AT&T Wireline Quick Help - Disputes (Business Center Interim Guidance)

About billing disputes

If you disagree with the charge for a service on an account, you can create and submit a dispute. If you have dispute permissions on your Business Center Billing Profile, you can:

* Submit a dispute, if you disagree with the charge for a service.
* Submit an inquiry to ask a general billing question.
* Submit a credit request if you disagree with the charge for a service that can't be viewed online.

An AT&T representative reviews your submission and responds.

Submit a dispute

1. From the top menu, click Disputes.
2. Select from the options to Submit Saved Disputes, View Dispute History, View Dispute and Inquiry History, Submit Inquiry, or Dispute Charges.
3. You will be re-directed to Business Center to complete the dispute process.

More information

For complete guidance on billing disputes, see Business Center Help for Disputes [https://businesscenter.att.com/ebiz/ebcsupport/v2/index.html#/ebcsupport/topic?module_id=topic_billing/topic_disputeacharge].

AT&T Wireline Quick Help - Account Tags

View bills

Account tags

Create Account Tags to label and manage accounts. Apply Account Tags to accounts on the Bills list to organize accounts for action, follow-up, filtering, grouping, bill ordering, and more.

Create an account tag

1. From the top menu, click Bills.
2. Select Tags, then click Manage Tags.
3. Choose Create New Tag.
4. Enter a name for your account tag and select a color. Click Save.

The new account tag is now available to apply to your accounts. You can apply one or multiple tags to your accounts.

Apply an account tag

1. From the top menu, click Bills.
2. Select one or more accounts, and then click Tags.
3. Choose Apply Tags.
4. Choose the tag to apply to the selected accounts. Click Apply.

The account tag will now appear in the Tags column for the associated accounts on the Bills list.

Edit or delete an account tag

1. From the top menu, click Bills.

2. Select Tags, then click Manage Tags.
3. Choose the edit icon to rename or change the color of the tag.
4. Choose the X icon to delete the tag.

Remove an account tag from an account

1. From the top menu, click Bills.
2. On the Bills list, find the account with the tag you want to remove.
3. Select the X next to the account tag.

The account tag will no longer appear in the Tags column for that account.

Filter the Bills list view by account tag

1. From the top menu, click Bills.
2. On the Bills list, select a tag to filter accounts with that assigned tag.
3. The Bill list view will update to show only the accounts assigned with the selected account tag.
4. To reset the view to all accounts, select All Accounts under Scope control.

Related topics

View a bill

View a consolidated bill

Compare bills

AT&T Wireline Quick Help - Descriptions - Add area code regions

Set up descriptions

Use descriptions to improve reports by clearly labeling area codes, phone numbers and time periods. Descriptions appear on reports but not on bills.

Add area code regions

1. From the top menu, click Setup.
2. Under Descriptions, click Area codes.
3. Click Add regions.
4. Add alphanumeric descriptions in the region fields.
5. Click Save.

Related topics

Edit or remove area code regions

Add phone number descriptions

Edit or remove phone number descriptions

Add time period descriptions

Edit or remove time period descriptions

AT&T Wireline Quick Help - Customize the Bills View

View bills

Customize the bills view

You can now select between multiple default views, or create unique custom views, in Bills. Choose between two default views: the Bill & Pay view for basic billing and payment details, or Trending & Variance for previous bill amounts, variance, budget tracking, and billing trends. You can also create and save multiple new views by selecting the column(s) that will appear and the order in which they are displayed. Customize the display of bill data in specific layouts and save these views for future use.

Create and save a custom view

1. From the top menu, click Bills.
2. Click the column selector icon, next to Views.
3. From Available Columns select one or more data types to add to your bill list view. Use the Shift key to select multiple data types.
4. Use the > and < buttons to include or exclude data types from the new view. Use the >> and << buttons to select and include or exclude all data types available. Reorder the columns using the up and down arrow buttons.
5. Click Apply Column View.
6. Your new view will display in Bills with the selected columns added to the view.
7. To rearrange the column order, select the column header and drag and drop to the preferred order.
8. To save the new, custom view, select Views.
9. Click Save Current View.
10. Enter a name for the custom view.
11. Click Close.

The new, customized view will be saved for future use, and can be selected from Views. You can create new views based on existing views by selecting the existing view, making changes, and then saving the new view.

Applying a view

1. From the top menu, click Bills.
2. Select Views.
3. Choose between the displayed Default Views and Saved Views. Select the view to display.
4. The Bills list view will update and display, based on the selected view.

Delete or rename a saved view

1. From the top menu, click Bills.
2. Select Views.
3. Choose the edit icon to rename the view.
4. Choose the X icon to delete the view.

Variance and trend tool options

You can add Monthly Trend, Variance, Variance %, Previous Bill, Previous Month, Budget, and Budget % columns to your view, to display trends and variances on the Bills list. The trend and variance tools display changes and activity in your accounts, such as increases or decreases in spending, consistent recurring billing, or new and cancelled accounts.

Variance displays the difference between the amount billed for the bill listed and the previous bill, while Variance % displays the percentage difference between the amount billed for the bill listed and the previous bill. Previous Bill displays the amount billed on the previous bill while Previous Month displays the total amount billed on the account for all bills in the previous month. For many accounts, the Previous Bill and Previous Month columns provide the same information, but for accounts with more than one bill cycle a month or that have on-demand billing, these columns provide a distinction.

Add variance and trend columns to the Bills list

1. From the top menu, click Bills.
2. Select the column selector icon, next to Views.

3. From Available Columns select Monthly Trend, Variance, Variance %, Previous Bill, Previous Month, Budget and/or Budget % to add to your bill list view. Use the Shift key to select multiple data types.

4. Use the > and < buttons to include or exclude data types from the new view. Use the >> and << buttons to select and include or exclude all data types available. Reorder the columns using the up and down arrow buttons.

5. Click Apply Column View.

6. Your new view will display the variance and trend columns.

Related topics

View a bill

View a consolidated bill

Compare bills

AT&T Wireline Quick Help - Descriptions - Edit area code regions

Set up descriptions

Use descriptions to improve reports by clearly labeling area codes, phone numbers and time periods. Descriptions appear on reports but not on invoices.

Edit area code region

1. From the top menu, click Setup.
2. Under Descriptions, click Area codes.
3. Select 1 or more area codes, and click Edit regions.
4. Make your changes, and then click OK.

Remove area code regions

1. From the top menu, click Setup.
2. Under Descriptions, click Area codes.
3. Select 1 or more area codes, and click Remove area codes.
4. Click OK.

Related topics

Add area code regions

Add phone number descriptions

Edit or remove phone number descriptions

Add time period descriptions

Edit or remove time period descriptions

AT&T Wireline Quick Help - Switching to New Billing Reports

Switching to New Billing Reports

For more information on how to recreate legacy reports and build new, custom reports, see the Switching to New Billing Reports Guide. [https://www.wireless.att.com/business/support/tcm/pdf/ReportingSwitch_Reference.pdf?v=1]

Related topics

Add a custom summary report

Add a custom detail report

AT&T Wireline Quick Help - Hierarchies - About hierarchies

About hierarchies

Hierarchies help you organize your user data. Use this powerful tool to expertly track trends and run robust, detailed reports.

For a high-level overview of what hierarchies can do, watch our quick visual guide.

You can have multiple hierarchies that group your accounts in different ways, such as by department, region, or store number.

Hierarchies use nodes to represent different groups. For example, to sort accounts by region, add a node for each region.

To create branches, add nodes within nodes. For example, you can divide each region by state and each state by office.

Hierarchies can be public (visible to any user in your organization) or private (visible only to you).

Related topics

Add a hierarchy

Add nodes and branches

Assign accounts and services

Move or remove nodes or branches

Run a cost allocation report

AT&T Wireline Quick Help - Pay bills - Pay an invoice

Pay invoice

Pay an invoice

1. From the top menu, click Invoices.
2. Check the box next to the billing account you want, and then click Pay.
3. Select your payment method, payment amount, and payment date, and then click Next.
4. Review your payment details, accept the Terms & Conditions, and then click Pay.
5. Click Print payment confirmation if you want to print your payment confirmation.

Related topics

Pay multiple invoices

View payment history

Cancel scheduled payments

AT&T Wireline Quick Help - Budgets - Remove budgets

Set up budgets

Remove budgets

1. From the top menu, click Setup.
2. Under Tools, click Budgets.
3. From the account list, select the accounts for the budgets you want to remove.
4. Click Remove budgets.
5. Click OK.

Related topics

Set budgets

Import budgets

View an invoice

AT&T Wireline Quick Help - Pay bills - Pay multiple invoices

Pay invoices

You can pay multiple invoices as a single charge, or each invoice as a separate charge.

Pay multiple invoices

1. From the top menu, click Invoices.
2. Check the boxes next to the invoicing accounts you want, and then click Pay.
3. Select your payment method, payment amount, and payment date.
4. Under Group charges, select Pay all invoices as a single charge or Pay each invoice as a separate charge, and then click Next.
5. Review your payment details, accept the Terms & Conditions, and then click Pay.
6. Click Print payment confirmation if you want to print your payment confirmation.

Related topics

Pay an invoice

View payment history

Cancel scheduled payments

AT&T Wireline Quick Help - Paperless billing - Enable paperless invoicing

Paperless invoicing

If you want to cancel paper invoices and only view your invoices online, you can enable paperless invoicing. You will receive an email each month when your paperless invoice is ready to view.

Enable paperless invoicing

1. From the top menu, click Setup.
2. Under User profiles, click Paperless invoicing.
3. Check the boxes next to the accounts you want, and then click Enable paperless invoicing.
4. To confirm, click Enable paperless invoicing again.

Related topics

Stop paperless invoicing

Invoice delivery and export invoices

AT&T Wireline Quick Help - Email Invoice Delivery

Email Invoice Delivery

You can submit a request for the PDF version of your paper invoice to be electronically delivered by email or sFTP on a monthly basis.

Scheduling email invoice delivery (EID)

1. From the top menu, click Invoices.
2. Check the box next to the account or accounts with the invoice or invoices you want delivered and click the link for Set up email invoice delivery at the top of page. You can also select Set up email invoice delivery when viewing a single or consolidated invoice.
3. Under Selection, keep the selected account or accounts or change your selection to All accounts.
4. Under Date range make sure that Monthly invoice cycle is chosen.
5. Under Invoice delivery and notification, select your delivery preferences. You can choose to have the invoices emailed or delivered to a sFTP location, if the sFTP location has been added under Setup.
6. Under Delivery Encryption, you can opt out of encrypted email delivery by unchecking the box next to Encrypted email delivery for this invoice order. You will need to agree to the encryption waiver language at the bottom of the screen.
7. Click Submit request.
8. You can edit or delete existing EID orders in the Download tab under the Pending section. View completed monthly orders under the Completed section.

AT&T Wireline Quick Help - Pay bills - Cancel scheduled payments

Pay invoices

If you've scheduled a payment for a future date, you can cancel it before the date of the payment.

Cancel scheduled payments

1. From the top menu, click Invoices.
2. Click Manage payments, and then select View payments.
3. Click Scheduled payments.
4. Check the boxes next to the payments you want to cancel and click Cancel payment.
5. Confirm the details and click Cancel payment.

Related topics

Pay an invoice

Pay multiple invoices

View payment history

AT&T Wireline Quick Help - Budgets - Set budgets

Set up budgets

Set budgets

1. From the top menu, click Setup.
2. Under Tools, click Budgets.
3. Under Scope, select All accounts or select a specific hierarchy level or account.
4. From the account list, select 1 or more accounts.
5. Click Set budgets.
6. Enter the monthly budget amount you want to track against, and then click OK.

This budget appears on the Invoices page for that account next to the invoiced amount.

Related topics

Import budgets

Remove budgets

View an invoice

AT&T Wireline Quick Help - Payment methods - Add a payment method

Payment methods

You can add credit cards, debit cards, and bank accounts to your stored payment methods.

Add a payment method

1. From the top menu, click Invoices.
2. Click Manage payments, and then select Manage payment methods.
3. Under Add payment method, click Add credit or debit card or Add bank account.
4. If you're adding a credit or debit card, enter your card information and click Add card.
5. If you're adding a bank account, enter your account information and click Add bank account.
6. Read and accept the Terms & Conditions, and click Submit.
7. Confirm your information and click Confirm.

Related topics

Manage payment methods

AT&T Wireline Quick Help - Filters - Add filters

Set up filters

You can create custom filters to use for your reports. You can add new filters for any report type.

Add filters

1. From the top menu, click Setup.
2. Under Tools, click Filters.
3. Click Add filter.
4. Select Start a new filter of type and select a report type on which the filter will be used.
5. Click Continue.
6. Add a name for the filter and define the filter rules.
7. If you want to share the filter with other users in your organization, select Share this filter under Sharing.
8. Click Save.

Related topics

Edit or remove filters

Run a summary or detail report

AT&T Wireline Quick Help - Descriptions - Edit phone number descriptions

Set up descriptions

You can make your reports more useful by adding descriptions. Descriptions appear on reports but not on invoices.

Edit phone number descriptions

1. From the top menu, click Setup.
2. Under Descriptions, select Phone numbers.
3. Select the phone numbers you want to edit, and click Edit descriptions.
4. Make your changes, and then click Save.

Remove phone number descriptions

1. From the top menu, click Setup.
2. Under Descriptions, select Phone numbers.
3. Select the phone numbers you want to remove.
4. Click Remove phone numbers, and then click OK.

Related topics

Add phone number descriptions

Add time period descriptions

Edit or remove time period descriptions

AT&T Wireline Quick Help - View bills - View an invoice

View invoices

View a single invoice or multiple invoices in a consolidated view. Use filters to quickly find and group the accounts you want to see.

View an invoice

1. From the top menu, click Invoices.
2. Under Month, select the invoice month you want to view.
3. To refine the list of accounts, use the sort and filter tools.
4. Click the account number. A summary view of the invoice appears.
5. To see a detailed view, under Expand invoice, select Detail invoice, and then click View.

Finding additional invoices

If your billing period has closed and you can't find your invoice on the invoices page in Billing (New), select Back to Business Center Home at the top right corner of the page and go to Business Center Billing.

Related topics

View a consolidated invoice

Sort and filter accounts

Compare invoices

AT&T Wireline Quick Help - Descriptions - Edit time period descriptions

Set up descriptions

You can make your reports more useful by adding descriptions. Descriptions appear on reports but not on invoices.

Edit time period descriptions

1. From the top menu, click Setup.
2. Under Descriptions, select Time periods.
3. Select the time periods you want to edit, and click Edit time periods.
4. Make your changes, and then click Save.

Remove time period descriptions

1. From the top menu, click Setup.
2. Under Descriptions, select Time periods.
3. Select the time periods you want to remove.
4. Click Remove time periods, and then click OK.

Related topics

Add phone number descriptions

Edit or remove phone number descriptions

Add time period descriptions

AT&T Wireline Quick Help - Bill delivery and export bills - Export an invoice

Export invoices

Create and download a report summary of an individual invoice to save for your offline records.

Export an invoice

1. From the top menu, click Invoices.
2. Check the box next to the accounts with the invoices you want to export and click View. A summary view of the invoices appears.
3. Click Export. The button may be hidden by this window.
4. Select the file format you want to download and click OK.

Related topics

Request an invoice

AT&T Wireline Quick Help - Customize reports - Add a custom summary report

Customize reports

Create and save reports with customized filter and sort options to meet your specific needs.

Add a custom summary report

1. From the top menu, click Reports.
2. Select Summary reports.
3. Click Add custom report.
4. Select a copy of an existing report or select a report type to start a new report, and then click Continue.
5. Enter a name for your report.
6. Specify a default filter, default view, grouping, subtotals display, table view, and graph view.
7. Click Save.

Your custom report appears with your other summary reports.

Related topics

About reports

Customize a detail report

Export reports

AT&T Wireline Quick Help - Running reports - Run a cost allocation report

Run reports

Run a cost allocation report

1. From the top menu, click Reports.
2. Select Cost allocation. The report appears. If you have multiple hierarchies, the report for the currently active hierarchy appears.

Request a downloadable document

1. While viewing a report, click Request report.
2. Under Report frequency, select one-time, daily, weekly or monthly deliveries. For monthly reports, select the day of the month you want your report to be delivered on.
3. Under Report format, select the format you want your report in.
4. Under Invoice & Report delivery and notification, select your delivery preferences.
5. Click Submit request.

Related topics

About reports

Run a summary or detail report

Customize a summary report

Customize a detail report

Export reports

Download a document

AT&T Wireline Quick Help - Running reports - Run a summary or detail report

Run reports

Run a summary or detail report for different views of your organization's activities. Run a cost allocation report to view charges allocated by hierarchy.

You can request reports as downloadable documents.

Run a summary or detail report

1. From the top menu, click Reports and select either Summary reports or Detail reports.
2. On the report page, click the name of the report you want to run.

Request a downloadable document

1. While viewing a report, click Request reports.
2. Under Report frequency, select one-time, daily, weekly, or monthly deliveries. For monthly reports, select the day of the month you want your report to be delivered on.
3. Under Report format, select the format you want your report in.
4. Under Invoice & Report delivery and notification, select your delivery preferences.
5. Click Submit request.

Related topics

About reports

Run a cost allocation report

Customize a summary report

Customize a detail report

Export reports

Download a document

AT&T Wireline Quick Help - About reports

About reports

Reports provide a customized view of your billing activities.

Summary reports allow you to visualize your information with interactive graphs.

Detail reports let you view individual usage and charges.

Cost allocation reports offer on-demand breakdowns of expenses.

Get started right away with one of the provided standard reports, or use simple and powerful tools to create custom reports that meet your exact needs.

You can download your reports as needed or have them emailed to you on your schedule.

Related topics

Run a summary or detail report

Run a cost allocation report

Customize a summary report

Customize a detail report

Export reports

AT&T Wireline Quick Help - Secure file transfer protocols (SFTP) - Add SFTPs

Set up SFTP locations

You can use a secure file transfer protocol (SFTP) location as a destination for documents. If your SFTP server or network restricts access to approved source IP addresses, files sent from this service will originate either from 64.94.143.25 or 66.116.117.165.

Add SFTPs

1. From the top menu, click Setup.
2. Under Account information, click SFTP locations.
3. Click Add location.
4. Complete the fields.
5. Click Save.

Related topics

Edit or remove SFTPs

AT&T Wireline Quick Help - Bill delivery and export bills - Scheduling invoice delivery

Request invoices

You can submit a request for an invoice to be delivered one time or on a recurring basis. You can specify other recipients as well.

Scheduling invoice delivery

1. From the top menu, click Invoices.
2. Check the box next to the account or accounts with the invoice or invoices you want, click Manage Statement Orders, and then click Request invoices.
3. Under Selection, select the Accounts and Date range you want. For recurring monthly delivery, within Date range, under Data, select Current month's invoice or Previous month's invoice.
4. Under Frequency, select one-time or monthly deliveries. For monthly invoices, select the day of the month you want your report to be delivered on.
5. Under Document type, select which format you want your report in.
6. Under Invoice delivery and notification, select your delivery preferences.
7. Click Submit request.

Related topics

Export an invoice

AT&T Wireline Quick Help - Custom Report Video

Reporting Video Library

Discover how to create and customize reports to view data, on-demand in the Reporting Video Library. [https://businesscenterlearning.att.com/]

With these short videos, you can speed through tips and tricks on self-service tools that help you organize, analyze, and customize your data.

Related topics

Add a custom summary report

Add a custom detail report

AT&T Wireline Quick Help - Manage document requests

Manage document requests

Edit or delete pending document requests.

Edit a document request

1. From the top menu, click Downloads.
2. Click Pending, then select the type of document you want to see under Report type.
3. Check the box next to the document name, and click Edit request.
4. Make your changes, and then click Submit request.

Delete a document request

1. From the top menu, click Downloads.
2. Click Pending, and then select the type of document you want to see under Report type.
3. Check the box next to the document name.
4. Click Delete requests. When prompted, click Delete request.

Related topics

Download a document

AT&T Wireline Quick Help - View bills - Compare invoices

View invoices

View and compare multiple invoices to track your spending month over month.

Compare Invoices

1. From the top menu, click Invoices.
2. Check the box next to the accounts with the invoices you want to compare.
3. Click View.
4. Under Compare, select up to 18 months of invoices to compare.
5. Click View.
6. To see a detailed view, click Expand invoice, select Detail invoice, and then click View.

Related topics

View an invoice

View a consolidated invoice

Sort and filter accounts

AT&T Wireline Quick Help - Hierarchies - Assign accounts and services

Set up hierarchies

Assign accounts and services

After you build your hierarchy, you need to assign accounts and services to each node.

1. From the top menu, click Setup.
2. Under Hierarchies, select Manage.
3. Under Display, select Accounts or Services.
4. Check the boxes next to the items you want to assign.
5. Click Move accounts or Move services.
6. Under Destination, select the node you want, and then click OK.
7. If prompted, click Save to confirm.

Related topics

About hierarchies

Add a hierarchy

Add nodes and branches

Move or remove nodes or branches

Run a cost allocation report

AT&T Wireline Quick Help - Preferences

Set up preferences

Manage notification and viewing options

1. From the top menu, click Setup.
2. Under User profiles, click Preferences.
3. Make selections to change your preferences.
4. Click Save.

AT&T Wireline Quick Help - Descriptions - Add time period descriptions

Set up descriptions

You can make your reports more useful by adding descriptions. Descriptions appear on reports but not on bills.

Add time period descriptions

1. From the top menu, click Setup.
2. Under Descriptions, select Time periods.
3. Click Add time periods.
4. Enter the start time and end time using a 24-hour clock format.
5. Click Save.

Related topics

Add phone number descriptions

Edit or remove phone number descriptions

Edit or remove time period descriptions

AT&T Wireline Quick Help - Automatic payments - Set up AT&T Autopay

Automatic payments

You can use AT&T AutoPay to pay your invoices automatically. AutoPay takes effect after your next invoice. You will need to pay any current invoices with a one-time payment.

Set up AT&T AutoPay

1. From the top menu, click Invoices.
2. Check the boxes next to the accounts you want.
3. Click Manage payments, and then select Manage AT&T AutoPay.
4. Read and accept the Terms & Conditions and click Submit.

Related topics

Stop AT&T AutoPay

AT&T Wireline Quick Help - Budgets - Import budgets

Set up budgets

Import budgets

1. From the top menu, click Setup.
2. Under Tools, click Budgets.
3. Click Import.
4. Click Browse..., and then select the CSV file of the budget you want to import from the menu. The first column in the CSV file is the Account number, and the second column is budget amount. The first row is ignored.
5. Click OK.

Related topics

Set budgets

Remove budgets

View an invoice

AT&T Wireline Quick Help - Secure file transfer protocols (SFTP) - Edit SFTPs

Set up SFTP locations

You can use a secure file transfer protocol location as a destination for documents. If your SFTP server or network restricts access to approved source IP addresses, files sent from this service will originate either from 64.94.143.25 or 66.116.117.165.

Edit SFTPs

1. From the top menu, click Setup.
2. Under Account information, click SFTP locations.
3. Under Location name, select the SFTP location you want to edit, and click Edit location.
4. Edit the fields and click Save.

Remove SFTPs

1. From the top menu, click Setup.
2. Under Account information, click SFTP locations.
3. Under Location name, select the SFTP location you want to remove, click Remove location, and then confirm.

Related topics

Add SFTPs

AT&T Wireline Quick Help - Paperless billing - Stop paperless invoicing

Paperless invoicing

Stop paperless invoicing

1. From the top menu, click Setup.
2. Under User profiles, click Paperless invoicing.
3. Check the boxes next to the accounts you want, and then click Stop paperless invoicing.
4. To confirm, click Stop paperless invoicing again.

Related topics

Enable paperless invoicing

Invoice delivery and export invoices

AT&T Wireline Quick Help - Descriptions - Add phone number descriptions

Set up descriptions

You can make your reports more useful by adding descriptions. Descriptions appear on reports but not on bills.

Add phone number descriptions

1. From the top menu, click Setup.
2. Under Descriptions, select Phone numbers.
3. Click Add phone numbers.
4. Complete the fields, and then click Save.

Use only numbers and no punctuation in the Phone number field. You can add up to 10 numbers and descriptions at a time.

Related topics

Edit or remove phone number descriptions

Add time period descriptions

Edit or remove time period descriptions

AT&T Wireline Quick Help - Add a custom detail report (in-depth guide)

Detail Reports

Check out this video on How to Create Custom Reports. [https://www.youtube.com/watch?v=S4KXQnuf0mQ]

Easily create custom detail reports to view your data the way you want to see it. This guide will walk you through creating a custom detail report.

* From the top menu, click Reports.
* Select Detail.
* Click Add custom report.
* Add new report - You can start with a copy of an existing report or select a report type to start a new report from scratch, then click Continue.
* Create a detail report

Name - Enter a name for your report.

Default filter - Use filters to narrow down the results of your reports. The selected filter is used any time the report is run and overrides any filter on the main reports tabs.

* To learn more about Filters, check out this quick video. [https://www.youtube.com/watch?v=Gxhg3bqtO9k]

Columns - Choose the columns you want displayed on your report. Use the arrows to include or exclude fields, then use the arrows on the right of the Include window to move the columns into the order you'd like them displayed.

Sort - You can select up to four levels of sorting and specify if the Sort 1 field should be used to group your data if choosing PDF for the report output.

Markup - If you need to include a service, processing or other fee on your reports, you can use a markup to add a percentage or fixed value increase to the charged amount. You manage markups in Setup under Tools.

Share this report - You can make the report available to other users in your organization. They will be able to run the report, but not make changes to it.

Related topics

Add a custom summary report

AT&T Wireline Quick Help - Customize reports - Add a custom detail report

Customize reports

Add a custom detail report

1. From the top menu, click Reports.
2. Select Detail reports.
3. Click Add custom report.
4. Select a copy of an existing report or select a report type to start a new report, and then click Continue.
5. Enter a name for your report.
6. Specify a default filter, columns, sorting, and more options.
7. Click Save.

Your custom report appears with your other detail reports.

Related topics

About reports

Customize a summary report

Export reports

AT&T Wireline Quick Help - Disputes

About disputes and billing questions

If you disagree with the charge for a service on an account, you can create and submit a dispute or a billing question. If you have dispute permissions on your Business Center Billing Profile, you can:

* Submit a dispute, if you disagree with the charge for a service.
* Submit a billing question to make a general invoice inquiry.

An AT&T representative reviews your submission and responds.

Submit a dispute

1. From the top menu, click Invoices.
2. Under Month, select the invoice month you want to view.
3. From the list of invoices, click the account number of the invoice you wish to dispute. A summary view of the invoice appears.
4. You can either dispute the entire invoice or an individual line item. To dispute the entire invoice, select Dispute Entire Invoice. To dispute a specific line item, view the detailed invoice. Under Expand invoice, select Detail invoice, and then click View. Find the line item you wish to dispute and select the flag icon next to the associated charge.
5. The Dispute Charges page will open, and you can enter details such as contact information, the dispute amount, reason and description. You can also add up to 10 attachments to the dispute. Next, you can either select Save as Draft, or you can Submit your dispute immediately.
6. You can view your submitted and draft disputes in Disputes and Billing Questions.

If you submit a dispute on an entire invoice, you cannot submit a subsequent dispute on a single line item of that invoice. If you submit a dispute on a single line item, you can no longer submit a dispute on the entire invoice. You can only submit a dispute or billing inquiry on an invoice issued within the last six months

Submit a billing question

1. From the top menu, click Invoices.
2. Under Month, select the invoice month you want to view.
3. From the list of invoices, click the account number of the invoice you wish to dispute. A summary view of the invoice appears.
4. Select Billing Question.
5. The Billing Question page will open, and you can enter contact information, routing code, contract number, the details and description of your question, and up to 10 attachments. Next, you can either select Save as Draft, or you can Submit your billing question immediately.
6. You can view your submitted and draft billing questions in Disputes and Billing Questions.

AT&T Wireline Quick Help - Add a custom summary report (in-depth guide)

Summary Reports

Check out this video on How to Create Custom Reports. [https://www.youtube.com/watch?v=S4KXQnuf0mQ]

Easily create custom summary reports to view your data the way you want to see it. This guide will walk you through creating a custom summary report.

* From the top menu, click Reports.
* Select Summary reports.
* Click Add custom report.
* Add new report - You can start with a copy of an existing report or select a report type to start a new report from scratch, then click Continue.
* Create a summary report

Name - Enter a name for your report.

Default filter - Use filters to narrow down the results of your reports. The selected filter is used any time the report is run and overrides any filter on the main reports tabs.

* To learn more about Filters, check out this quick video. [https://www.youtube.com/watch?v=Gxhg3bqtO9k]

Default view - Choose how you'd like to see your report when running it from the report list - as table or graph. You can easily toggle between table and graph when viewing the report in real time.

* Check out this video [https://www.youtube.com/watch?v=ZA5QhS2U3x0&t=1s] to learn more about interactive graphs.

Grouping - Create up to four grouping levels to summarize your data. Select the fields you want to see summarized from the Group and Subgroup lists.

* Groups/subgroups control how your data is summarized.
* Any fields selected display as columns on the report when viewing results in the table view.
* You can also specify a minimal value to further refine the results. For example, choose to display data only for calls over five minutes.

Subtotals display - Choose if you want subtotals displayed and where they should appear.

Table view - Choose the columns you'd like to include in your report when viewing in the table view. Use the arrows to include or exclude fields, then use the arrows on the right of the Include window to move the columns into the order you'd like them displayed. Fields you select for groups/subgroups will also display as columns in the table view.

Graph view

* Choose how you'd like your data to display with the Graph type.
* Choose your Calculation method - You can choose what you would like to have calculated on your report. If you want a calculation to appear in the summary report, move it from the EXCLUDE to the INCLUDE input box under Table view.
* You can also choose to add an extra segment, such as pie or bar, to your graph to see the value of a group as it relates to the complete record set. To add a segment to the graph that represents the records that didn't fall into the groups being graphed, select Include 'None' groups. To add a segment in the graph showing data that is below a minimum you specified for your groups, select Include 'Below Minimum' groups. Select the labels to include as point descriptions for either the group name or the group value of a graph segment.

Markup - If you need to include a service, processing or other fee on your reports, you can use a markup to add a percentage or fixed value increase to the charged amount. You manage markups in Setup under Tools.

Share this report - You can make the report available to other users in your organization. They will be able to run the report, but not make changes to it.

Related topics

Add a custom detail report

AT&T Wireline Quick Help - Hierarchies - Add nodes and branches

Set up hierarchies

Add nodes and branches

Add nodes to your hierarchy for each of your organization's departments, regions, store numbers, etc. You can also add nodes within a node to create a branch. The top level of a branch is the parent node.

Add a top level node

1. From the top menu, click Setup.
2. Under Hierarchies, select Edit.
3. Click Add nodes.
4. Enter information for the node, and then click Save.

Add a branch

1. Click the node you want to make a parent node, and then click Add nodes.
2. Enter information for the node and then click Save.

Related topics

About hierarchies

Add a hierarchy

Assign accounts and services

Move or remove nodes or branches

Run a cost allocation report

AT&T Wireline Quick Help - View bills - View a consolidated invoice

View invoices

View a consolidated invoice

1. From the top menu, click Invoices.
2. Under Month, select the invoice month you want to view.
3. To locate the accounts you want, use the sort and filter tools.
4. Check the boxes next to the accounts you want to see, and then click View. A summary view of the invoices from the selected accounts appears as 1 consolidated invoice.
5. To see a detailed view, under Expand invoice, select Detail invoice, and then click View.

Related topics

View an invoice

Sort and filter accounts

Compare invoices

AT&T Wireline Quick Help - View bills - Sort and filter accounts

View invoices

Sort and filter accounts

From the top menu, click Invoices to get started.

Filter by hierarchy

1. Click Scope and select Level.
2. Select a hierarchy, if you have more than one, and then select a level.

Filter by account

1. Click Scope and select Account.
2. Use the Search field to search by account number or description.
3. Click the account you want.

Filter by month

* Click Month and select a different month.

Search by account number, description, source, or invoice number

1. Click Advanced search and specify search values.
2. Click View.

Sort invoices in the table

1. Click a column heading.
2. To reverse the order, click it again.

Change the number of accounts per page

* Above the table, in the Show entries menu, select an amount.

Related topics

View an invoice

View a consolidated invoice

Compare invoices

AT&T Wireline Quick Help - Filters - Edit filters

Set up filters

Edit filters

1. From the top menu, click Setup.
2. Under Tools, click Filters.
3. Select the filter you want to edit and click Edit filter.
4. Edit the fields you want to change.
5. Click Save.

Remove filters

1. From the top menu, click Setup.
2. Under Tools, click Filters.
3. Select the filter you want to remove and click Remove filter. When prompted, click Remove filter again.

Related topics

Add filters

Run a summary or detail report

AT&T Wireline Quick Help - Payment methods - Manage payment methods

Payment methods

If you remove a payment method that is being used by AT&T AutoPay, it will continue to be charged. You can change your AutoPay payment method in your AutoPay settings.

Manage payment methods

1. From the top menu, click Invoices.
2. Click Manage payments, and then select Manage payment methods.
3. Click the payment method you want to manage.
4. To remove the payment method, click Remove, and then click OK.
5. To edit the payment method, click Edit.
6. Make your changes to the payment method information and click Save.

Related topics

Add a payment method

AT&T Wireline Quick Help - Download requested documents

Download documents

Store or share invoices and reports by requesting a downloadable document.

Download a document

1. From the top menu, click Downloads. A list of completed documents appears.
2. Under Report type, select a type of document to view in the table.
3. Click the document name to download it.

Related topics

Edit or delete a document request

AT&T Wireline Quick Help - Instructor Led Training

Digital Training Center

Visit the Reporting section of the Digital Training Center [https://businessdigital.att.com/trainingregistration/] to learn more about reporting with free, virtual training sessions.

Join these guided sessions where you can ask questions and get answers in real-time.

Related topics

Add a custom summary report

Add a custom detail report

AT&T Wireline Quick Help - Exporting reports - Export a report

Export reports

Export report data for storing, sharing, or importing into other tools.

Export a summary or detail report

1. From the top menu, click Reports, and then select Summary reports or Detail reports.
2. Click the report you want to run.
3. Click Export.
4. Select a file format, and click OK.

Export a cost allocation report

1. From the top menu, click Reports, and then select Cost allocation.
2. Click Export.
3. Select a file format, and click OK.

Exporting to CSV

1. When exporting to CSV and opening it in Excel, be sure to review and modify the cell formatting for numbers, dates, negative values, and more to adjust to your preference.

Related topics

About reports

Run a summary or detail report

Run a cost allocation report

AT&T Wireline Quick Help - Markups - Add markups

Set up markups

Create markups for use on reports you send to your customers. You can add a percentage, a fixed amount, or both.

Add markups

1. From the top menu, click Setup.
2. Under Tools, click Markups.
3. Click Add markup.
4. Enter a markup name, percentage, or fixed amount. If you enter a fixed amount and a percentage, both are used.
5. Click Save.

Related topics

Edit or remove markups

Run a summary or detail report

AT&T Wireline Quick Help - Automatic payments - Stop AT&T Autopay

Automatic payments

Stopping AutoPay takes effect immediately.

Stop AT&T AutoPay

1. From the top menu, click Invoices.
2. Check the boxes next to the accounts you want.
3. Click Manage payments, and then select Manage AT&T AutoPay.
4. Read and accept the Terms & Conditions and click Stop AutoPay.

All future invoices must be paid manually.

Related topics

Set up AT&T AutoPay

AT&T Wireline Quick Help - Hierarchies - Move or remove nodes or branches

Set up hierarchies

Move a node or branch

1. From the top menu, click Setup.
2. Under Hierarchies, select Edit.
3. Select a node and click Move branch.
4. Under Destination, select a location, and then click OK.
5. If prompted, click OK to confirm.

When you move a node or branch, all assigned accounts and wireless numbers move with it.

Remove a node or branch

1. From the top menu, click Setup.
2. Under Hierarchies, select Edit.
3. Select a node and click Remove branch.
4. Click Remove.
5. If prompted, click Remove to confirm.

When you remove a node or branch, all accounts and wireless numbers assigned to that node or branch become unassigned.

Related topics

About hierarchies

Add a hierarchy

Add nodes and branches

Assign accounts and services

Run a cost allocation report

AT&T Wireline Quick Help - Markups - Edit markups

Set up markups

Edit markups

1. From the top menu, click Setup.
2. Under Tools, click Markups.
3. Select the markup you want to edit, and then click Edit markup.
4. Make your edits, and click Save.

Remove markups

1. From the top menu, click Setup.
2. Under Tools, click Markups.
3. Select the markup you want to remove, and then click Remove markup.
4. Click OK.

Related topics

Add markups

Run a summary or detail report

AT&T Wireline Quick Help - Pay bills - View payment history

Pay invoices

View payment history

1. From the top menu, click Invoices.
2. Click Manage payments, and then select View payments.
3. Click Payment history.
4. To sort, click the arrows at the top of each column.

Related topics

Pay an invoice

Pay multiple invoices

Cancel scheduled payments

AT&T Wireline Quick Help - Hierarchies - Add a hierarchy

Set up hierarchies

Hierarchies help you organize your user data. Use this powerful tool to expertly track trends and run robust, detailed reports.

Add a hierarchy

1. From the top menu, click Setup.
2. Under Hierarchies, select Build.
3. Click Add hierarchy and do the following:
    + Under Hierarchy, enter a name.
    + Under Access, select Public or Private.
    + Under Basis, choose to copy an existing hierarchy, or start with a blank one.
4. Click Save.

Related topics

About hierarchies

Add nodes and branches

Assign accounts and services

Move or remove nodes or branches

Run a cost allocation report