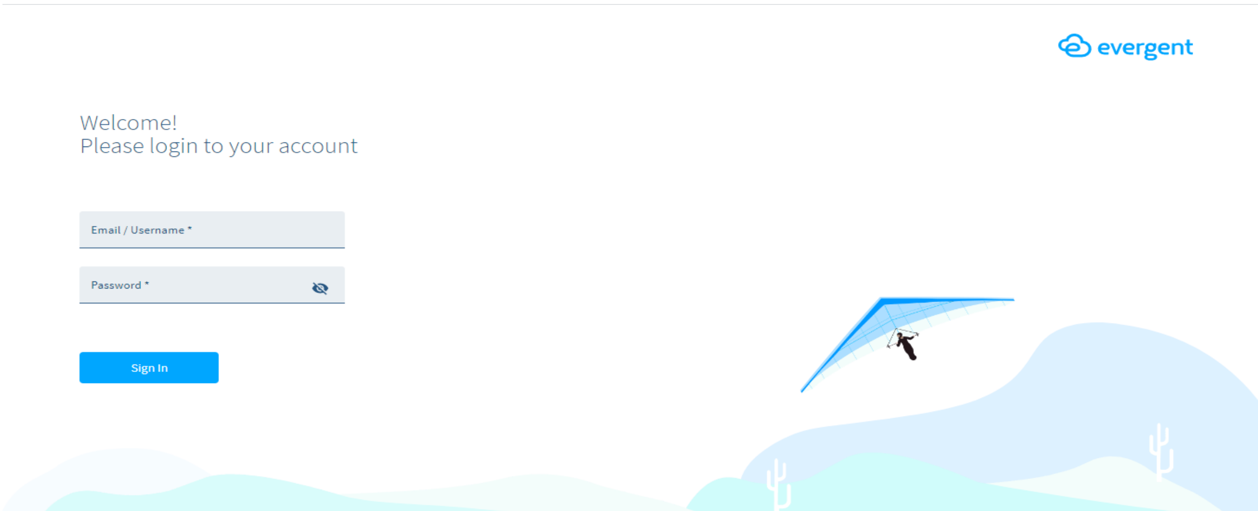
- Click the **Email Templates** tab, under the **Emailers** tab from the left menu bar.
- Click a Bulk Email (Message Type) that you want to remove.
- The **Update Emailer** screen appears.
- Click the **Schedule Emails** tab.
- Click the **Delete** ( ) icon in the **Actions** column that you want to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



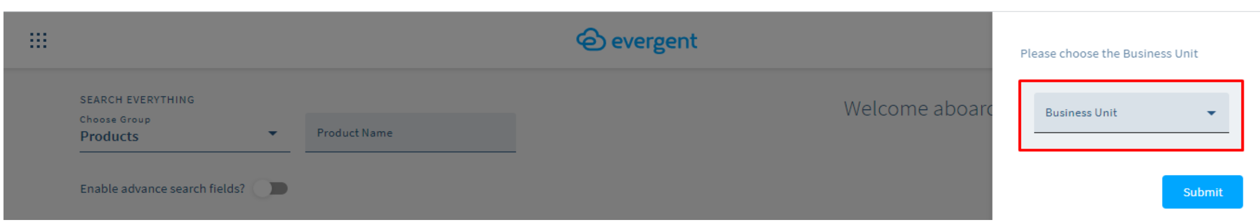
Ticket Management

Login to Ticket Management

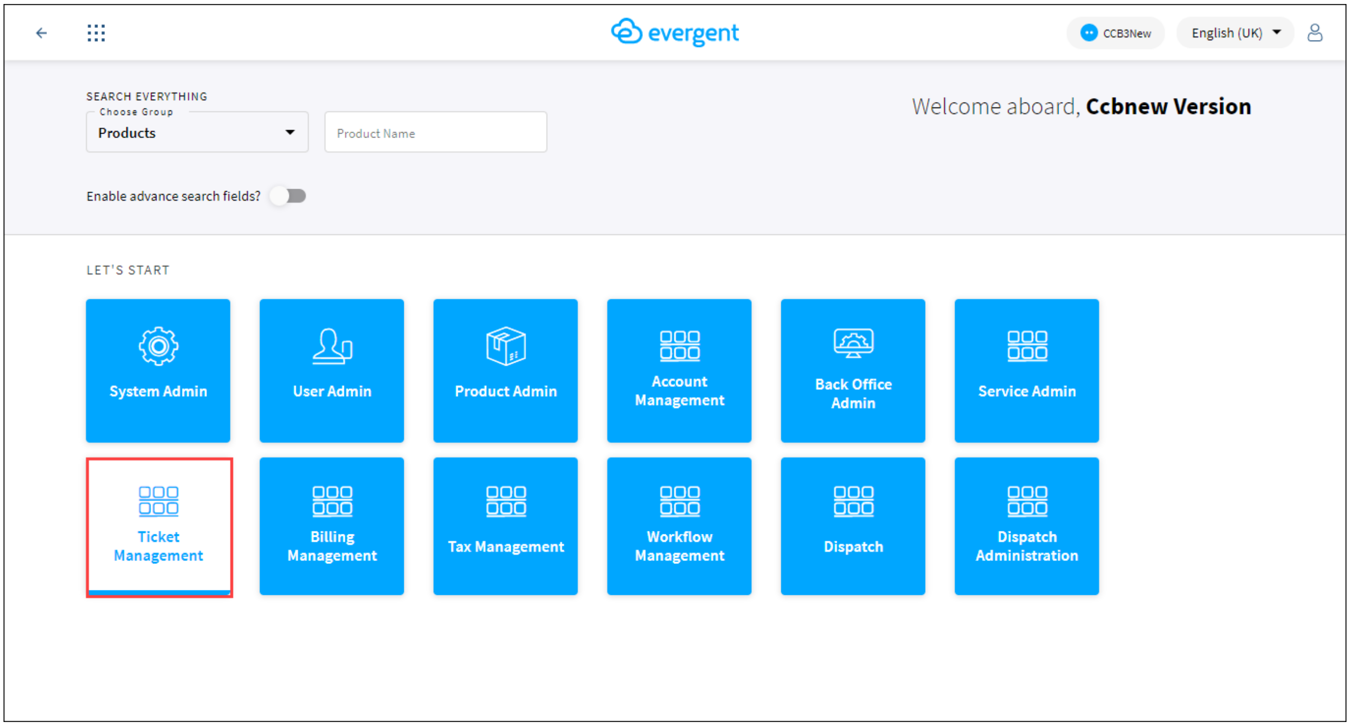
- Open a web browser, such as Internet Explorer / Mozilla Firefox / Google Chrome.
- In the address bar, enter the application URL as provided by Evergent.
- Enter the valid Email/Username and Password.
- Click the **Sign In** button. This will begin your Evergent session.



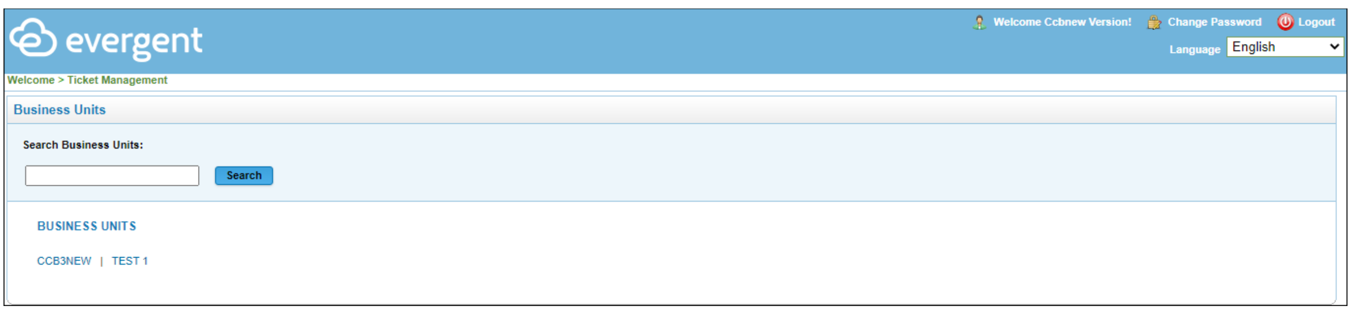
- The users with access to multiple business units must select the business unit from the available drop-down list and click **Submit**.



- 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.



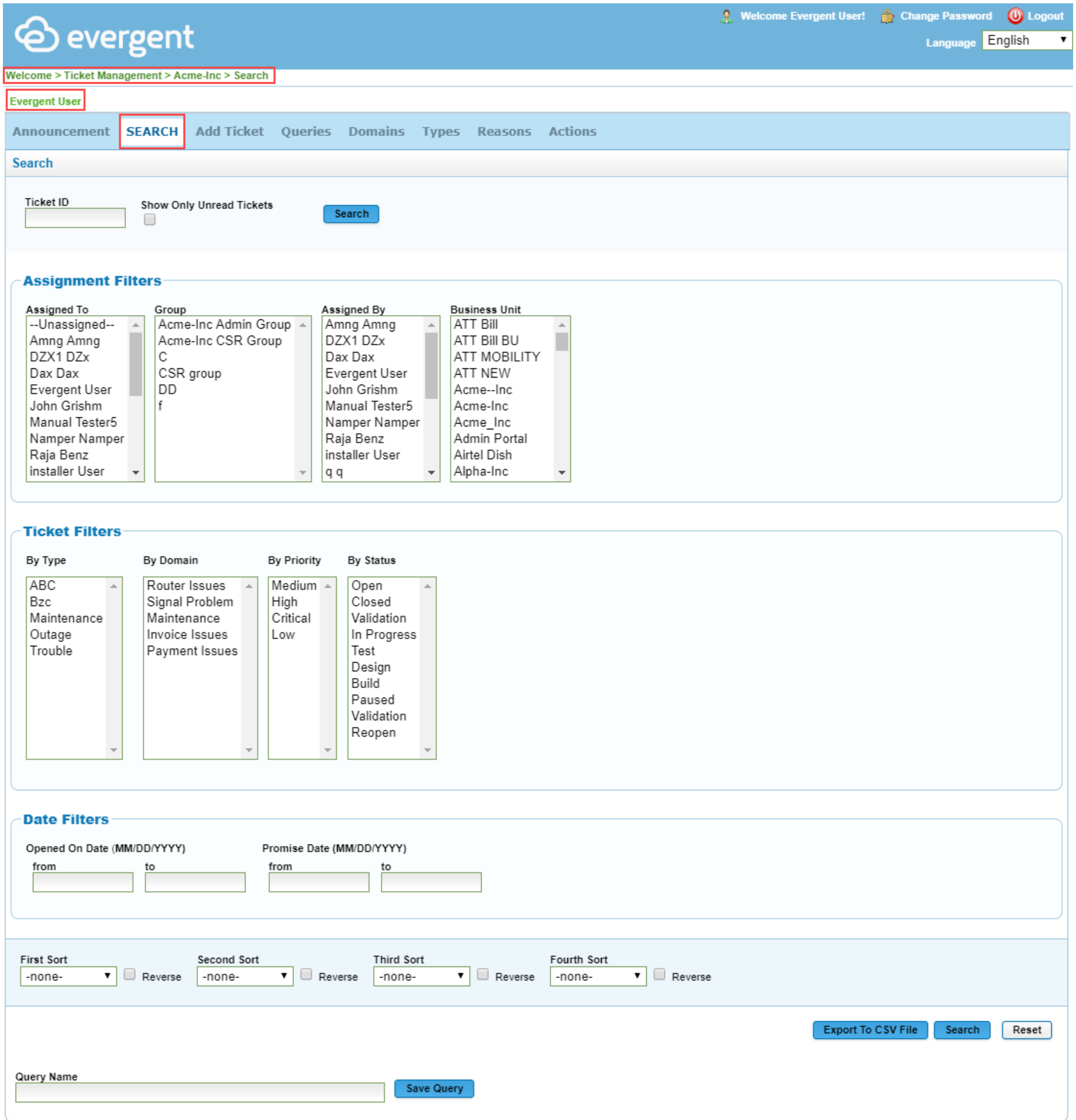
- The Search Business Units screen appears.
- Type the Business Unit in the Search field or select the Business Unit from the available Business Units list.



Ticket Management

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

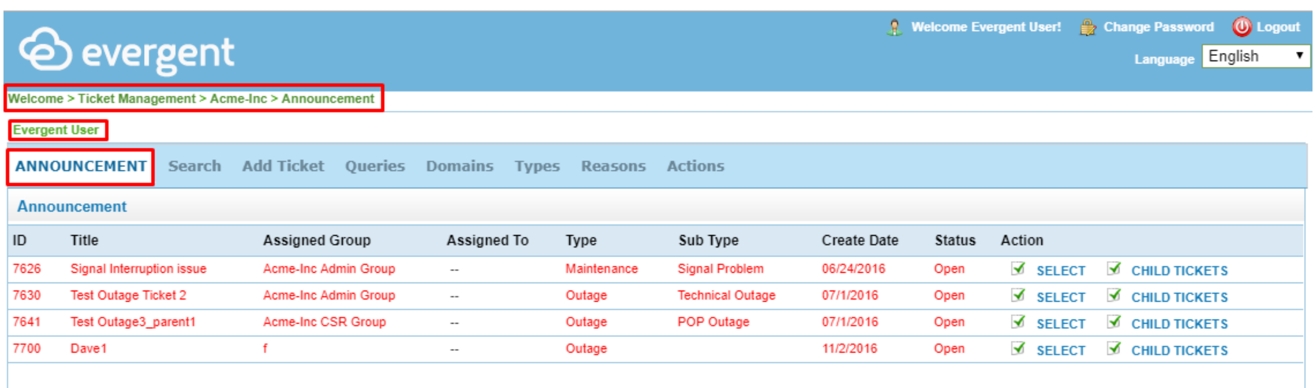
- The system is designed to record the full life cycle of problems, issues, change requests, software bugs, and trouble tickets by logging in and each user's interaction with the system in a chronological comment log that is part of the Ticket.



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.

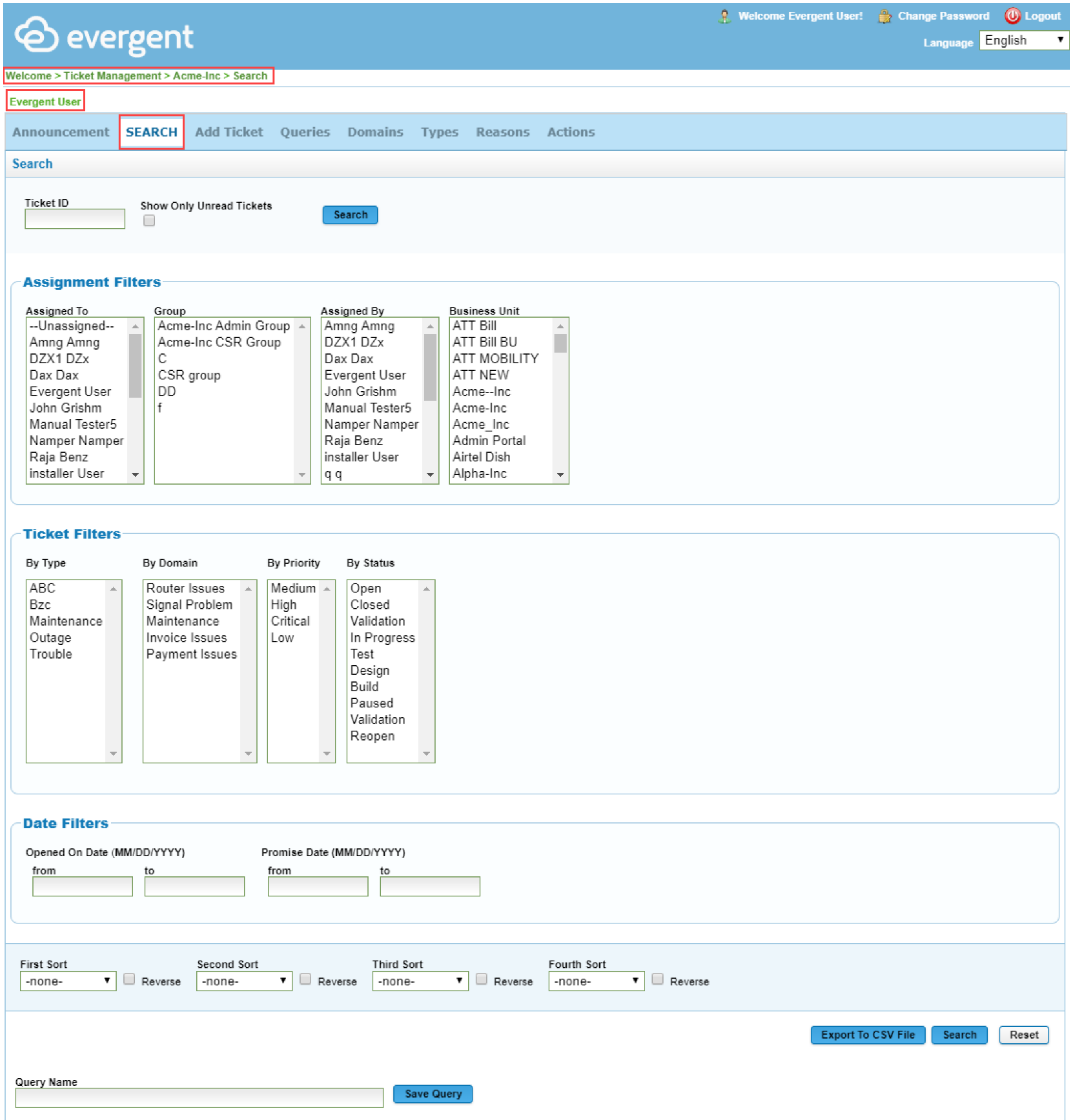
Queries	A query is some saved search criteria. You can use queries to track commonly used search criteria so that you do not need to repeatedly indicate the different criteria. Access this screen to execute, edit, or delete queries.
Domains	A domain is a category of problems. You can add, modify, or 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



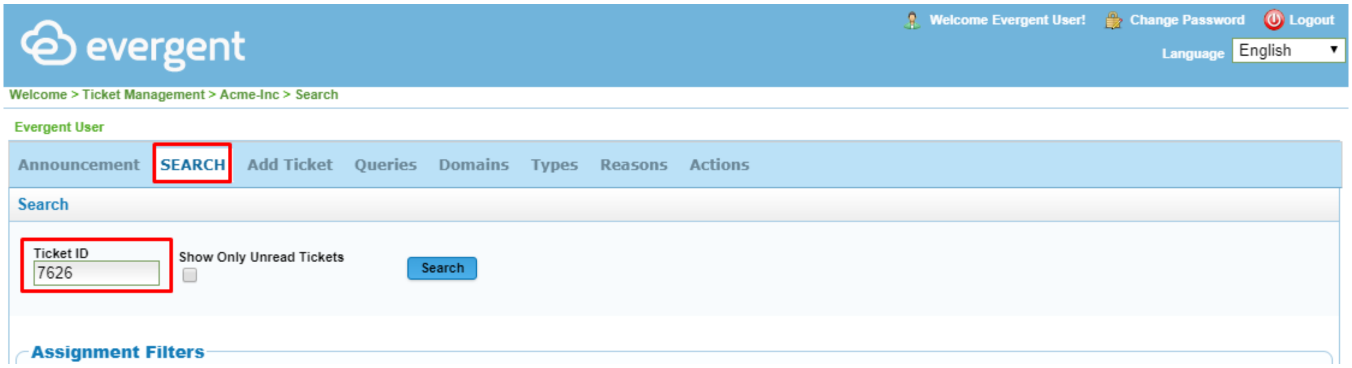
- Users can view the list of outage tickets that are created for that business unit.
- On closing a parent ticket, the same comments are added to child tickets of that parent and get closed, but on closing a child ticket this will not be reflecting the parent ticket.

Search Screen

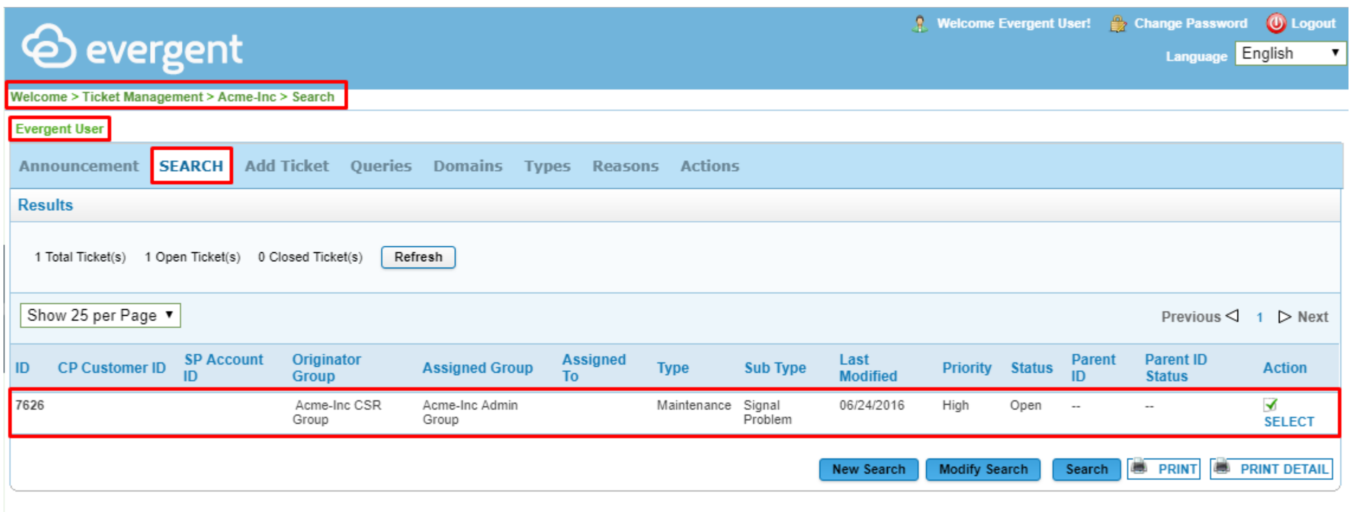


Searching for a Trouble Ticket by Ticket ID

- 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.



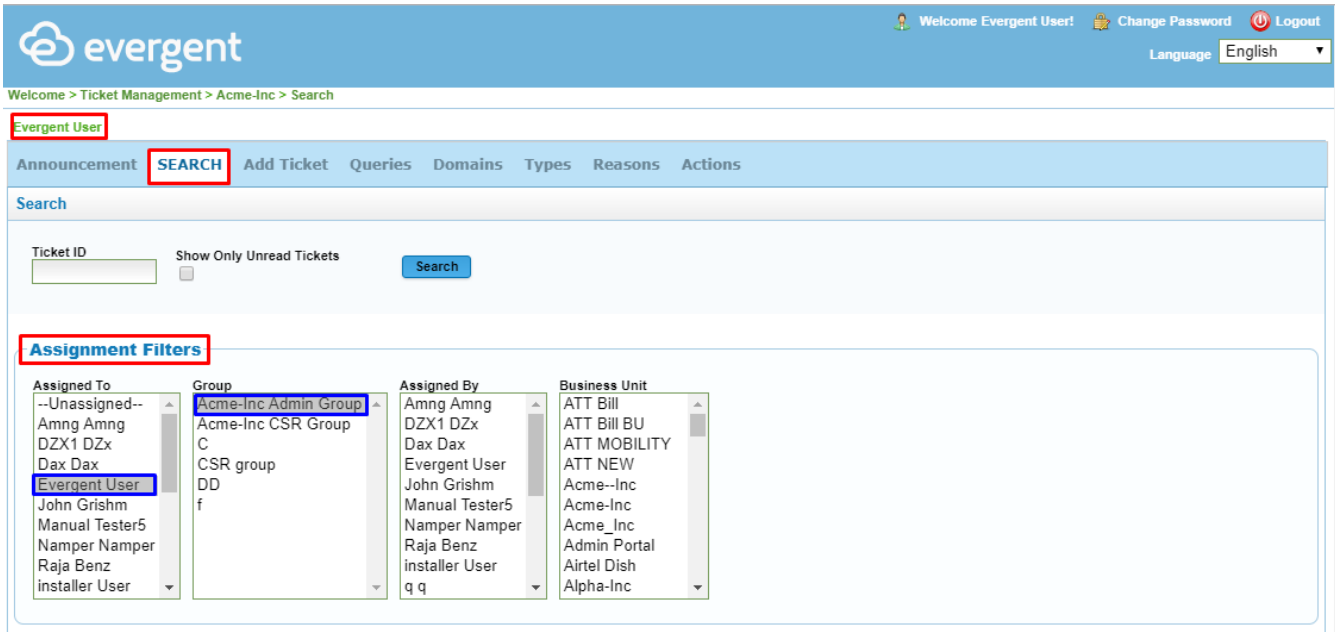
- Click the **Search** button.
- The trouble ticket for the matching **'Ticket ID'** will appear in the **Results** screen as shown below:



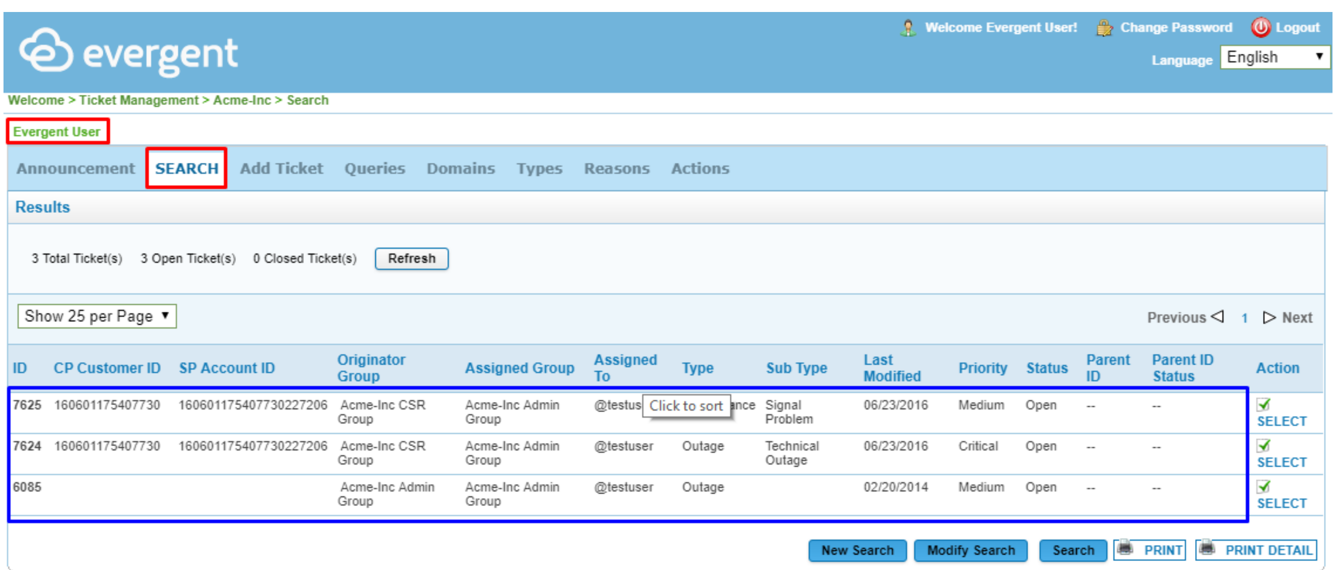
- Click the **<Select>** inline button corresponding to the ticket to view or modify the ticket details.

> *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.

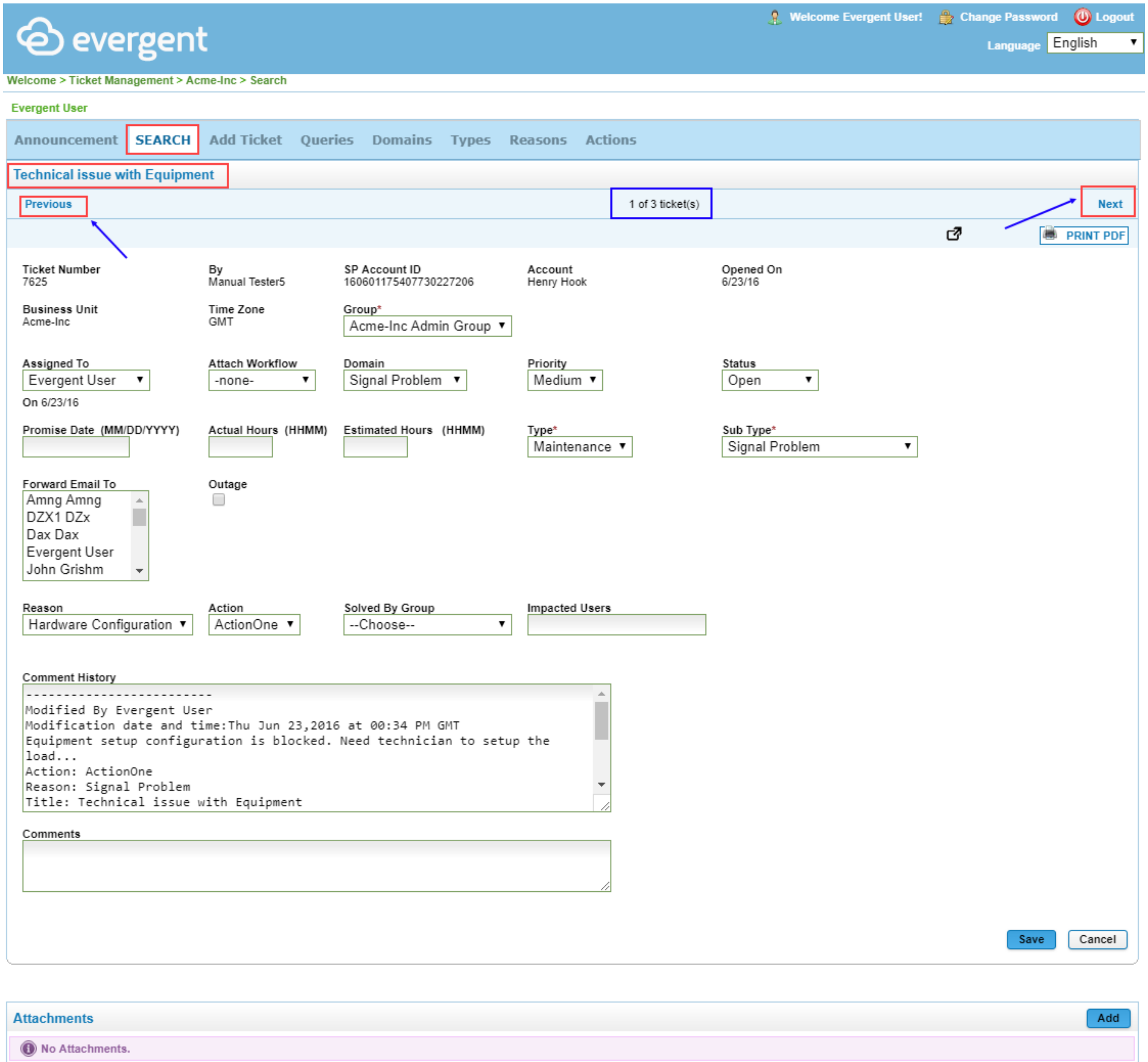


- Select one or more usernames in one or more of the fields <**Assigned To>**, **<Group>**, **<Assigned By>,** and **<Business Unit>**. The more fields you select, the narrower your search. You may select more than one username in each field by holding down the **<Ctrl>** key.
- Click the **<Search>** 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**.



***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)*

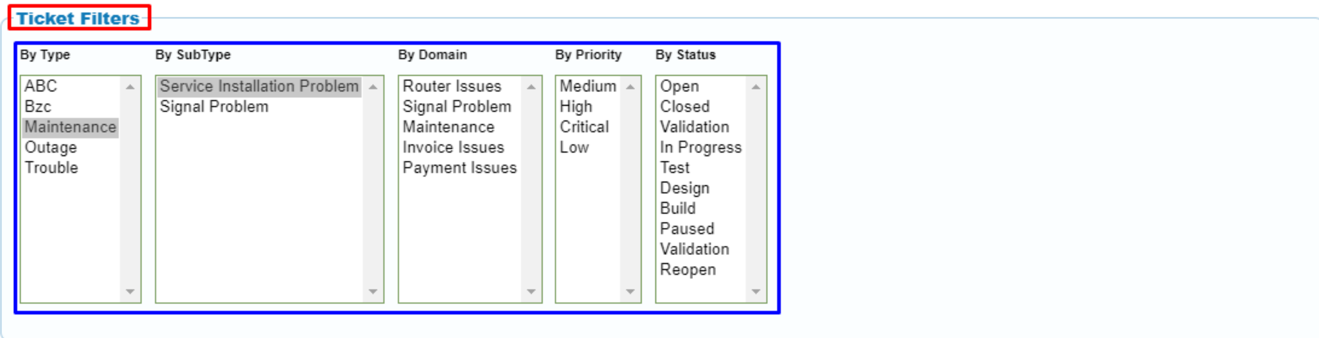
- Click the **<Select>** inline button corresponding to a trouble ticket to view or modify the ticket details.



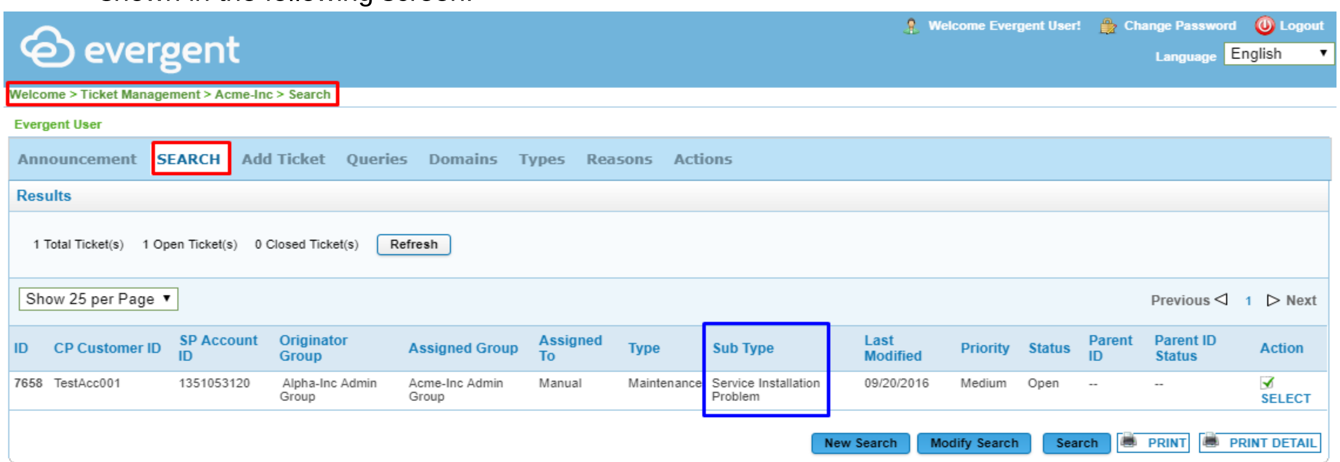
> *You can move from trouble ticket to trouble ticket in a list by clicking the <**Previous**> or <**Next**> inline buttons located at the top of the trouble ticket you are viewing.*
> *Click the **<Cancel>** button to return to the previous screen without saving any changes.*
> *Click the **<Save>** 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.



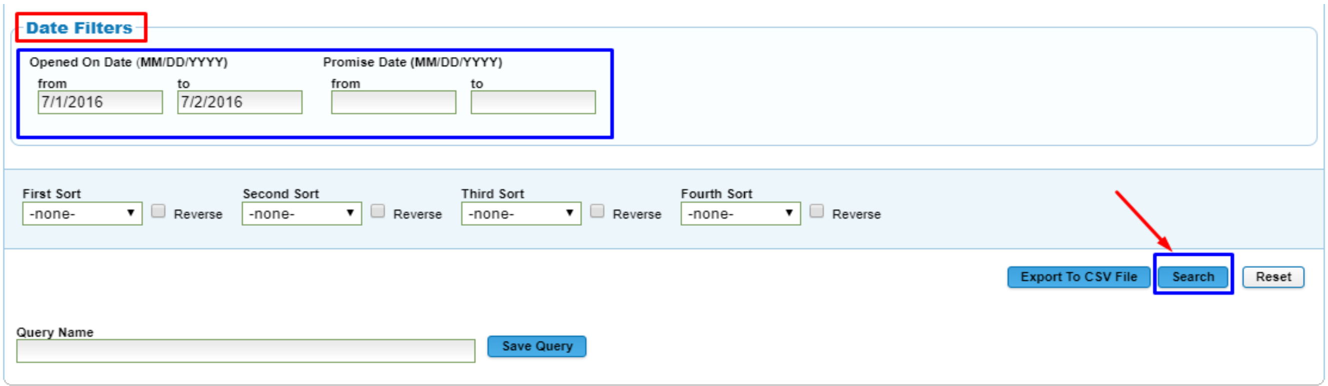
- Click the **<Search>** button at the bottom of the screen.
- A list of trouble tickets matching your selected criteria will be displayed on the **<Results>** screen as shown in the following screen:



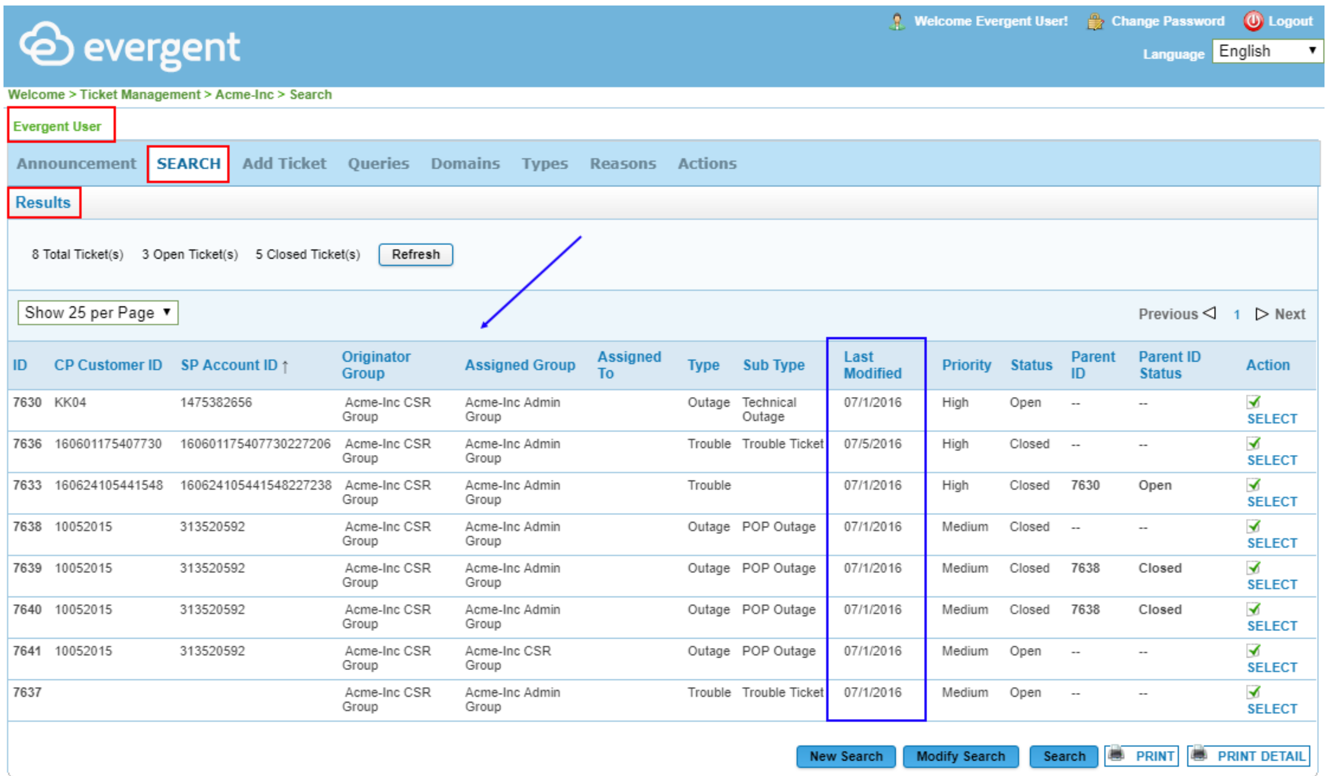
- Click the **<Select>** inline button corresponding to a ticket to view or modify its details.

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.



- 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.

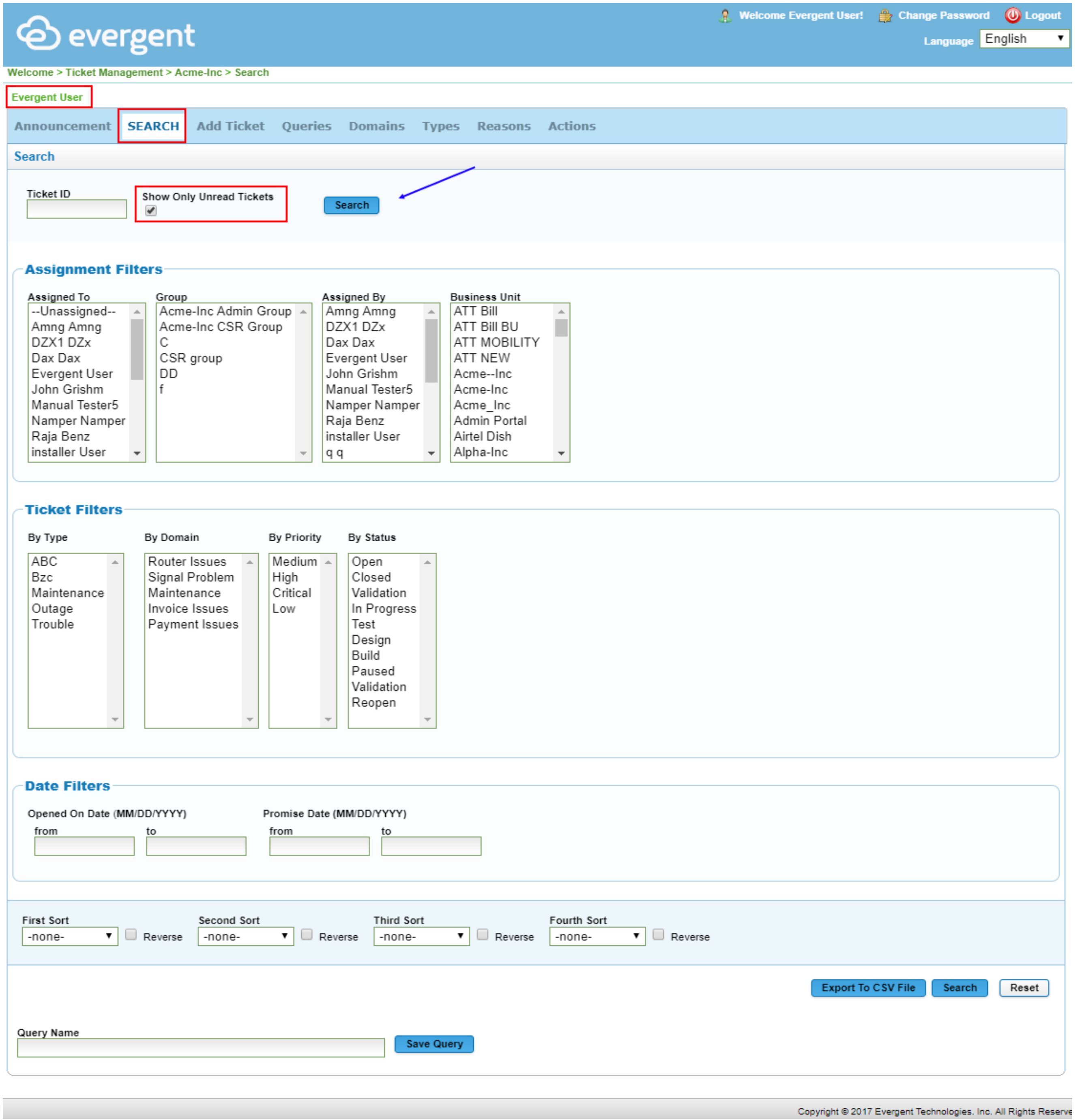


ID	CP Customer ID	SP Account ID ↑	Originator Group	Assigned Group	Assigned To	Type	Sub Type	Last Modified	Priority	Status	Parent ID	Parent ID Status	Action
7630	KK04	1475382656	Acme-Inc CSR Group	Acme-Inc Admin Group		Outage	Technical Outage	07/1/2016	High	Open	--	--	SELECT
7636	160601175407730	160601175407730227206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

- 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:



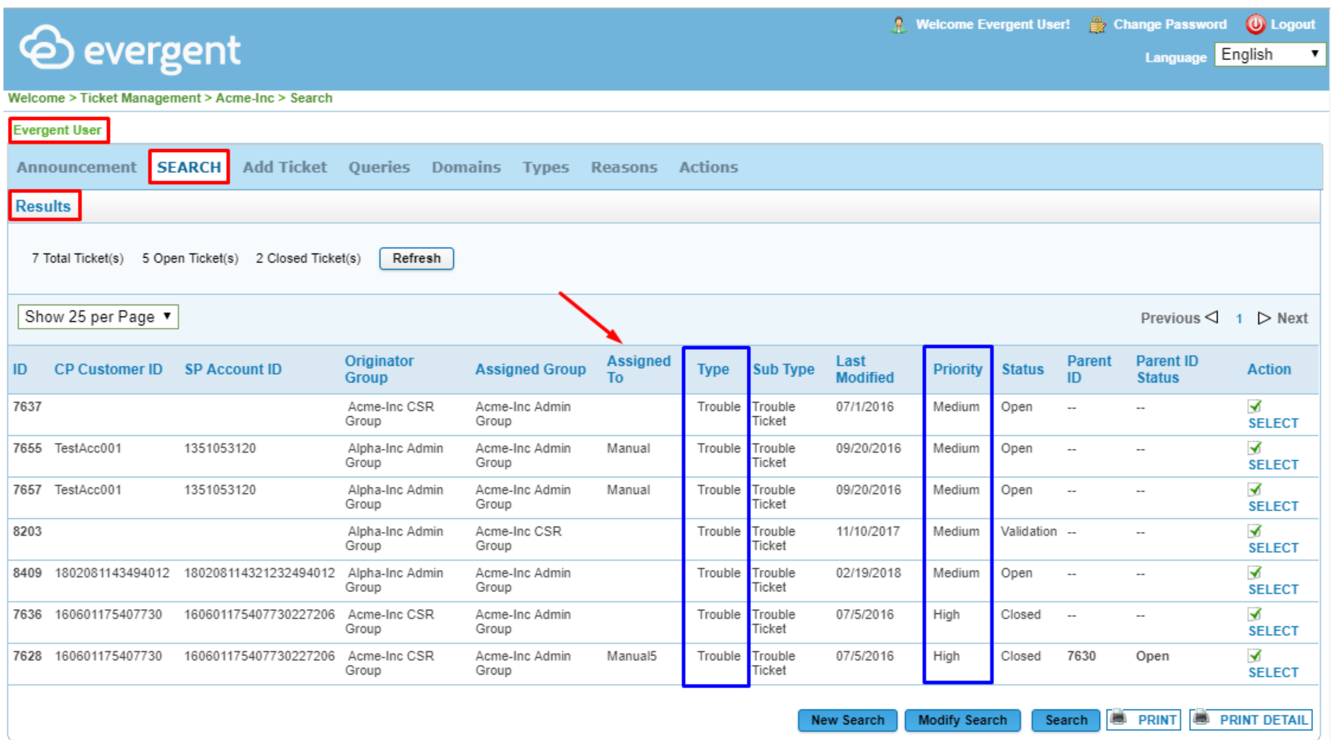
- You can also check this check box in addition to any of the search criteria you have already selected.

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.

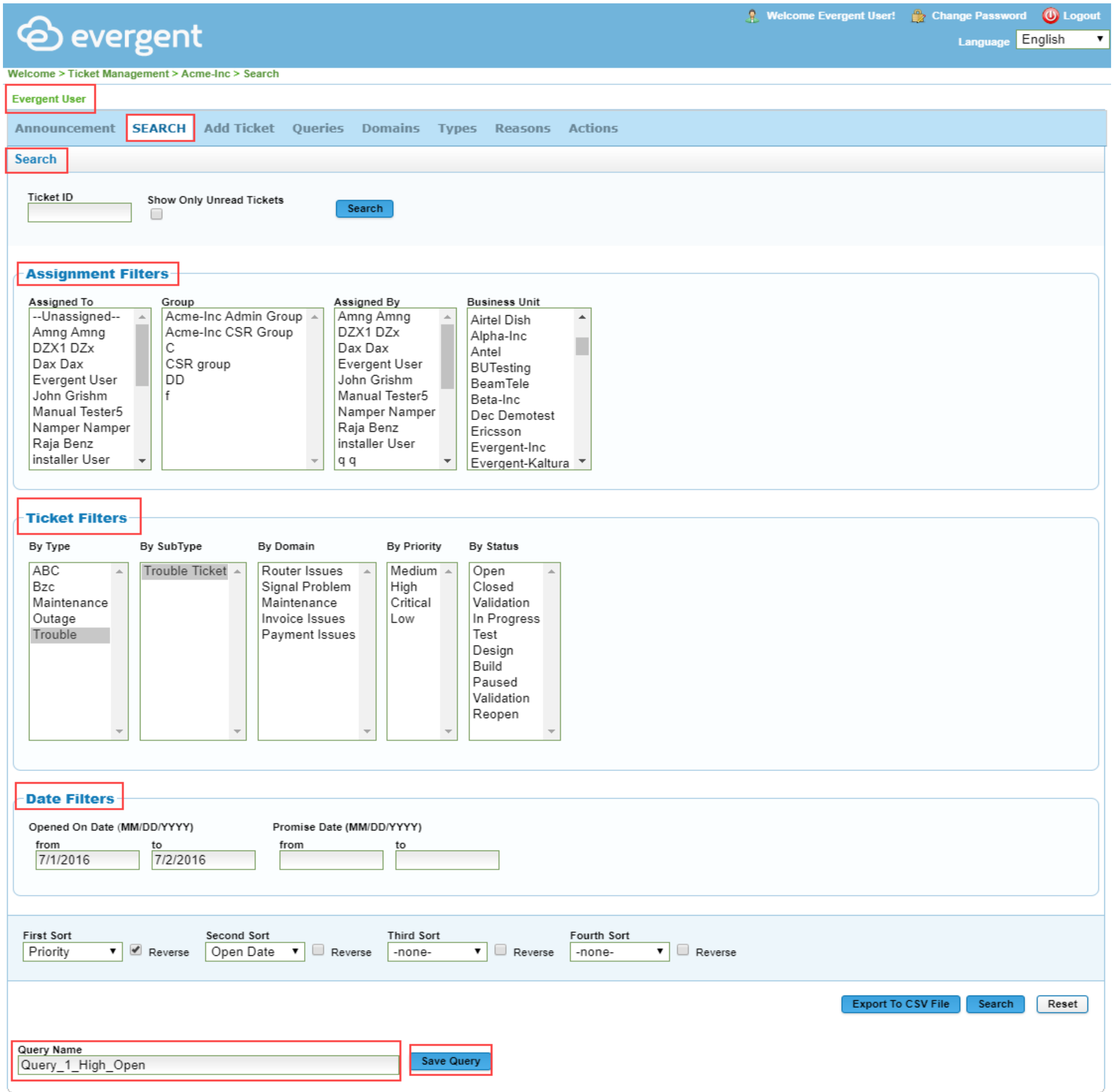
- After specifying your search criteria, click the **<Search>** button at the bottom of the screen.
- Your search results will then be displayed in the order you specified as shown on the following screen:



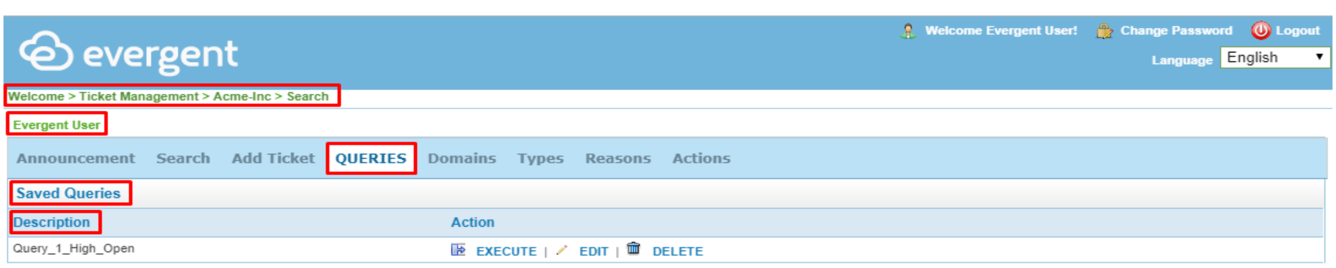
ID	CP Customer ID	SP Account ID	Originator Group	Assigned Group	Assigned To	Type	Sub Type	Last Modified	Priority	Status	Parent ID	Parent ID Status	Action
7637			Acme-Inc CSR Group	Acme-Inc Admin Group		Trouble	Trouble Ticket	07/1/2016	Medium	Open	--	--	SELECT
7655	TestAcc001	1351053120	Alpha-Inc Admin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

*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.

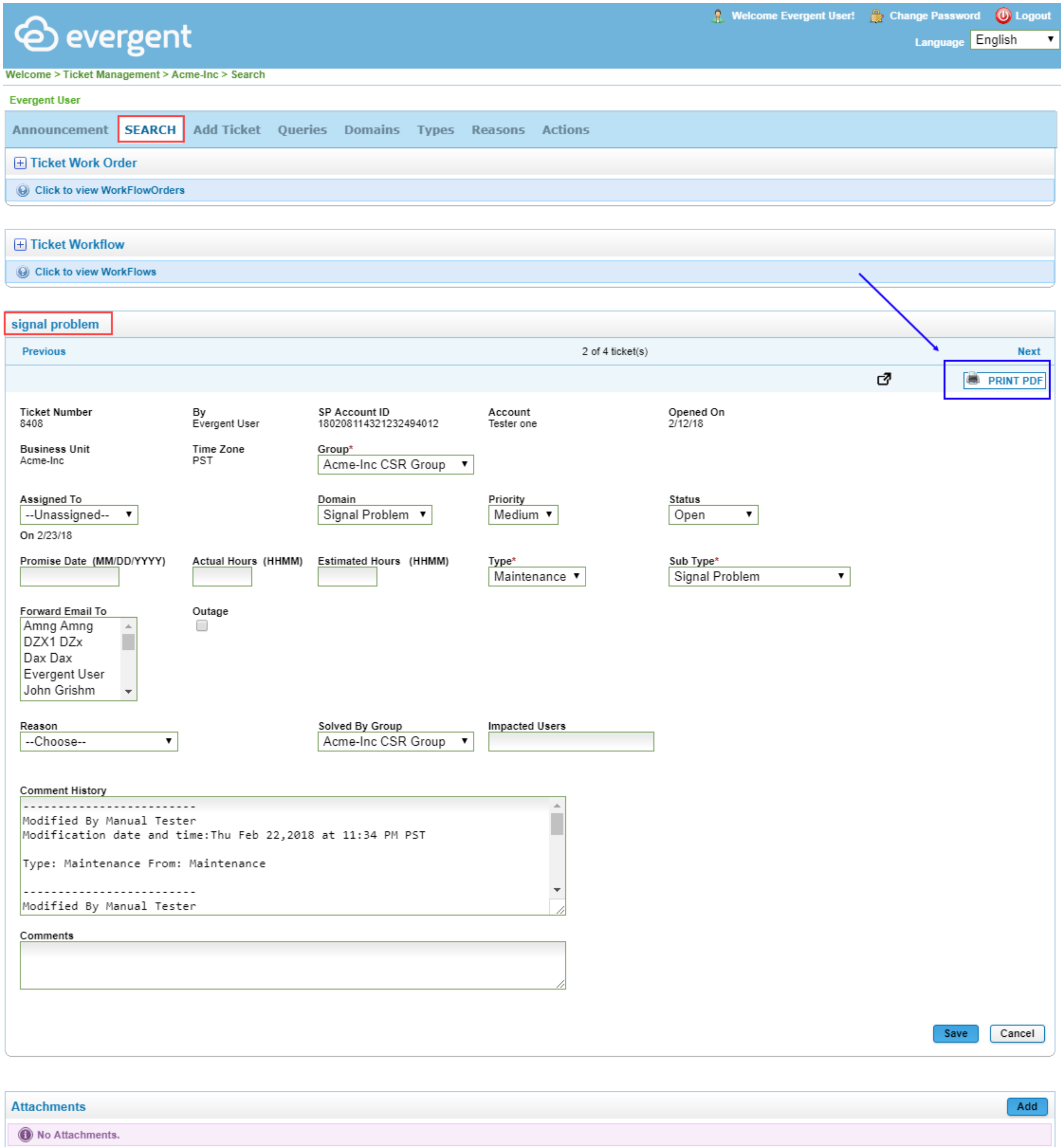


- Click the **<Save Query>** button to save the query.
- Clicking on the **'Save Query'** button will navigate to the **<Queries>** tabbed screen displaying the newly saved query as shown in the following screen:

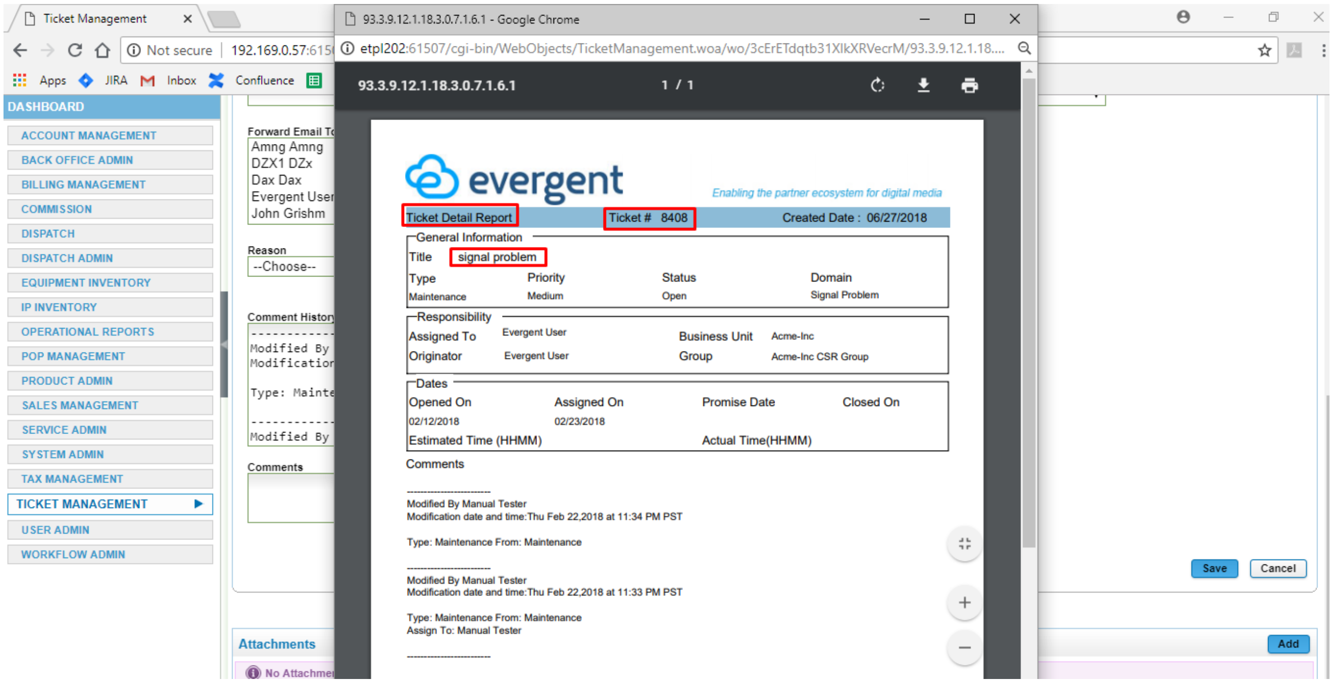


Printing a Trouble Ticket

- 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:



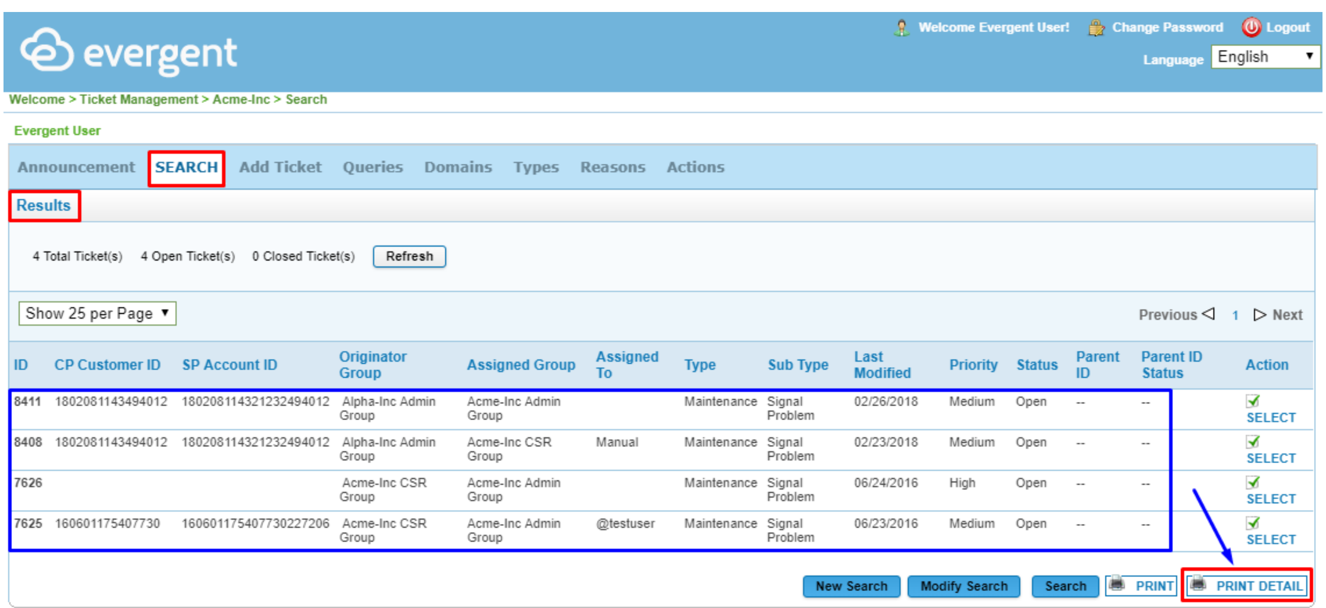
- Click the **<Print PDF>** button in the top right of the ticket details screen to view the ticket details in a new **PDF report file** window.
- The **PDF report file window** with ticket details is displayed as shown on the following screen:



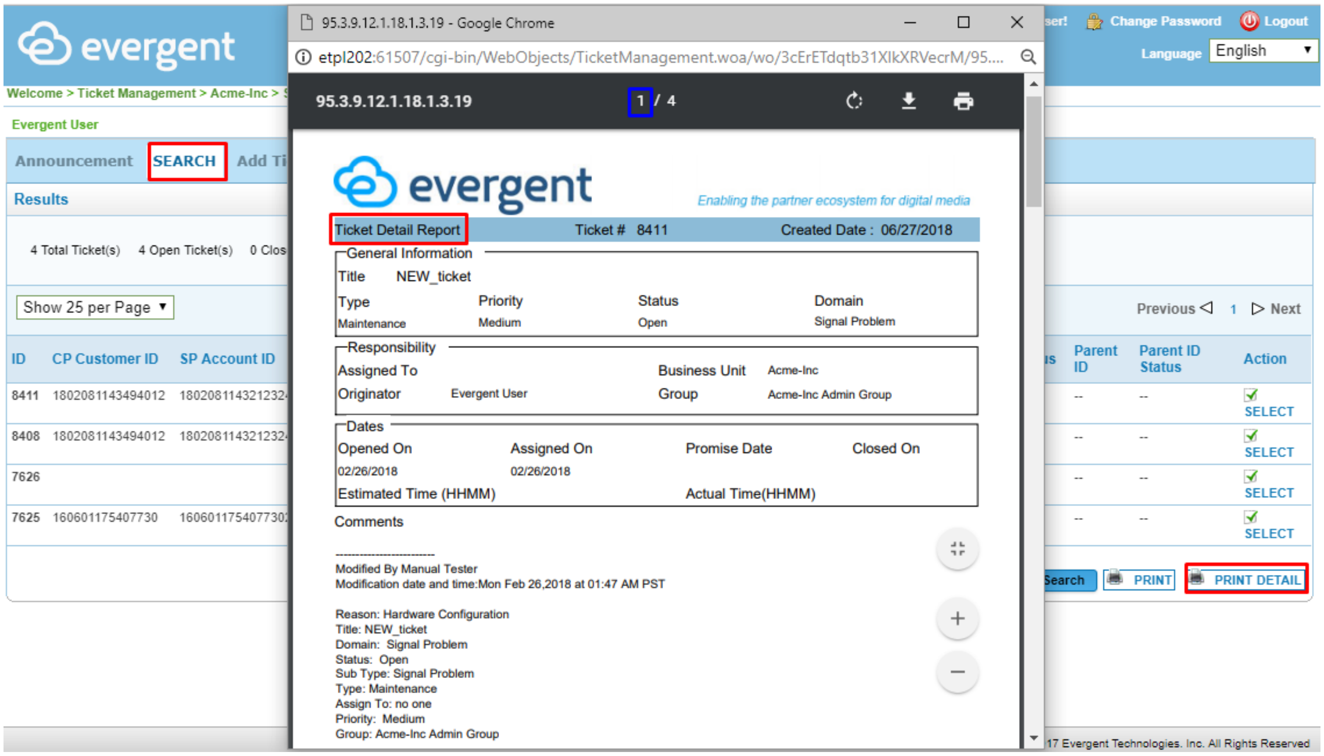
- Click the <**Print**> icon located in the PDF report file properties to send the trouble ticket details to the printer.
- Click the close <> icon in the top right corner to close the trouble ticket PDF report window.

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.



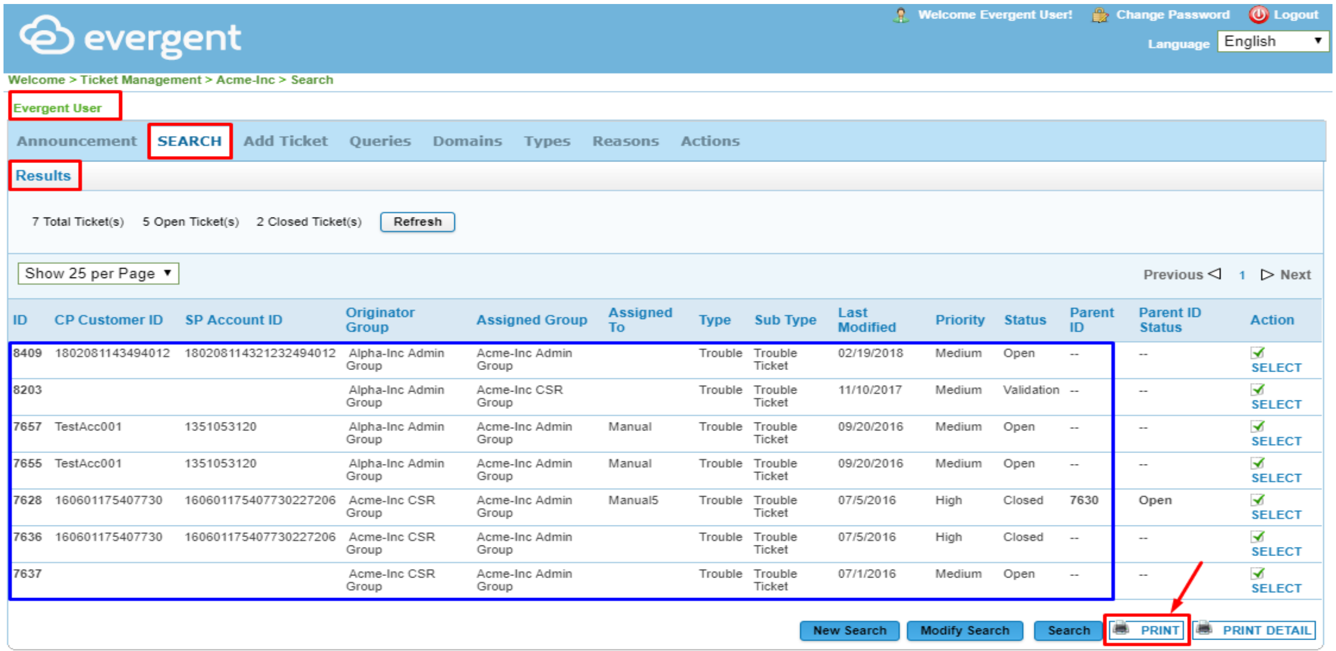
- Click the < **Print Detail>** button at the bottom of the search the **Results** screen to view all the tickets in a new PDF report file window.
- The **PDF report file** window then appears, displaying the details of all the trouble tickets in a page-wise navigation as shown in the following screen:



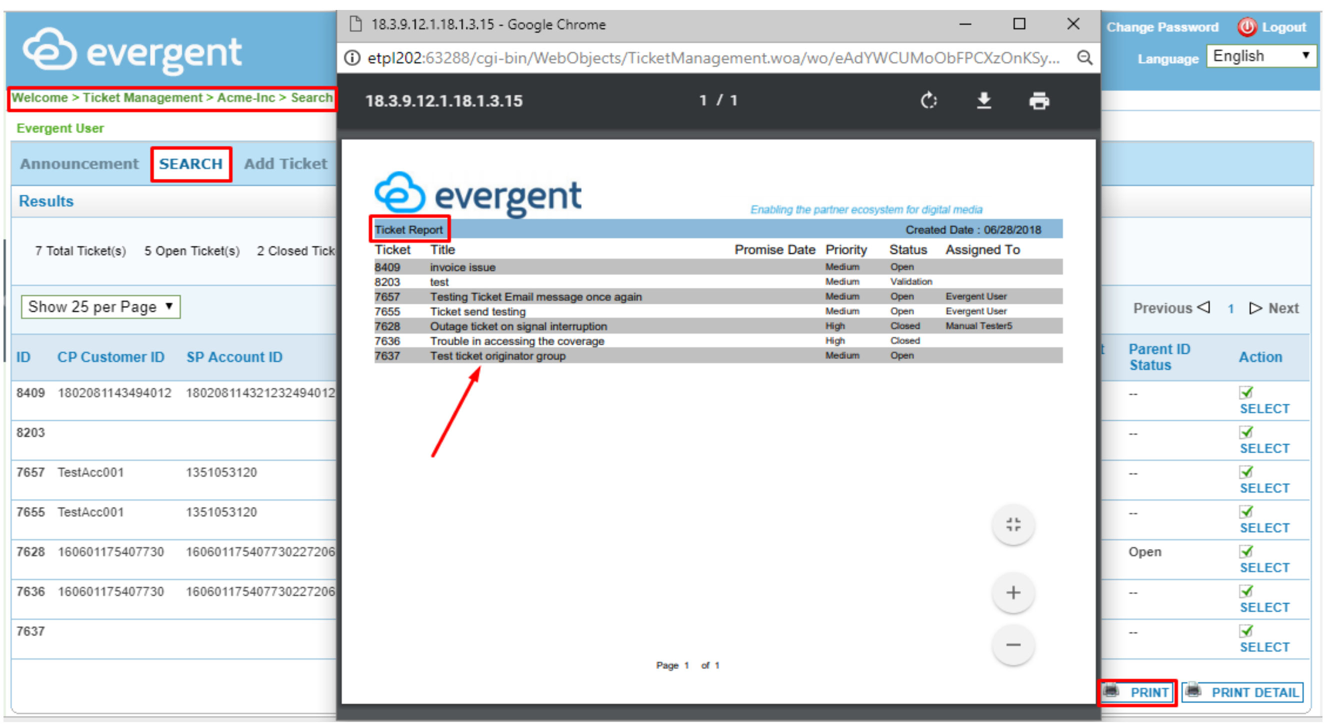
- Click the print icon located in the PDF report file properties to send all the trouble ticket details to the printer. You may scroll down to view all the trouble tickets.
- Click the close < > icon in the top right corner to close the PDF report window.

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.



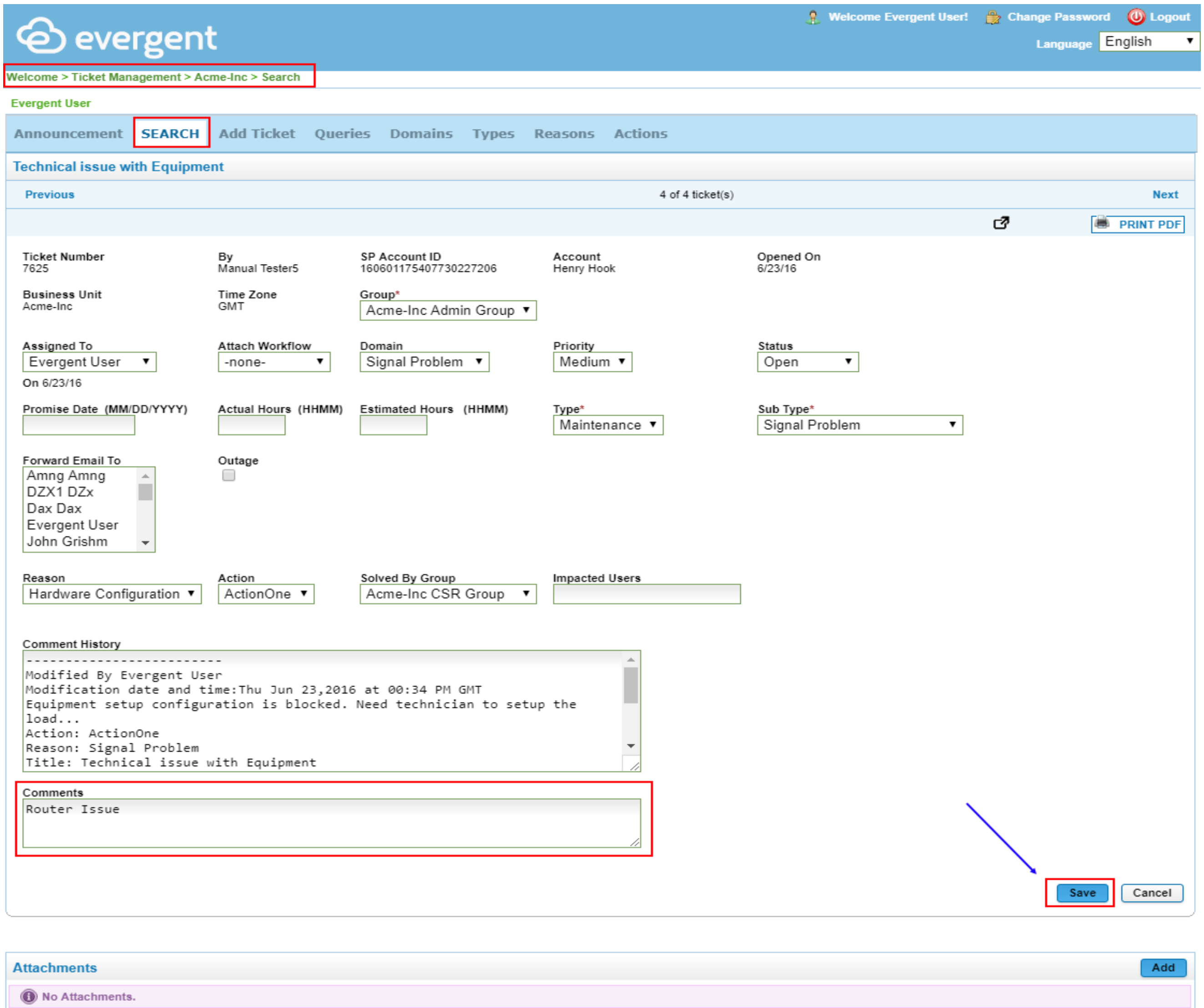
- Once you have a list of trouble tickets displaying on your search results screen, click the **< Print>** button.
- A new **PDF report window** appears, displaying the summary of the trouble tickets as shown in the image below:



- 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 **<>** 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:

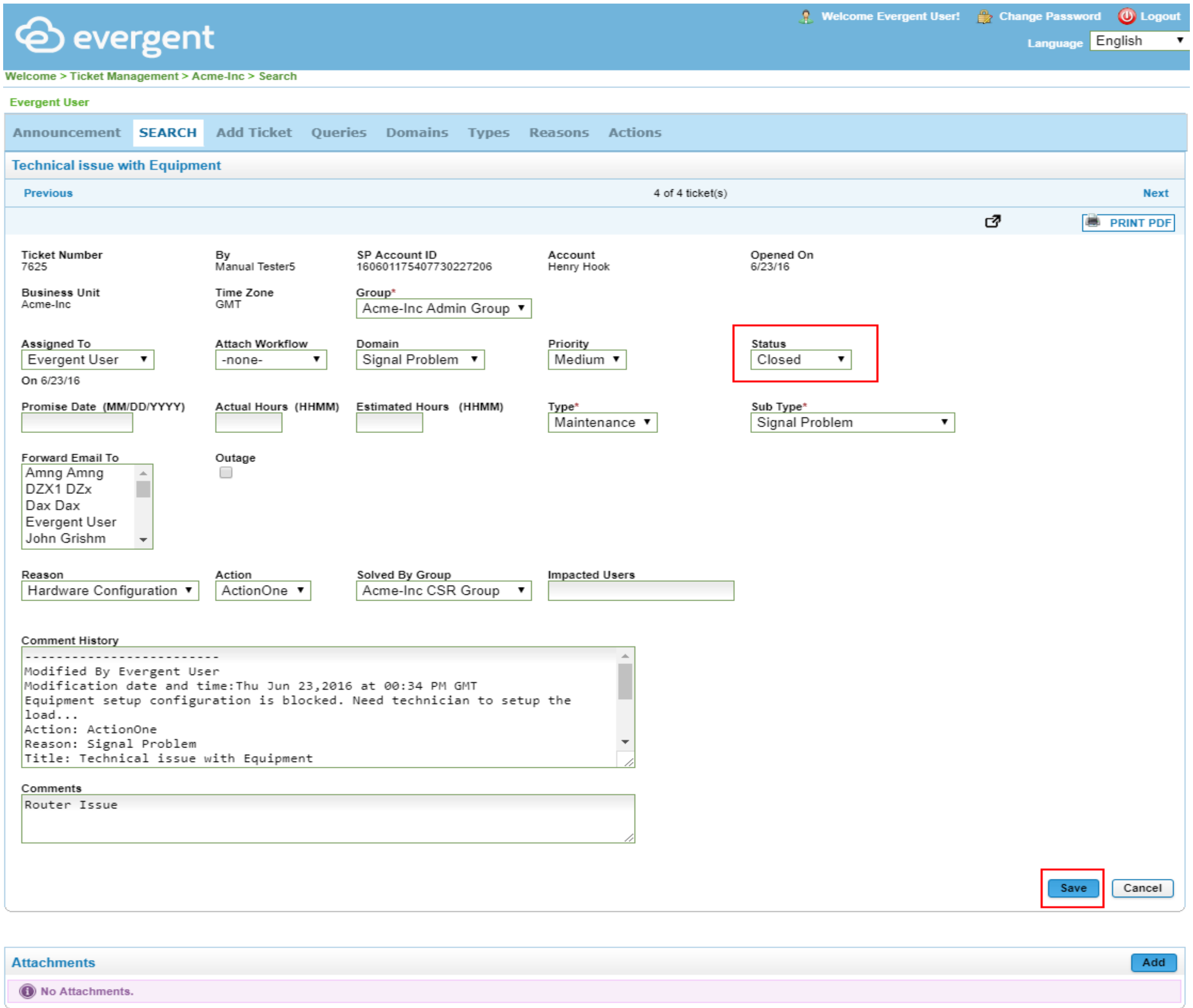


- Click the **<Save>** button to save the changes. Or click the <**Cancel>** button to discard.

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>**.

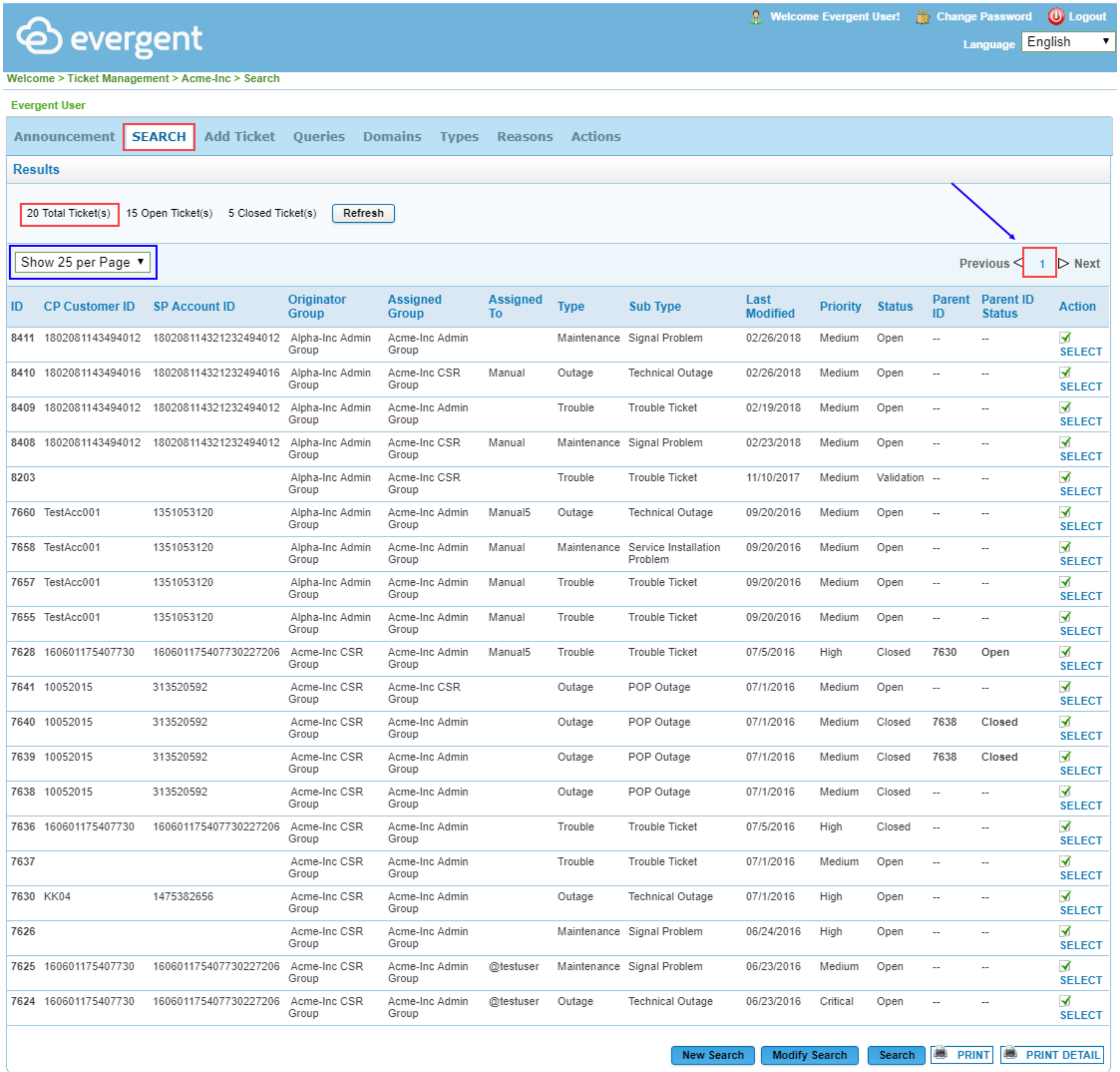
- Indicate comments if any, in the **<Comments>** section.



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

Pagination display of Trouble Ticket Results

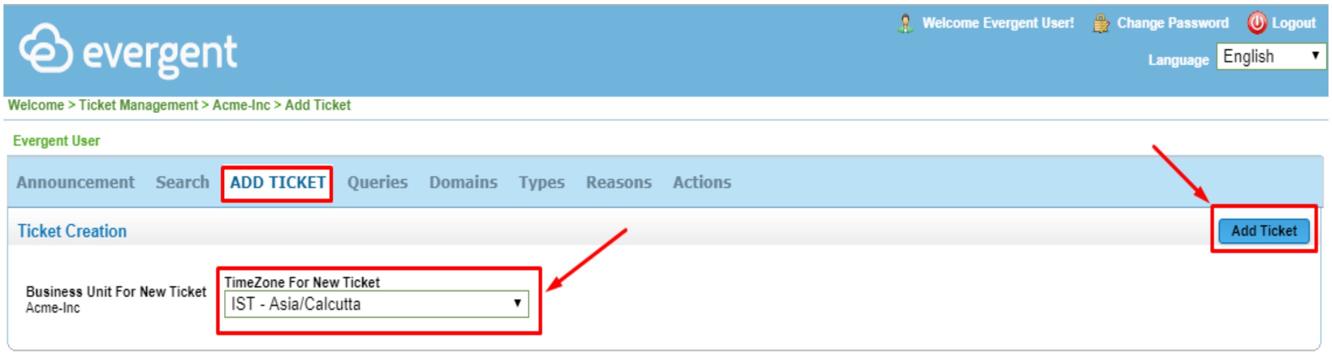
- Navigate <**Search**> tabbed screen of a business unit.
- Specify any of the search criteria and click the <**Search**> button at the bottom of the screen.
- From the search **Results** screen, select any one of the pagination selections say, "**Show 25 per Page**" (or) "**Show 50 per Page**" (or) 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:



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

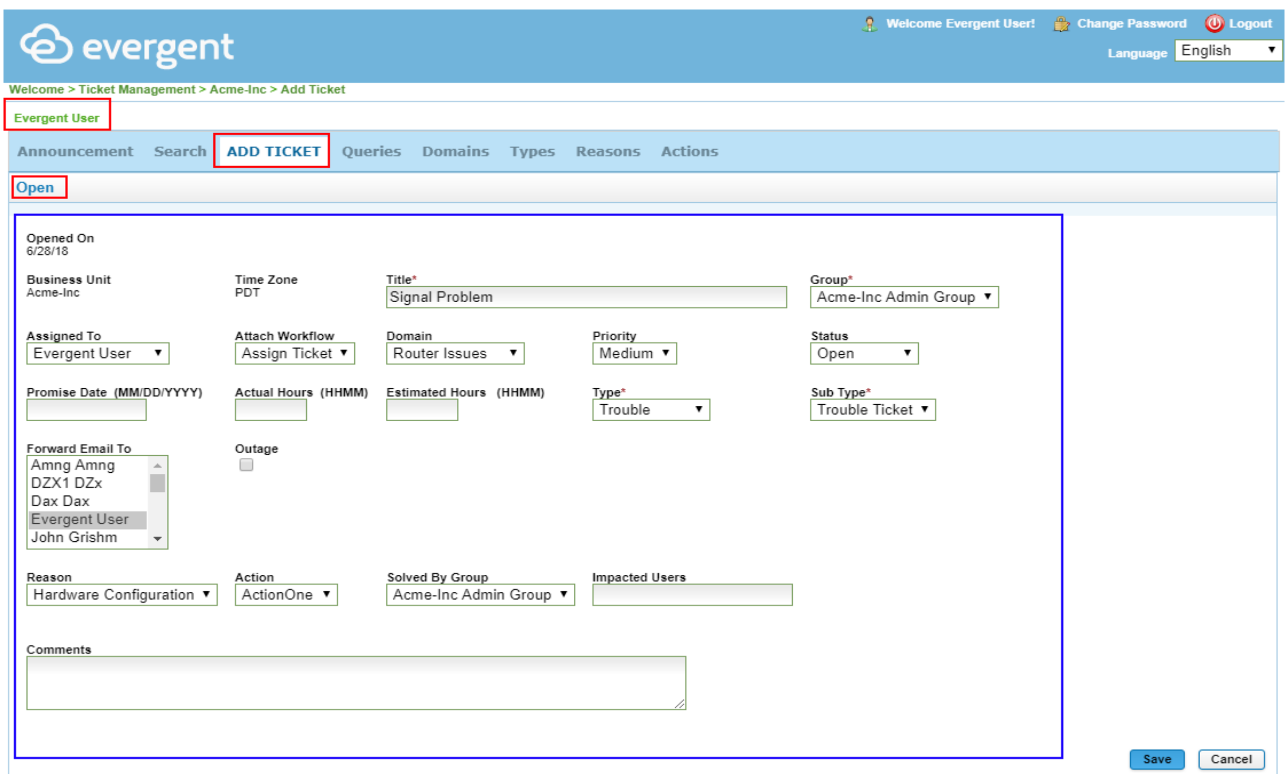
- Similarly, when “**Show 50 per Page**” pagination is selected, a total of **50 Group** records will be displayed per page along with page number hyperlinks.

Adding Tickets



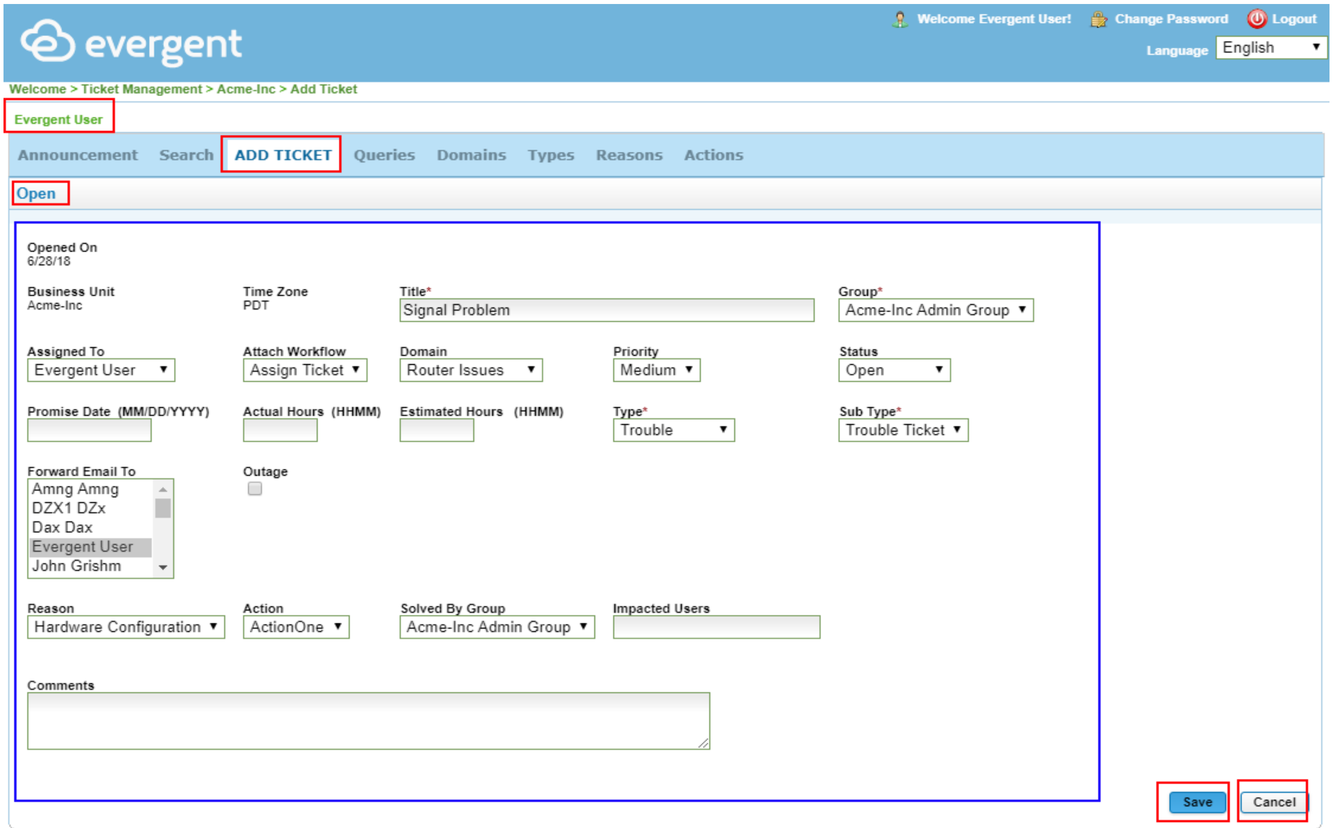
Creating a Trouble Ticket

- 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.

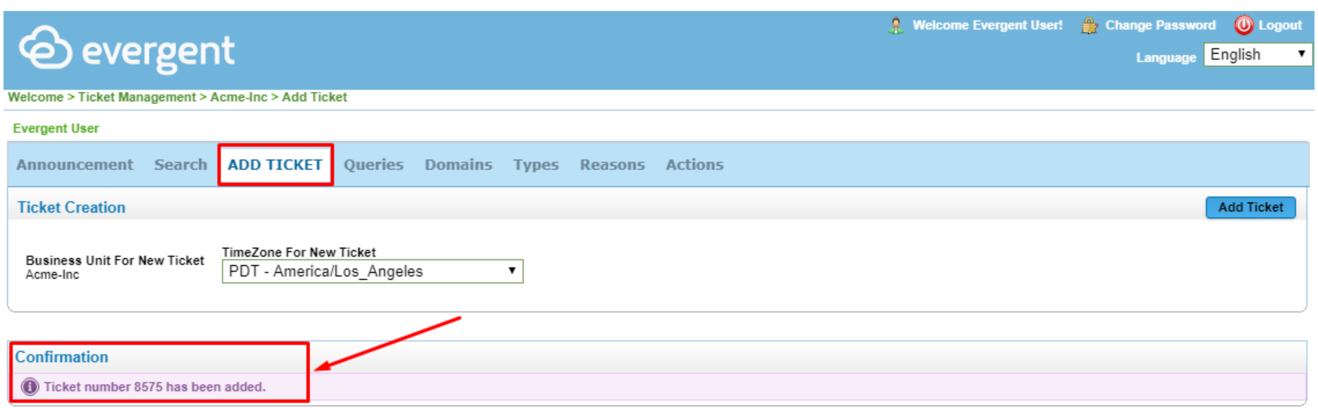


- In the **<Open>** screen that appears, indicate the subject of the ticket in the **<Title>** field.
- Select the <**Group**> to which the owner, who will be responsible for the ticket belonging to.

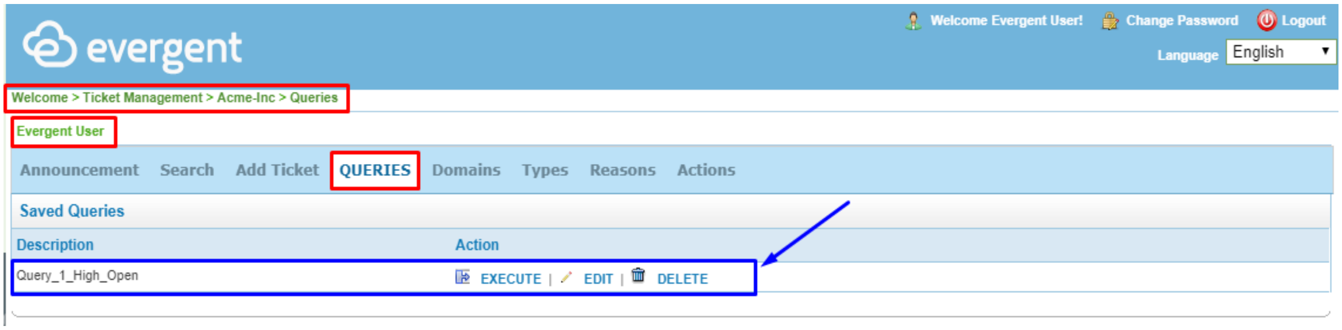
- In the **<Assigned To>** field, select the owner of the ticket. You may choose to indicate **<Unassigned>** and instead of indicating the responsible group only in the **<Group>** field. An email should be sent to the corresponding person selected in the list.
- You can attach the Workflow (if required) 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.



- 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:

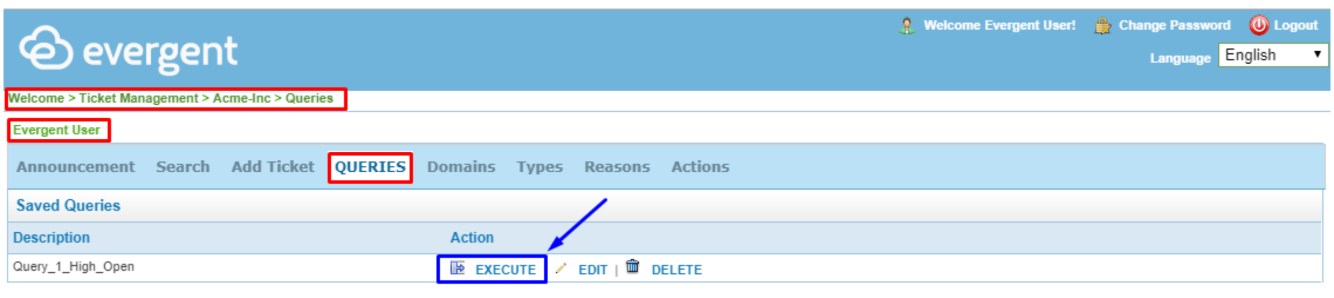


Queries



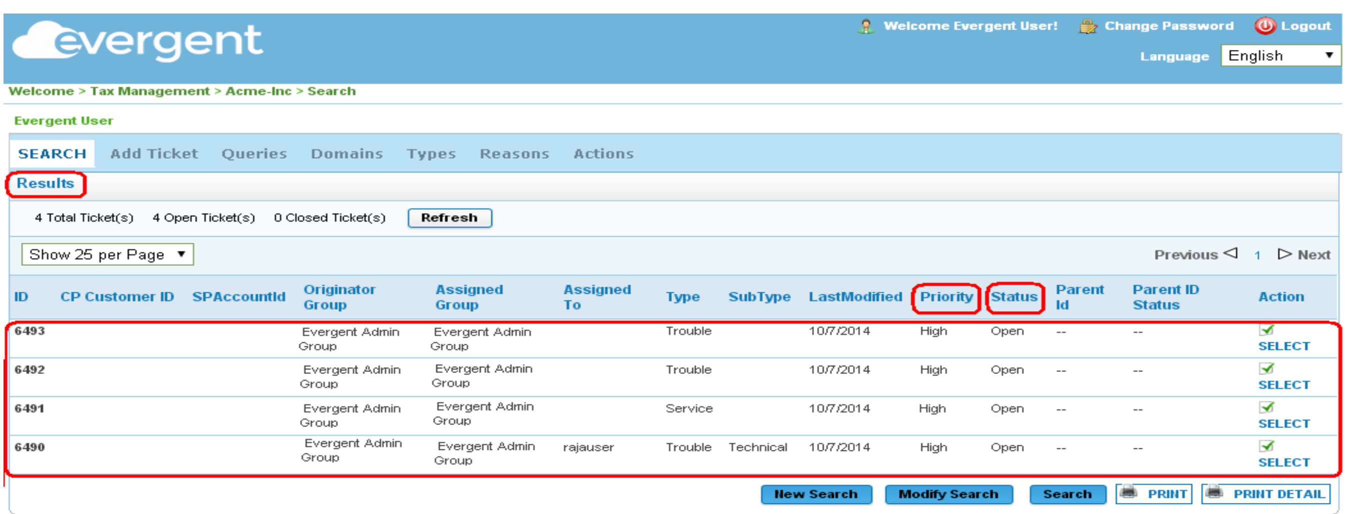
*You can dynamically sort the data displayed under the <**Saved Queries**> screen by their columns. You can sort the data either in ascending or descending order by clicking on the corresponding <**Description**> column heading hyperlink.*

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



- 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:

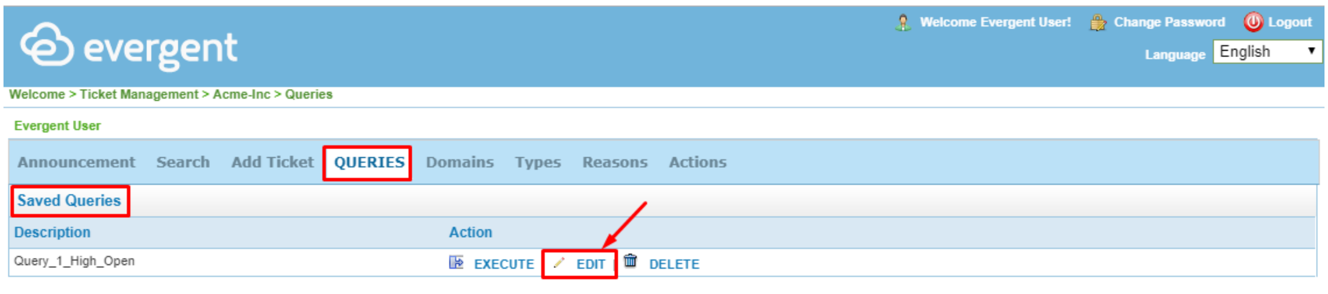


- You can also edit the existing saved query search criteria by clicking on the **<Modify Search>** button from the search **<Results>** screen or by clicking on the **<Edit>** inline button corresponding to the query from the **<Queries>** tab.

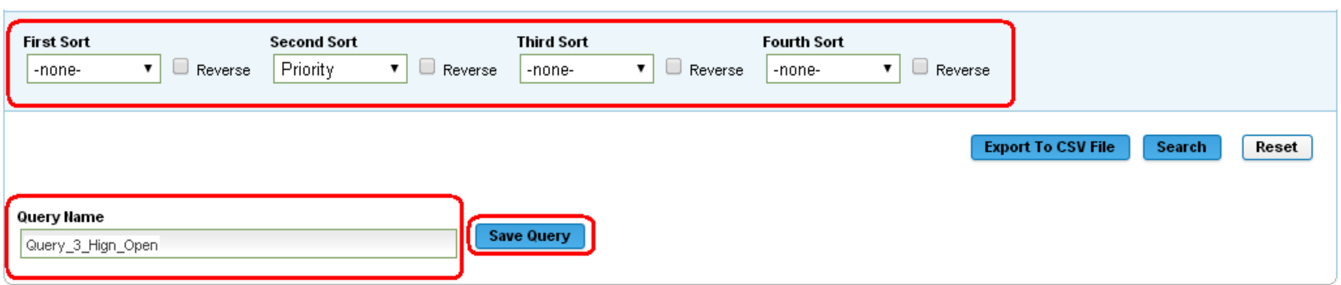
- Once you have modified the query search criteria, you can save the query with a different name or save with the same name.

Updating a Query

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



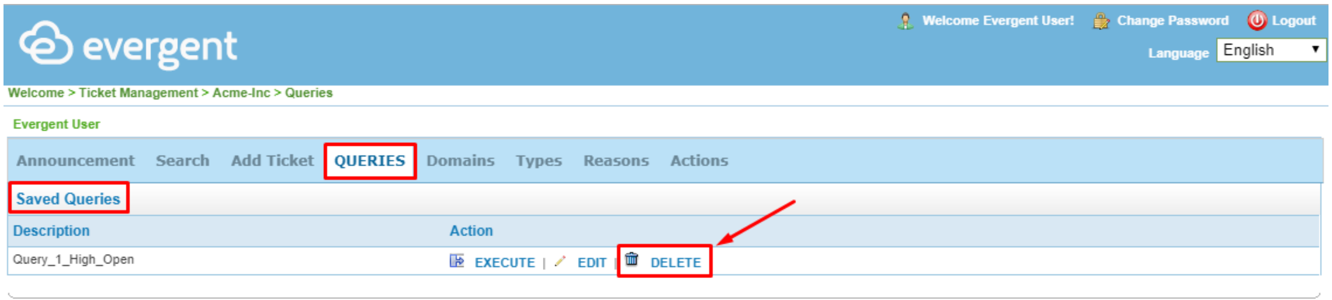
- Click the **<Edit>** inline button corresponding to the query you wish to modify.
- This will navigate you to the <**Search**> tabbed screen displaying the saved search criteria of the edited query.
- Make your desired changes to the search criteria.
- You can also change the <**Query Name**> if you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



- 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.

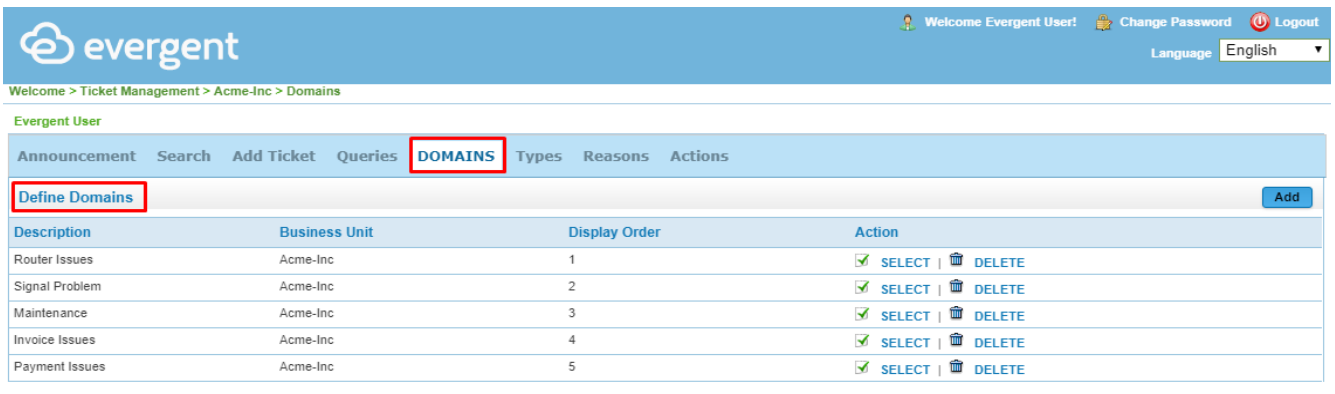
Removing a Query

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



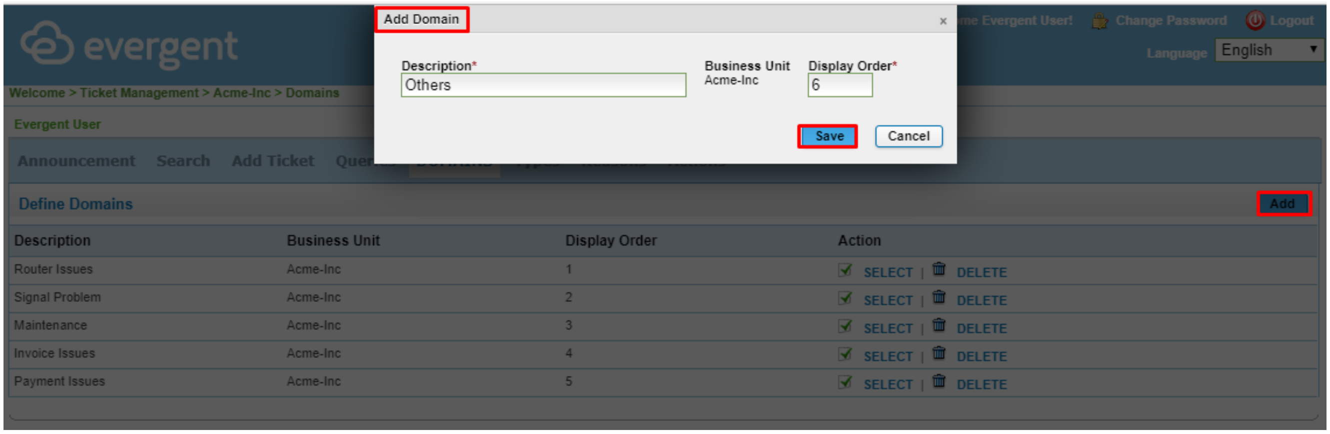
- Click the **< Delete>** inline button corresponding to the query you wish to delete.
- The selected query will be deleted from the list.

Domains

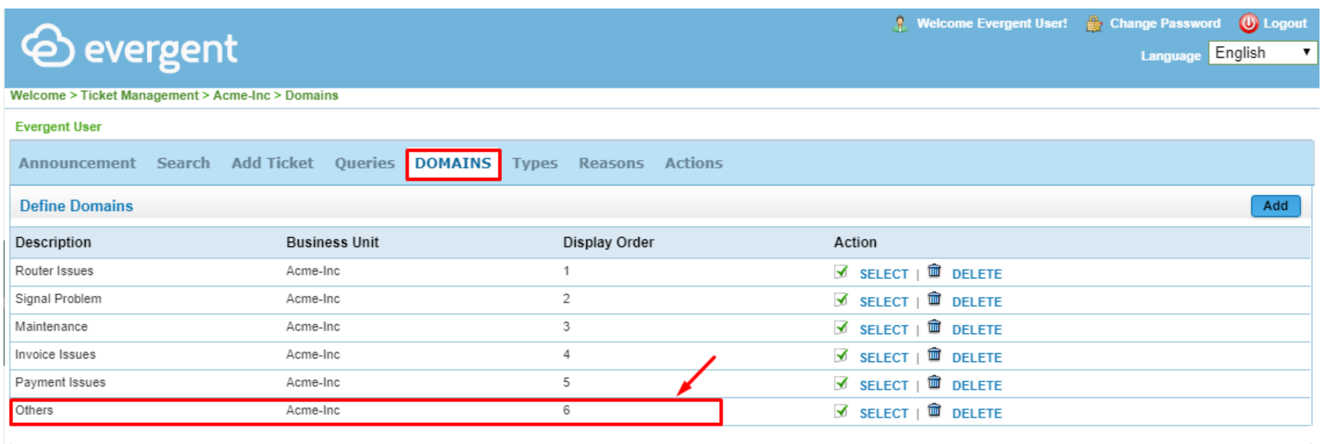


*You can dynamically sort the data displayed under the <**Define Domains**> screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (say, **Description, Display Order)**.*

- 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.

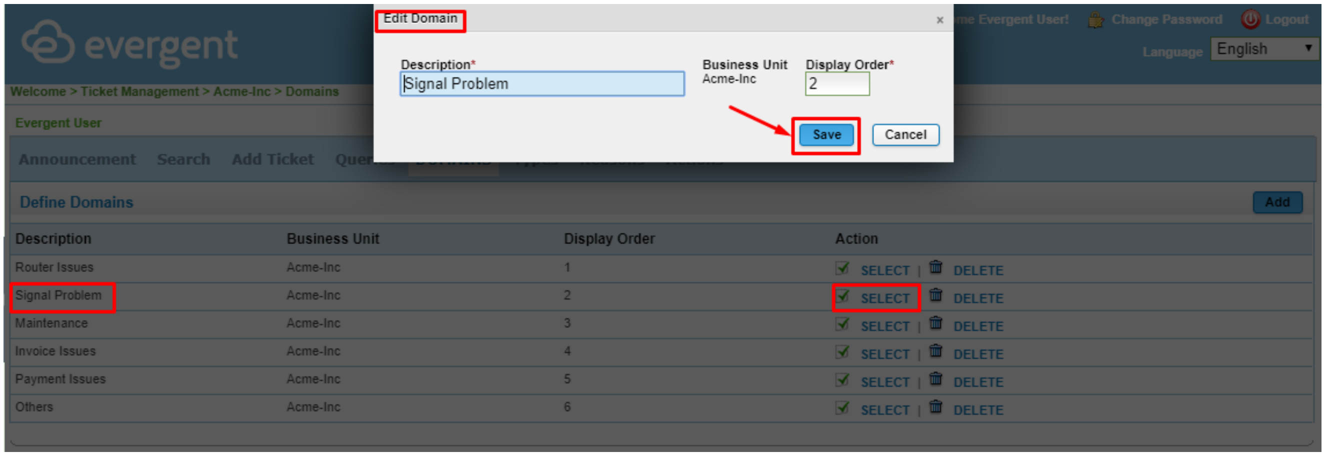


- Enter the **<Description>** of the new domain.
- Enter a number in the **<Display Order>** field indicating the position of the new domain such that it will be displayed in the order in the <**By Domain**> type in <**Ticket Filters**> section of the <**Search**> screen and in the **<Ticket Detail>** 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:



Modifying a Domain

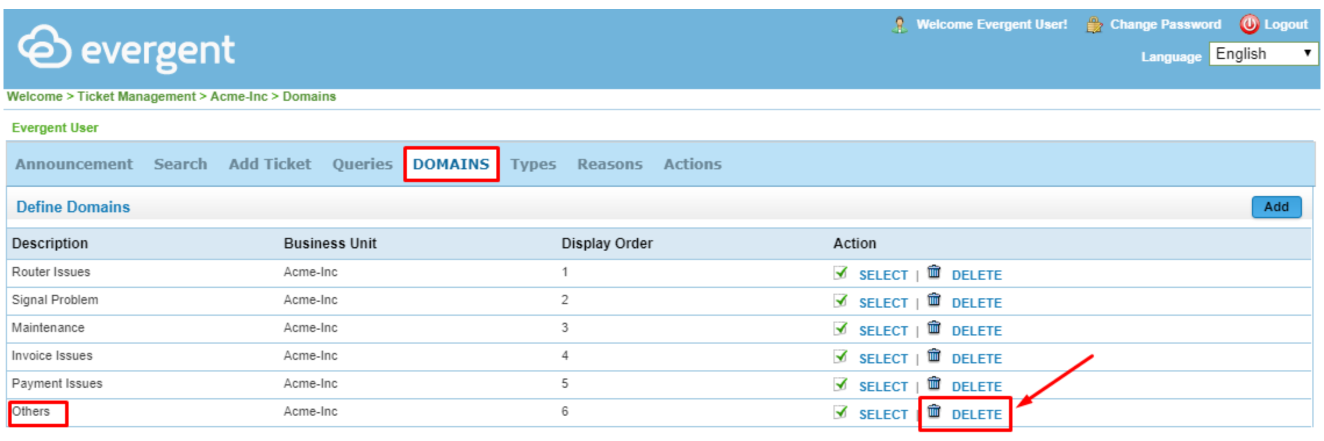
- Navigate to the **<Domains>** tabbed screen of a Business Unit, where you want to modify.
- Click the **< Select>** inline button corresponding to the domain that you wish to modify.
- In the <**Edit Domain**> pop-up model dialog box that appears, update the necessary fields.



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

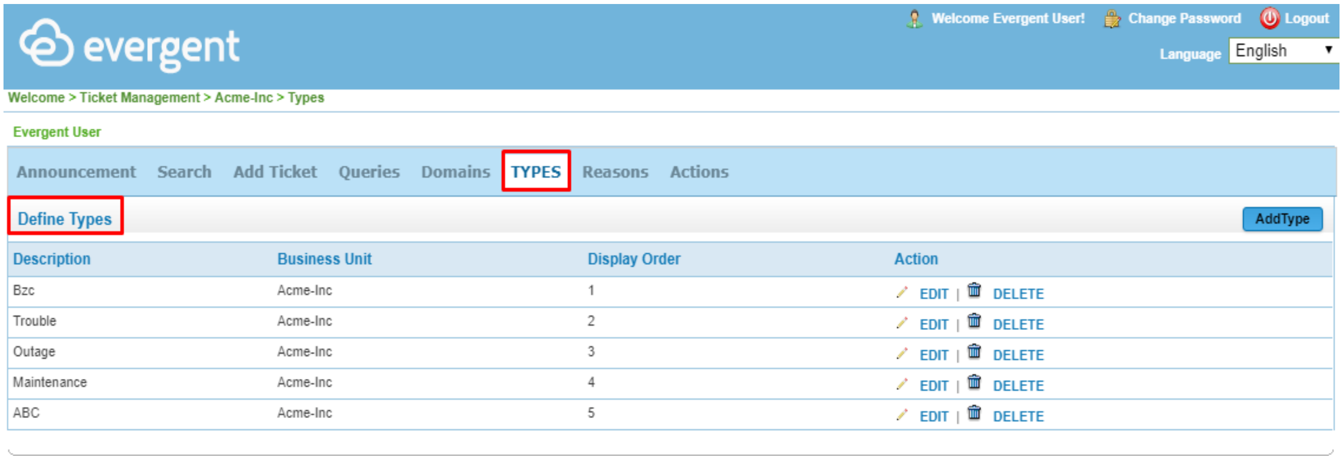
Removing a Domain

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



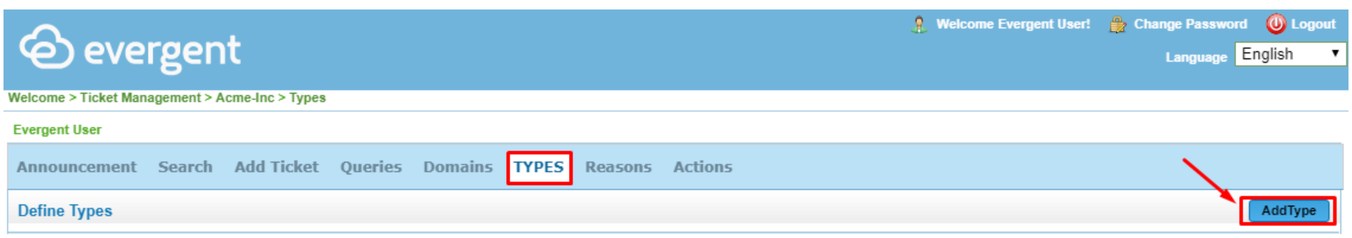
- Click the **< Delete>** inline button corresponding to the domain you wish to delete.
- The selected domain will be deleted from the list, if and only if, it is not associated with at least one ticket in the system of that respective business unit.

Types

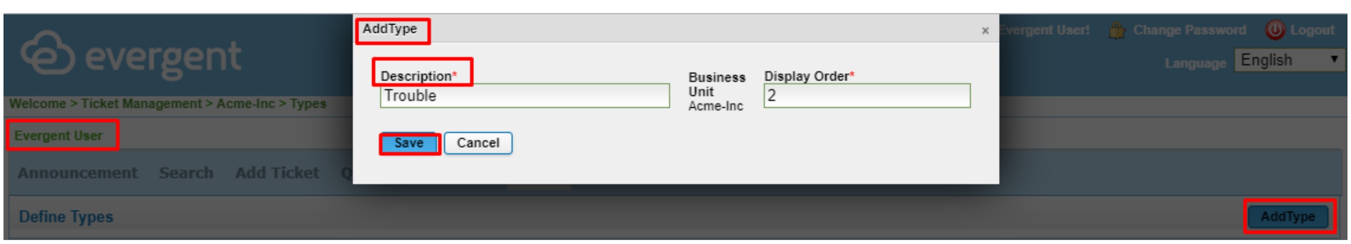


*You can dynamically sort the data displayed under the <**Define Types**> screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Description** and **Display Order)**.*

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



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

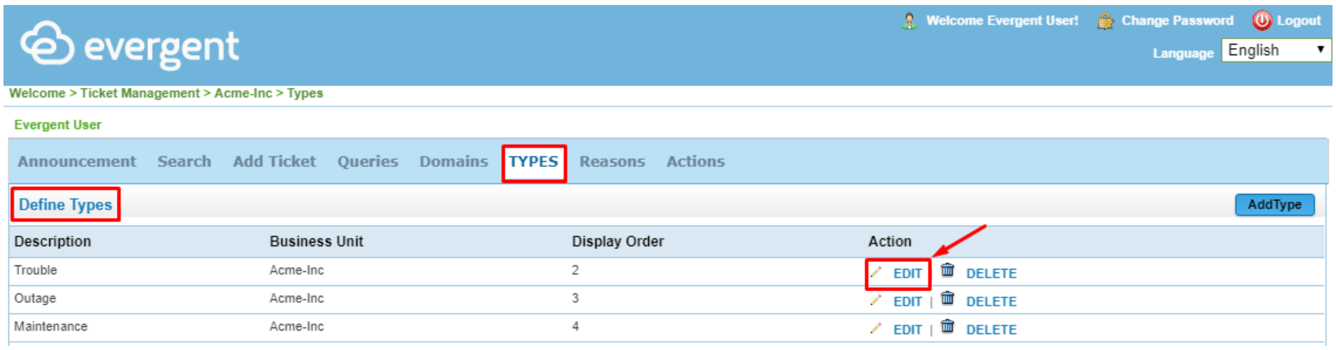


- In the **<Add Type>** pop-up model dialog box that appears, fill in the necessary fields.
- Enter description in the <**Description**> field.
- Enter a number in the <**Display Order**> field indicating the position of the new **type** such that it will be displayed in the order in the <**Types**>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

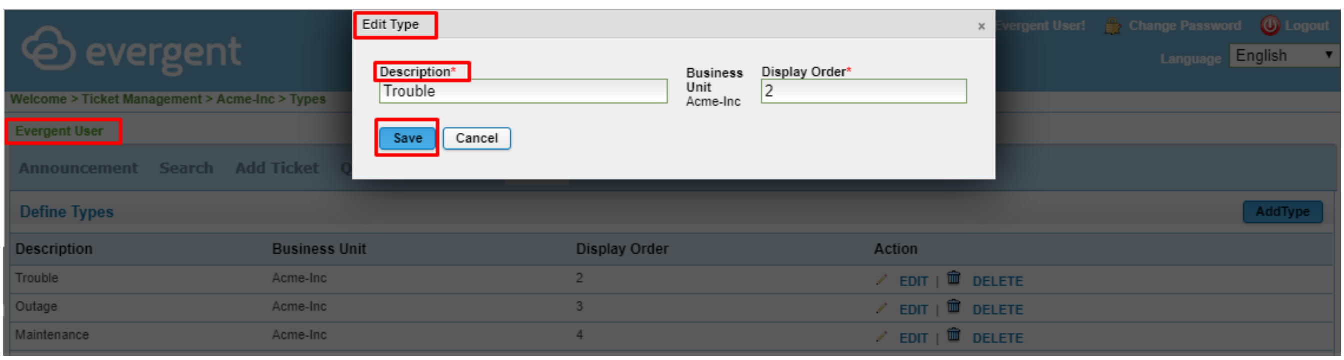
- Click the <**Save**> button to save the new **type**. Or else click the <**Cancel**> to discard.
- You can define any number of Types you wish to define for the Business Unit.

Modifying Types

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



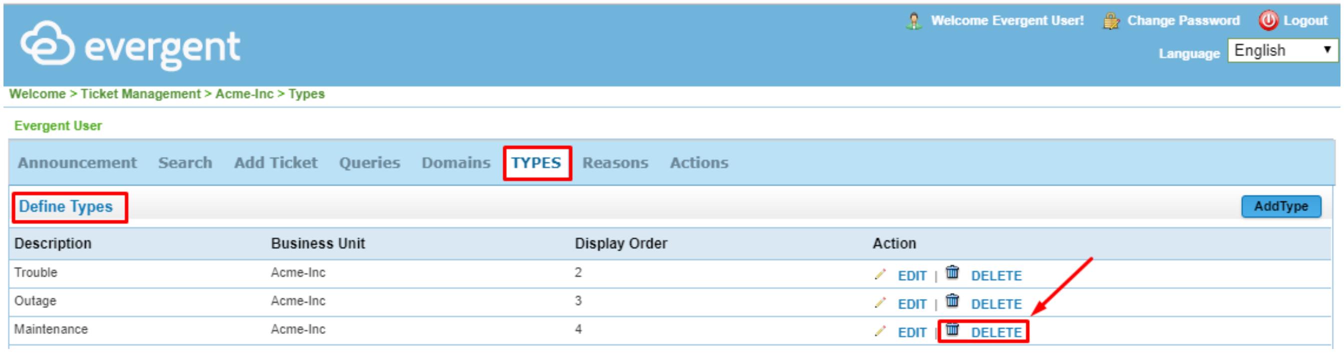
- Click the < **Edit** > inline button corresponding to the **type** that you wish to modify.
- In the <**Edit Type**> pop-up model dialog box that appears, update the necessary fields.



- 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.

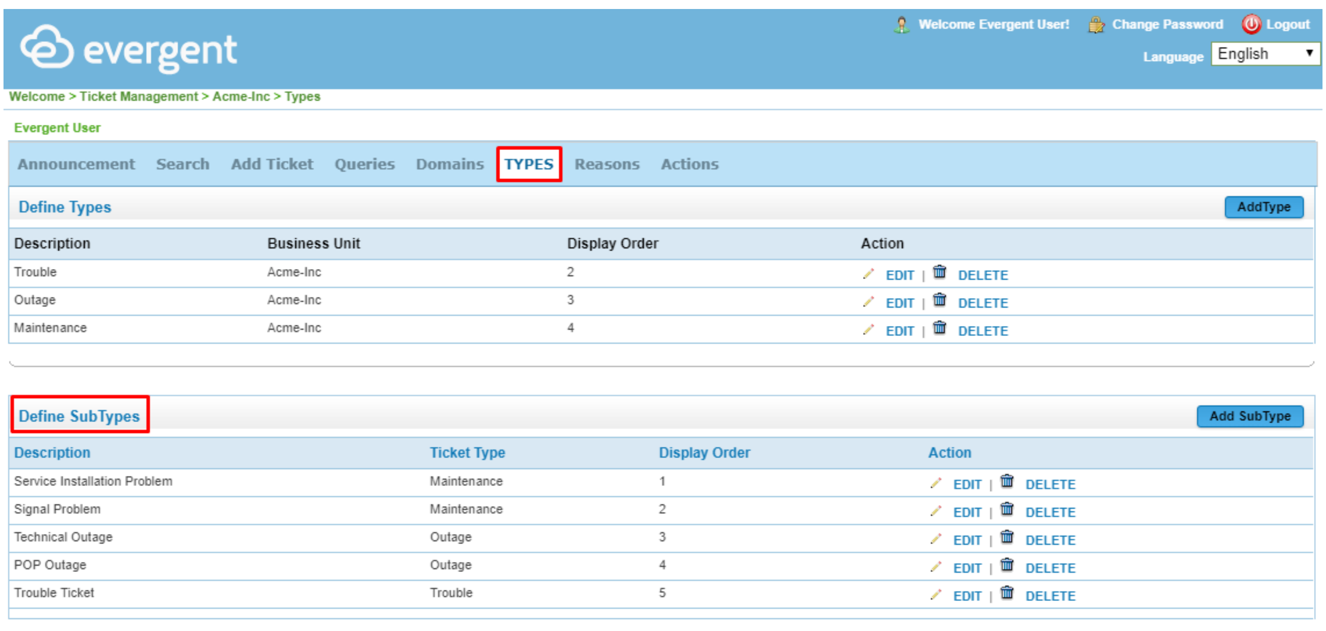
Removing a Type

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



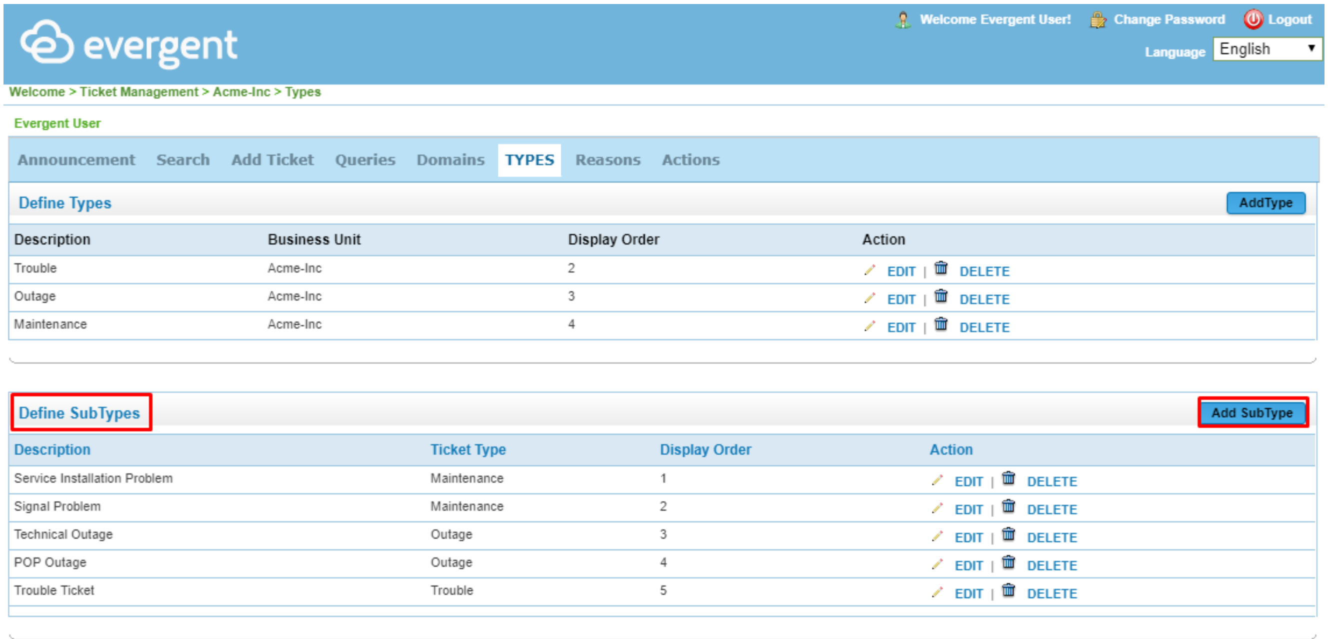
- Click the < **Delete** > inline button where you wish to remove the Type.
- The selected **Type** will be deleted from the list, if and only if, it is not associated with any ticket in the system of that respective business unit.

Subtypes

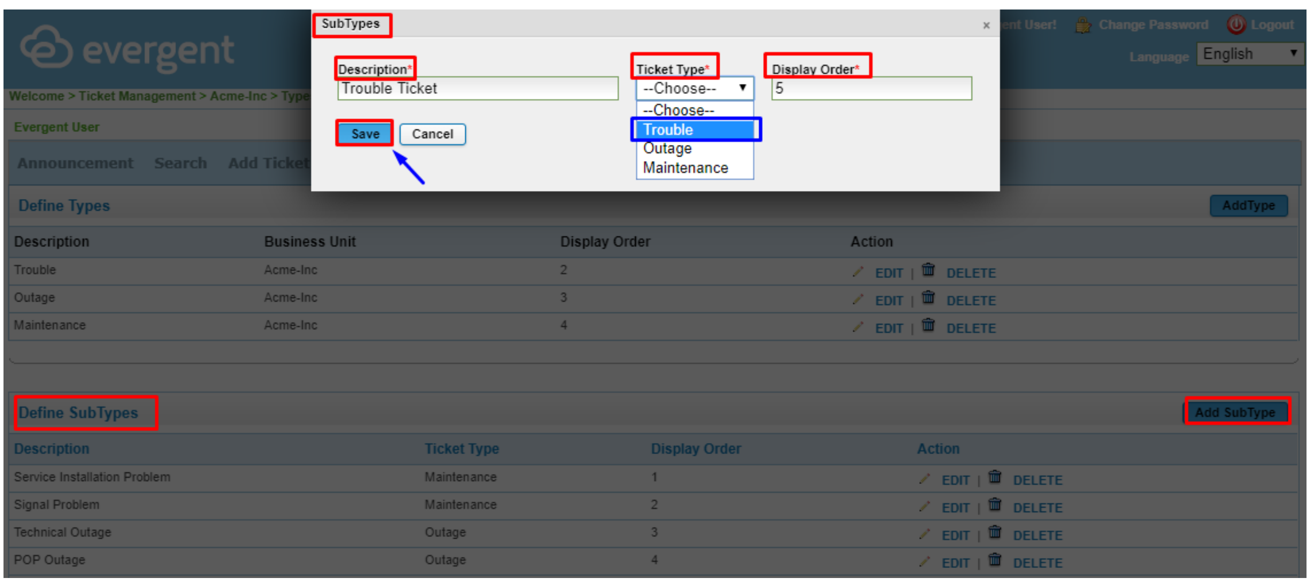


*You can dynamically sort the data displayed under the <**Define SubTypes**> section screen by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Description, Ticket Type** and **Display Order**).*

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



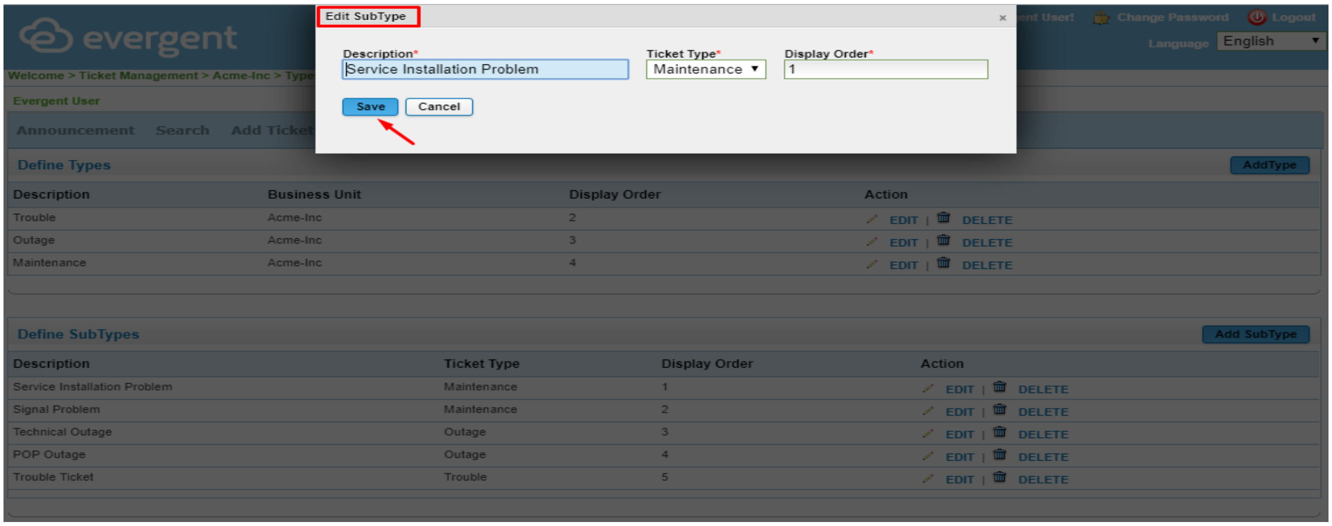
- Click the <**Add Sub Type**> button to define ticket Sub-Type to a ticket type that is already defined.



- 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

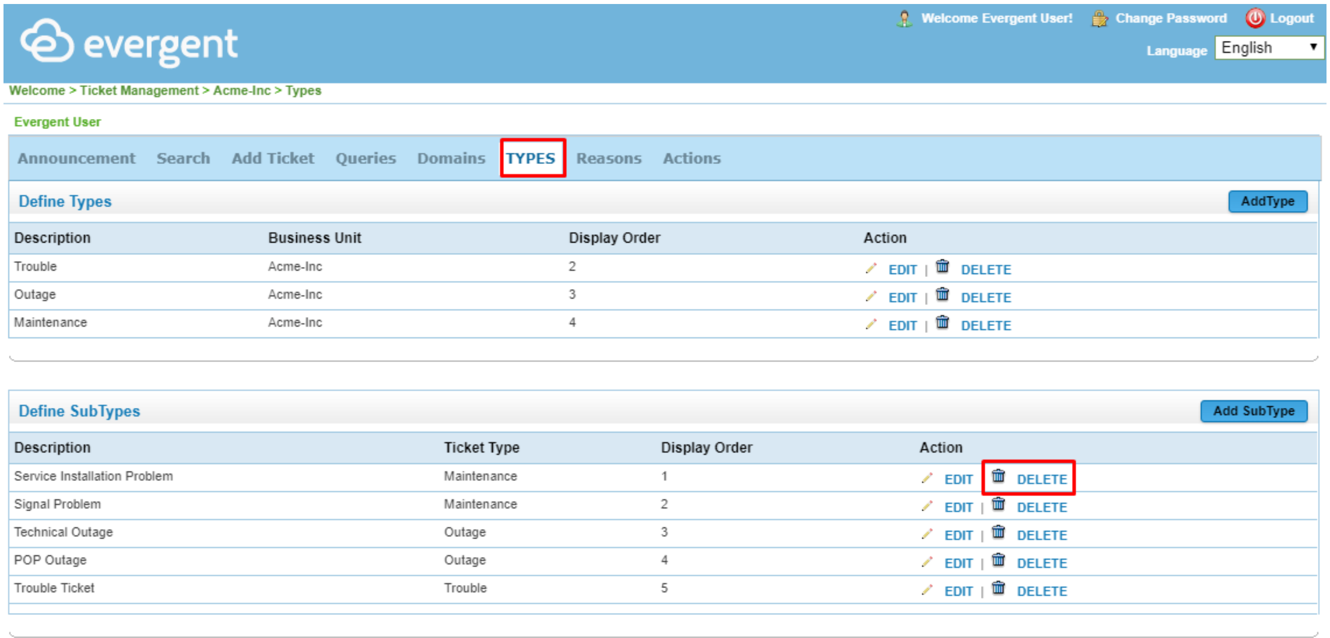
- Navigate to the <**Types**> tabbed screen of a Business Unit, where you wish to modify the **Sub Type**.
- Click the < **Edit**> inline button corresponding to the **Sub Type** that you wish to modify.
- In the <**Edit Sub Type**> pop-up model dialog box that appears, update the necessary fields.



- 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.



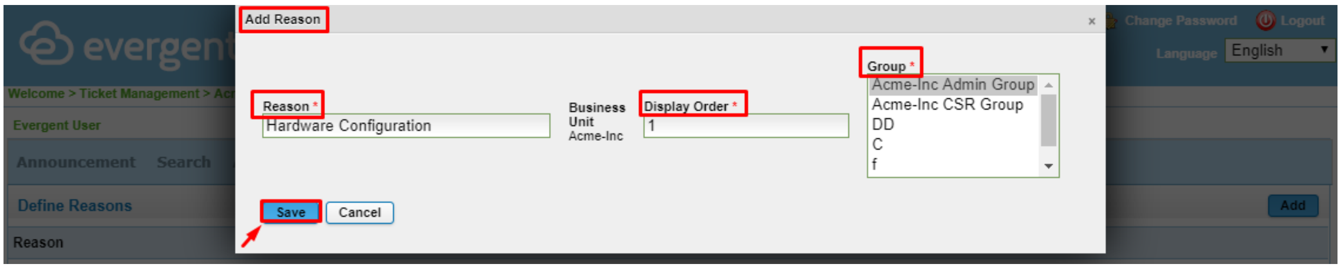
- Click the < **Delete** > inline button corresponding to the **Sub Type**, you wish to **remove**.
- The selected **Subtype** will be deleted from the list, if and only if, it is not associated with at least one ticket in the system of that respective business unit.

Reason

*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.

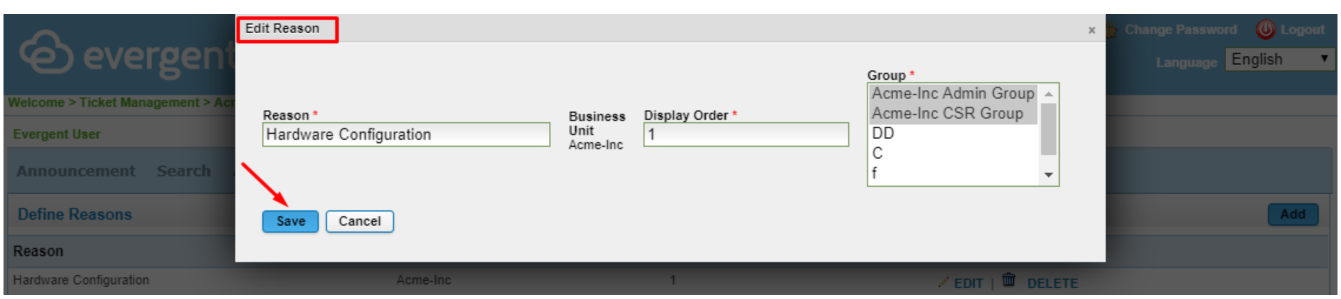
- Click the <**Add**> button to add a new Reason.
- In the <**Add Reason**> pop-up model dialog box that appears, fill in the necessary fields.



- 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.



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

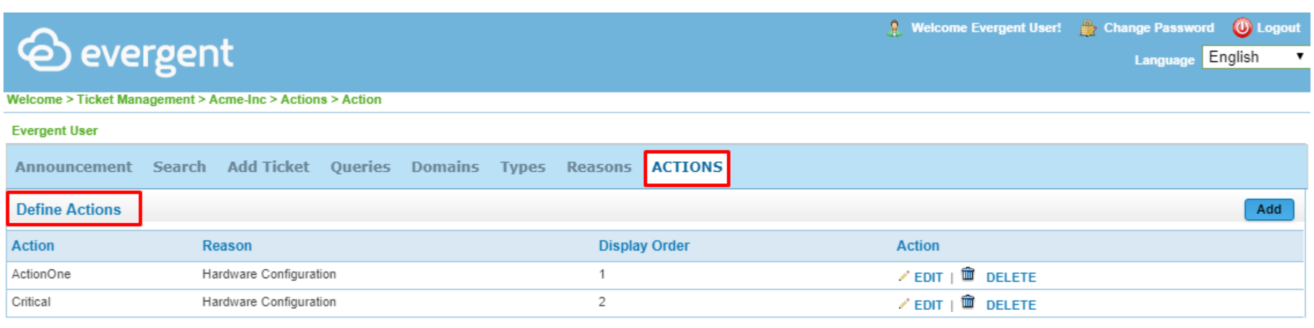
- You can also select/ unselect the selected groups from the <**Group**> list box.
- Click the <**Save**> button to save the changes. Or else, click the <**Cancel**> button to discard the changes.

Removing a Reason

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

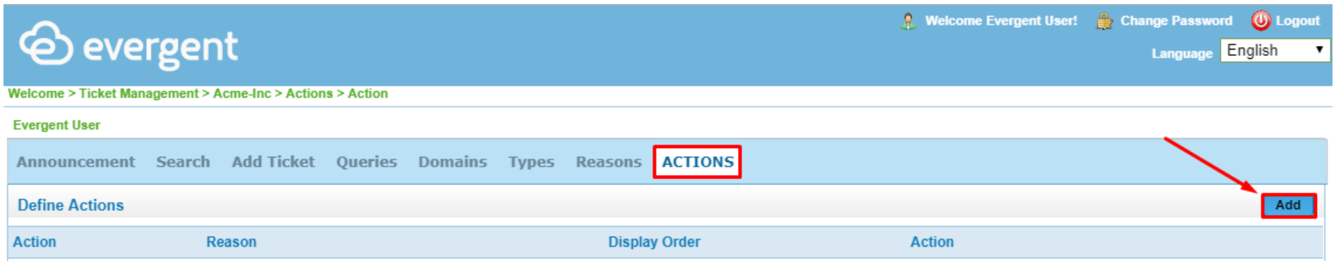
- Click the **< Delete>** inline button corresponding to the reason you wish to delete.
- The selected reason will be deleted from the list, if and only if, it is not associated with at least one ticket in the system of that respective business unit.

Actions

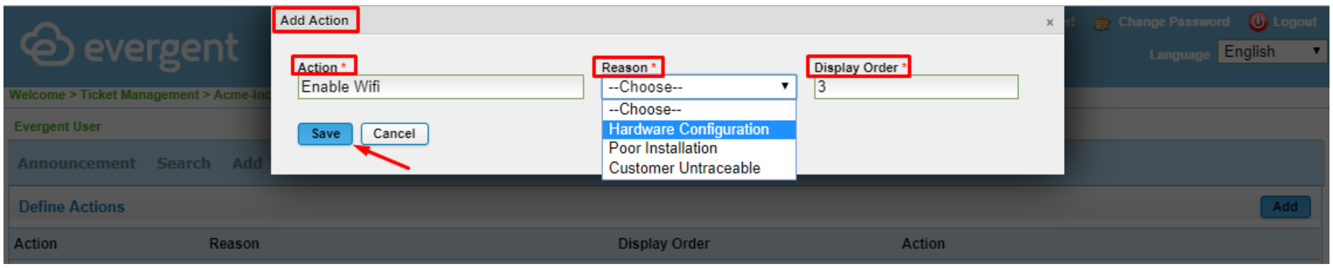


*You can dynamically sort the data displayed under the <**Define Actions**> by their columns. You can sort the displayed data either in ascending or descending order by clicking on the corresponding column name hyperlinks (Say, **Action**, **Reason** and **Display Order**).*

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



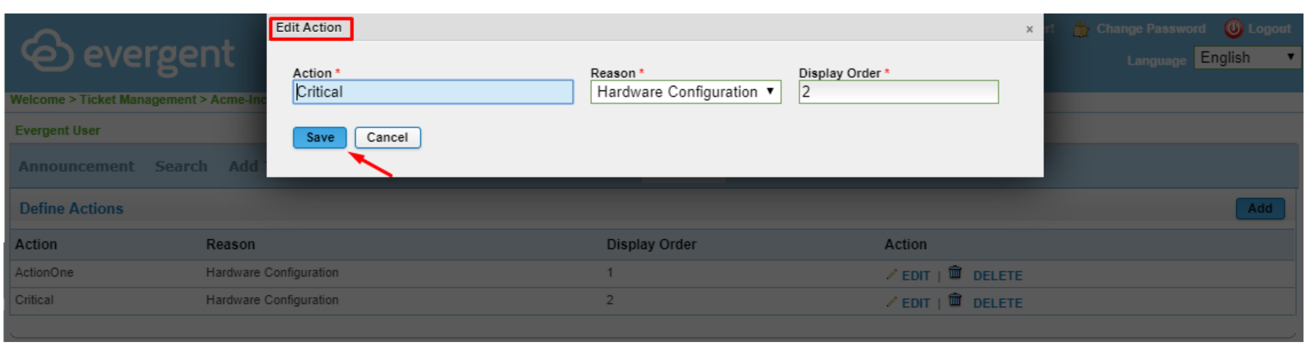
- In the **<Add Action>** pop-up model dialog box that appears, enter the description of the action in <**Actions**> field.



- 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.

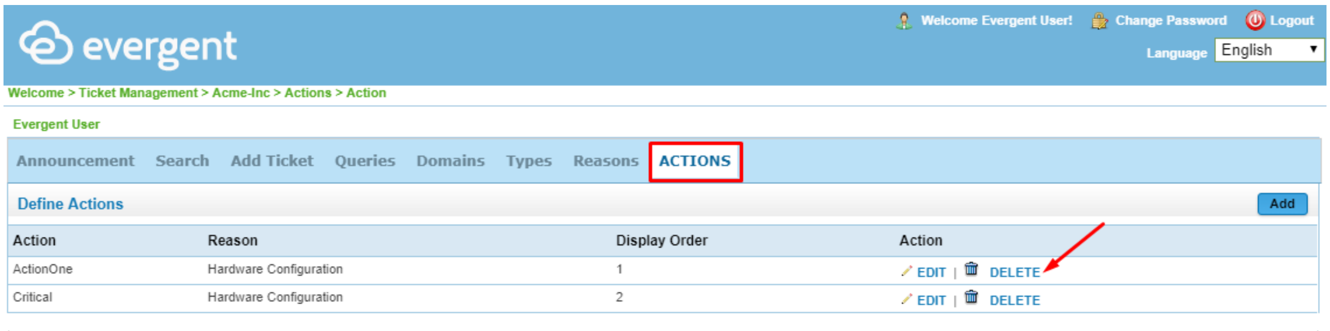


- Make necessary changes to the <**Action**> and <**Display Order**> fields.
- You can also change the reason for the action from the <**Reason**> drop-down list box.

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

Removing an Action

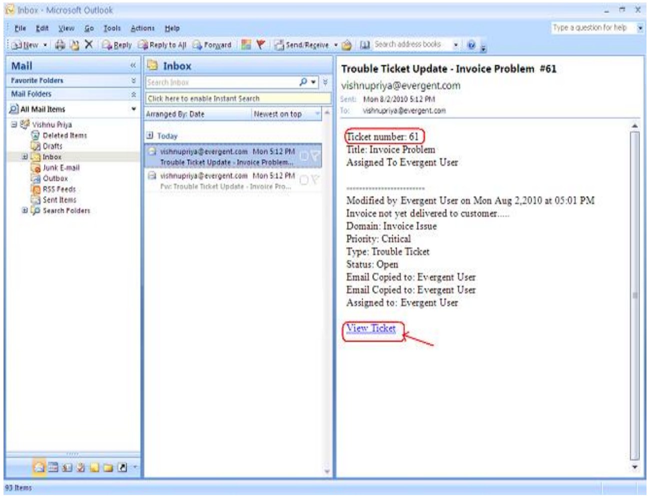
- Navigate to the **<Actions>** tabbed screen of a Business Unit and locate the **Action,** you wish to delete.



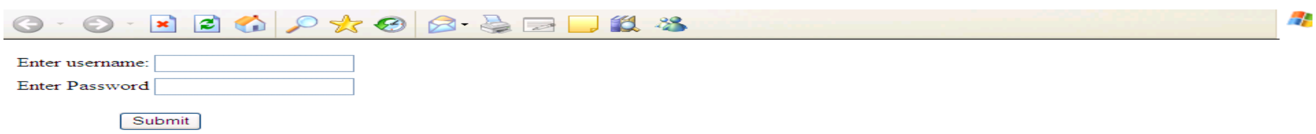
- Click the < **Delete**> inline button corresponding to the **Action** you wish to delete.
- The selected **Action** will be deleted from the list if and only if it is not associated with at least one ticket in the system of that respective business unit.

Viewing a Ticket through Email

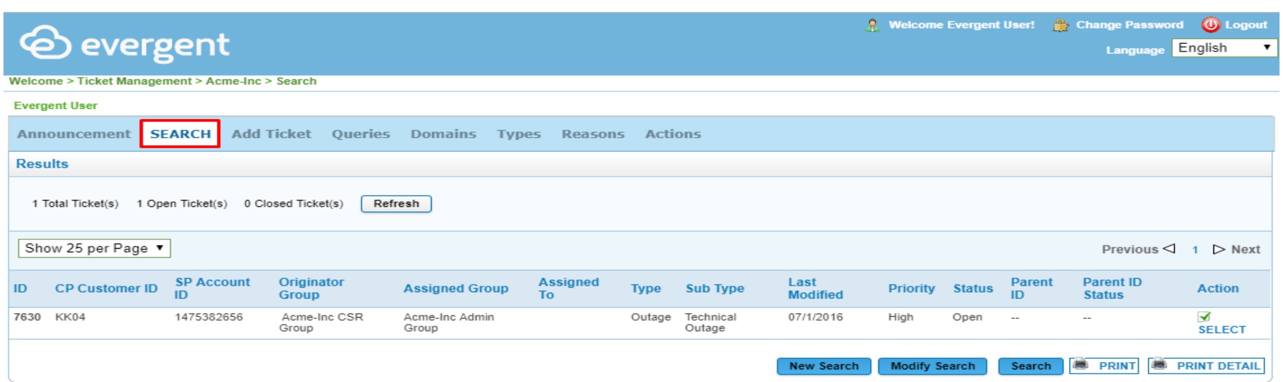
- Navigate to the <**Add Ticket**> screen.
- Follow the same procedure from steps **1** to **16,** in creating a new trouble ticket as mentioned in the **Creating a Trouble Ticket** section.
- Clicking on the <**Save**> button will navigate back to the <**Add Ticket**> screen displaying the ticket confirmation. 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.



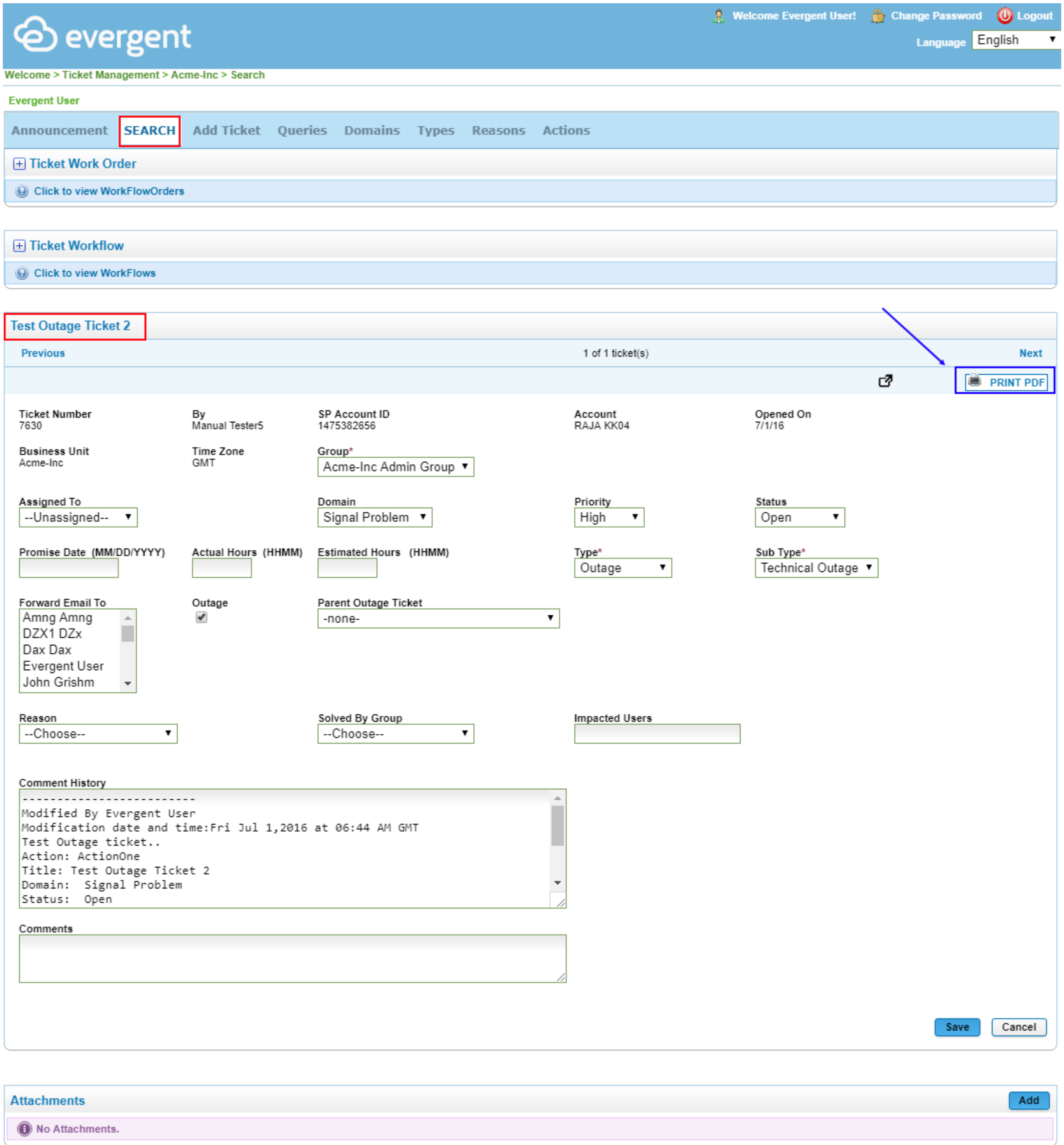
- Click the <**View Ticket**> hyperlink in the ticket mail.
- A new explorer window appears, asking you to enter login credentials into the ticket system to view the ticket details as shown on the following screen:



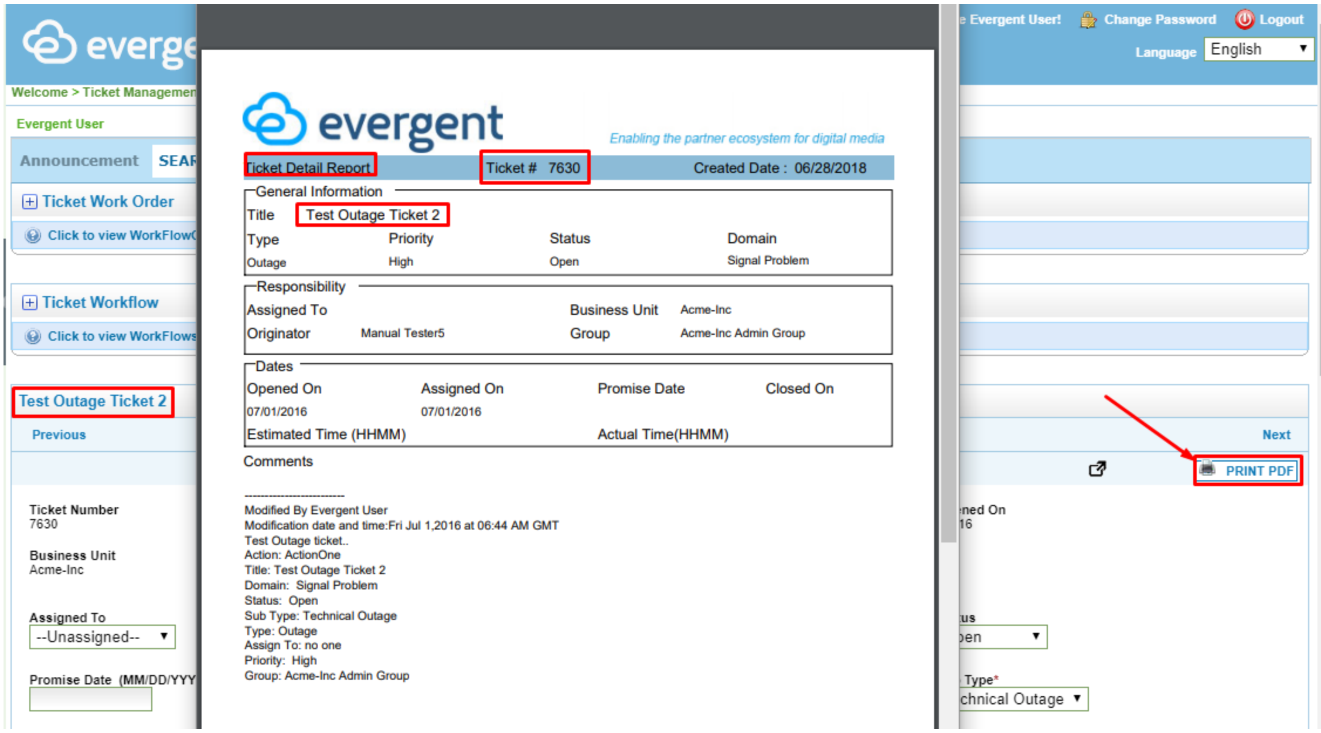
- Enter your username and password in the <**Username**> and <**Password**> fields respectively and click the <**Submit**> button.
- The <**Results**> screen will now appear, displaying the ticket as shown below:



- 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.



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



- 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 <> **close** icon located in the right top corner of the PDF report window to close the PDF report window.