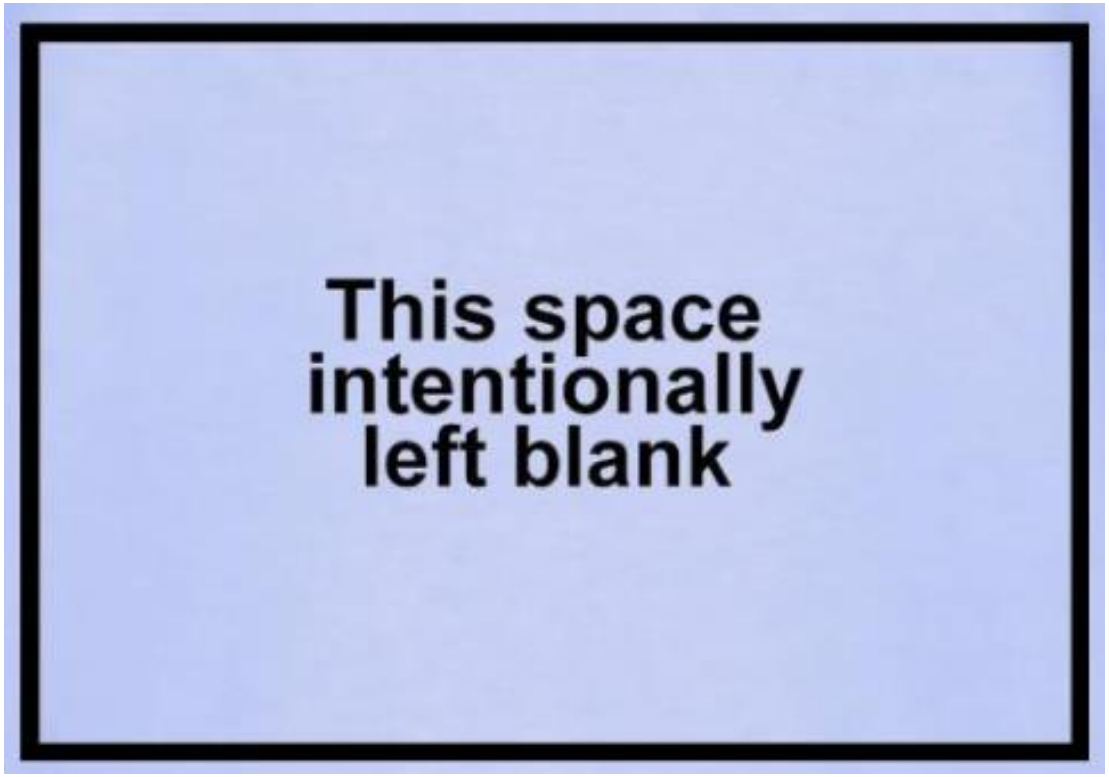

ProductName™

Customer Relations Management (CRM) User Guide

Version 1.0

Month DD, 2024

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Document History

Date	Version	Author	Summary of Changes
Month DD, 2023	1.0	ETC	Initial draft

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1. CRM Overview

The Customer Relations Management (CRM) application allows Customer Service Representatives (CSR) to perform their daily activities based on their user role and permissions. The CRM application is accessed by clicking CRM on the Launch Pad screen of the riteHorizon application.

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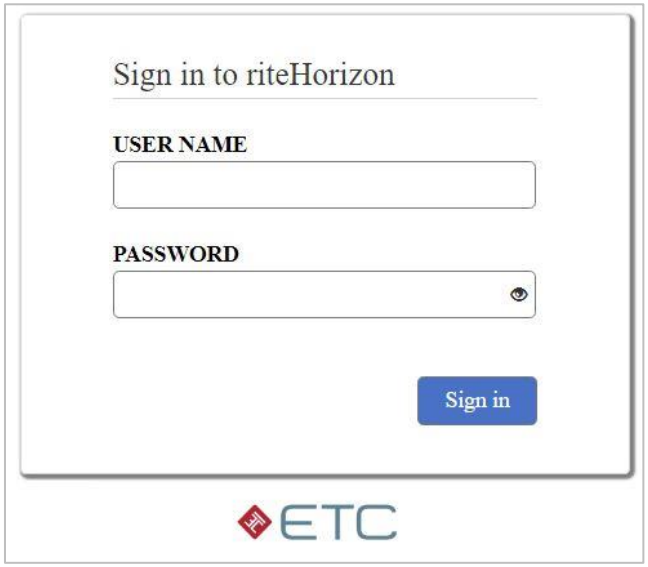
2. Accessing CRM

CRM is one of the applications supported by riteHorizon. You need to sign in to riteHorizon to access CRM. The Launch Pad screen is the first screen that displays when you Sign in to riteHorizon. This screen displays the applications that are available to the user based on their user roles and permissions.

To access CRM:

1. Enter your User Name and Password and click Sign in. The Launch Pad screen displays.
   - For security purposes, your password is masked (appears as dots). To see what you are entering, click the eye icon.
   - If you forget your password, contact the Administrator to create a new one for you.



   The Launch Pad screen displays the applications that are available to you based on your user roles and permissions.
2. Click CRM. The Home screen displays.

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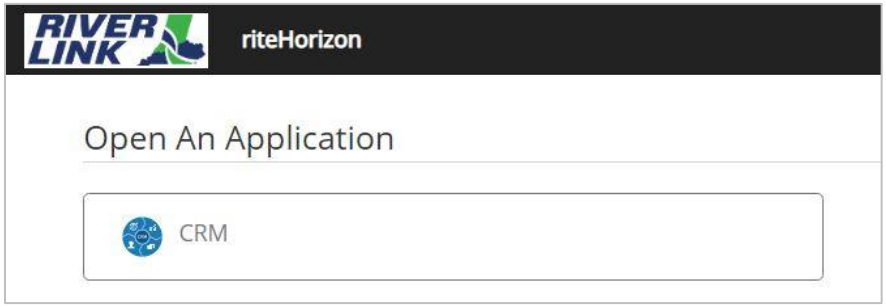
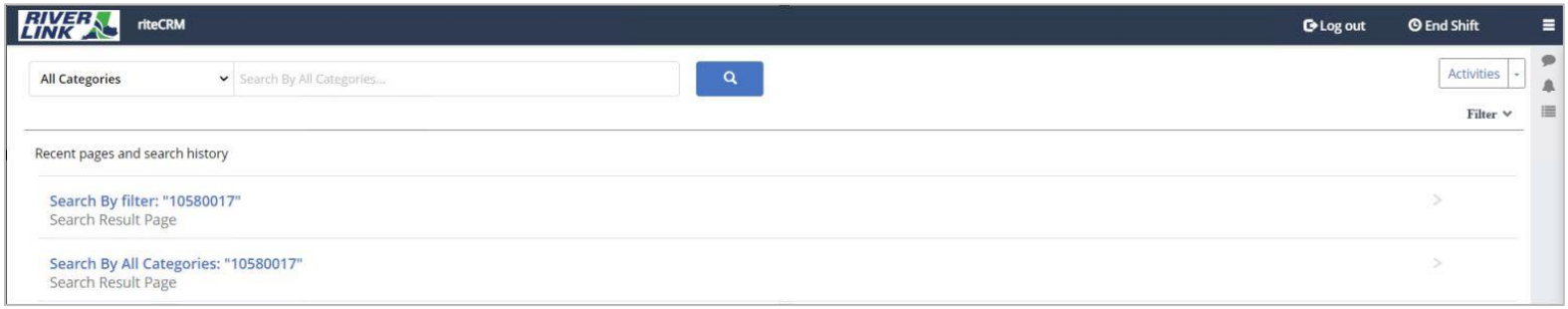


The Home screen is the initial screen that displays for CRM. This screen allows you to search for and access customer accounts.

- Click Log Out on the navigation bar to log out of CRM. The system returns to the riteHorizon Log In screen.
- Click the RiverLink icon on the navigation bar to return to the Launch Pad from any screen within CRM.



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2.1. Navigating CRM

The CRM application provides a smooth navigation between screens through various menu options and buttons.

2.1.1. CRM Navigation Buttons and Icons

The table below contains the navigational buttons and icons that are most commonly used within the CRM application.

Table 1: CRM Navigation Buttons and Icons

Button/Icon	Description
Navigation Bar	
RIVER LINK	RiverLink icon: For returning to the Landing Page
Log out	Log out icon: For logging out of the application
End Shift	End Shift icon: For accessing the shift screen
≡	Hamburger icon: For displaying the hamburger menu
Hamburger Menu	
Home	Home icon: For accessing the Home screen
My Profile	My Profile icon: For accessing Shift information and balancing a shift
Navigation	Navigation icon: For accessing role-based screens
Fleet	Fleet icon: For accessing menu option for uploading Multiple Vehicle File
Administrative Hearing Form	Administrative Hearing Form icon: For downloading Administrative Hearing Form
Bank Deposit	Bank Deposit icon: For creating and searching bank deposits
Multiple Match VRI	Multiple Match VRI icon: For managing multiple license plate matches
Case Management	Case Management icon: For accessing the Case Management screen
Lockbox Exception Search	Lockbox Exception Search icon: For searching Lockbox exception files
Performances	Performances icon: For accessing the Performances screen

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Button/Icon	Description
Setting	Settings icon: For configuring settings as permitted by the user role
Write-Off Batch Approval	Write – Off Batch Approval icon: For approving Write-Off Batches
Side Menu Bar	
	Chat icon: For chatting with online customers
	Alerts icon: For viewing account alerts
	Transcript icon: For viewing conversation starter call scripts that are relevant for the current screen
	Comments icon: For viewing and adding account comments
Account Header	
Active	Status icon: Displays the account status such as Active and Proposed
	Unload icon: For canceling out of the action
EDIT	Account Mode icon: Displays the mode the account is in such as Edit and View
BACK TO ACCOUNT	Back to Account icon: Returns to the account overview
Overview Tab	
Pay	Pay button: For making a payment on the account
	Transponder icon. Indicates if the vehicle is associated with a transponder or a transponder request is pending for the vehicle.
Manage	Manage button: For managing vehicles and payment methods on the account
Open Items Tab	
Collapse All	Collapse All icon: For collapsing all open items sections

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Button/Icon	Description
Expand All	Expand All icon: For expanding all open items sections
Account Setup	
Previous	Previous button: Returns to the previous screen on the account setup wizard
Next	Next button: Displays the next screen on the account setup wizard
Accept	Accept button: Accepts the information and continues to the next screen on the account setup wizard
Vehicle Information	
	Three vertical dots icon: Displays more available functions
Add A New Vehicle	Icon for adding a new vehicle
Show Transponder List	List icon: For accessing the Transponder List screen
Contact Information	
	Gold Star icon: Indicates the primary account holder
	Three vertical dot icon: Displays more available functions
Add A New Contact	Add A New Contact icon: For adding new contacts
Verify PIN	Verify PIN icon: For verifying the PIN
	Unmask icon. This icon is used in the contact Profile section to unmask secure information such as SSN or PIN.
	Trash can icon: For deleting the corresponding contact information such as an email address or phone number.
	Thumbs down icon: For setting the corresponding contact address as Bad.
	Thumbs up icon: For setting the corresponding contact address as Current.
	Manual icon: For enabling the contact address fields for manual editing.
	Hide Manual icon: For disabling the contact address fields for manual editing.

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Button/Icon	Description
	Save icon: For saving the corresponding contact information such as email, phone, and address.
	Validate icon: For validating the corresponding contact email or phone number.
Miscellaneous	
Validate	Validate button: For validating the information that was entered such as an email or phone number
✓ Validate	Validation status: Indicates the information was validated
	Three vertical dot icon: Displays more available functions
Create & Pay	Create & Pay button: For submitting the payment
Manual	Allows user to perform a manual validation
	Search icon: Allows the user to search after providing the relevant criterion/criteria

2.1.2. Navigating CRM

Click or select the following to navigate from the Home screen:

- Click the Log Out icon on the navigation bar to log out of the application.
- Click the End Shift icon on the navigation bar to navigate to the Shift Management screen.
- Click the RiverLink icon on the navigation bar to exit the CRM application and navigate back to the Launch Pad.
- Select an option from the hamburger menu on the navigation bar.
- Select an option from the Activities list.
- Search for an account or select an account from the recent pages and search history.

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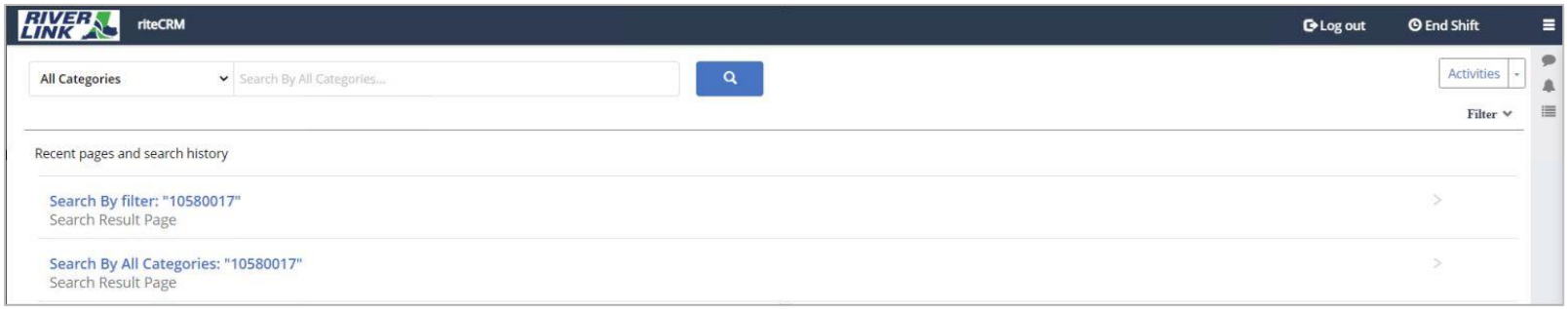

2.1.3. Accessing the Hamburger Menu

The hamburger icon displays a menu that allows you to navigate between Home screen and other screens.

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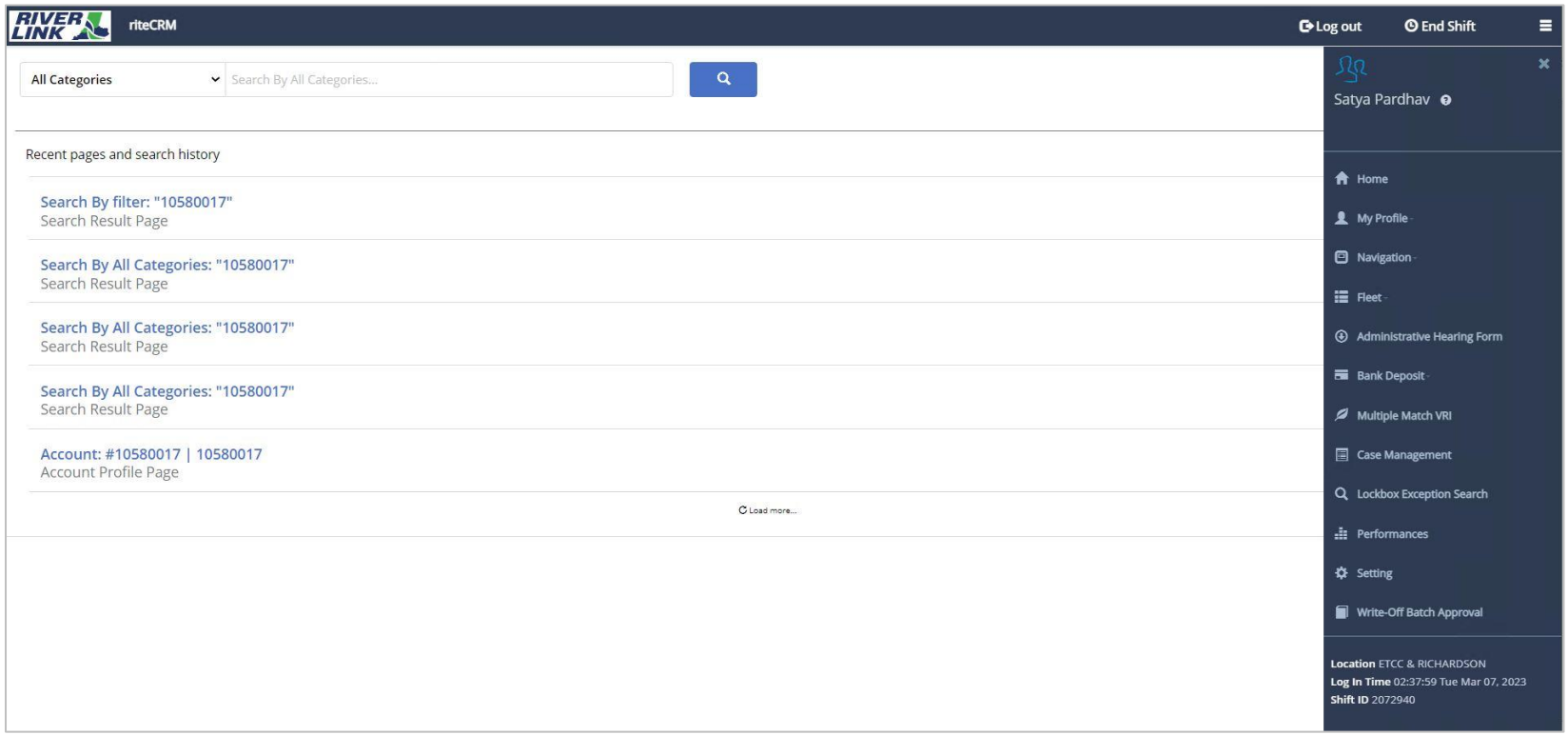
Click the hamburger icon in the upper right corner to toggle the hamburger menu on and off.



2.1.4. Accessing the Activities Menu

The Activities menu displays a list of activities that you can perform. You can access the menu from any screen within the CRM application. The options that display from the Home screen are not related to specific accounts. Whereas the options that display from the Account View screen are specific to the selected account.

To access the Activities menu:

1. Click the Activities button in the upper right corner from the Home screen or the Account View screen. The menu options display.
   Note: Click the Activities button to toggle the menu on and off.

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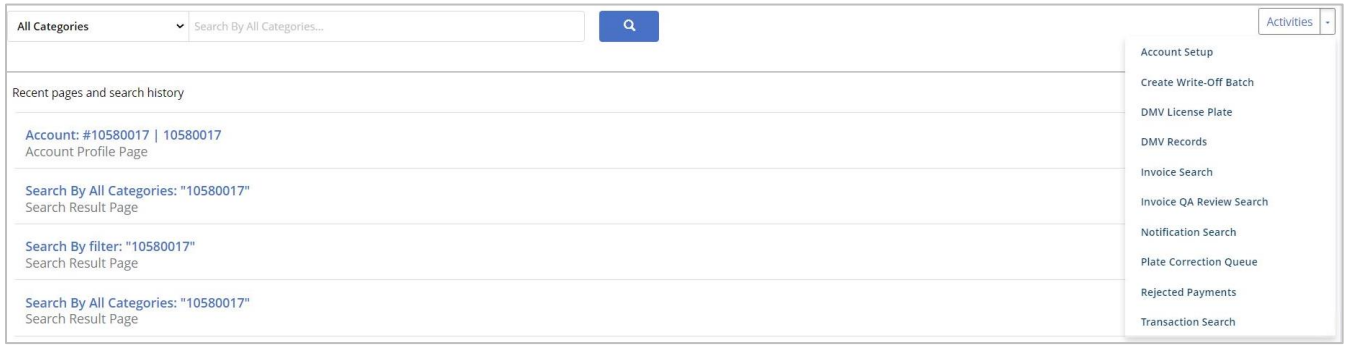
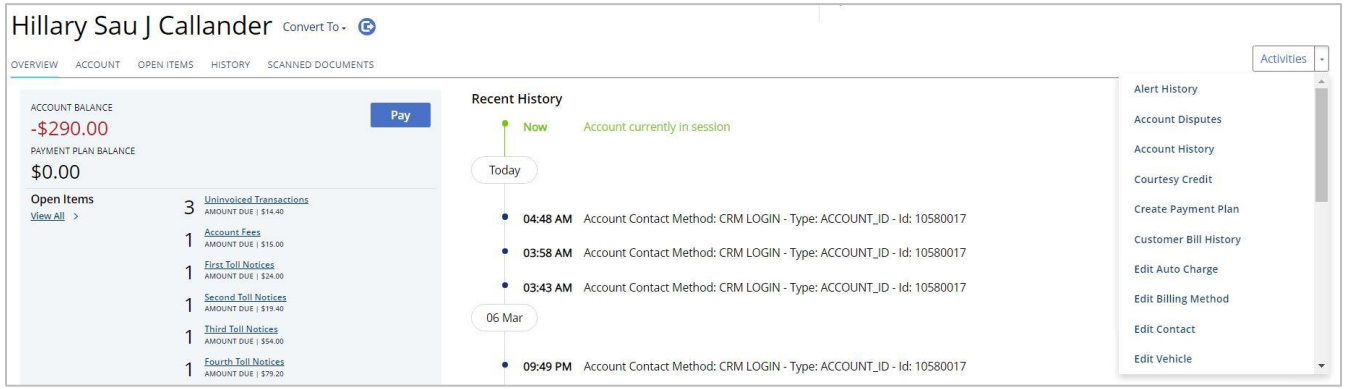
- The figure below shows the Activities menu for the Home screen.



- The figure below shows the Activities menu for the Account View screen.



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3. Shift Management

A shift must be open for users to create or modify entries that impact CRM accounts financially. This includes changes to customer and system accounts. A shift allows the riteHorizon system to track financial changes to a specific user and location.

A single shift may include activity from different riteHorizon modules. A user opens a shift when logging into the system for the day. The user balances and closes the shift at the end of the workday.

The CSRs and Supervisors use the Shift Management functionality to perform the following functions:

- Opening a shift
- Searching Shifts
- Accepting, rejecting, and updating inventory
- Balancing a shift
- Closing/Force closing a shift

Where the user accesses the system is the location (such as a Call Center) to which the user is associated. If a user works in multiple locations during a single workday, the user opens a separate shift in each location.

At the end of each shift, the CSR sums the actual amounts of cash, checks, and money orders, and counts the actual inventory items such as transponders.

The CSR enters the values for each item in the corresponding fields located in the Balance Shift screen. During shift reconciliation, the system compares the values entered by the CSR to the values expected by the CSC.

Credit card payments are not entered by the CSR in the Balance Shift process. Credit card payments are electronic; therefore, they are not present in the cash drawer and are not part of a bank deposit in the system.

Credit card payments are automatically populated in the shift information screen.

3.1. Opening Shifts

The Shift screen allows you to open a shift, search shifts, update the inventories and access the Inventory screen. When you open a shift, the Shift Information section displays your Employee Name, the Location, and the Opening Balance in the cash drawer entered by you.

The Shift History section shows the history of accepts or rejects you have performed over the course of your shift.

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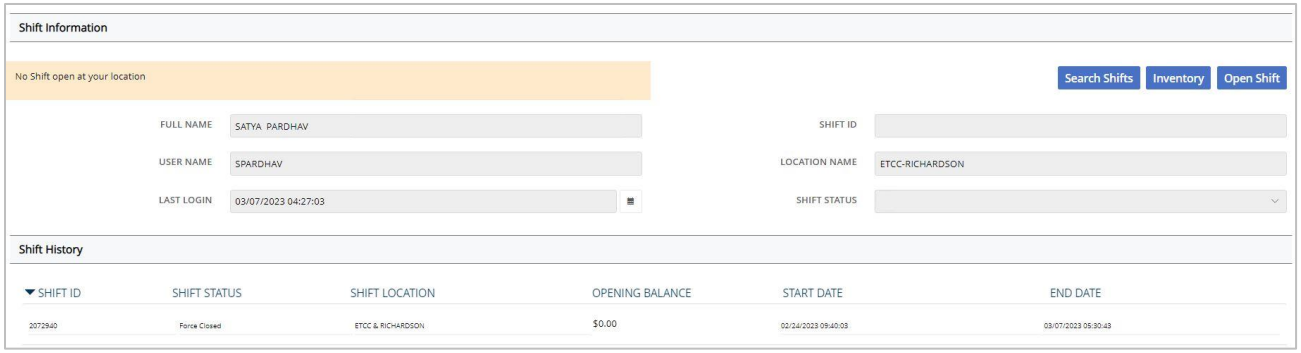
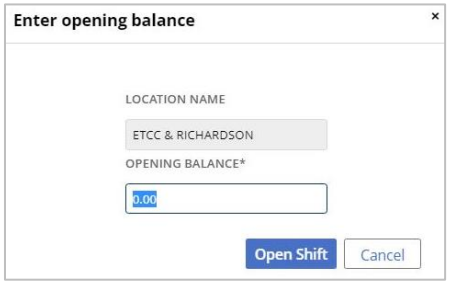
To open a shift:

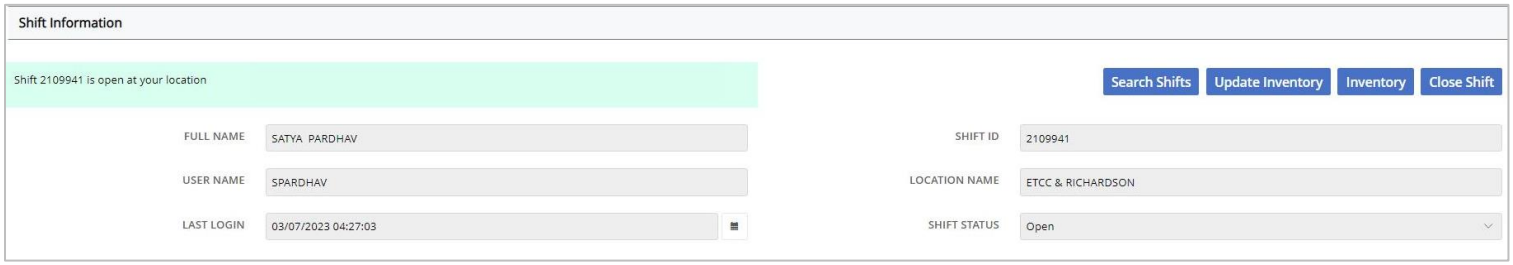
1. Click the End Shift icon on the navigation bar. The Shift screen displays.



2. Click Open Shift. The Enter opening balance window displays.



3. Enter the opening balance (the amount of money that is in the till) and click Open Shift. The Shift screen displays Open for the shift status.



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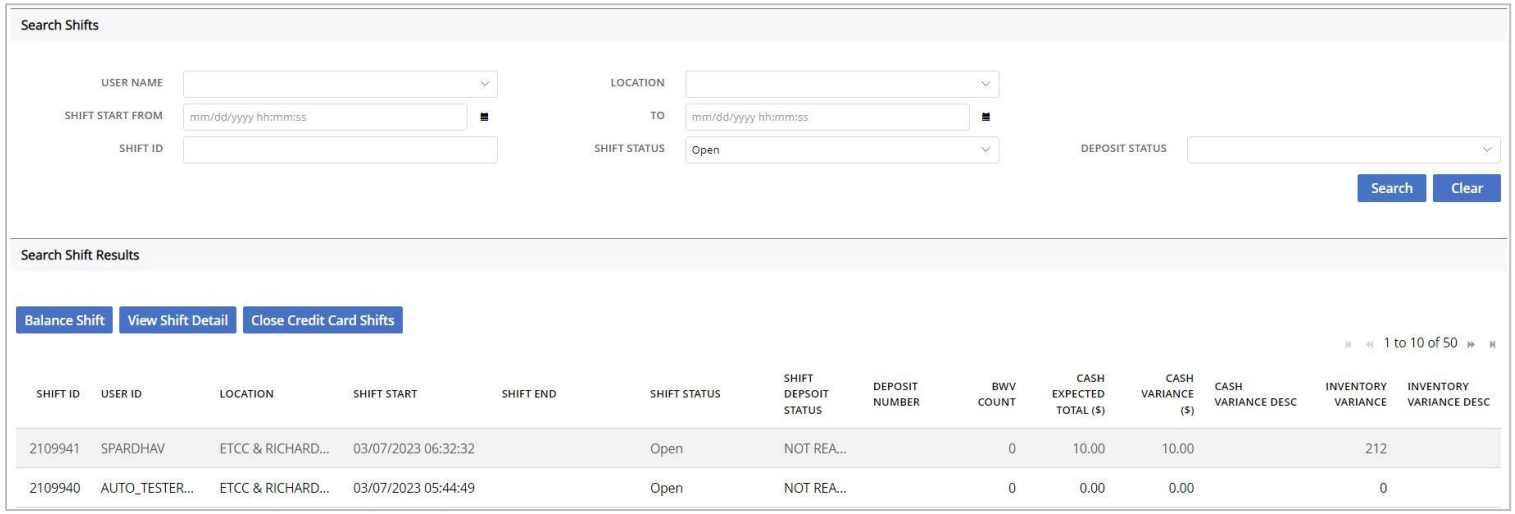
3.2. Searching Shifts

The Search Shift screen allows you to search for and balance the shifts.

To search for a shift:

1. Click the End Shift icon on the navigation bar. The Shift screen displays.
2. Click Search Shifts. The Search Shift screen displays.
3. Select or enter the search criteria, then click Search. The search results display.



3.2.1. Viewing Shift Details

The Search Shift Results screen allows you to view the shift details.

To view the shift details:

1. From the Search Shift Results screen, select the shift. The row is highlighted.

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Search Shift Results

Balance Shift | View Shift Detail | Close Credit Card Shifts

1 to 10 of 50

SHIFT ID	USER ID	LOCATION	SHIFT START	SHIFT END	SHIFT STATUS	SHIFT DEPSOIT STATUS	DEPOSIT NUMBER	BWV COUNT	CASH EXPECTED TOTAL ($)	CASH VARIANCE ($)	CASH VARIANCE DESC	INVENTORY VARIANCE	INVENTORY VARIANCE DESC
2108944	AUTO_TESTER_14	ETCC & RICHARDSON	03/07/2023 05:38:28		Open	NOT READY FO...		0	10.00	10.00		40	
2108940	AUTO_TESTER_09	ETCC & RICHARDSON	03/07/2023 05:37:38		Open	NOT READY FO...		0	0.00	0.00		0	
2108939	AUTO_TESTER_17	ETCC & RICHARDSON	03/07/2023 05:35:53		Open	NOT READY FO...		0	0.00	0.00		0	
2107939	AHUMNABADKAR	ETCC & RICHARDSON	03/06/2023 10:02:44		Open	NOT READY FO...		0	0.00	0.00		12	
2106943	VTANG	ETCC & RICHARDSON	03/06/2023 06:36:13		Open	NOT READY FO...		0	0.00	0.00		0	
2106942	VTANG	ETCC & RICHARDSON	03/06/2023 06:35:53		Open	NOT READY FO...		0	0.00	0.00		0	
2106940	AUTO_TESTER_01	ETCC & RICHARDSON	03/06/2023 05:44:28		Open	NOT READY FO...		0	0.00	0.00		0	

2. Click View Shift Details. The Shift Details screen displays.

RIVER LINK riteCRM | Activities | Log out | End Shift

Balance Shift Details

USERNAME: VTANG
SHIFT START: 03/06/2023 06:36 AM
SHIFT END:
OPENING BALANCE $: 0.00
SHIFT ID: 2106943
LOCATION: ETCC & RICHARDSON
SHIFT STATUS: Open

3. Click End Shift to navigate to the Shift Information screen.

3.3. Accepting Inventory

The Inventory screen allows you to accept inventory batches.

The riteHorizon system allows you to open a shift with or without accepting or rejecting inventory. When inventory is accepted, the shift opens automatically. When inventory is rejected, the shift does not open automatically. In this case, you must open it manually by clicking Open Shift.

If there is an open shift where inventory was not accepted or rejected when the shift was opened, the system allows you to accept or reject inventory as needed.

To accept an inventory batch:

1. Click the End Shift icon on the navigation bar. The Shift screen displays.

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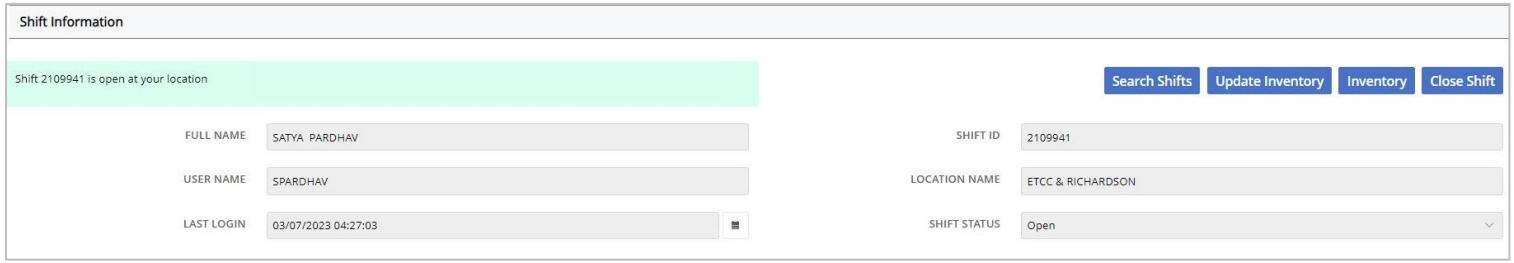
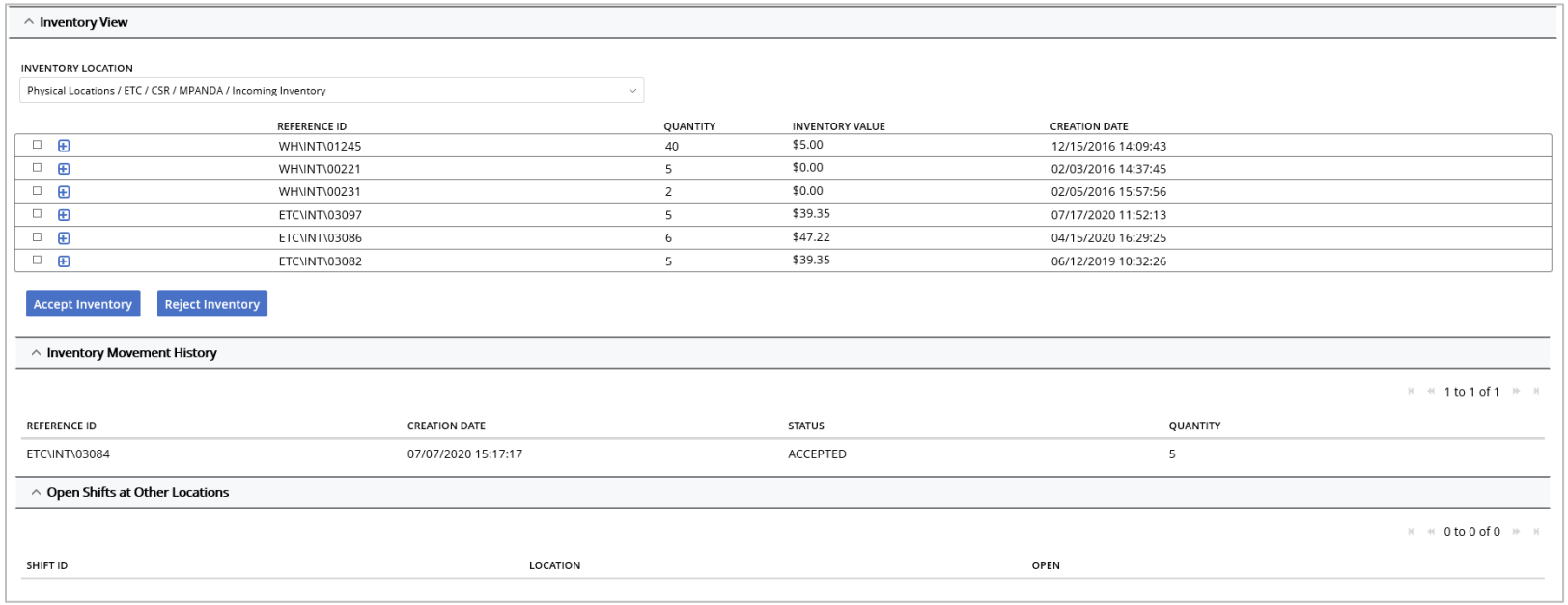


2. Click Inventory. The Inventory screen displays.



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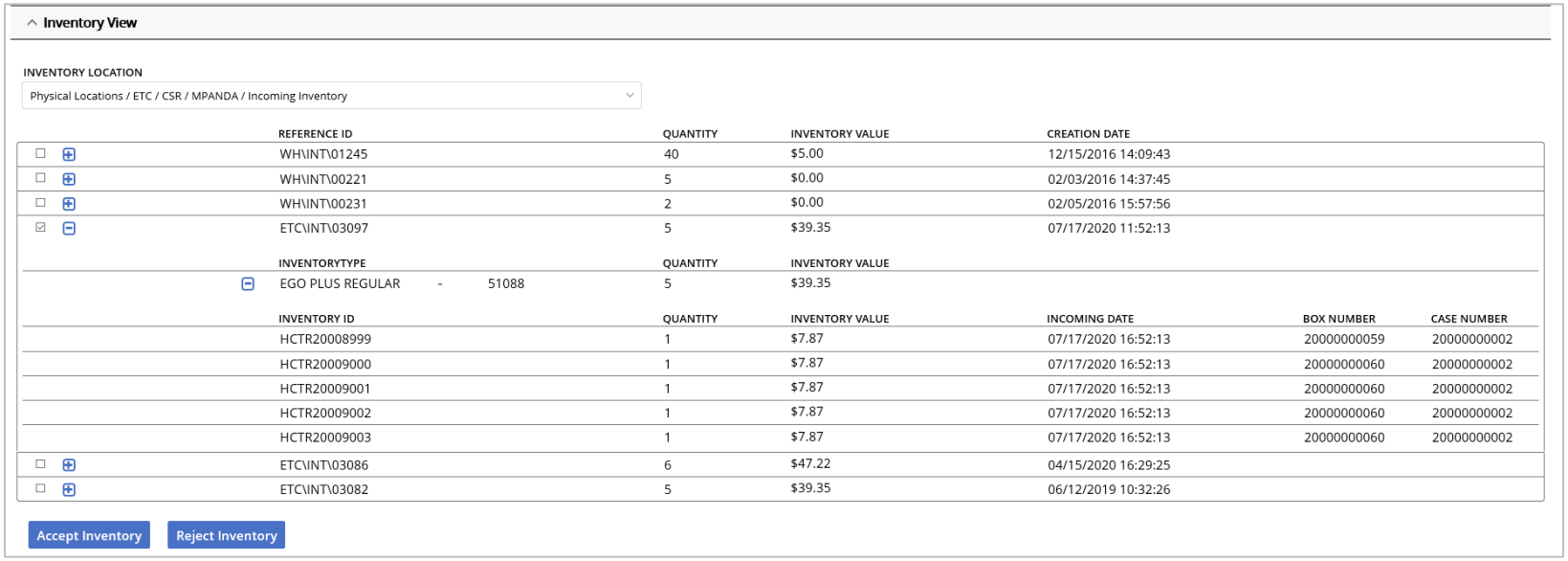
3. Expand the inventory batch. The items in the batch display.
4. Verify that the items in the batch match the physical inventory items that were received.
5. Select the batch. A checkmark displays in the box.



6. Click Accept Inventory. The items in the batch are accepted and an information message displays.

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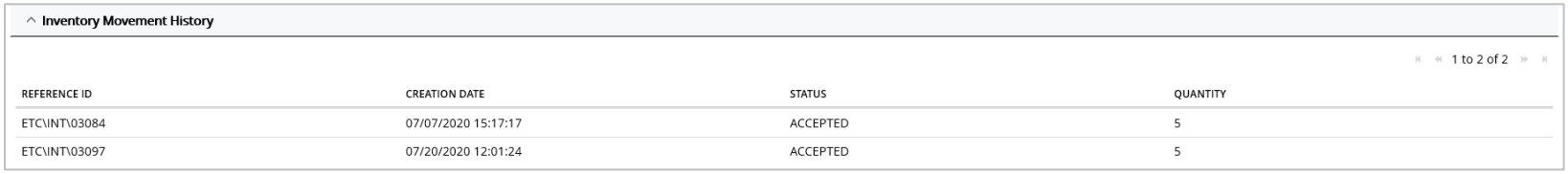
7. Click OK to the message. The movement is displayed in the Inventory Movement History.


Inventory Movement History

1 to 2 of 2

REFERENCE ID	CREATION DATE	STATUS	QUANTITY
ETC\INT\03084	07/07/2020 15:17:17	ACCEPTED	5
ETC\INT\03097	07/20/2020 12:01:24	ACCEPTED	5

3.4. Rejecting Inventory

The Inventory screen allows you to reject inventory batches.

To reject an inventory batch:

1. Click the End Shift icon on the navigation bar. The Shift screen displays.

2. Click Inventory. The Inventory screen displays.

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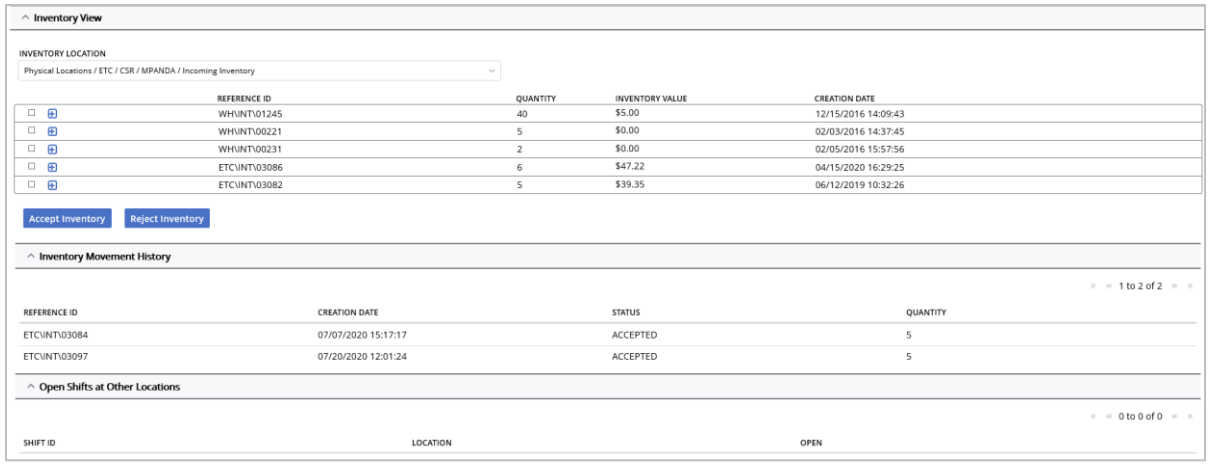
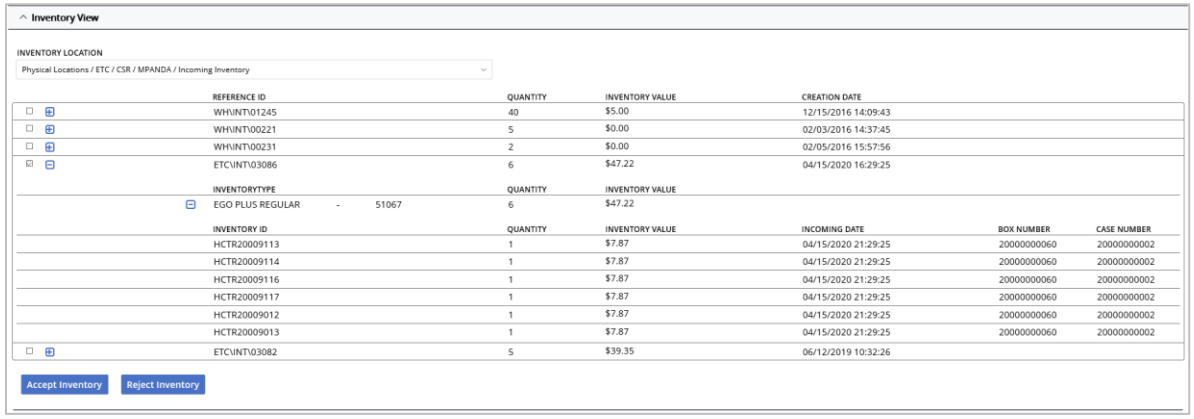


3. Expand the inventory batch. The items in the batch display.
4. Verify that the items in the batch match the physical inventory items that were received.
5. Select the batch. A checkmark displays in the box.



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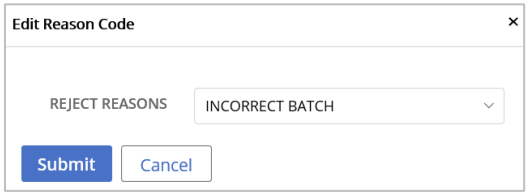
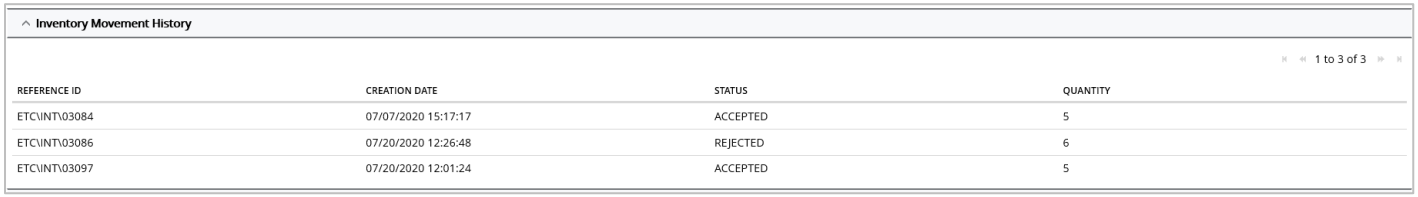
6. Click Reject Inventory. The Edit Reason Code window displays.



7. Select the reject reason.
8. Click Submit. The items in the batch are rejected and a movement is displayed in the Inventory Movement History.



REFERENCE ID	CREATION DATE	STATUS	QUANTITY
ETC\INT\03084	07/07/2020 15:17:17	ACCEPTED	5
ETC\INT\03086	07/20/2020 12:26:48	REJECTED	6
ETC\INT\03097	07/20/2020 12:01:24	ACCEPTED	5

3.5. Closing Shifts

At the end of a shift, you must reconcile the money (cash, checks, money orders) received and the accepted inventory items such as transponders remaining at the end of your shift.

Note: When you log out and the shift is still open, the system displays a confirmation popup.

3.5.1. Balancing and Closing Shifts

The Shift screen allows you to balance and close a shift.

You will sum the payments by payment form and enter the amounts in the Balance Shift screen.

You sum your ending money by payment form and enter the amounts in the Balance Shift screen. The amount to enter includes any Opening Balance amount you may have received at the beginning of their shift for making change. You count and enter the inventory items still in your possession at the end of the shift. The system compares the entered amounts with the expected amounts and determines whether variances exist. You can close a shift once balancing completes successfully.

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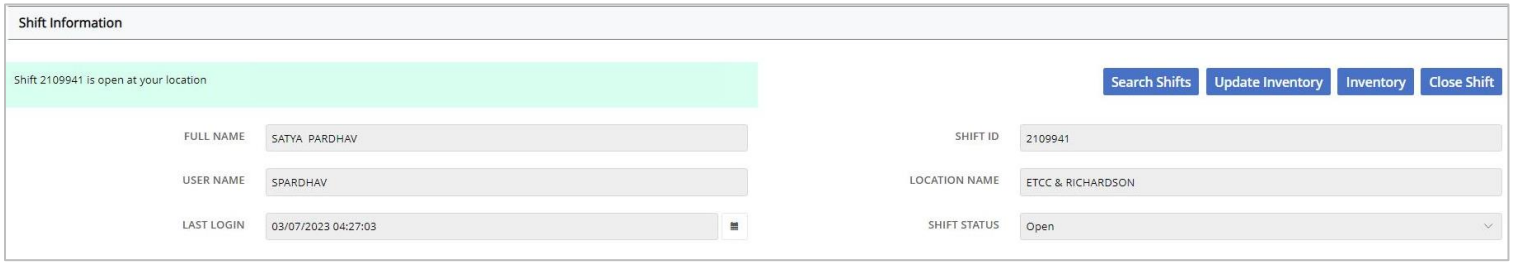
You have the option to balance the shift as follows:

- All (Balance shift for cash, checks, money orders, and inventory)
- Cash and Checks/Money Orders
- Inventory

To balance and close a shift:

1. Click the End Shift icon on the navigation bar. The Shift screen displays.



2. Click Close Shift. A confirmation message displays.

3. Click Proceed to the message. The Balance Shift screen displays.
4. Select All for the Balance Option.
5. Enter any cash, checks, or money orders that were received during the shift.
6. Enter the remaining inventory.

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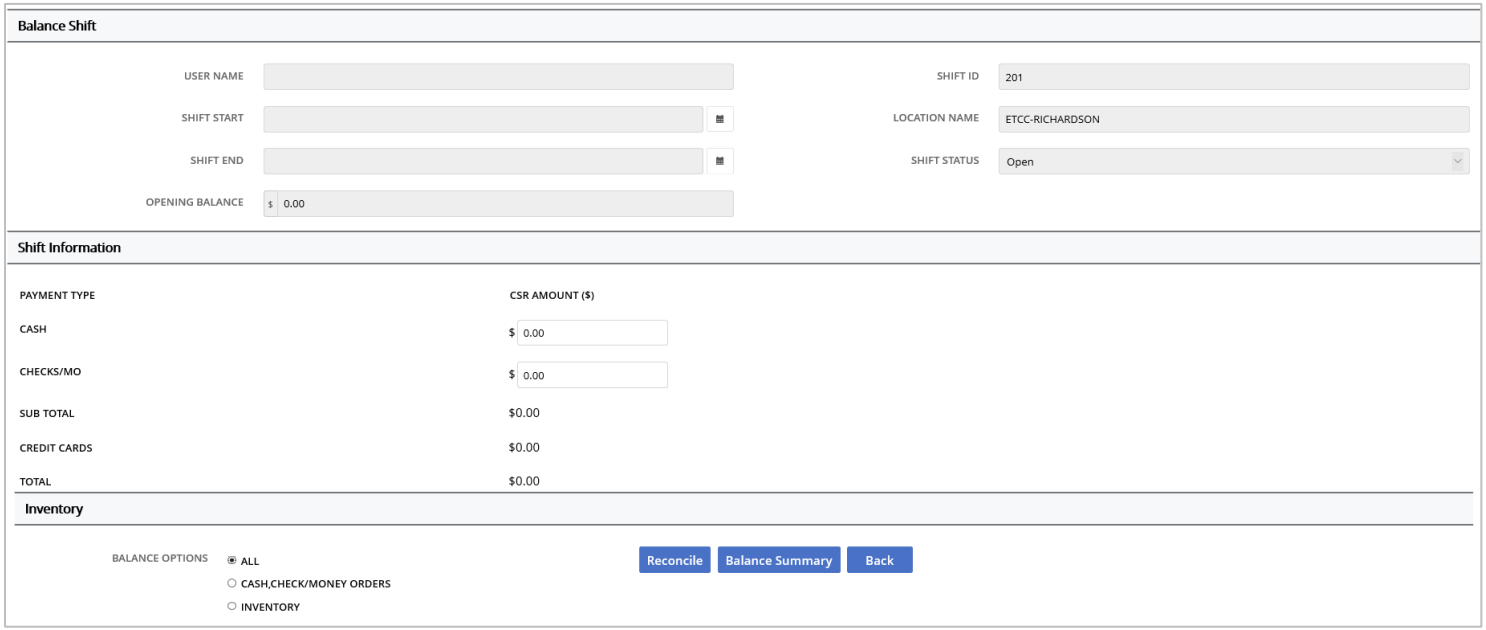

7. Click Reconcile. When the values entered match what the system is expecting, the Close Shift button and the "Shift Was Balanced Successfully" message displays at the bottom of the screen. If the shift doesn't balance, the Force Close button displays. See section 3.3 Force Closing Shifts for more information.

Note: The Force Close button displays if you have attempted shift balancing more than 5 times.

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Balance Shift

USER NAME		SHIFT ID	201
SHIFT START		LOCATION NAME	ETCC-RICHARDSON
SHIFT END		SHIFT STATUS	Open
OPENING BALANCE	$ 0.00		

Shift Information

PAYMENT TYPE	CSR AMOUNT ($)
CASH	$ 0.00
CHECKS/MO	$ 0.00
SUB TOTAL	$0.00
CREDIT CARDS	$0.00
TOTAL	$0.00

Inventory

BALANCE OPTIONS
- (•) ALL
- ( ) CASH,CHECK/MONEY ORDERS
- ( ) INVENTORY

Reconcile | Balance Summary | Close Shift | Back

SHIFT WAS BALANCED SUCCESSFULLY.

8. Click Close shift. The Shift Summary and the Reconciliation Details display.

Shift Summary

FULL NAME		SHIFT ID	201
SHIFT START		LOCATION NAME	ETCC-RICHARDSON
SHIFT END		SHIFT STATUS	Balance Closed

Reconciliation Details

PAYMENT TYPE	CSR AMOUNT	EXPECTED AMOUNT	VARIANCE
Cash	$0.00	$0.00	$0.00
Checks/MO	$0.00	$0.00	$0.00
Sub Total	$0.00	$0.00	$0.00

Back | Shift Summary Report

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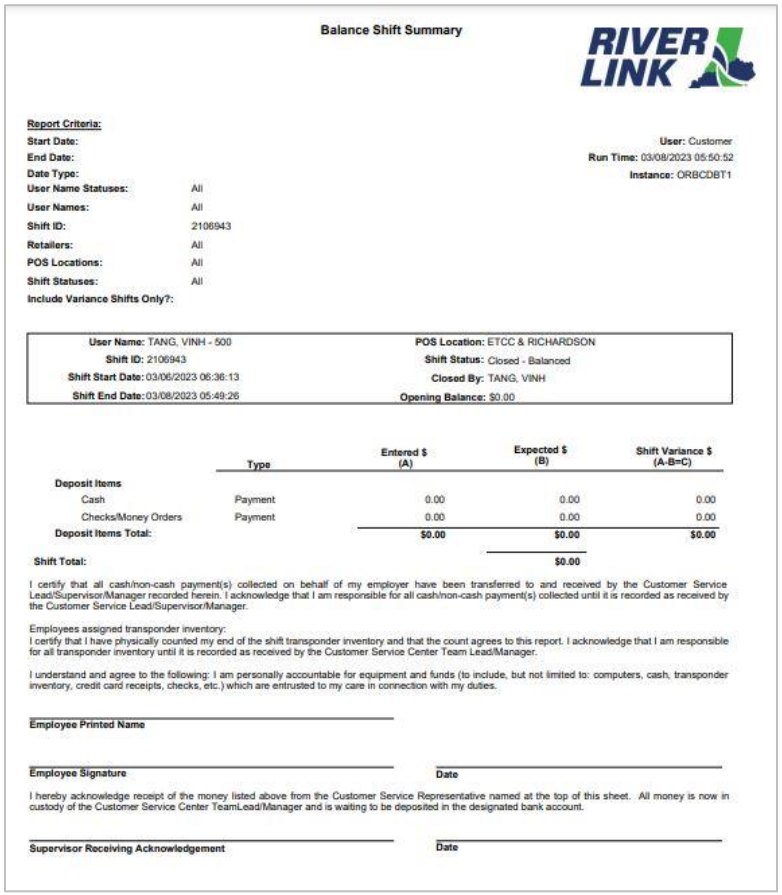
3.5.2. Generating Shift Summary Report

The Search Shift Summary screen allows you to download and review the shift summary report.

To review the shift summary report:

1. From the Search Shift Summary screen, click Shift Summary Report. The report is generated and displays as a PDF file.



Balance Shift Summary

RIVER LINK

Report Criteria:

Start Date:
End Date:
Date Type:
User Name Statuses: All
User Names: All
Shift ID: 2106943
Retailers: All
POS Locations: All
Shift Statuses: All
Include Variance Shifts Only?:

User: Customer
Run Time: 03/08/2023 05:50:52
Instance: ORBCDBT1

User Name: TANG, VINH - 500	**POS Location:** ETCC & RICHARDSON
Shift ID: 2106943	**Shift Status:** Closed - Balanced
Shift Start Date: 03/06/2023 06:36:13	**Closed By:** TANG, VINH
Shift End Date: 03/08/2023 05:49:26	**Opening Balance:** $0.00

	Type	Entered $ (A)	Expected $ (B)	Shift Variance $ (A-B=C)
Deposit Items				
Cash	Payment	0.00	0.00	0.00
Checks/Money Orders	Payment	0.00	0.00	0.00
Deposit Items Total:		**$0.00**	**$0.00**	**$0.00**
Shift Total:			**$0.00**	

I certify that all cash/non-cash payment(s) collected on behalf of my employer have been transferred to and received by the Customer Service Lead/Supervisor/Manager recorded herein. I acknowledge that I am responsible for all cash/non-cash payment(s) collected until it is recorded as received by the Customer Service Lead/Supervisor/Manager.

Employees assigned transponder inventory:
I certify that I have physically counted my end of the shift transponder inventory and that the count agrees to this report. I acknowledge that I am responsible for all transponder inventory until it is recorded as received by the Customer Service Center Team Lead/Manager.

I understand and agree to the following: I am personally accountable for equipment and funds (to include, but not limited to: computers, cash, transponder inventory, credit card receipts, checks, etc.) which are entrusted to my care in connection with my duties.

Employee Printed Name

Employee Signature **Date**

I hereby acknowledge receipt of the money listed above from the Customer Service Representative named at the top of this sheet. All money is now in custody of the Customer Service Center TeamLead/Manager and is waiting to be deposited in the designated bank account.

Supervisor Receiving Acknowledgement **Date**

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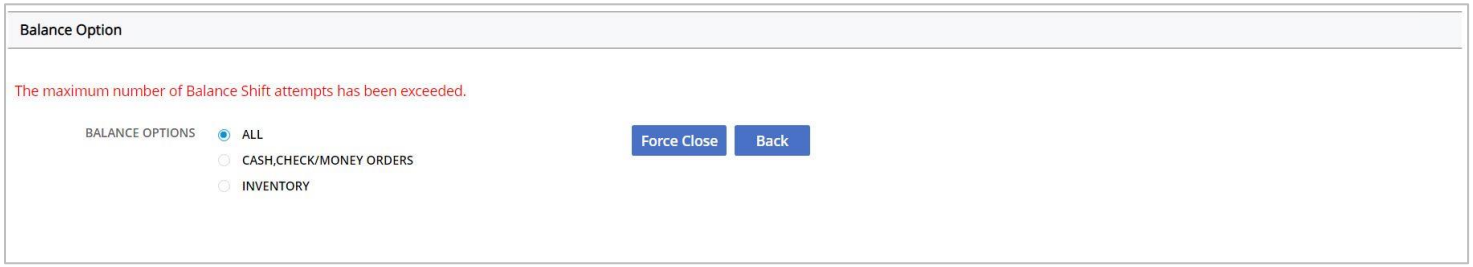
3.5.3. Force Closing Shifts

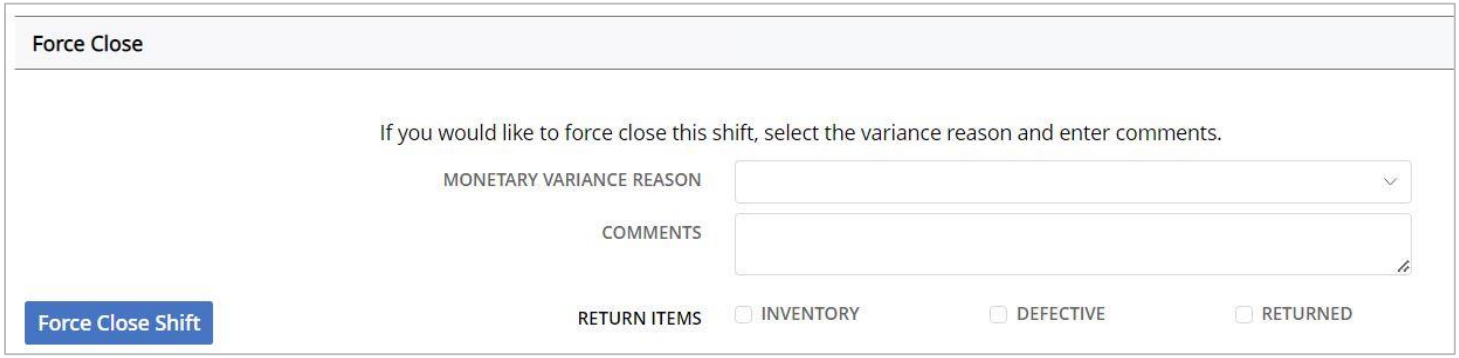
When a shift displays variance in money or inventory totals, you can force close the shift. In such cases, a message displays at the bottom of the screen.

To force close a shift:

1. Click Force Close. The Force Close details screen displays.



2. Select or enter the following:
   - Monetary Variance Reason
   - Comments
   - Return Items



3. Click Force Close Shift. The Shift History displays with the status of Force Closed.

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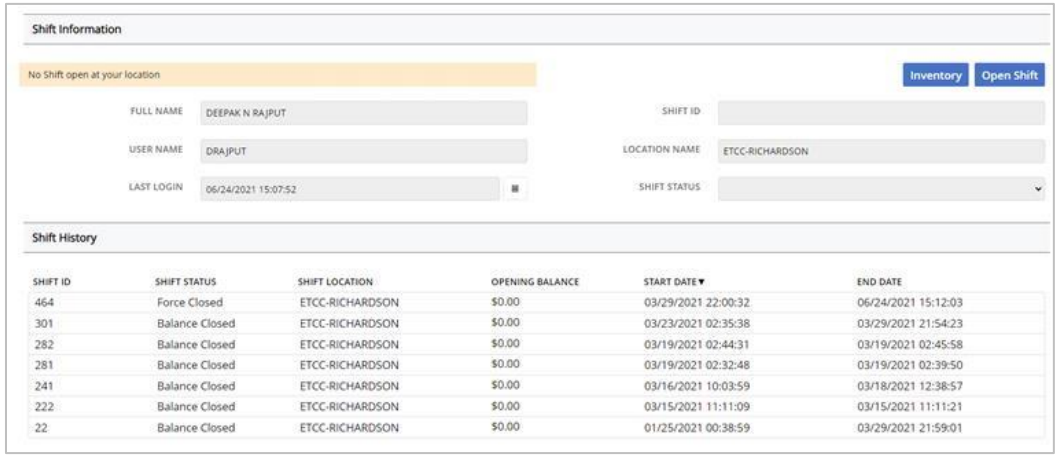

Note:

- If you have exceeded the maximum variance allowed for cash/check/money order balance, a Supervisor Override popup displays.
- If you have exceeded the maximum number of attempts to force close a shift, a Supervisor Override popup displays.

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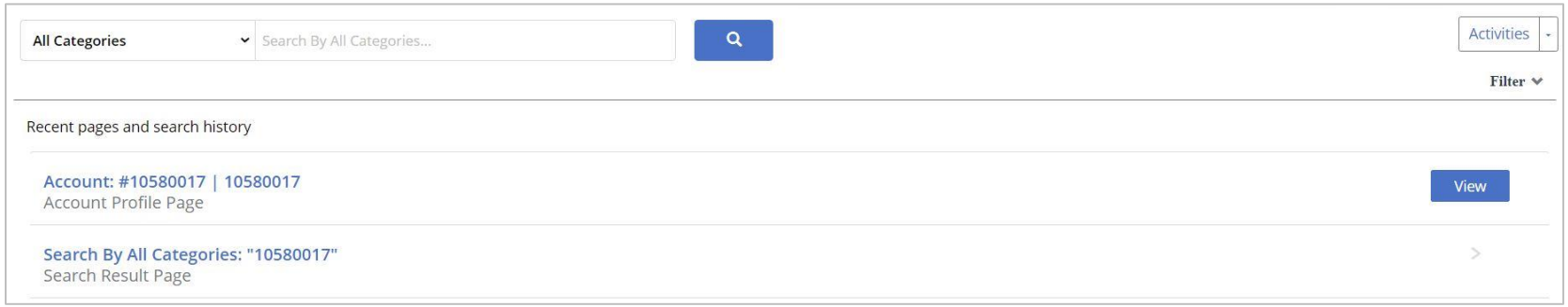
4. Account Search

The Account Search functionality allows you to perform a search for accounts and to view previous search results from the Recent pages and search history.

Note: The Recent pages and search history screen is the default screen that displays when you log into the system.



4.1. Performing Account Search

The Home screen allows you to search for an account based on search criteria enter by you. The search functionality supported by riteCRM allows user to enter any text field to display accounts in the Search Results and Recent pages and search history shown in the figure below.

To perform an account search:

1. From the Home screen, select a category for the search. The system defaults to All Categories.

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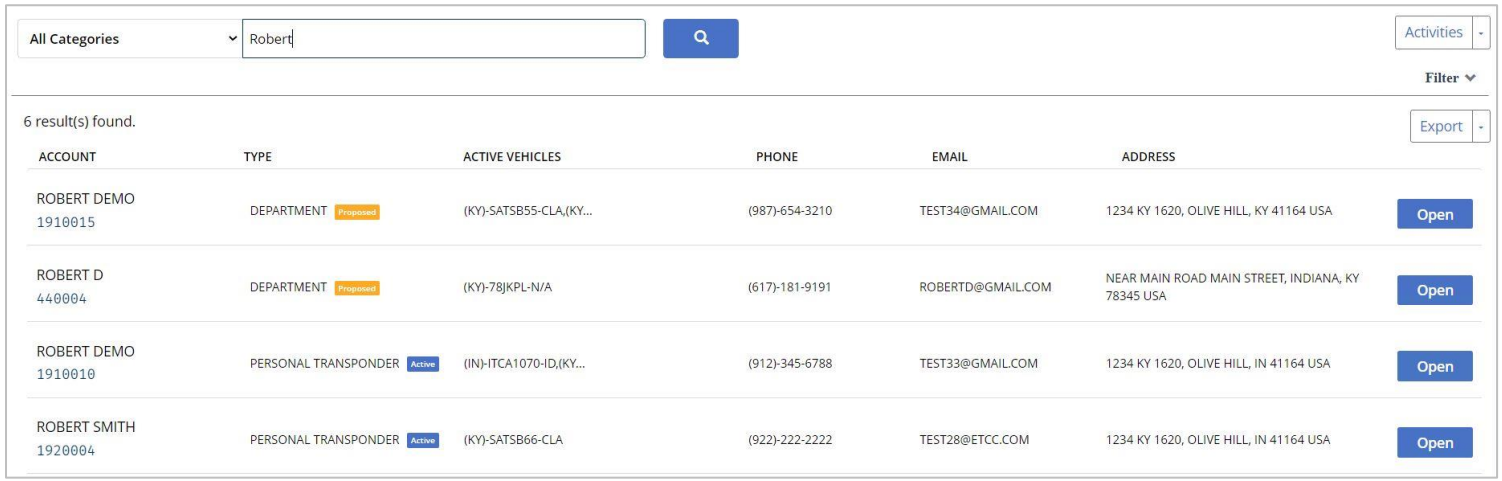
2. Enter the text in the search field, then click the Search icon. The search results display.
   - If a single match is found, the system automatically displays the account.
   - If multiple matches are found, the accounts display in the search results as shown in the figure below.



4.2. Filtering Search Results

The Home screen provides filters which allow you to narrow the search results.

To filter search results:

1. From the Home screen, click the arrow to the right of the Filter list. Additional search fields display.

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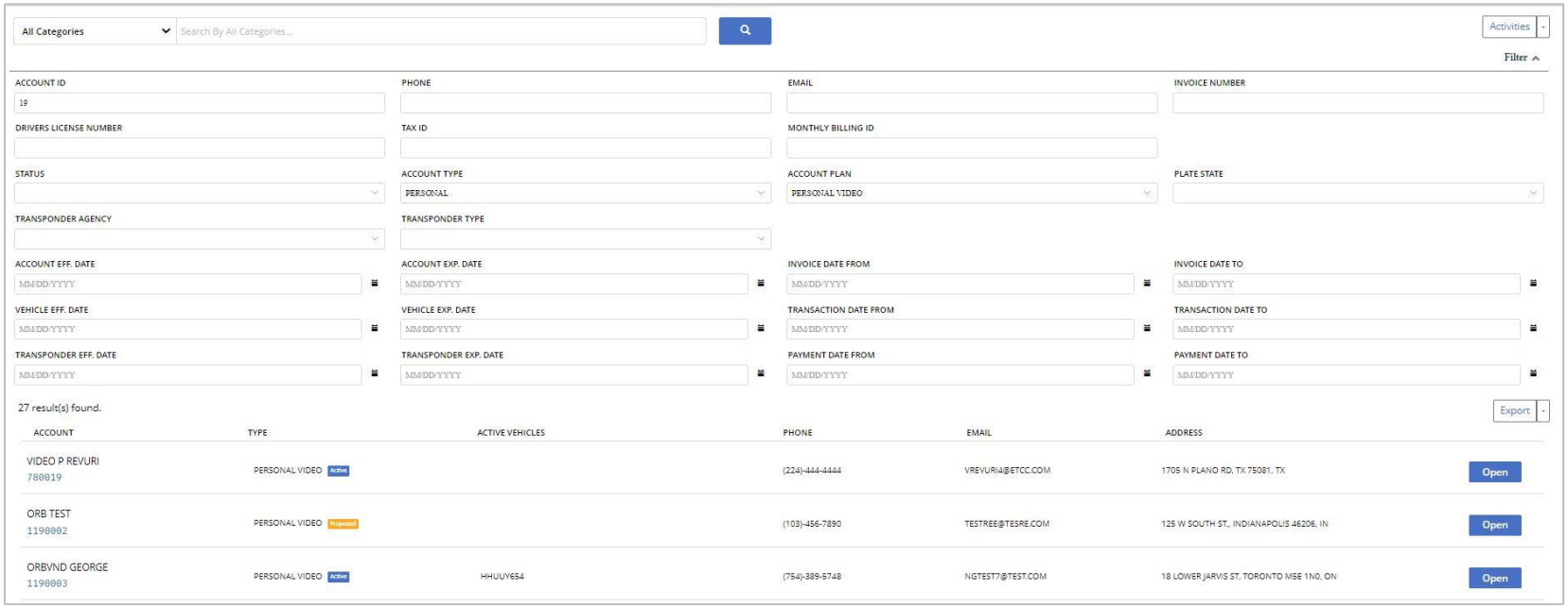
2. Select or enter any of the search fields, then click the search icon.
   - If a single match is found, the system automatically displays the account.
   - If multiple matches are found, the accounts display in the search results as shown in the figure below.



4.3. Viewing Recent Pages and Search History

The Home screen allows you to view the search results pages from the most recent searches.

To view a previous search page from the Home screen, click any of the search links from the “Recent pages and search history”. The corresponding search results page displays.

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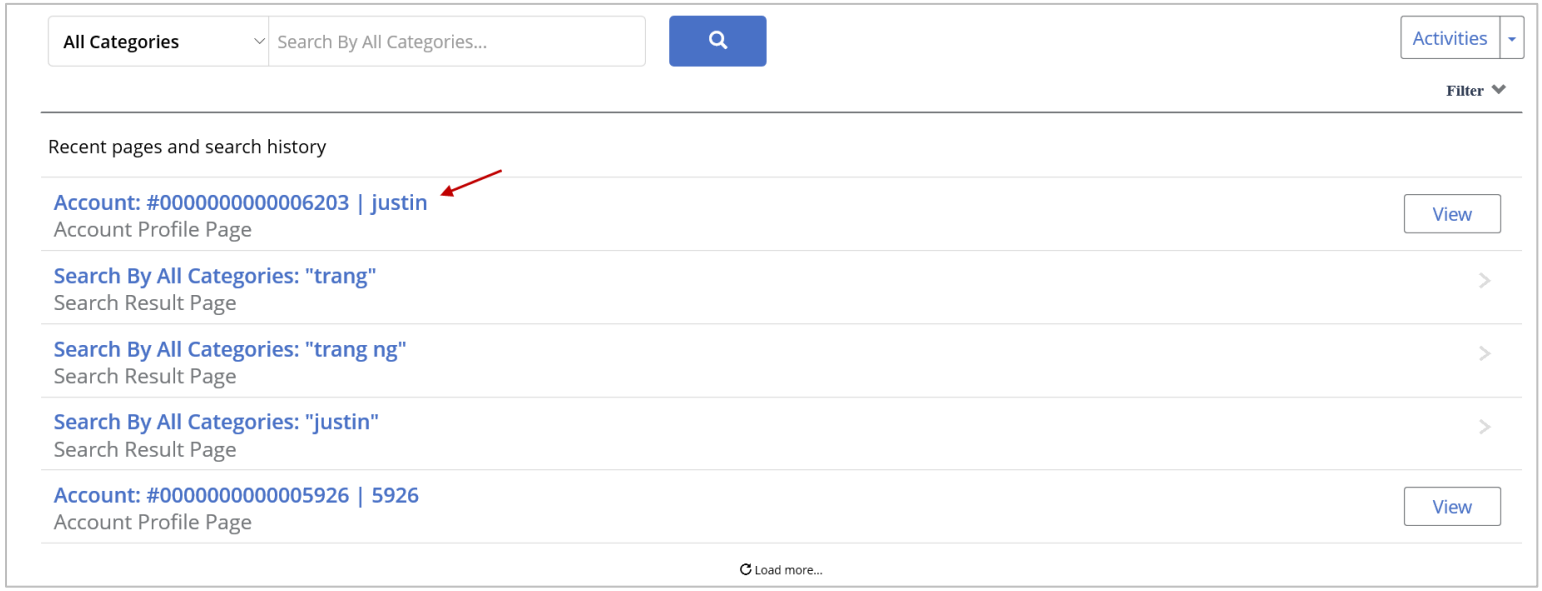

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5. Account Management

The Account Management structure consists of account class, account type, and account plans. Both the account type and account plans are related directly to the account class.

The table below shows the mapping between the Account Type, Account Plan, Account Class with descriptions.

Table 2: Account Type to Account Plan to Account Class Mapping

Account Type	Account Plan	Account Class	Description
Personal	Personal Transponder	Registered	A pre-paid account plan that requires transponders (6C or EZP) for each vehicle for a maximum of 10 vehicles.
Personal	Personal Video	Registered	An account plan that does not require transponders for a maximum of 10 vehicles.
Corporate	Commercial Transponder	Registered	A pre-paid per vehicle account plan that requires transponders (6C or EZP) that allows for an unlimited number of vehicles.
Corporate	Commercial Video	Registered	A pre-paid per vehicle account plan that does not require transponders and allows for an unlimited number of vehicles.
Corporate	Non-Revenue	Registered	Account plan which automatically sets all associated vehicles to the non-revenue special rate classification.
Corporate	Department	Registered	Account plan for first responders like Ambulance, Police, Fire department etc... Non-revenue vehicles can be allowed in this plan.
Corporate	Fleet	Registered	Account plan usually for a large group of vehicles under the same ownership. This account plan is used to communicate vehicle information and toll transaction data via file exchanges.

5.1. Account Setup

The Account Setup allows you to create new accounts using a setup wizard. The wizard uses a methodical process and, depending on the account type and/or account plan chosen at the beginning of the wizard, the account creation process varies.

During the new account creation process, the account and its vehicle(s) are in the Proposed status. Once the new account setup is complete, the account and vehicle statuses automatically change to Active. If the account setup is not completed, the system retains the account and vehicles in Proposed status and saves all of the account information that has been entered.

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5.1.1. Creating Accounts

The Account Setup menu option displays the Create New Account screen. This Create New Account screen allows you to create a new Personal account or a new Corporate account using a setup wizard to prompt you through the screens during the setup process.

Personal Account Type support the below account plans:

- Personal Transponder
- Personal Video

Corporate Account Type support the below account plans:

- Commercial Transponder
- Commercial Video
- Non-Revenue
- Department
- Fleet

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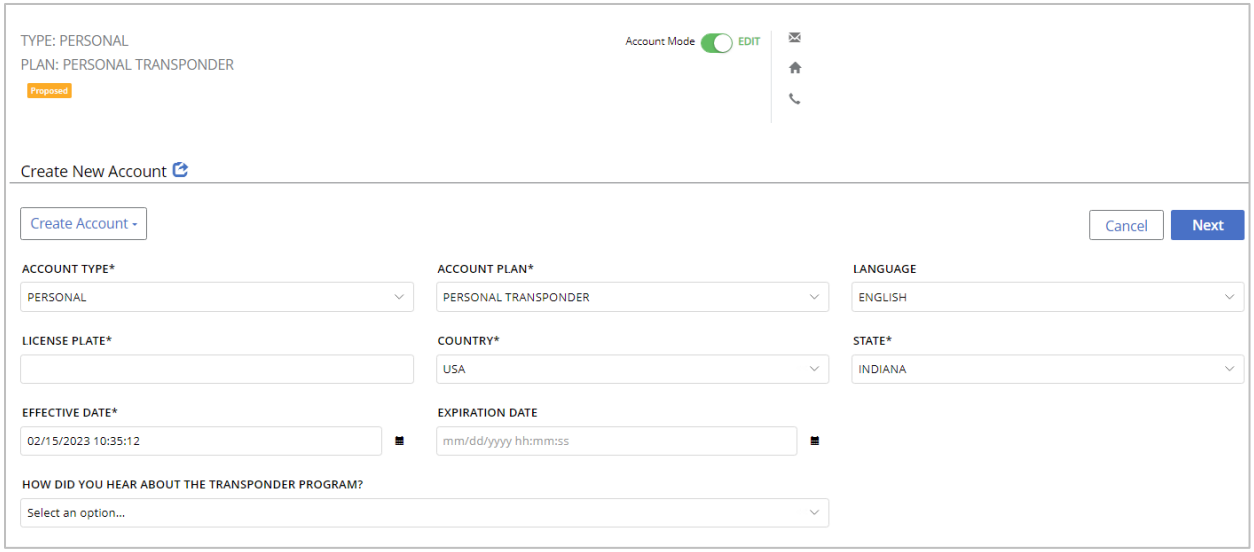
To create a new personal account:

1. Select Activities > Account Setup from the Home screen. The Create New Account screen displays.



2. Select or enter the required fields.
3. Click Next. The Add Driver's License or Tax ID screen displays.

5.1.1.1. Adding Drivers' License/Tax ID

To add a Drivers' License/Tax ID:

1. Select the Drivers' License or Tax ID radio button and select or enter the following:
   - For Drivers License:
     - Number (Enter the driver's license number
     - Country (Default to system setting)
     - State (Default to system setting)

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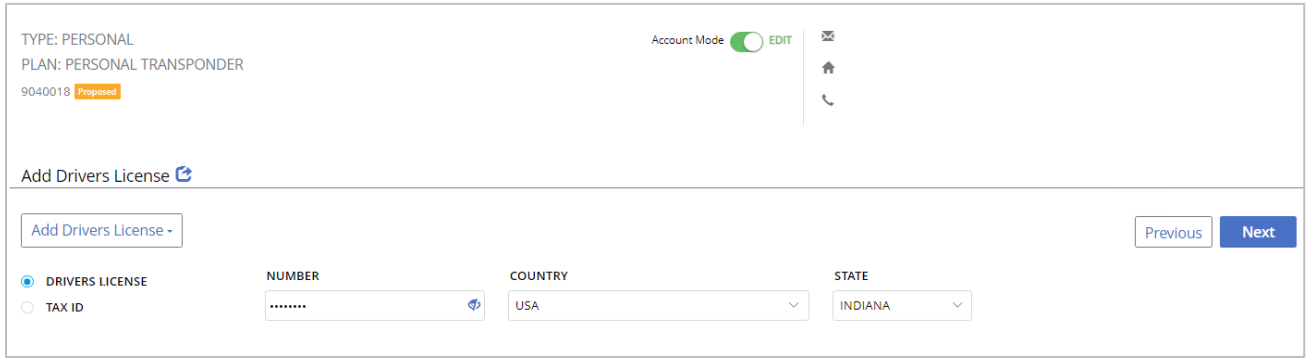
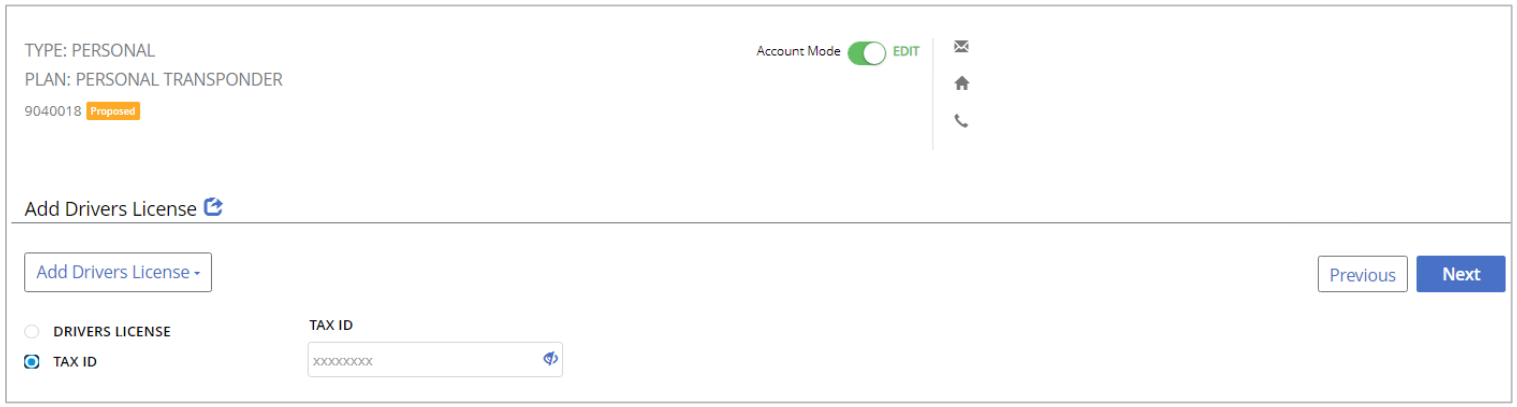


- For Tax ID/Drivers License:
  - Tax ID (Required)
  - Country (Default to system setting)
  - State (Default to system setting)



2. Click Next. The Add Person screen displays.

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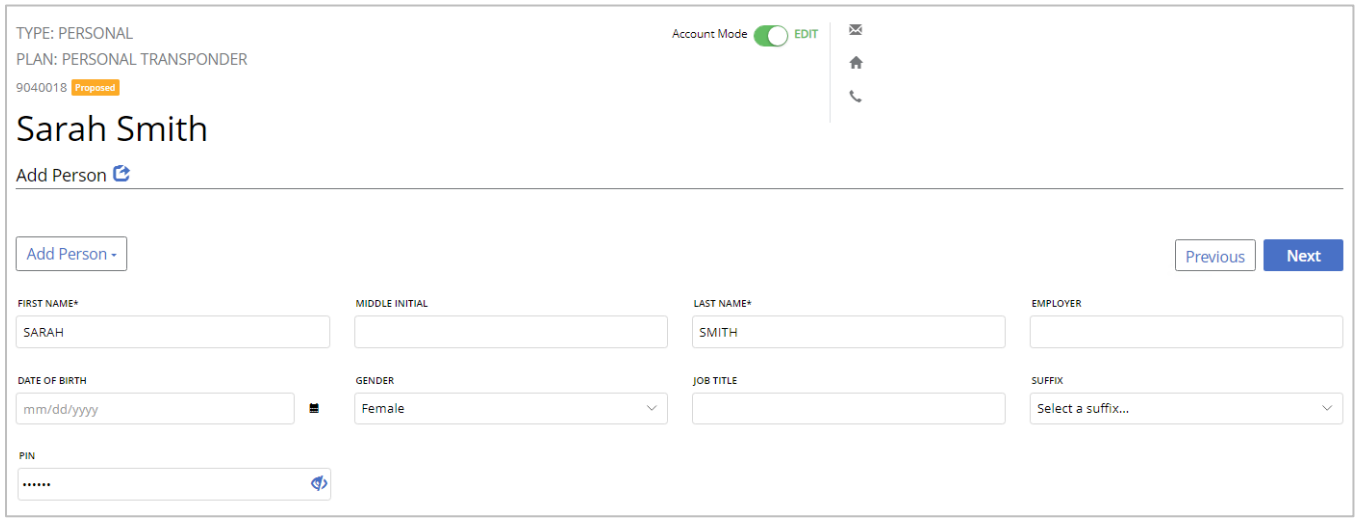
5.1.1.2. Adding Persons

To add a person:

1. Select or enter any of the search criteria.



2. Click Next. The Add New Account Address screen displays.

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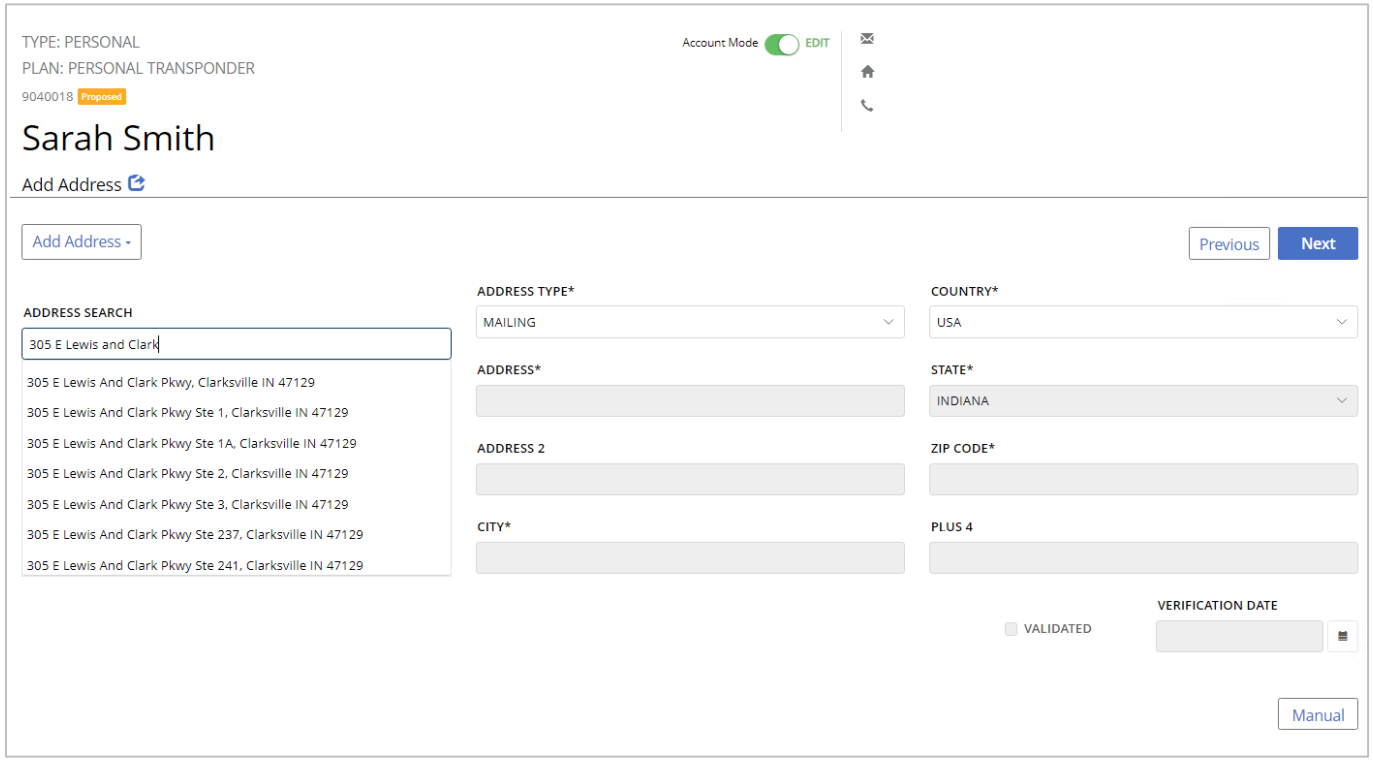
5.1.1.3. Adding New Account Address

To add a new address:

1. Enter the address in the interactive map. The system searches Google Maps and dynamically displays addresses that match the information entered.



2. Select an address. The address fields are populated with the selected address, and the map displays with a location marker.

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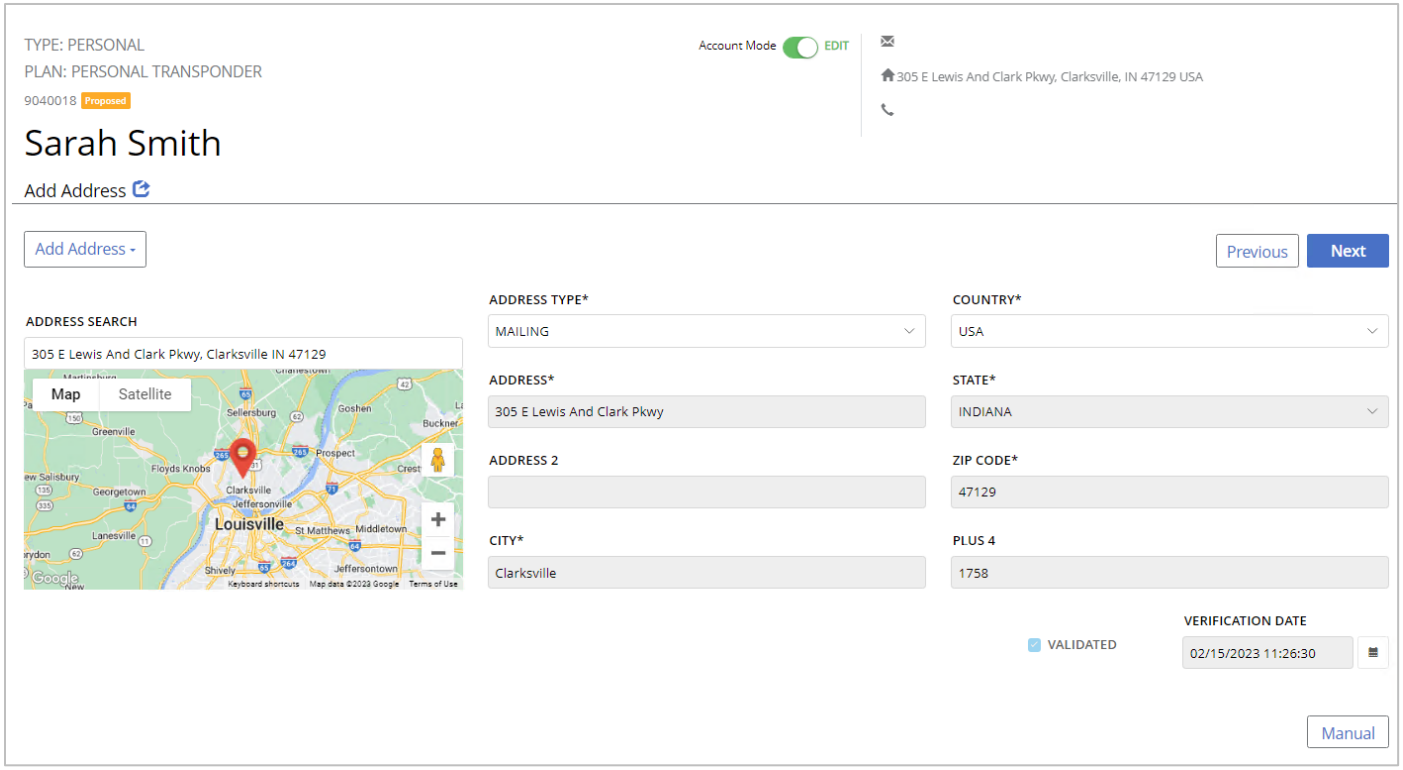

3. Select the Address Type.
4. Click Next. The Add Phone screen displays.

5.1.1.3.1. Adding a new address manually

To add a new address manually:

1. From Add Address screen, click Manual. All the fields now allow you to enter information.
2. Select and/or enter the required fields.

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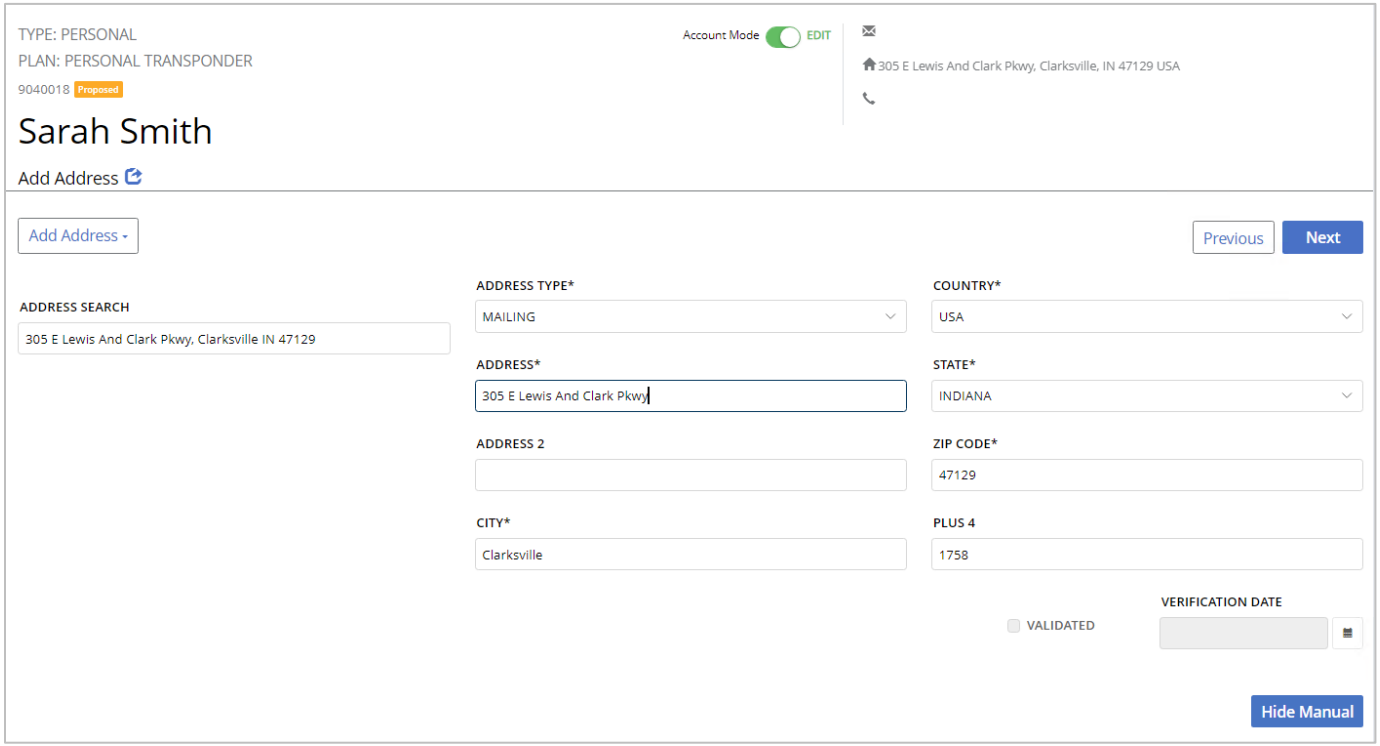

3. Select the Address Type.
4. Click Next. The Add Phone screen displays.

5.1.1.4. Adding New Phone Numbers

To add a new phone number:

1. Select and/or enter any of the required fields.
2. Click Validate. The phone number is validated, and the validation information is populated.

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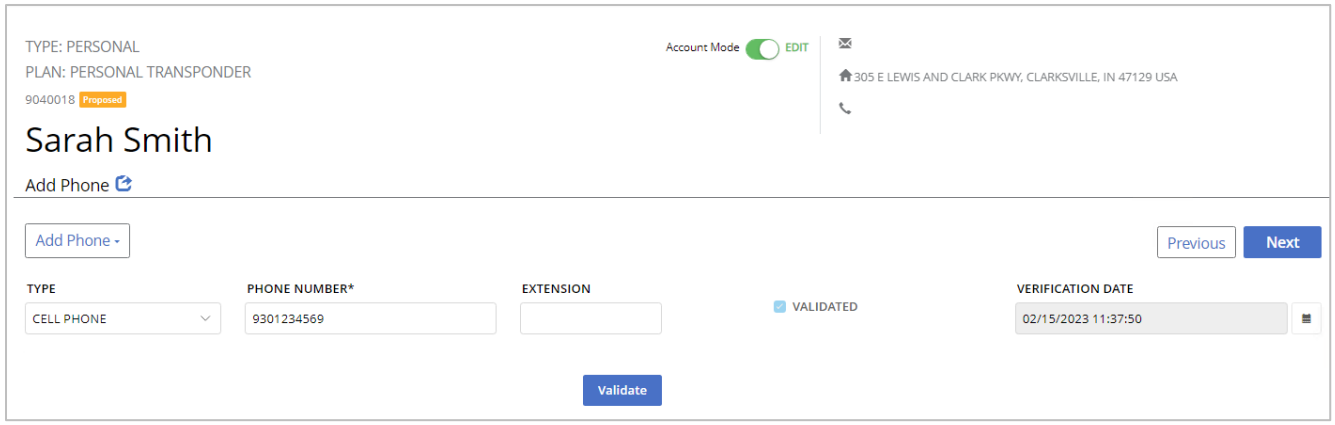
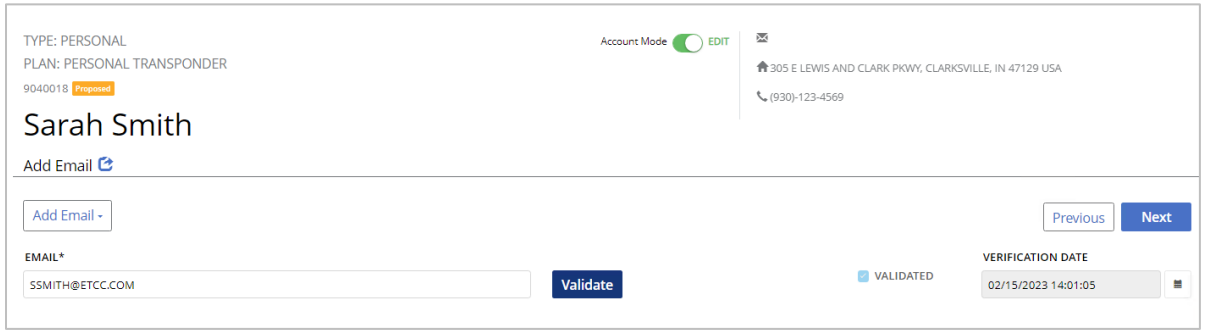


3. Click Next. The Add Email screen displays.

5.1.1.5. Adding New Email

To add a new email

1. Enter the email address.
2. Click Validate. The validation information is populated.



3. Click Next. The Add Vehicle screen displays.

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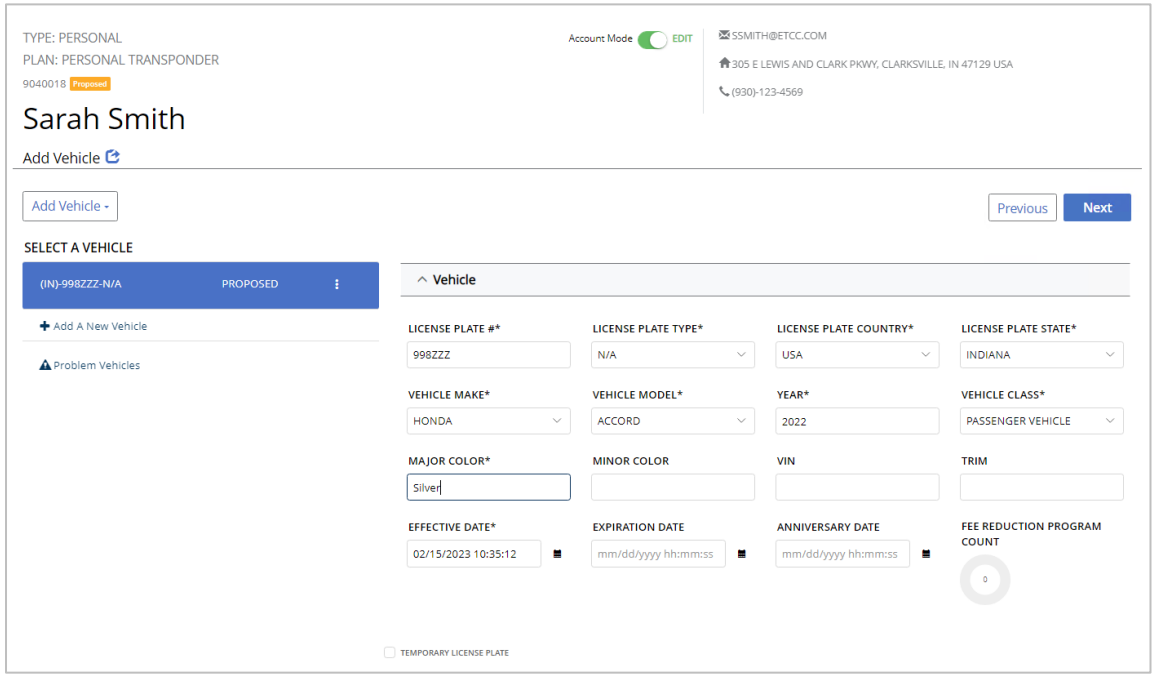
5.1.1.6. Adding New Vehicles

To add a new vehicle:

1. Select or enter all the required fields.



5.1.1.6.1. Requesting Transponder for New Vehicle

To add a new shipping address:

1. Click three vertical dot icon and select Manage Transponder from the list. The Transponder screen displays.

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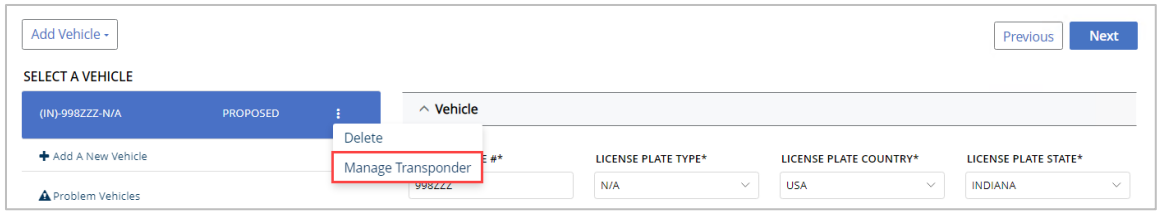
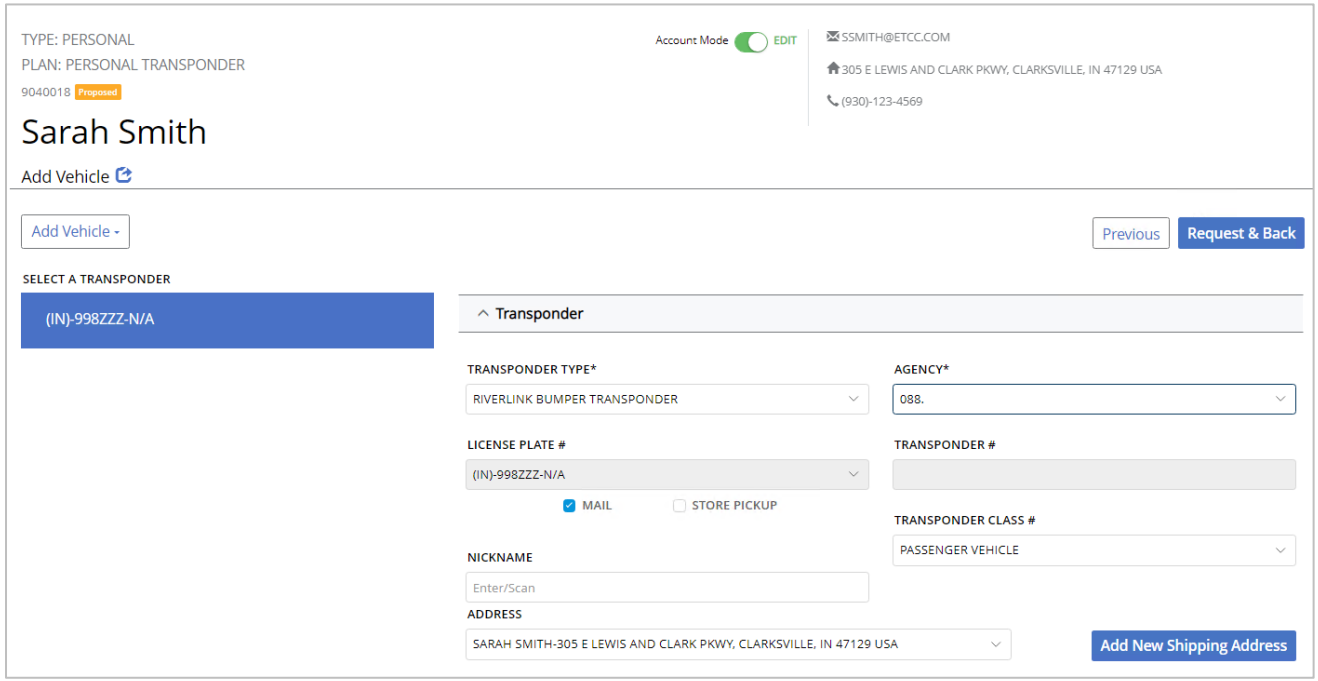


2. Select and/or enter all the required fields.



3. Click Request and Back. The Add Vehicle screen displays.
4. Click Next. The Add Billing Method screen displays.

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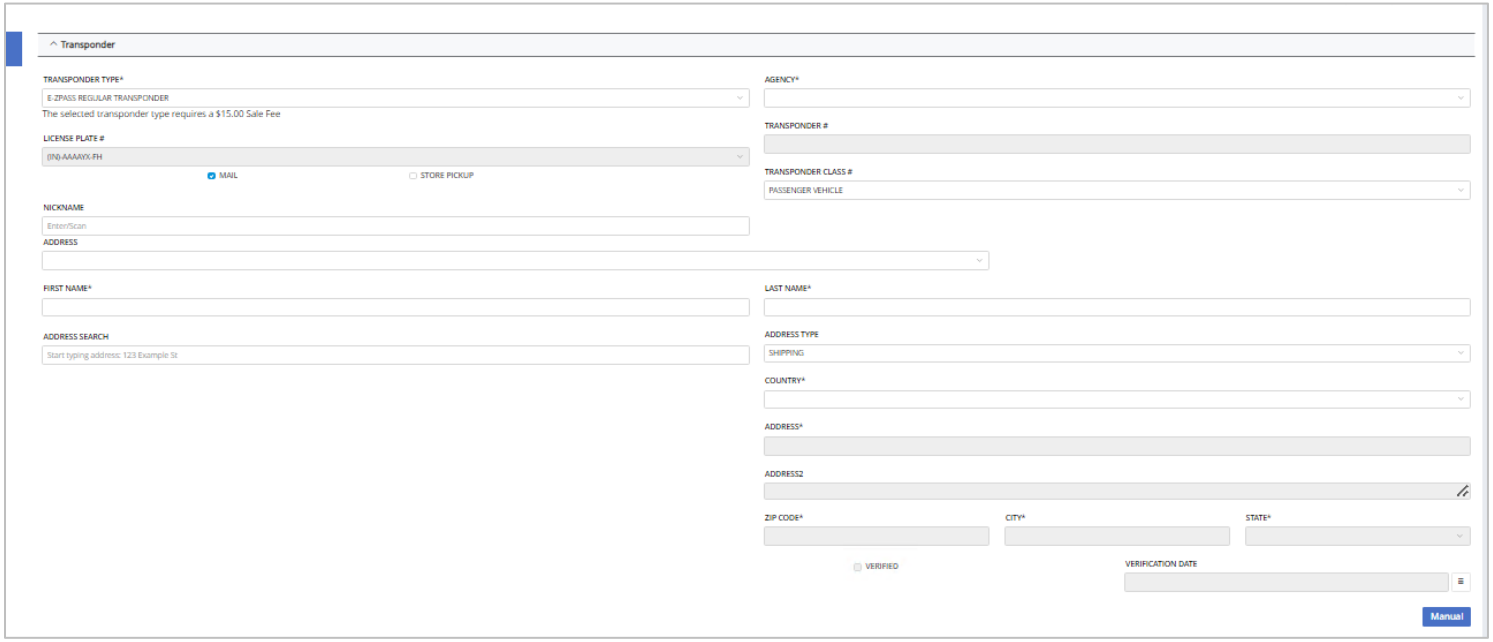
5.1.1.6.2. Adding New Shipping Address

To add a new shipping address:

1. Click Add New Shipping Address on the Transponder screen.
   The screen to add an address that is different from the address on the account displays. This address is used for mailing the requested transponder.



2. If you want to enter the address manually instead of selecting from the list of addresses suggested by Address Search, click Manual.

For more information on to entering address manually see *Creating Account > Adding New Account Address.*

5.1.1.7. Adding Billing Methods

The Billing Method screen allows you to add a payment method used to replenish the account.

To add a billing method:

1. Select a Billing Method. The system displays the appropriate fields for the selected billing method.

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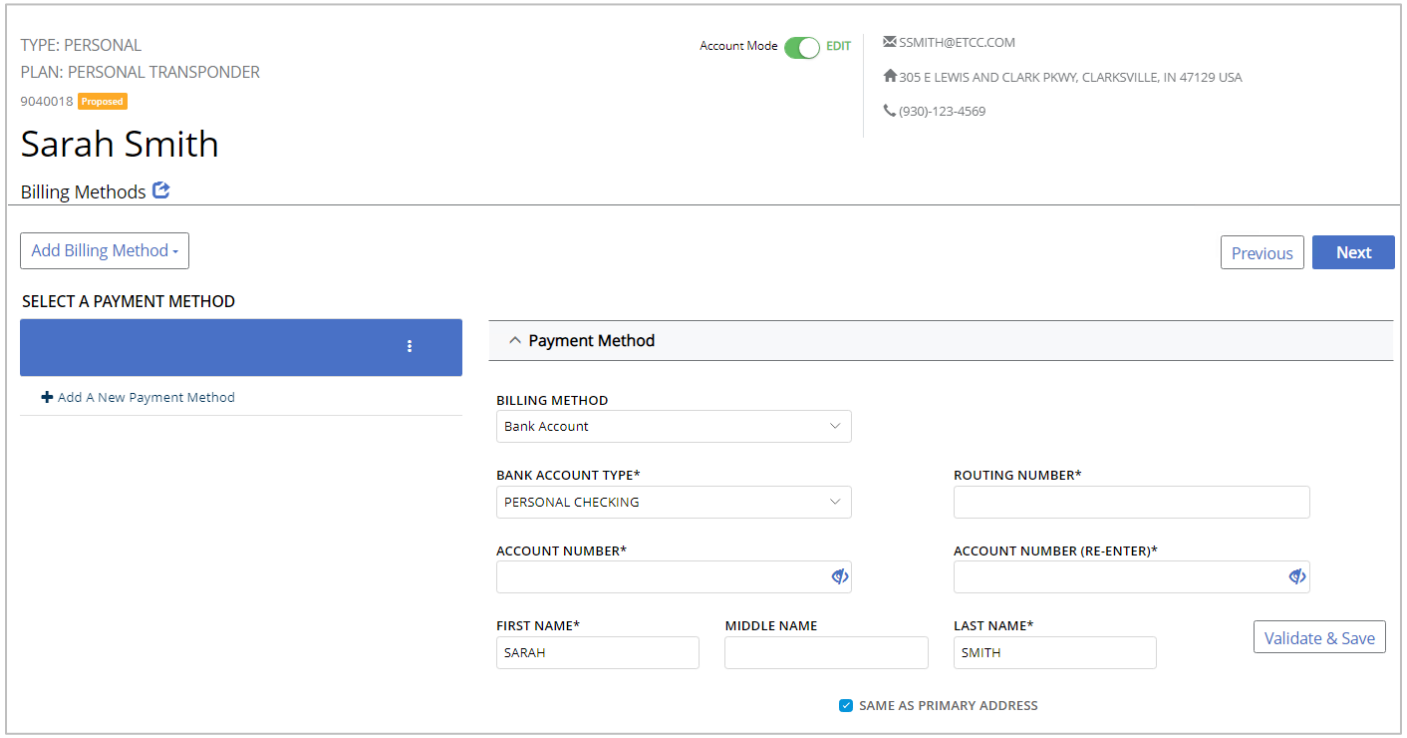
2. For Bank Account, select or enter the required fields.



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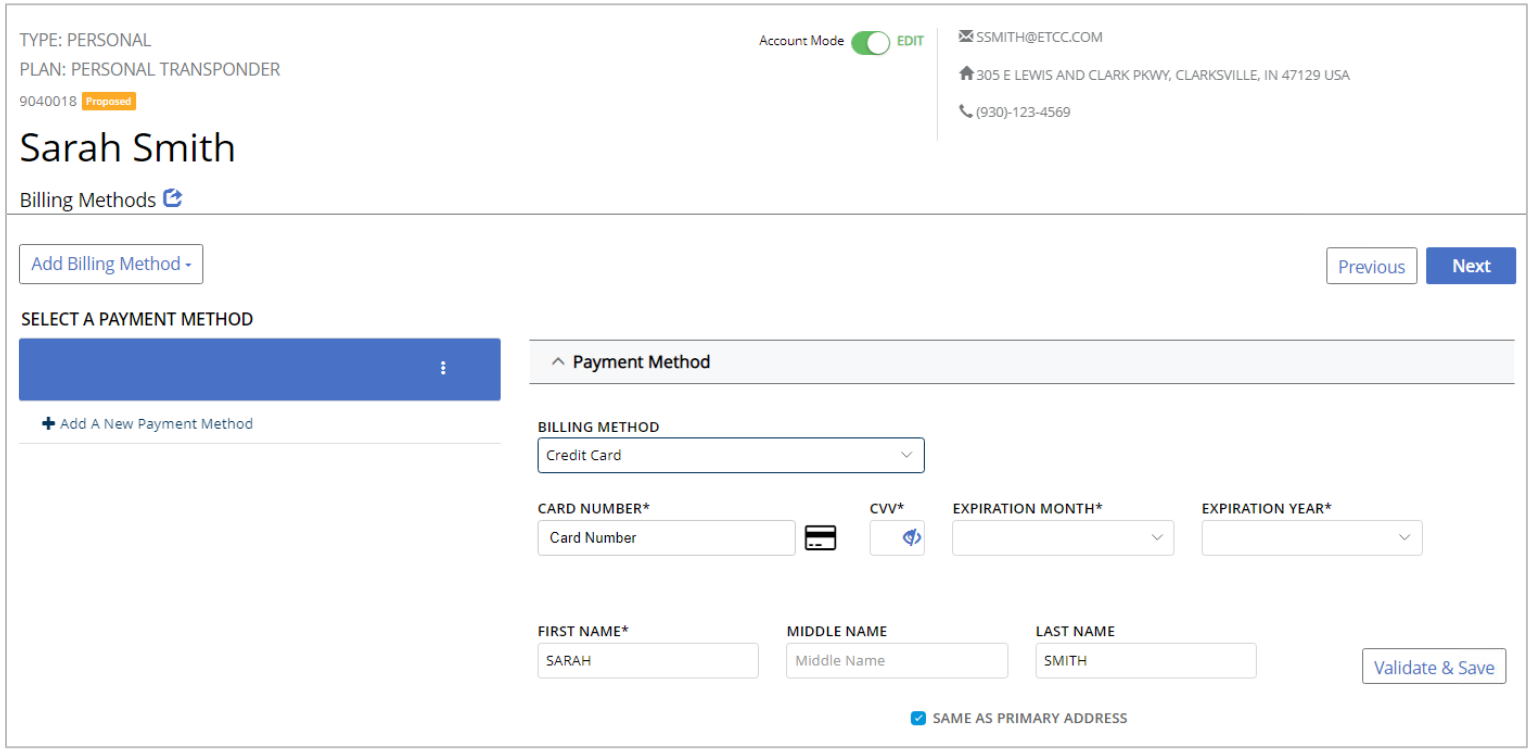
3. For Credit Card, select or enter any of the search criteria.



4. Click Validate and Save. The system validates the information and checks the Validate box when the information passes validation. The billing method and account number displays for the selected payment method.
5. To add another billing method, click Add A New Payment Method and repeat Steps 1 to 3.
6. Click Next. The Add Notification Preference screen displays.

5.1.1.8. Adding Notification Preferences

The Add Notification Preference screen allows you to add the customer's preferred preference for receiving notifications.

To add a notification preference:

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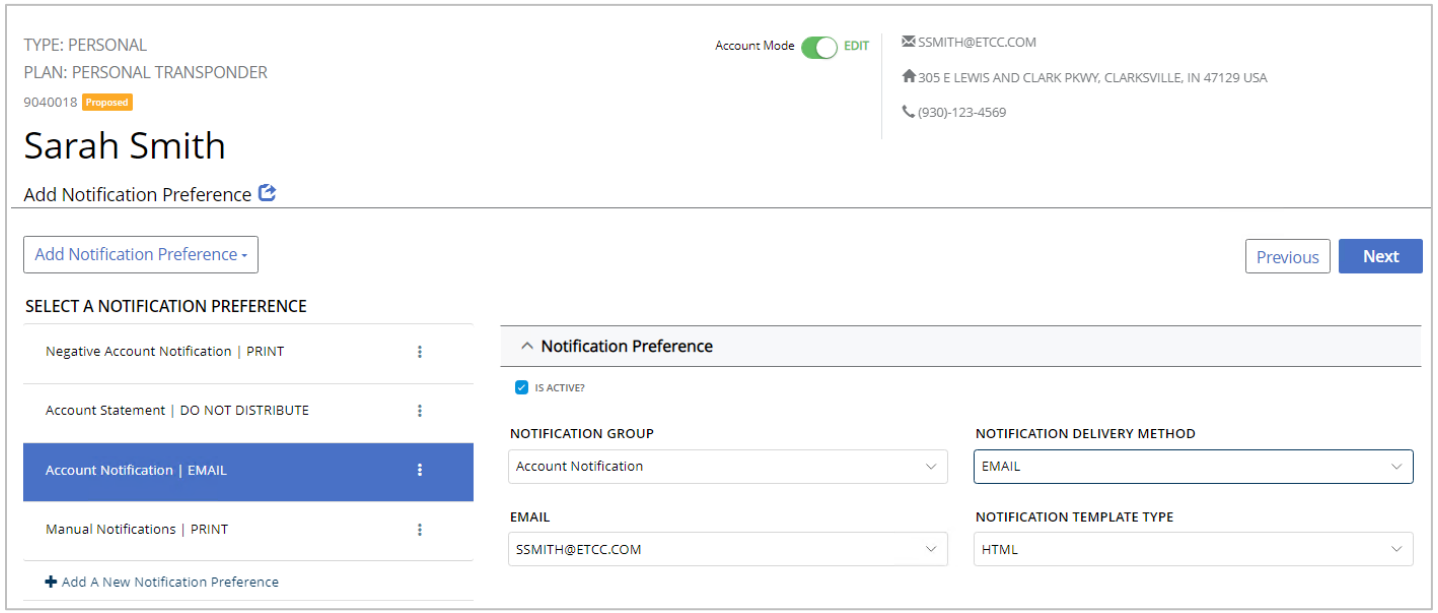
1. Select the notification preference. The Notification Preference screen displays the notification details.
2. Edit the notification preference as needed.



3. Click Next. The Billing Preference screen displays.

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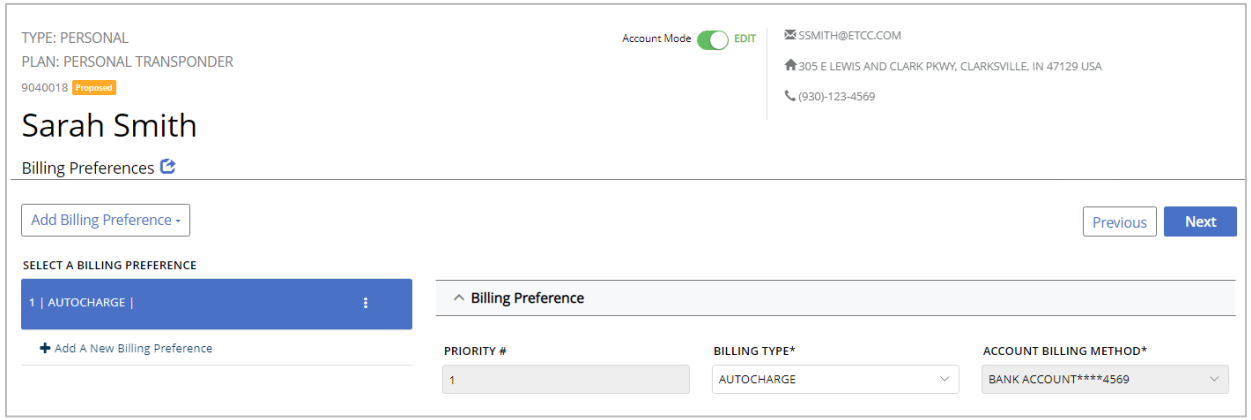
5.1.1.9. Adding Billing Preferences

The Billing Preferences screen allows you to add the default billing method.

To add a biling preference:

1. Select a Billing Preference Method.



2. To add multiple payment methods to the account, click Add A New Billing Preference.
   - Select an account billing method.
3. Click Save. The payment method displays in the Billing Preferences.
4. Click Next. The Auto Charge screen displays.

5.1.1.10. Adding Auto Charge

The auto charge and low balance amounts can be updated on an account. For prepaid accounts, the auto charge amount and/or the low balance level can be updated at any time. You can view the minimum initial prepaid balance, auto charge amount, and low balance level amounts as required based on the account type, account plan, and the number of vehicles on the account.

The Auto Charge screen allows you to modify the rebill and low balance amounts on the account.

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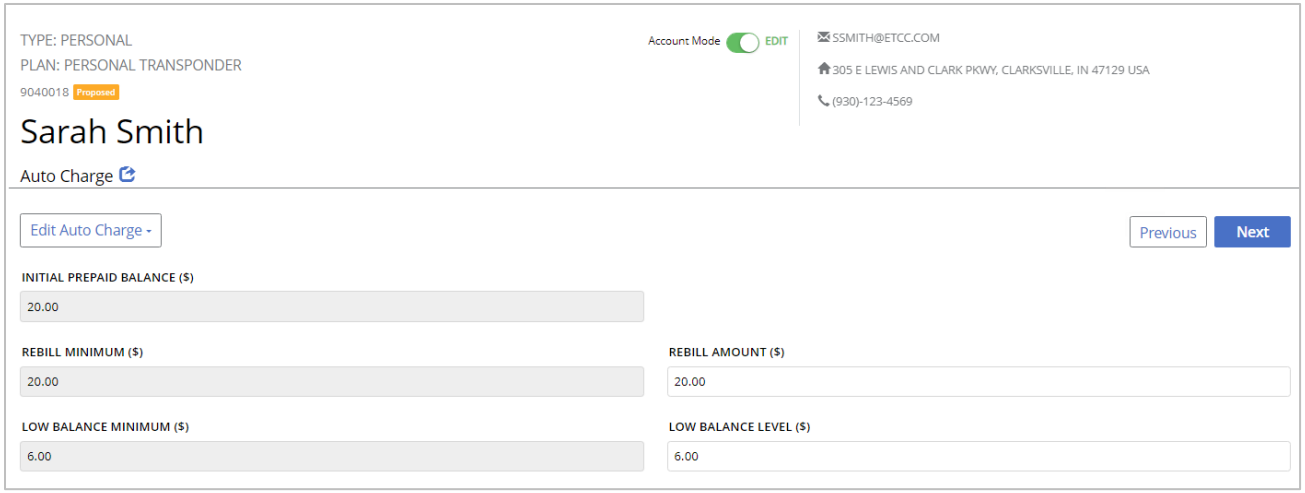
To edit autocharge:

1. Edit the rebill and low balance level as needed.



2. Click Next. The Account Summary screen displays.

5.1.1.11. Updating Account Summary

The Account Summary screen allows you to make updates to any of the previous steps in the account creation process.

To make updates to the account:

1. To make updates to the account, select a screen from the Account Summary drop-down list. The system displays the selected screen.
2. Make the updates as needed, then return to the Account Summary screen.

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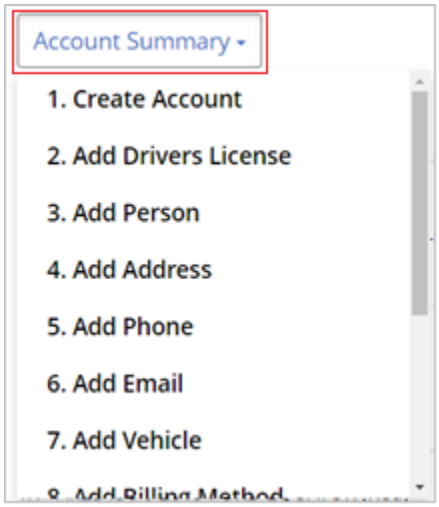
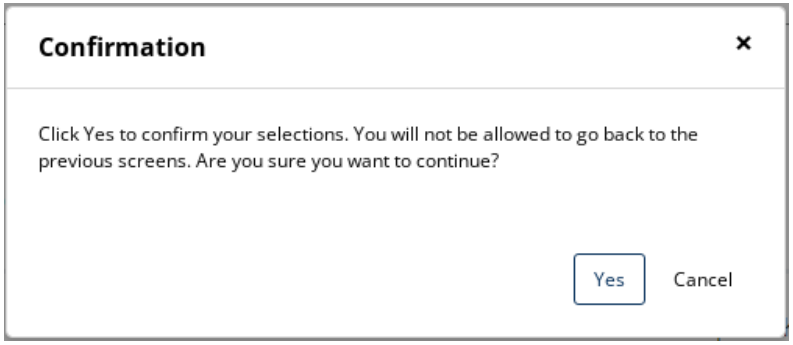


3. From the Account Summary screen, click Next. A confirmation message displays as shown below.



4. Click Yes to the message. The Payment screen displays.

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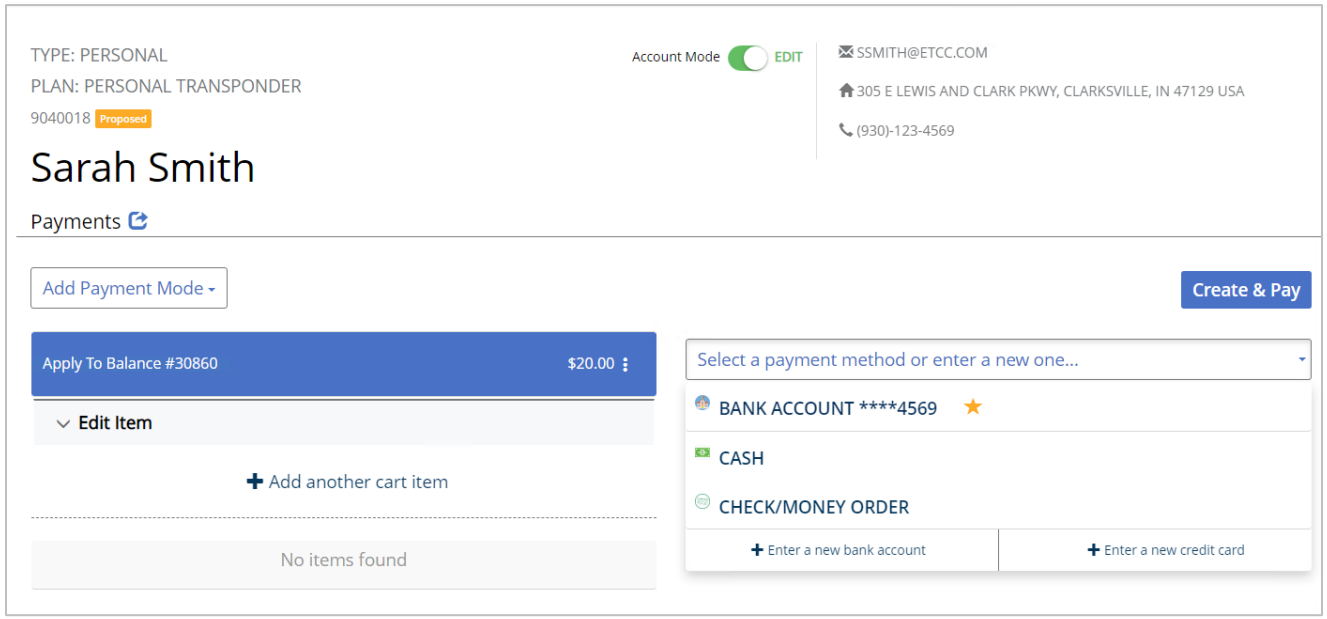
5.1.1.12. Adding Payment Mode

The Payments screen allows you to make a payment to the account balance.

To make a payment:

1. Select a payment method or enter a new one from the drop-down list box. The payment method information displays.



2. Select the Payment Delivery method. The payment method information displays.

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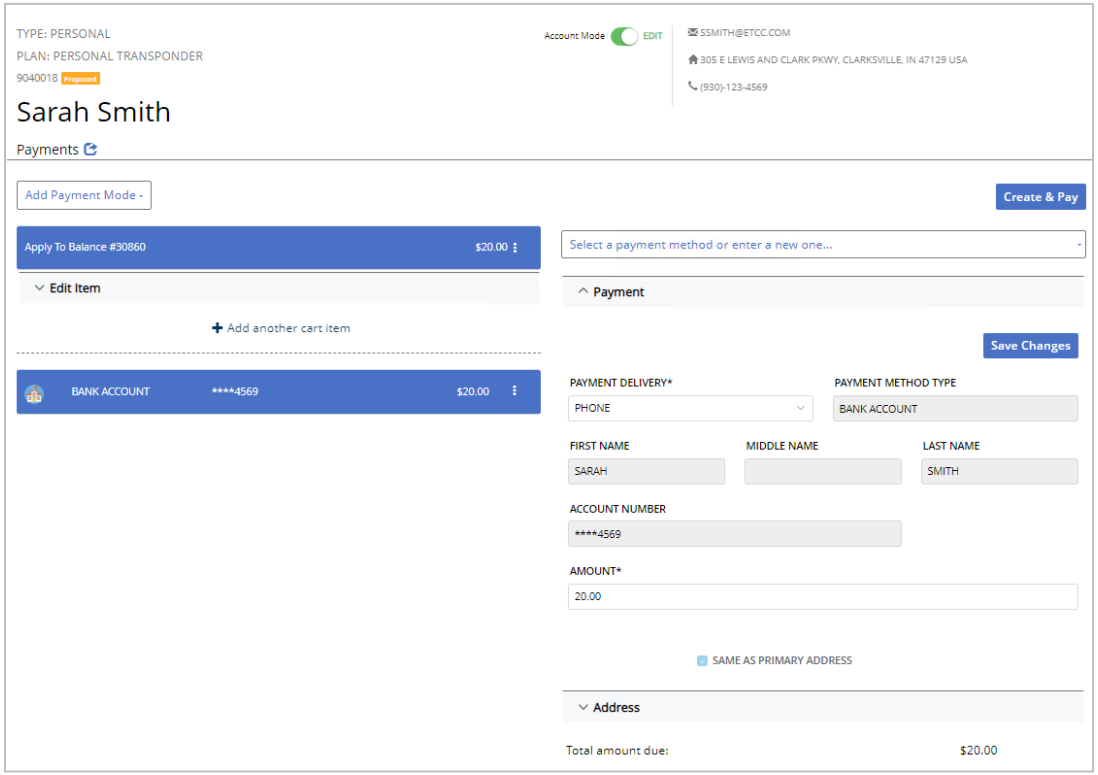

3. Click Save Changes.

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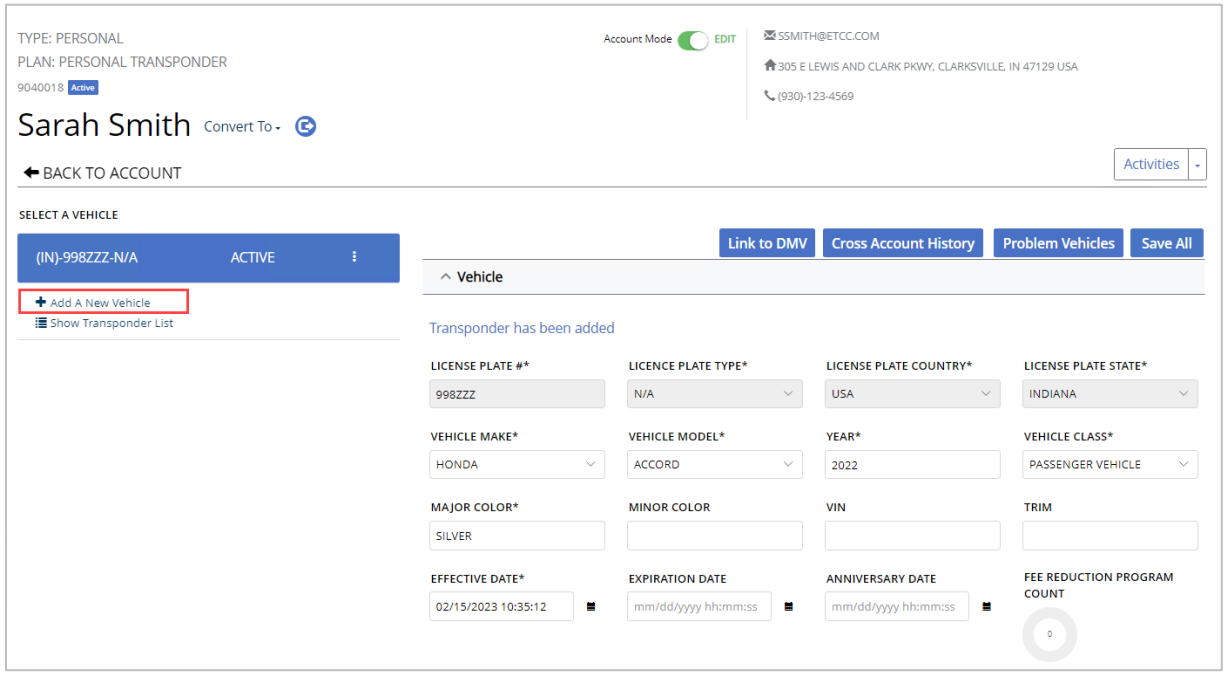
5.1.2. Managing Active Vehicles

To manage the active vehicles:

1. Click the corresponding Manage button for the Active Vehicles. The vehicles screen displays.



2. Click Add A New vehicle to add a new vehicle to the account.

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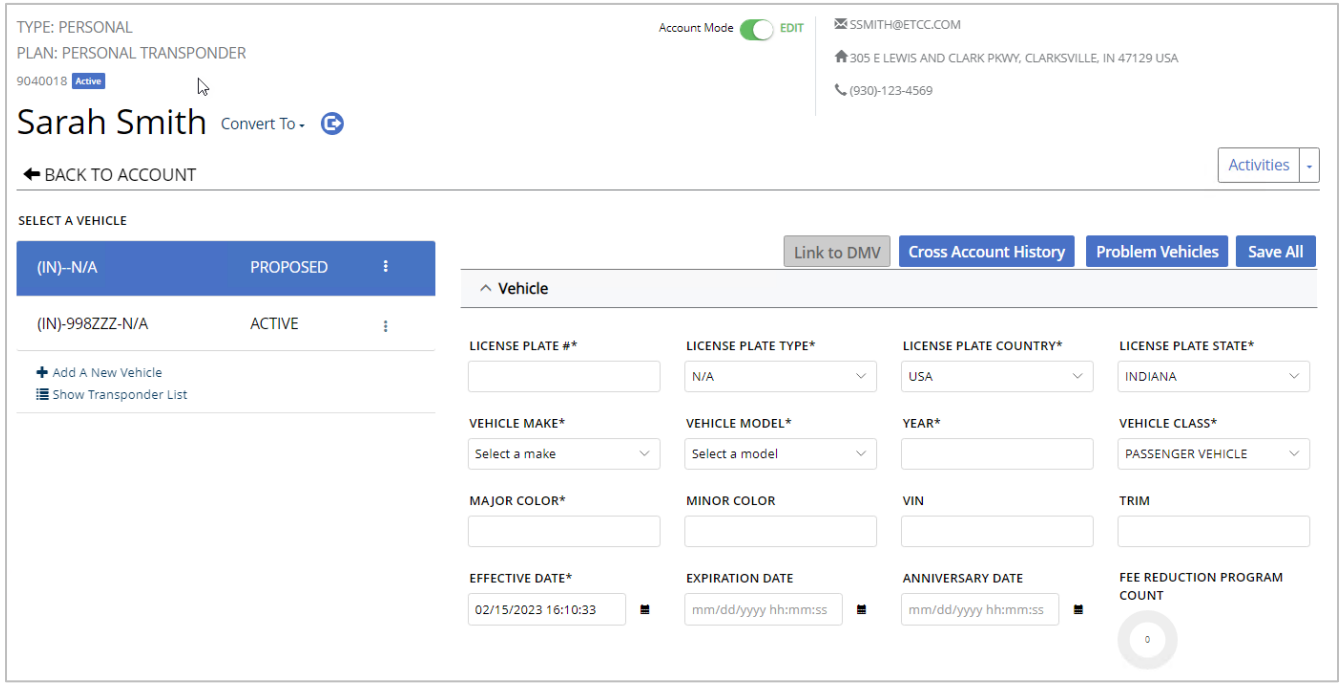

3. Enter and select the required vehicle information.
4. Add or request a transponder for the newly added vehicle.
5. Click on Save All. The system displays a confirmation message. Click on Proceed.

5.2. Account Conversion

Personal Unregistered Video accounts are created by the system when an unauthorized vehicle uses the roadway. Transactions associated with the vehicle are posted to the Unregistered Video account. The system allows you to convert the account plans.

The table below contains the account plan transition mapping.

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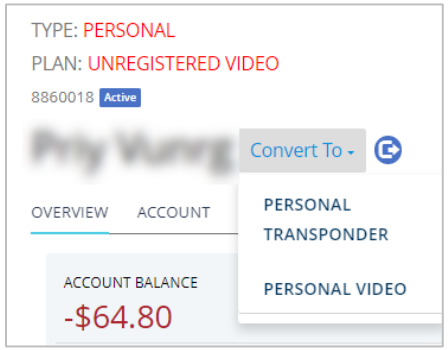
Table 3: Account Plan Transition Mapping

From	To								
	Personal Transponder	Personal Video	Personal Temporary	Commercial Transponder	Commercial Video	Non-Revenue	Department	Unregistered Video	Fleet
Personal Transponder	N/A	Yes	No	Yes	No	No	No	No	No
Personal Video	Yes	N/A	No	No	Yes	No	No	No	No
Personal Temporary	Yes	No	N/A	No	No	No	No	No	No
Commercial Transponder	No	No	No	N/A	Yes	No	No	No	Yes
Commercial Video	No	No	No	Yes	N/A	No	No	No	Yes
Non-Revenue	No	No	No	No	No	N/A	No	No	No
Department	No	No	No	No	No	No	N/A	No	No
Unregistered Video	Yes	Yes	No	No	No	No	No	N/A	No
Fleet	No	No	No	No	No	No	No	No	N/A

5.2.1. Converting Personal Unregistered Video Accounts to Personal Registered Accounts

To convert a personal unregistered video account to a personal transponder account:

1. Select Convert To > Personal Transponder from the Account View screen. The Plan Transition screen displays.



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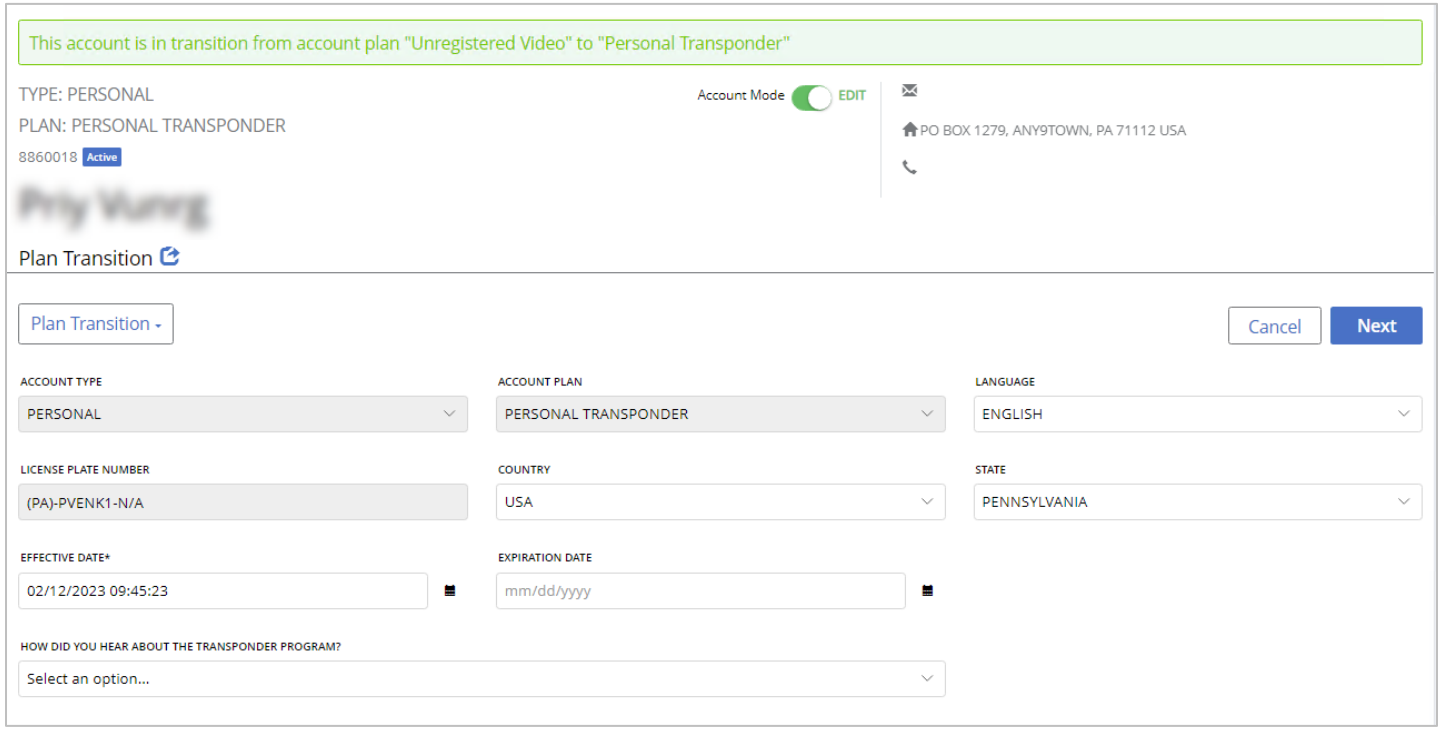

2. Click Next. The Add Driver's License screen displays.
3. Select the Driver's License or Tax ID radio button and select or enter the following:
   - For Drivers License:
     - Number – Enter the driver's license number
     - Country – Defaults to USA
     - State – Defaults to Indiana
   - For Tax ID:
     - Tax ID – Enter the Tax ID
     - Country – Defaults to USA
     - State – Defaults to Indiana

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4. Click Next. The Add Person screen displays.
5. Select or enter the following:
    - First Name (Required)
    - Middle Initial
    - Last Name (Required)
    - Employer
    - Date of Birth
    - Gender
    - Job Title
    - Suffix
    - PIN (Optional: Enter 6-12 alphanumeric characters (The PIN allows the user to authenticate any information update requested by the account holder. During account setup this information is masked and cannot be viewed once entered by the user.)
6. Click Next. The Add Address screen displays with the address fields populated and disabled.
7. Select the Address Type.
8. To update the address, click the Manual button to enable the fields and select or enter the following information:
    - Address Type – defaults to Mailing
    - Country (Required) – defaults to USA.
    - Address 1 (Required)
    - Address 2
    - Zip Code (Required)
    - City (Required)
9. Click Next. The Add Phone screen displayed.
10. Select the Type of phone.
11. Enter the phone number and clicked Validate. The phone number is validated. The validation fields are updated, and the Validated box is checked.
12. Click Next. The Add Email screen displays.
13. Enter the email address.
14. Click Validate. The email address is validated. The validation fields are updated, and the Validation box is checked.
15. Click Next. The Add Vehicle screen displays.
16. Select or enter the following:
    - License Plate
    - License Plate Type – defaults to N/A
    - License Plate Country – defaults to USA

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- License Plate State – defaults to Indiana
- Vehicle Make (Required)
- Vehicle Make (Required)
- Vehicle Model (Required)
- Year (Required)
- Vehicle Class (Required) – defaults to two axles.
- Major Color (Required)
- Minor Color
- VIN
- Trim
- Effective Date (Required) – defaults to the current date.
- Expiration Date
- Is Temporary License Plate checkbox.

17. Click three vertical dot icon and select Manage Transponder from the list. The Transponder screen displays and allows you to add transponder for the newly added vehicle.
18. Click Next. The Add Billing Method screen displays.
19. Select a Billing Method. The system displays the appropriate fields for the selected billing method.
    - For Bank Account, select or enter the following:
        - Bank Account Type – defaults to personal checking
        - Routing Number (Must be 9 digits)
        - Account Number (Required)
        - Account Number (Required Re-Enter)
        - First Name (Prefilled)
        - Middle Name (Prefilled)
        - Last Name (Prefilled)
    - For Credit Card, select or enter the following:
        - Card Number (Required)
        - CVV (Required)
        - Expiration Month (Required)
        - Expiration Date (Required)
        - First Name (Prefilled)
        - Middle Initial (Prefilled)
        - Last Name (Prefilled)

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20. Click Validate. The system checks the Validate box when the information passes validation.
21. Click Save. The billing method and account number displays for the selected payment method.
22. To add another billing method, click Add A New Payment Method and repeat Steps 19 through 21.
23. Click Next. The Add Notification Preference screen displays with the default notifications and preferences.
24. To update a notification preference:
25. Select the notification to be updated. The Notification Preference form displays the notification details.
26. Make the updates.
27. Click Save. The updates are saved, and an information message displays.
28. Click OK to the message.
29. Click Next. The Add Billing Preference screen displays.
30. If multiple payment methods were added to the account, click Add a New Billing Preference.
31. Select a billing method.
32. Click Save. The payment method displays in the Billing Preferences.
33. Click Next. The Edit Auto Charge screen displays.
34. Click Next. The Account Summary screen displays.
35. To make updates, select a screen from the drop-down list. The system displays the selected screen.
36. Make updates as needed, then return to the Account Summary screen.
37. From the Account Summary screen, click Next. The Open Items screen displays all open items selected on the account.
38. Click Next. The Payments screen displays with a payment to apply to the account balance.
39. Select a payment method. The payment method information displays.
40. Select the Payment Delivery.
41. Click Save Changes.
42. Click Checkout. The Please wait message displays while the system converts the account. A confirmation message displays.
43. Click Send Email. The Account View screen displays for the new account.
44. Click the corresponding Manage button for the Active Vehicles. The Vehicle form displays.
45. Add or request a transponder for the vehicle on the account.

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6. Account Maintenance

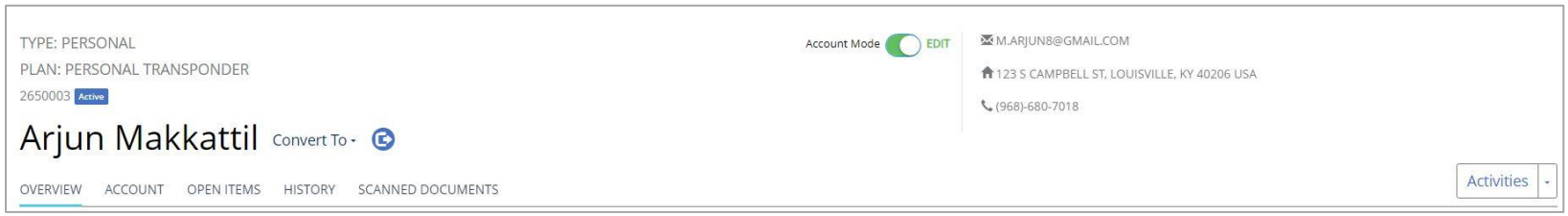
This section describes the account maintenance functions.

6.1. Loading Accounts

An account must be loaded before account maintenance activities can be performed.

To load an account:

1. Select an account from the Home screen. The account is loaded. The Account View screen displays.
   - If the Account Mode is green, the account is available for editing.



   - If the Account Mode is grey, the account defaults to Read Only because it is in use by someone else.

2. To verify who has the account open, click the Account Mode button. A message displays the name of the person who is accessing the account.

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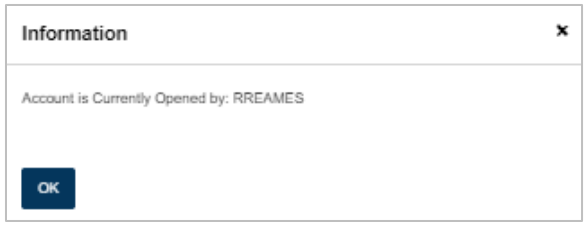
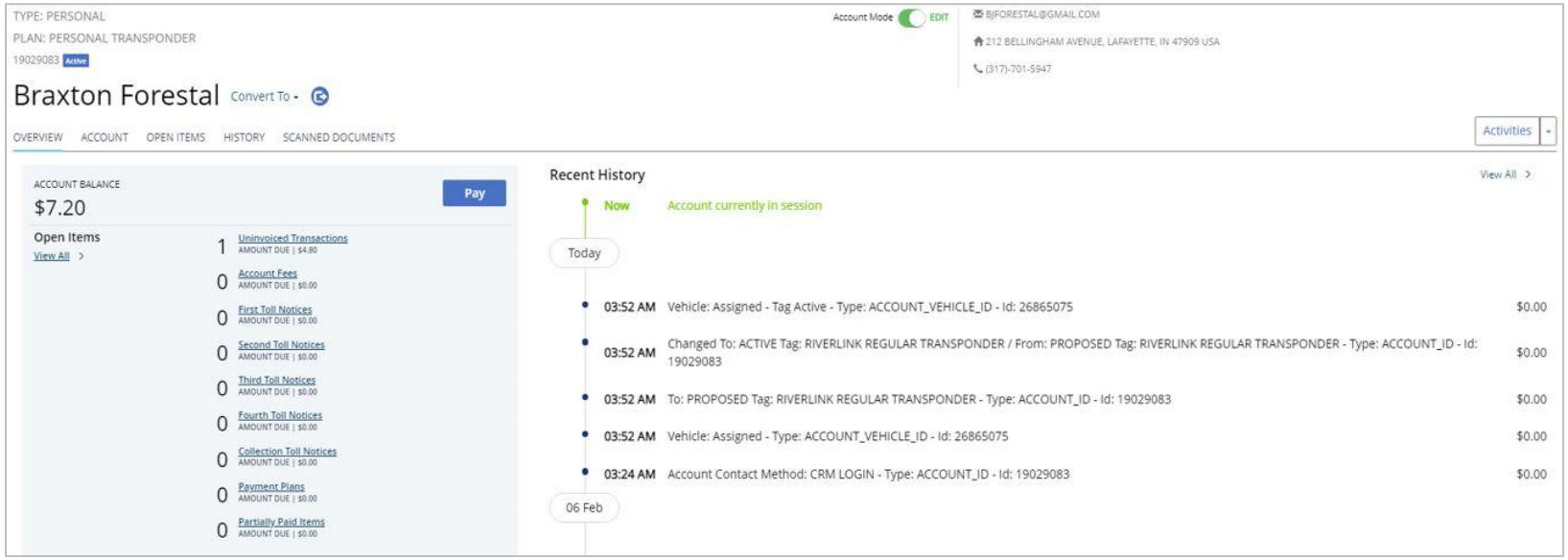


6.2. Account View Screen

The Account View screen is the starting point for all customer account activities. This screen allows you to perform account maintenance services as required or requested by the account holder (customer). Multiple users may access the same account at the same time, but only the first person to load the account can perform maintenance functions. All others will be limited to the View mode until the first user unloads/releases the account.

The Account View screen includes the Overview, Account, Open Items, History, and Scanned Documents tabs which are shown below.



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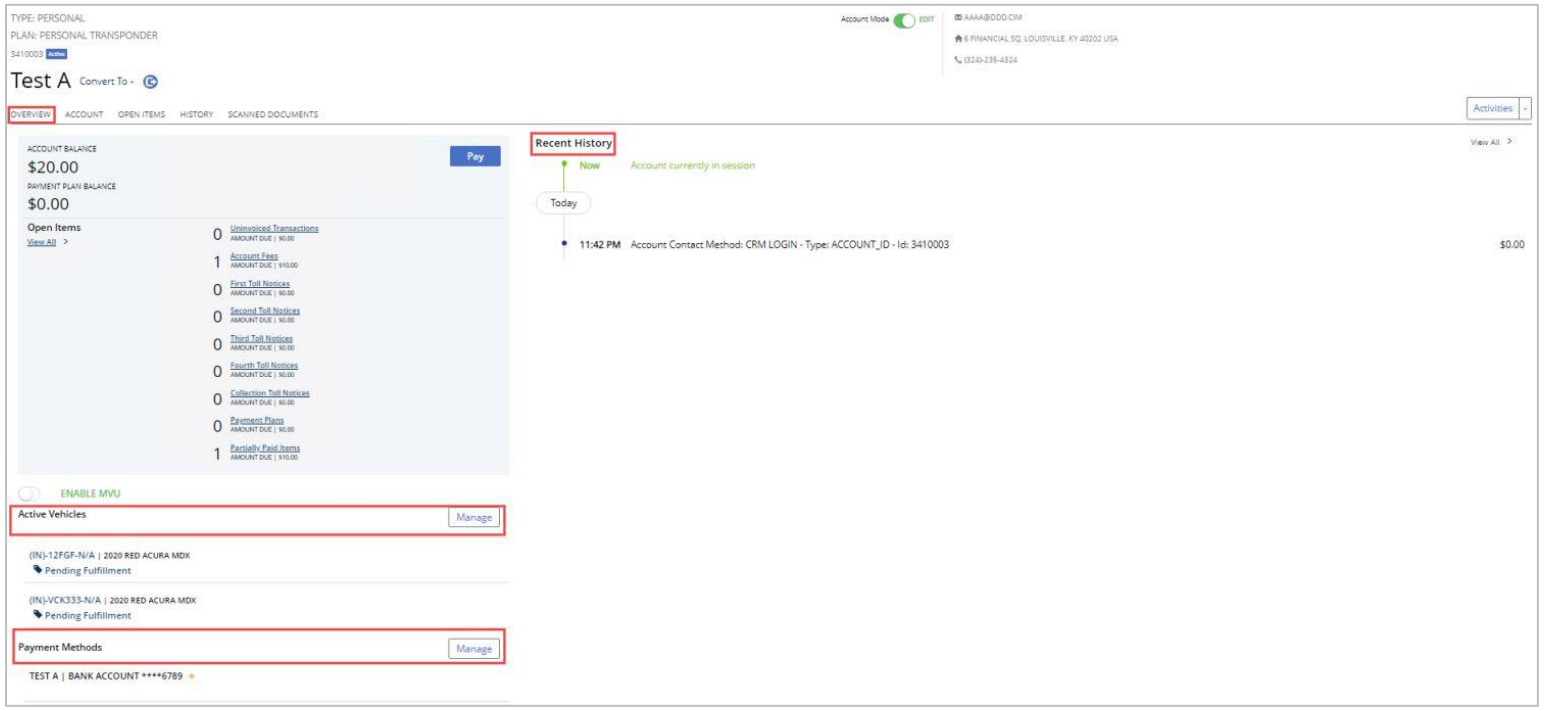
6.2.1. Overview Tab

The Overview tab provides a high-level overview of the account balance and open items and allows you to make a payment, manage vehicles and payment methods, and to view the recent history.



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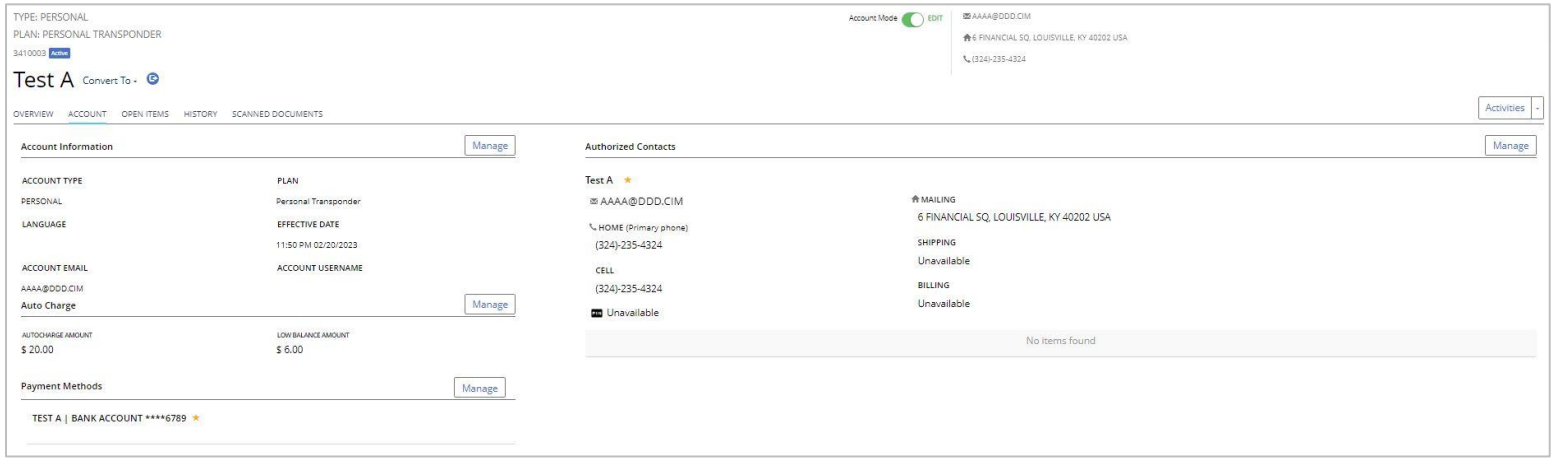
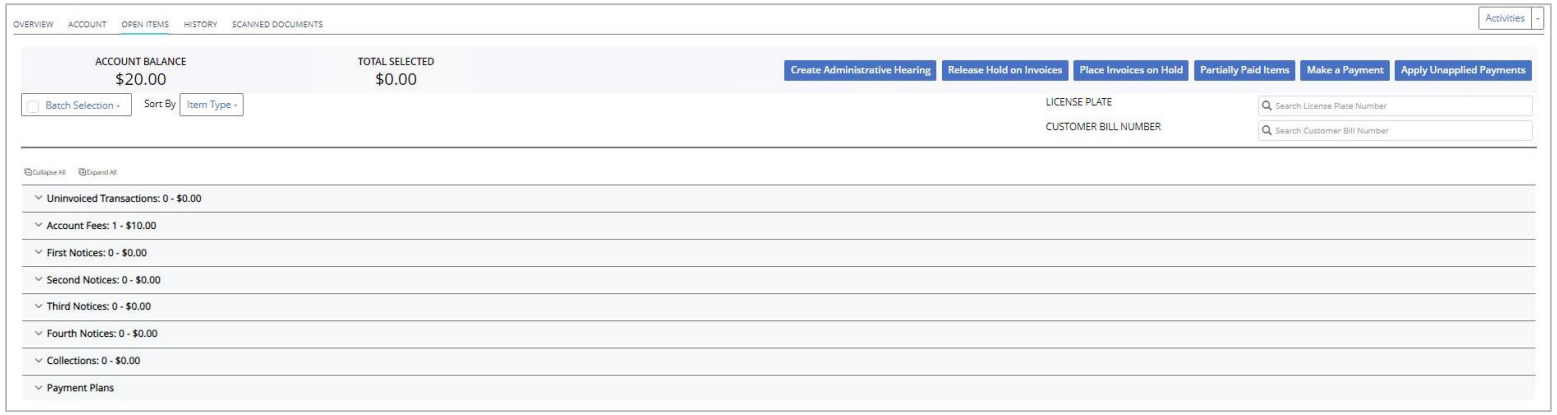
6.2.2. Account Tab

The Account tab allows you manage the account information, payment methods, and authorized contacts.



6.2.3. Open Items Tab

The Open Items tab displays the open item details and allows you to hold and release invoices, request administrative hearing, search partially paid items, apply unapplied payments, and to make payments.



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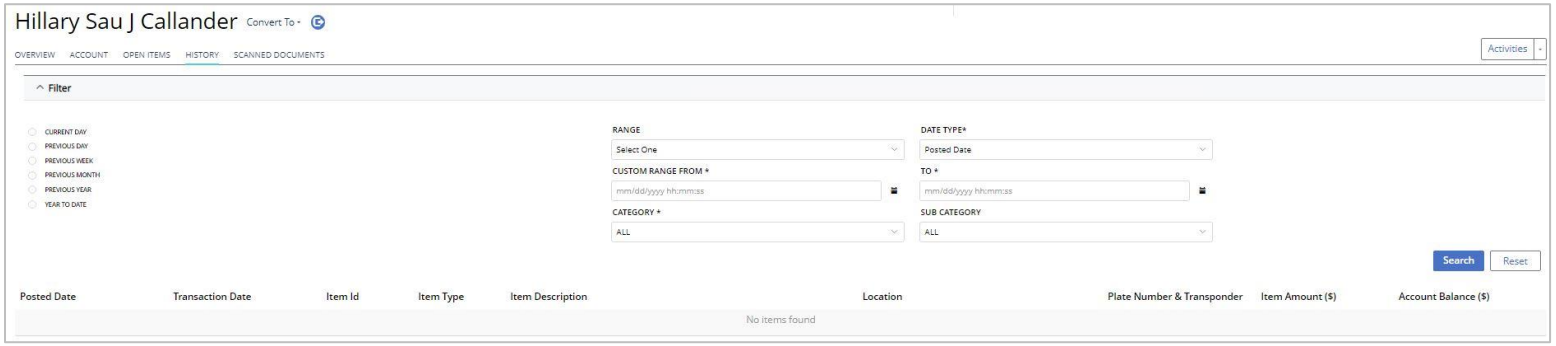
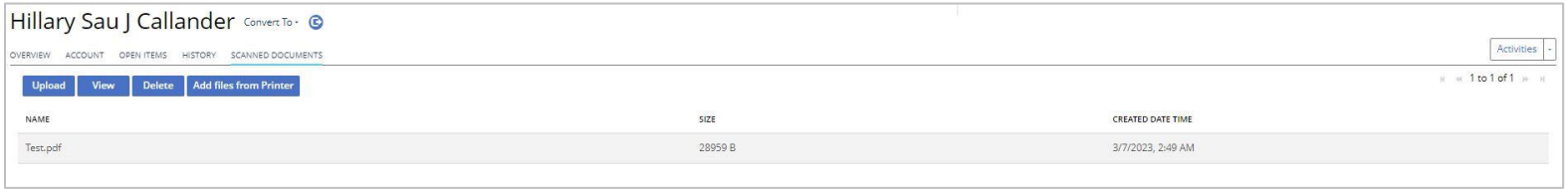
6.2.4. History Tab

The History tab allows you to search for and view account history activities such as comments, payments, and transactions.



6.2.5. Scanned Documents Tab

The Scanned Documents tab allows you to add files from printer, upload, view, and delete scanned documents.



6.3. Payments

The Payments functionality allows you to make a payment for outstanding open items.

6.3.1. Making Payments – Open Items

The Payments functionality allows you to make a payment on one or more open items with an outstanding balance.

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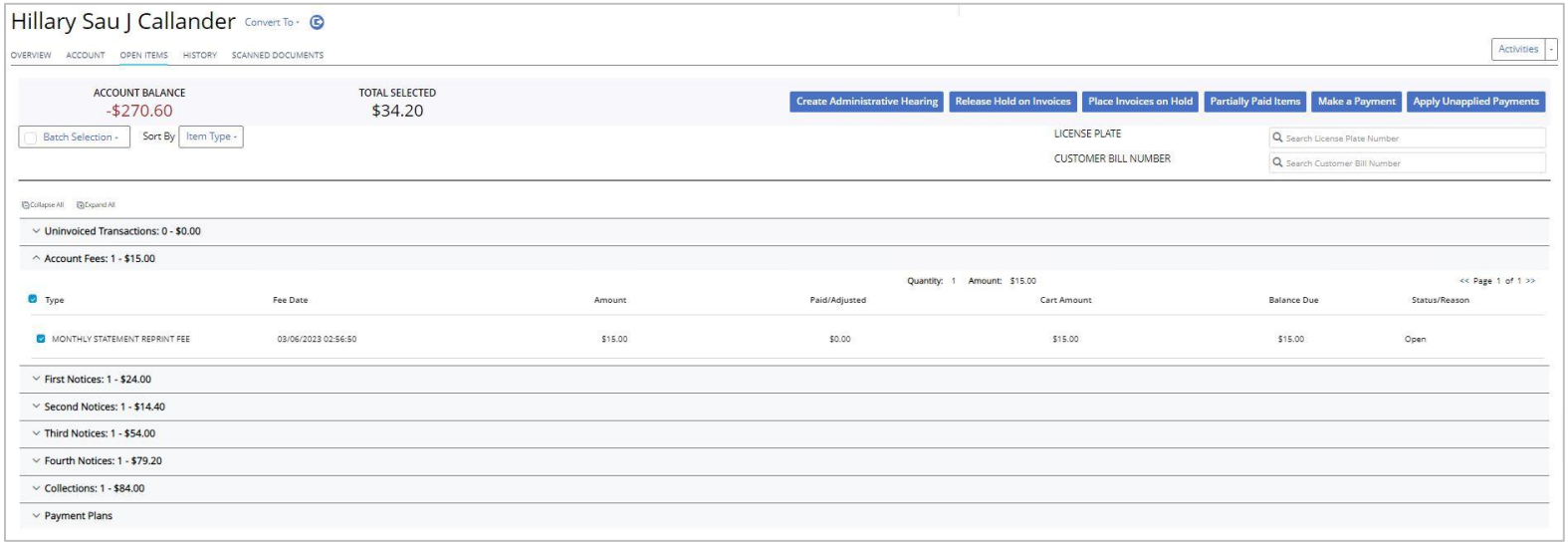
To make a payment on open items with an outstanding balance:

1. From the Account View screen, do one of the following:
   - Select the Open Items tab.
   - Select Activities > Payments.
2. Click the corresponding down-arrow to expand each section as needed or click Expand all to open all sections. The open items are displayed. Refer to section *Managing Open Items* for information about the different types of open items.



3. Select the transactions to be paid. (Transactions can be selected from multiple sections.) The box is checked for each transaction selected.

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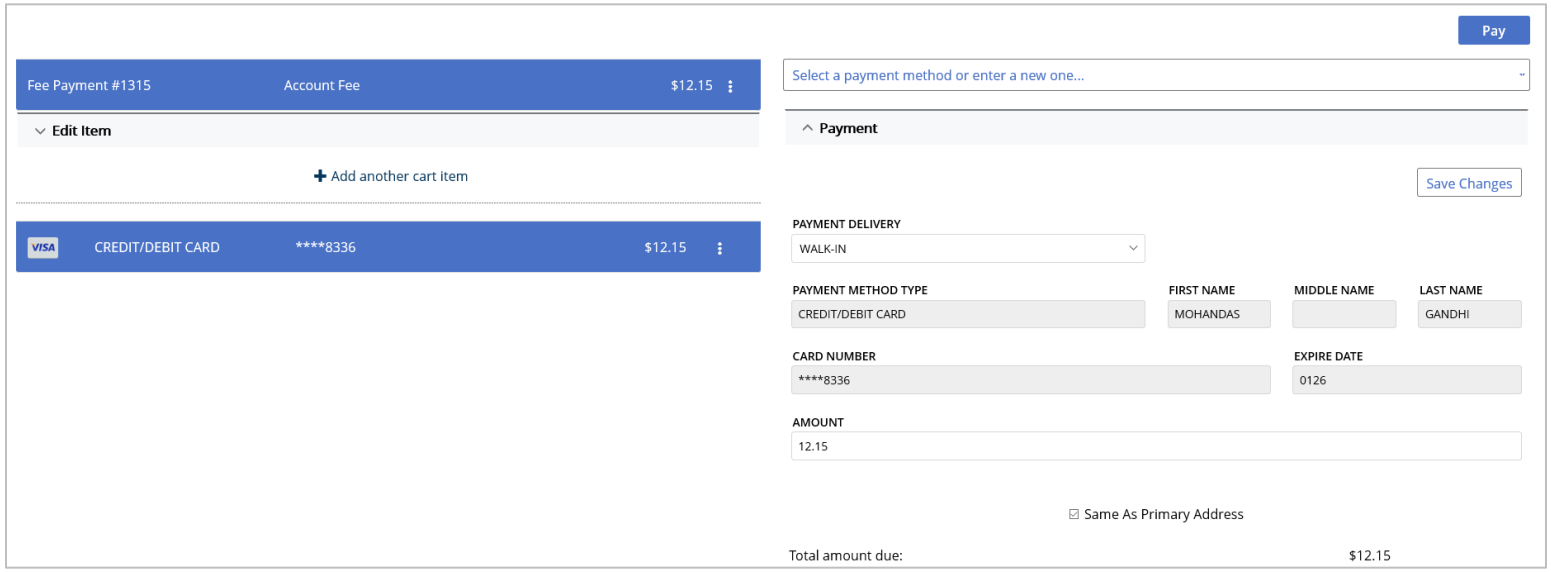
4. Click Make a Payment. The Payment screen displays.



5. Select one of the following from the Payment Method Type:
   - Credit Card
   - Cash
   - Check/Money order
6. Select one of the following from Payment Delivery.
   - Email
   - Mail
   - Mobile Walk-Up Center
   - Phone
   - Walk In
7. Click Save Changes.
8. Click Pay. The following things occur:
   - The payment receipt is generated and is available for downloading, emailing, or viewing the payment details.
   - A payment confirmation message displays along with the updated account balance.

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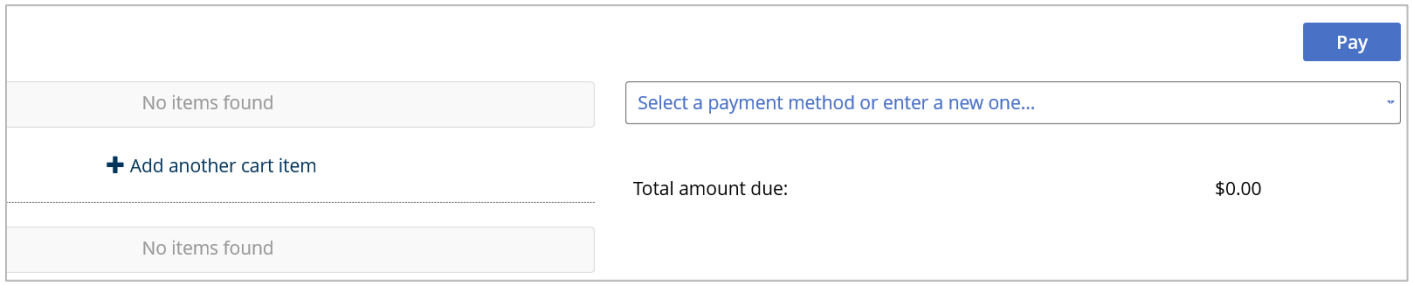
6.3.2. Making Payments – Add to Account Balance

The Payment screen allows you to make a payment to add to the account balance.

To make a payment for adding to the account balance:

1. From the Account View screen, do one of the following:
   - Select Activities > Payment. The Payment screen displays.
   - Select the Overview tab, click Pay. The Payment screen displays.



2. Click Add another cart item. An item is added to the cart for editing.

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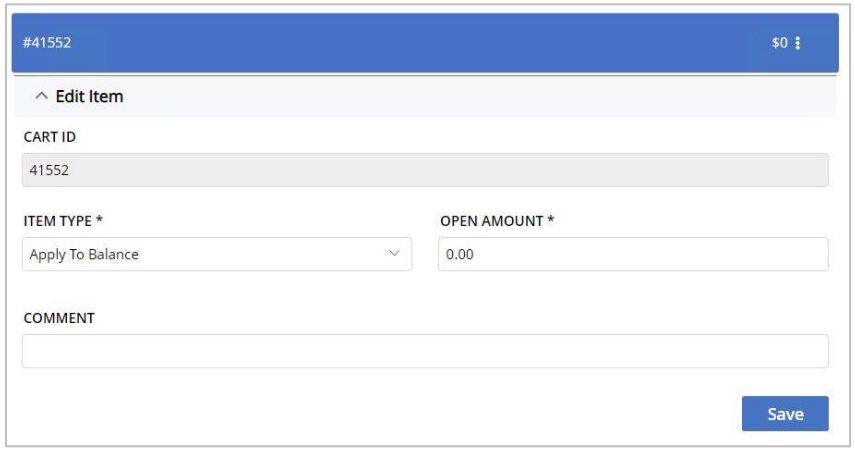
3. Expand the Edit Item section.



4. Select or enter the following:
   - Item Type
   - Open Amount
   - Comment
5. Click Save. The total amount due is updated.

6. Select a payment method. The Payment screen displays the payment information.

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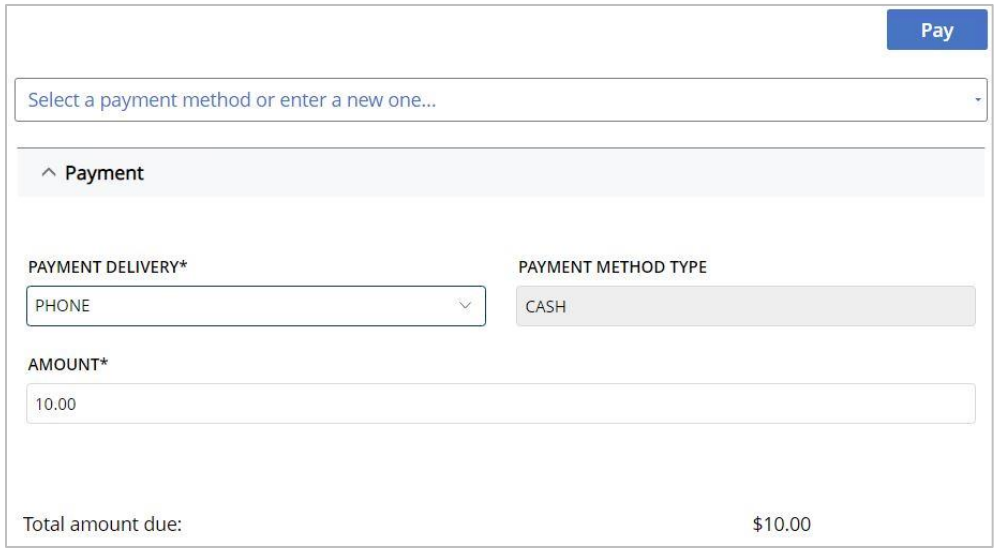

7. Click Pay. The following things occur:
   - The payment receipt is generated and is available for downloading, emailing, or viewing the payment details.
   - A payment confirmation message displays along with the updated account balance.

6.3.3. Making Split Payments

Split payment processing is the terminology used when one payment, for example one check, is sent with the instructions to pay for multiple accounts. This may occur with fleet and rental customers or families with multiple family members having different accounts. The split payment process begins with the creation of the payment to be split. The payment must be created on a customer account that meets one of the following criteria:

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- Account has a zero or positive balance.
- All the account's negative balance will be paid by the split payment.

Based on the number of payments that need to be split, you determine which method to utilize, UI method or File method.

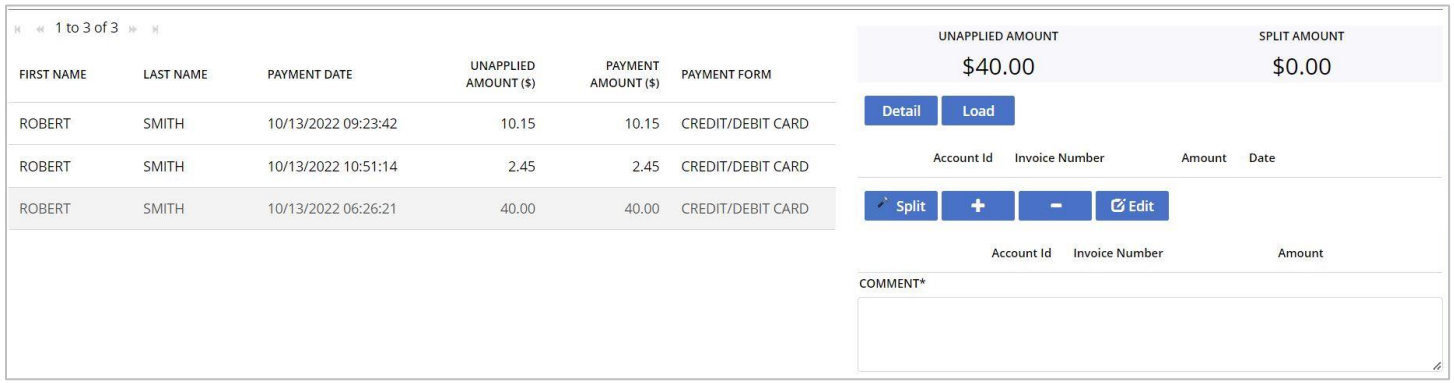
The UI method has a configurable maximum number of split payments allowed from one source payment (currently configured as 10). The split may be directed towards invoices (across multiple accounts or same account), payment plans (across multiple accounts or same account) and/or accounts (account balance).

6.3.3.1. Splitting Payments via UI

The Payment screen allows you to split a payment across multiple accounts up to a maximum amount allowed by the system.

To split a payment via the UI:

1. From the Account View screen, click Activities > Split Payments. The Split Payment screen displays.
2. Select the unapplied payment to be split. The row is highlighted.



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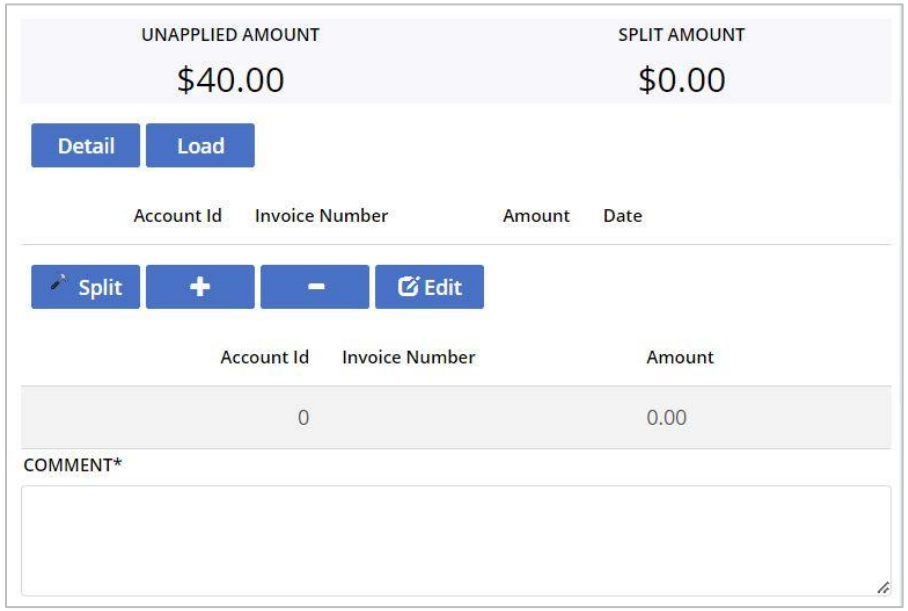
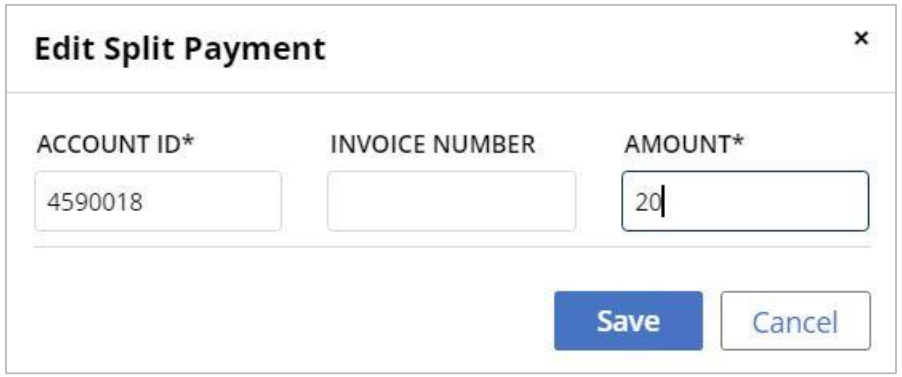
3. Click the plus sign in the Split Payment panel. The account number input fields display on the screen.



4. Double click the account number. The Edit Split Payment window displays.



5. Enter the following information, then click Save. The information displays on the screen.

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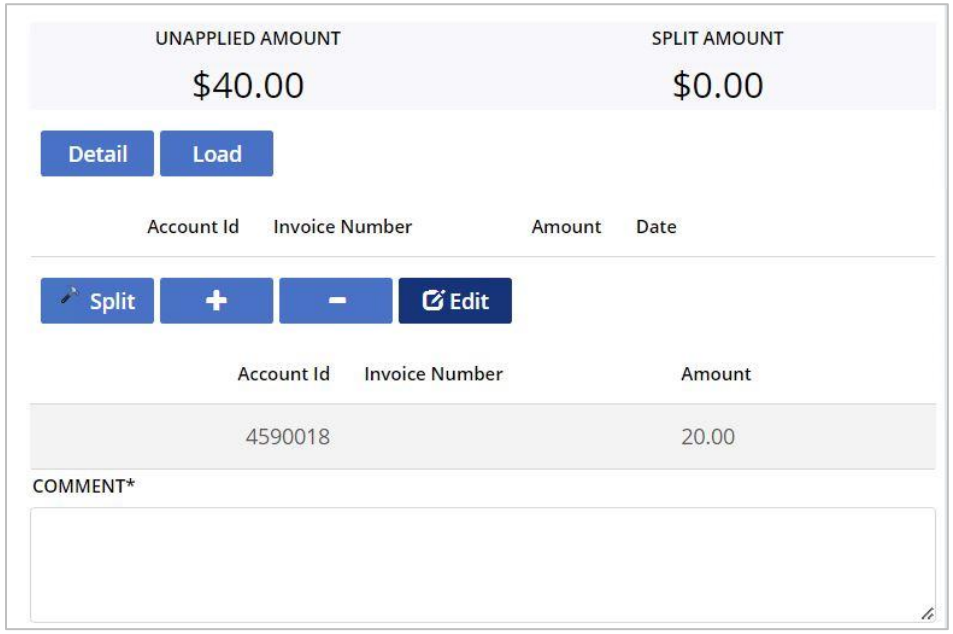
- Account Number (Required)
- Invoice Number
- Amount (Required)

6. Enter a comment.



7. To enter another split payment, repeat steps 3 through 6.

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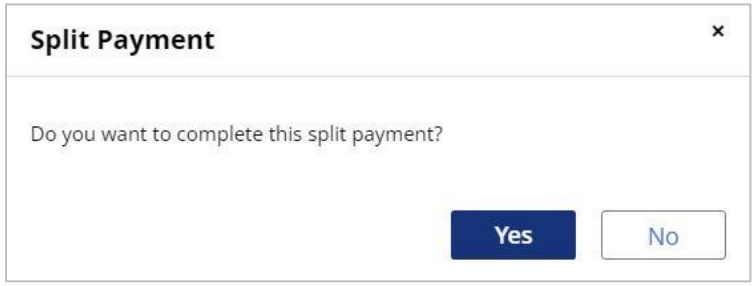
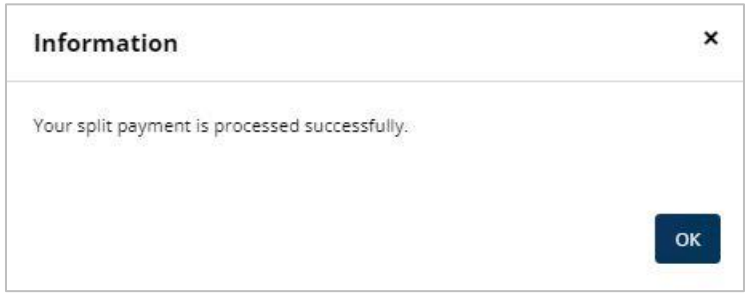
8. When finished adding split payments, click Split. A confirmation message displays.



9. Click Yes. The following things occur:
   - A success message displays.
   - The split payment is submitted, and a case number is assigned to the payment.
   - The amount of the split payment is deducted from the Unapplied Amount on the parent/source account and the split payment amount is applied to the child/destination account.



10. Click Ok.

6.4. Vehicle Management

The Vehicle screen allows you to maintain the vehicle information. From this screen you can add and edit the vehicle information, change the license plate, link the vehicle to DMV, cross-check the vehicle history throughout all the accounts in the system, and add comments related to vehicle.

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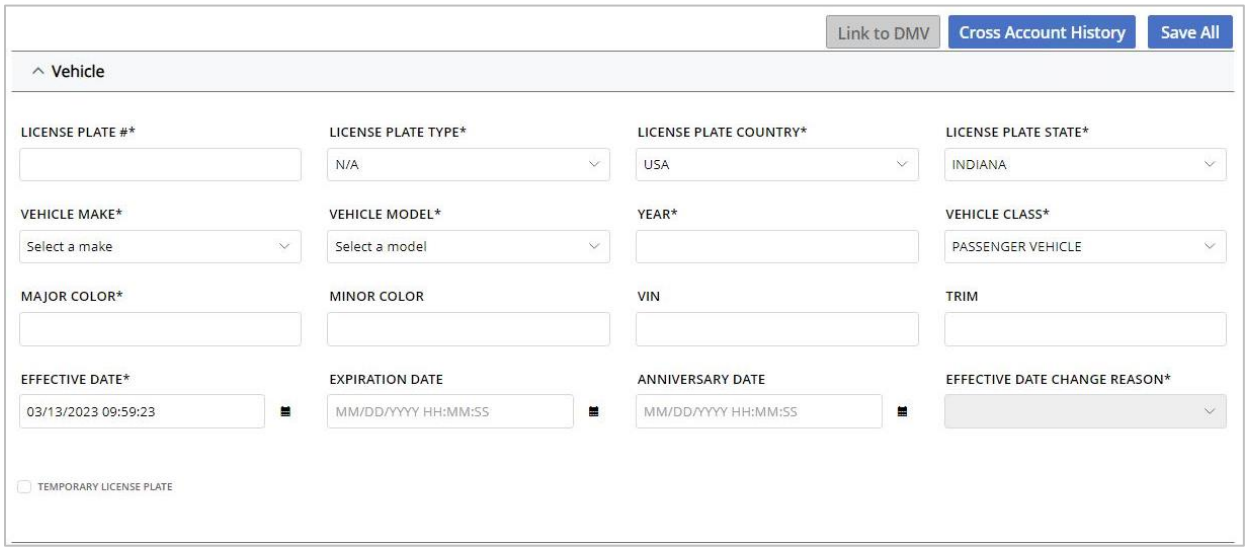
6.4.1. Adding Vehicles

The Vehicle screen allows you to add a vehicle to an account.

To add a vehicle to an account:

1. From the Account View screen, do one of the following:
   - Select Activities > Edit Vehicle. The Vehicles screen displays.
   - Select the Overview tab then the corresponding Manage button for Active Vehicles. The Vehicles screen displays.

2. Click Add a New Vehicle. A new Vehicle form displays.



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3. Select or enter the following:
   - License Plate (Required)
   - License Plate Type – defaults to N/A
   - License Plate Country – defaults to USA
   - License Plate State – defaults to Indiana
   - Vehicle Make (Required)
   - Vehicle Model (Required)
   - Year (Required)
   - Vehicle Class – defaults to Passenger Vehicle
   - Major Color (Required)
   - Minor Color
   - VIN
   - Trim
   - Effective Date (Required)
   - Expiration Date
   - Anniversary Date
   - Is Temporary License Plate checkbox
4. Click Save All. A confirmation message displays.

5. Click Proceed to the message. The vehicle is added to the account and a success message displays.

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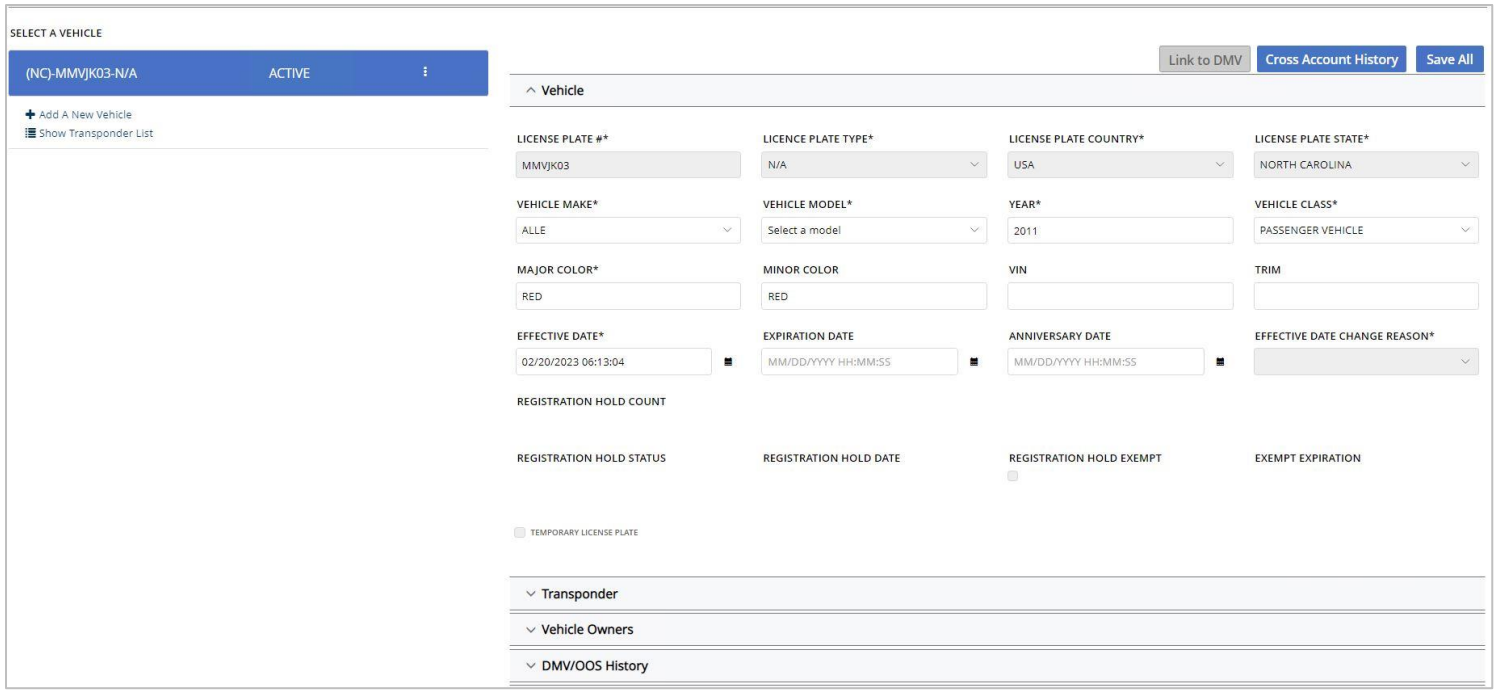
6. Click Ok.

6.4.2. Updating Vehicles

The Vehicle screen allows you to update vehicles on an account.

To update a vehicle:

1. From the Account View screen, do one of the following:
   - Select Activities > Edit Vehicle. The Vehicles screen displays.
   - Select the Overview tab then the corresponding Manage button for Active Vehicles. The Vehicles screen displays.
2. Select the vehicle to be updated. The Vehicle form displays the vehicle details.



3. Make the updates as needed.

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4. Click Save All. A confirmation message displays.

5. Click Proceed to the message. The vehicle information is updated and a success message displays.

6. Click Ok.

6.4.3. Deleting Proposed Vehicles

The Vehicle screen allows you to delete vehicles on an account that are in the Proposed status.

Note: You cannot delete a vehicle that is in ACTIVE status. You can only delete a vehicle in PROPOSED status. If you wish to delete the selected vehicle, please update the Expiration Date and try again.

To delete a proposed vehicle:

1. From the Account View screen, do one of the following:
   - Select Activities > Edit Vehicle. The Vehicles screen displays.
   - Select the Overview tab then the corresponding Manage button for Active Vehicles. The Vehicles screen displays.

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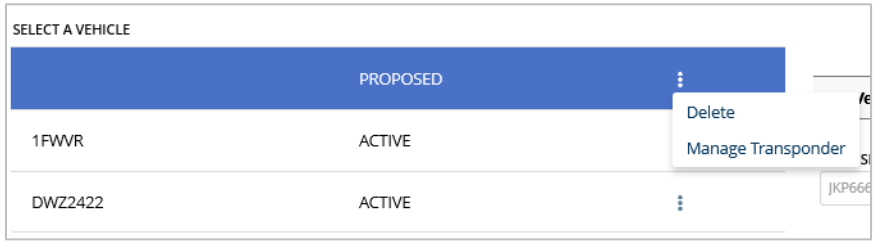
2. Select the Proposed vehicle to be deleted. The row is highlighted.



3. Click the three vertical dots icon and select Delete. The proposed vehicle is deleted.

6.4.4. Viewing DMV Record for a Vehicle

The Vehicle screen allows you to view the DMV information for a selected vehicle on an account. For unregistered accounts, this is the option that allows the Authority to obtain a name and address for invoicing open transactions. For all accounts, only the registered owner per the state is legally responsible for the transactions created by the vehicle. Therefore, certain legal enforcement activities can only be addressed to the registered owner.

To view the DMV record for a vehicle:

1. From the Account View screen, do one of the following to display the Vehicles screen:
   - Select Activities > Edit Vehicle.
   - Select the Overview tab, then select the corresponding Manage button for Active Vehicles.

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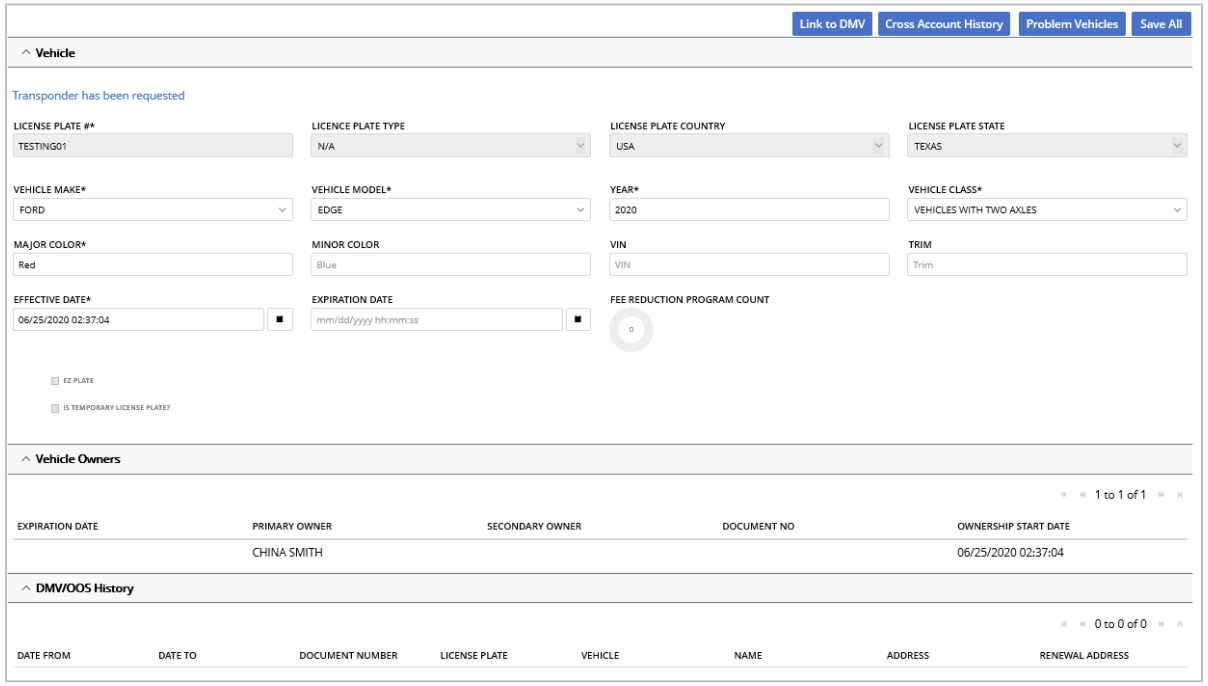
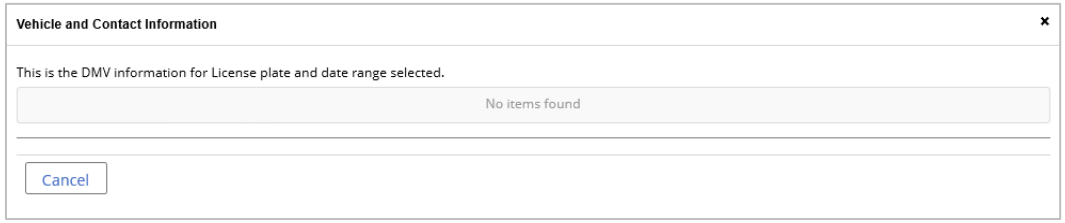
2. Select the vehicle. The row is highlighted and the vehicle details display.



3. Click Link to DMV. The Vehicle and Contact Information window displays.



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4. Click Cancel to close the Vehicle and Contact Information window.

6.5. Managing Billing Preferences

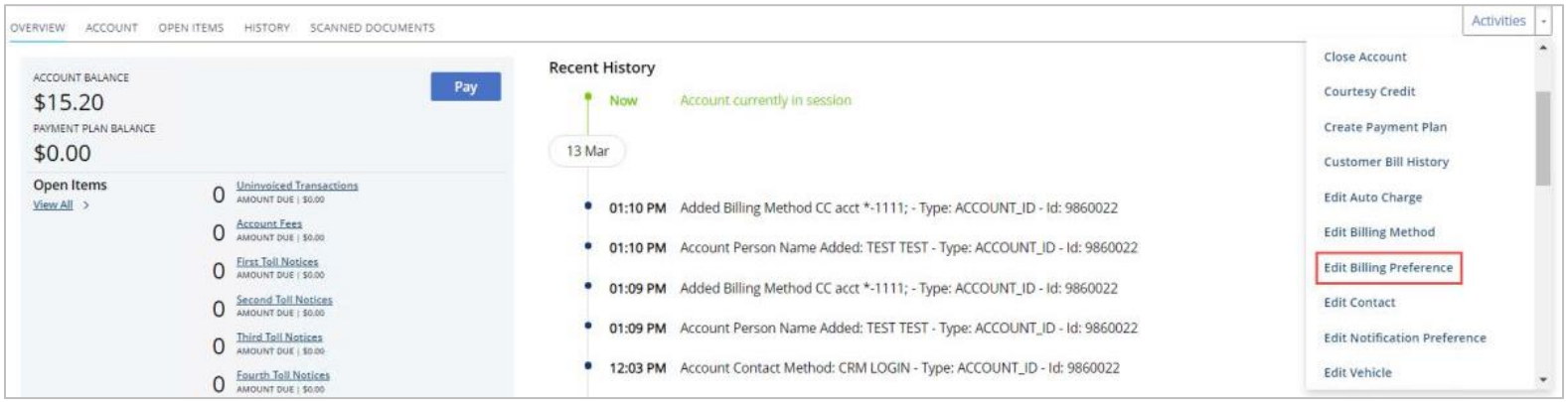
The Billing Preference screen allows you to add, update, and delete billing preferences for a billing type such as Auto charge.

6.5.1. Adding Billing Preferences

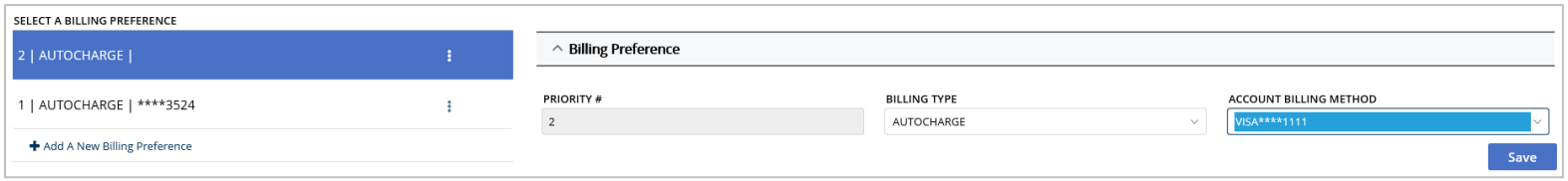
The Billing Preference screen allows you to add a billing method to a category.

To add a billing preference:

1. From the Account View screen select Activities > Edit Billing Preference. The Billing Preference screen display.



2. Click Add a New Billing Preference. A new Billing Preference form displays with Auto charge as the default billing type.
3. Select the account billing method to be added. The billing preference is automatically assigned priority 2.



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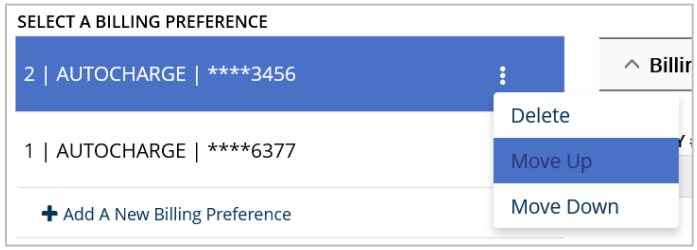
4. Click Save. The billing preference is added.

6.5.2. Updating Billing Preference Priority

The Billing Preference screen allows you to set the billing priority on an account for a specific category such as Auto charge.

To update the billing priority:

1. From the Account View screen, select Activities > Edit Billing Preference. The Billing Preferences screen displays.
2. Select a payment method. The row is highlighted and billing preference details display.
3. Click the corresponding three vertical dots icon. The menu displays.



4. Do one of the following:
   - If the billing preference is set to 1, click Move Down. A confirmation message displays.
   - If the billing preference is set to 2, click Move up. A confirmation message displays.

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5. Click Proceed to the message. The billing method is moved up or down on the screen and the billing preference priority is updated.

6.5.3. Deleting Billing Preference

The Billing Preference screen allows you to delete a billing preference on an account.

To delete a billing preference:

1. From the Account View screen select Activities > Edit Billing Preference. The Billing Preference screen display.
2. Select the billing preference to be deleted. The row is highlighted.

3. Click the three vertical dot icon and select the Delete option. A confirmation message displays.

4. Click Proceed to the message. The billing preference is deleted.

6.6. Managing Notification Preferences

Notification Preferences allow you to assign or unassign account contacts and communication types for account notifications by notification group. A Notification Group is a collection of different notification types. Each notification group has recommended communication types.

6.6.1. Adding a Notification Preference

The Notification Preference screen allows you to add a notification preference to an account.

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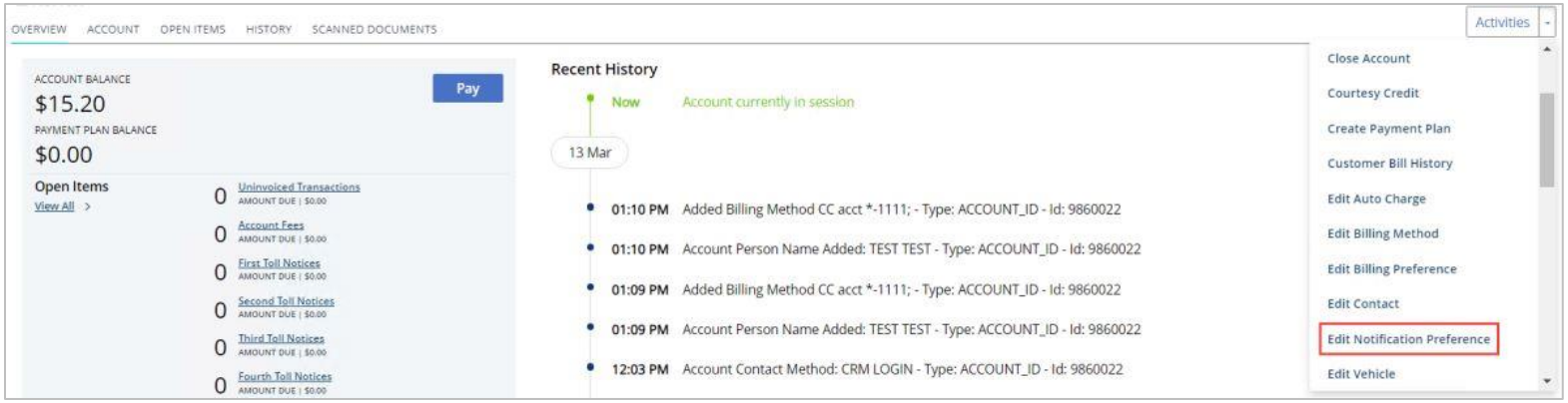
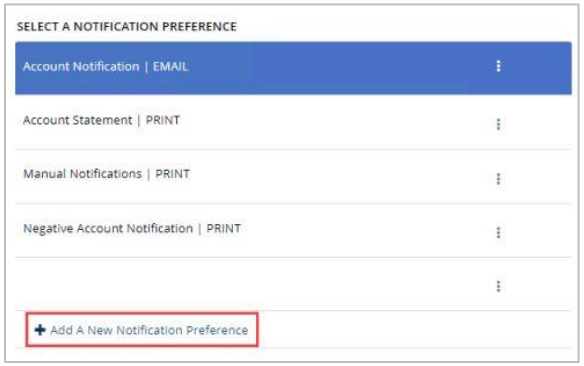
To add a notification preference:

1. From the Account View screen, select Activities > Edit Notification Preference. The Notification Preference screen displays.



2. Click Add a New Notification Preference. A new Notification Preference form displays.



3. Select the following:
   - Notification Group
   - Notification Delivery Method
   - Emails
   - Notification Template Type

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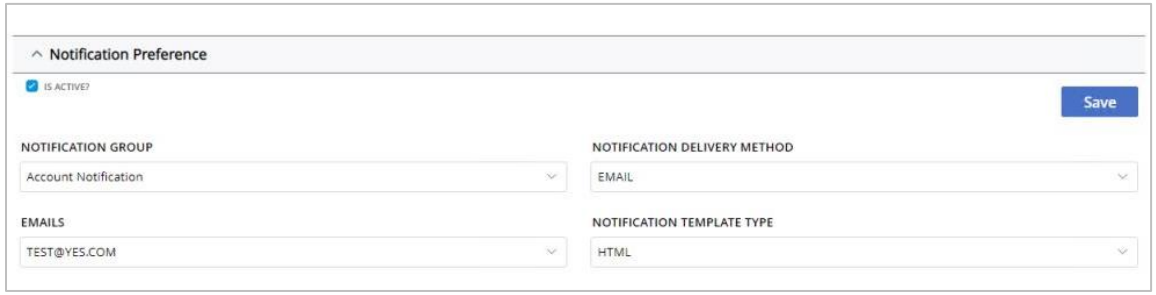


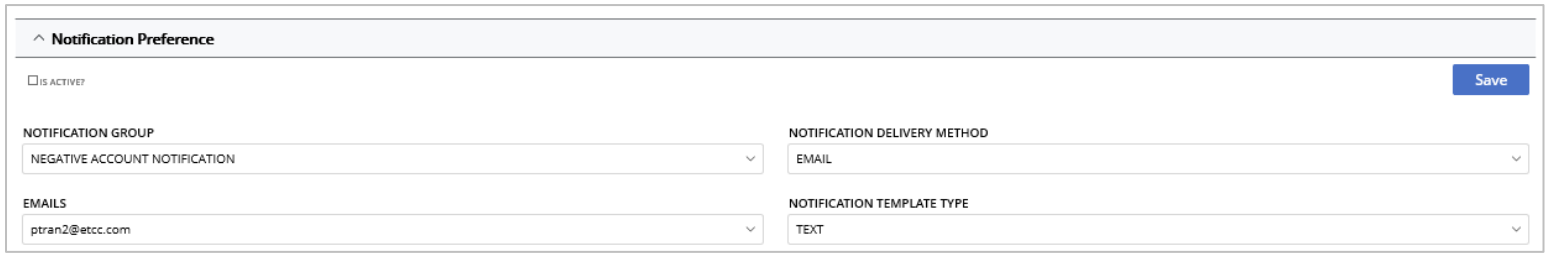
4. Click Save. The notification preference is added.

6.6.2. Updating Notification Preferences

The Notification Preference screen allows you to update a notification preference on an account.

To update a notification preference:

1. From the Account View screen, select Activities > Edit Notification Preference. The Notification Preference screen displays.
2. Select the notification to be updated. The row is highlighted, and the Notification Preference form displays the notification details.



3. Edit the notification information, click Save. The notification preferences are updated and a success message displays.

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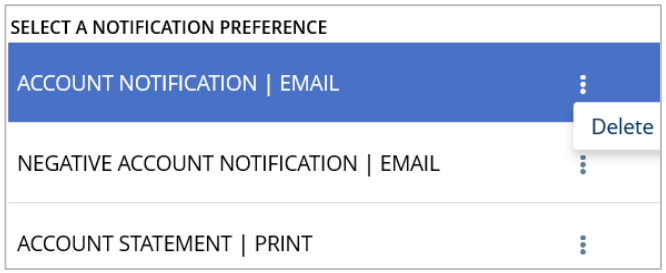
4. Click Ok.

6.6.3. Deleting a Notification Preference

The Notification Preference screen allows you to delete a notification preference on an account.

To delete a notification preference:

1. From the Account View screen, select Activities > Edit Notification Preference. The Notification Preference screen displays.
2. Select the notification preference to be deleted. The row is highlighted.



3. Click the three vertical dot icon and click Delete. A confirmation message displays.

4. Click Proceed to the message. The notification preference is deleted.

6.7. Auto charge

The auto charge and low balance amounts can be updated on an account. The auto charge amount and/or low balance level can be updated at any time for prepaid accounts. The system displays the minimum initial prepaid balance, auto charge amount, and low balance level amounts as required based on the account type, account plan, and the number of vehicles on the account.

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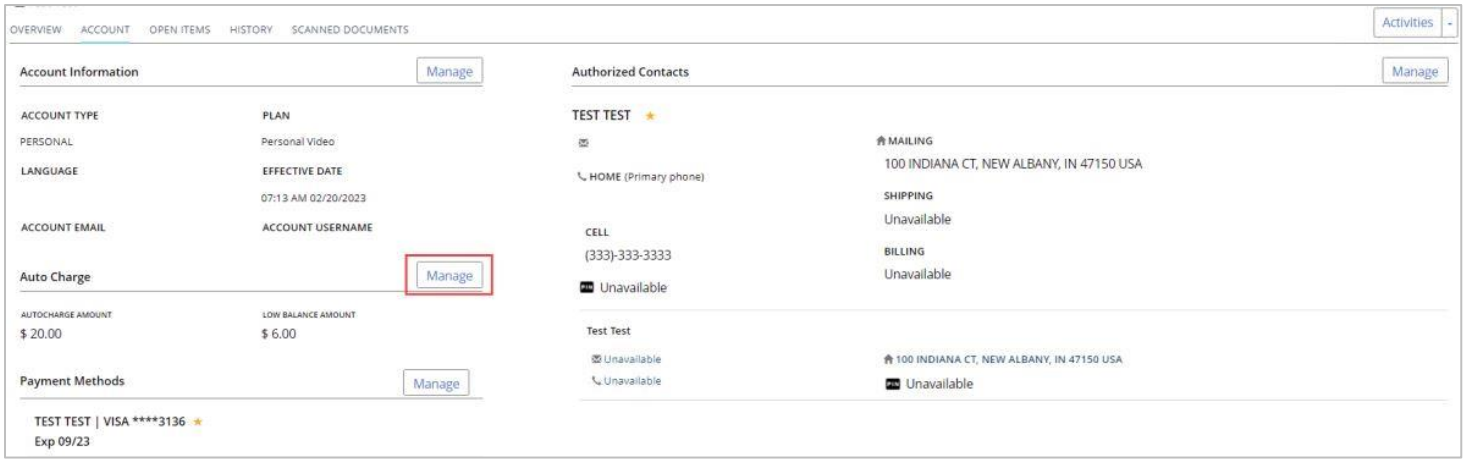
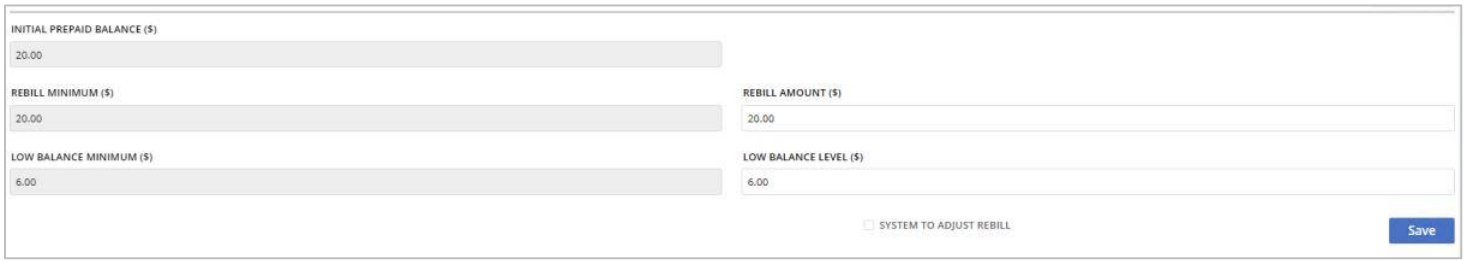
6.7.1. Editing Auto charge

To edit the auto charge amounts:

1. From the Account View Screen, do one of the following:
   - To make updates from the Auto Charge screen, select Activities > Edit Auto Charge, then continue to Step 4.
   - To make updates from the Account screen, continue to the next step.
2. Select the Account tab. The account details display.



3. Click the corresponding Manage button for the Auto Charge. The Auto Charge screen displays.



4. Update the rebill and/or low balance level amounts.
5. Click Save. The updates are saved and a success message displays.

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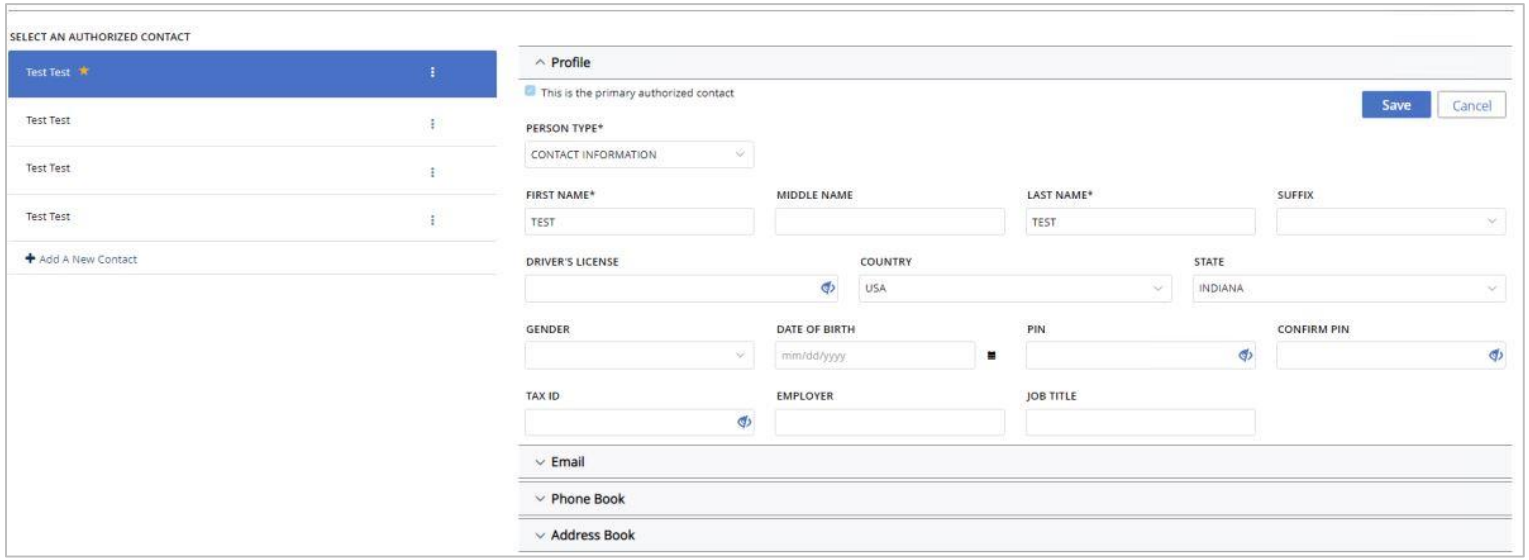
6. Click Ok.

6.8. Managing Contact Information

The Edit Contact menu option displays the account contact screen in the Edit mode. A gold star displays next to the primary account contact. This screen allows you to add, update, and delete contact information on an account. You can also change the primary contact, email address, phone number, and address from this screen.



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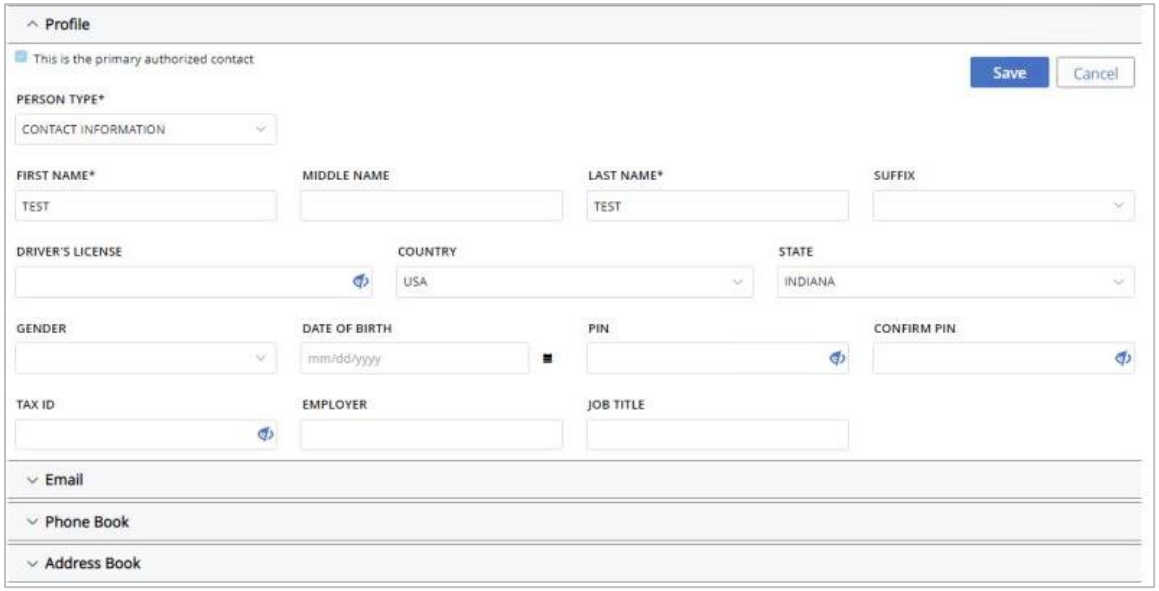
6.8.1. Changing Primary Contact/Account Holder

The account holder is the designated primary contact. This system allows you to designate another contact on the account as the primary contact. When another primary contact is selected, that contact becomes the account holder, and their name displays on the account.

To change the primary contact on an account:

1. From the Account View screen, do one of the following to display the Contact screen:
   - Select Activities > Edit Contact.
   - Select the Account tab and click the corresponding Manage button for Authorized Contacts.
2. Select the contact to become the primary contact. The contact is highlighted, and the Profile form displays the contact profile details.



3. Ensure that the following required contact information is provided:
   - Primary Email Address
   - Primary Phone Number
   - Primary Address

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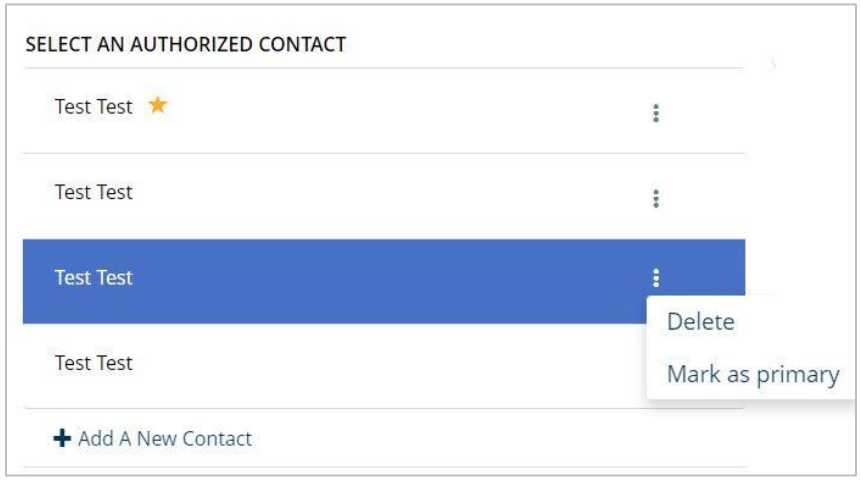
4. Click the three vertical dot icon. The menu list displays.



5. Select Mark as Primary from the list. A confirmation message displays.

6. Click Proceed to the message. The selected contact becomes the primary contact/account holder, and their name displays on the account.

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6.8.2. Adding Contact Profile

The Contact screen allows you to add one or more contact profiles to an account.

To add a contact profile to an account:

1. From the Account View screen, do one of the following to display the Contact: screen:
   - Select Activities > Edit Contact.
   - Select the Account tab and click the corresponding Manage button for Authorized Contacts.

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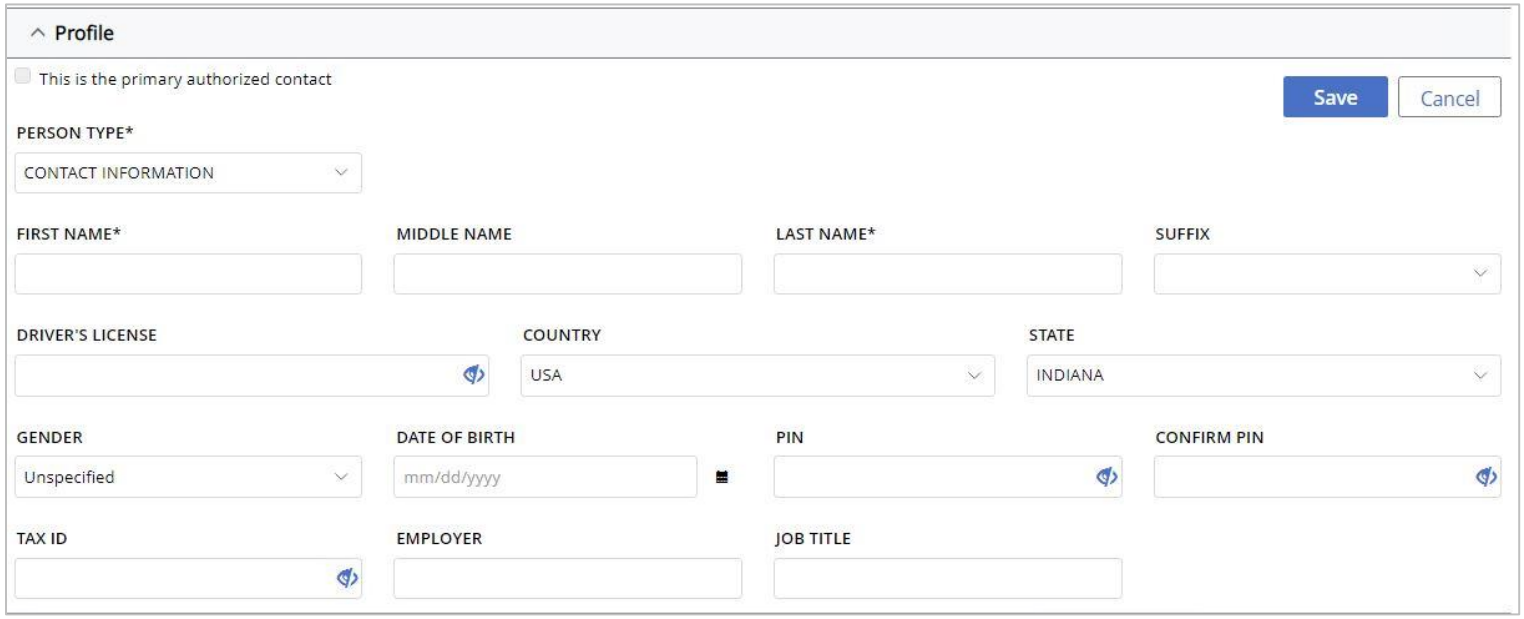
2. Click Add a New Contact. A new contact Profile form displays.



3. Select or enter the following information:

- Person Type
- First Name
- Middle Name
- Last Name
- Suffix
- Driver's License
- Country
- State
- Gender
- PIN (Optional: Enter 6-12 alphanumeric characters (The PIN allows the user to authenticate any information update requested by the account holder. During account setup this information is masked and cannot be viewed once entered by the user.)
- Confirm PIN
- Gender

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- Date of Birth
- Employer
- Job Title
- Tax ID

4. Click Save. The contact is added to the account, and a success message displays.

5. Click OK to the message.

6.8.3. Updating Contact Profile

The Contact screen allows you to update contact profiles on an account.

To update a contact profile on an account:

1. From the Account View screen, do one of the following to display the Contact: screen:
   - Select Activities > Edit Contact.
   - Select the Account tab and click the corresponding Manage button for Authorized Contacts.

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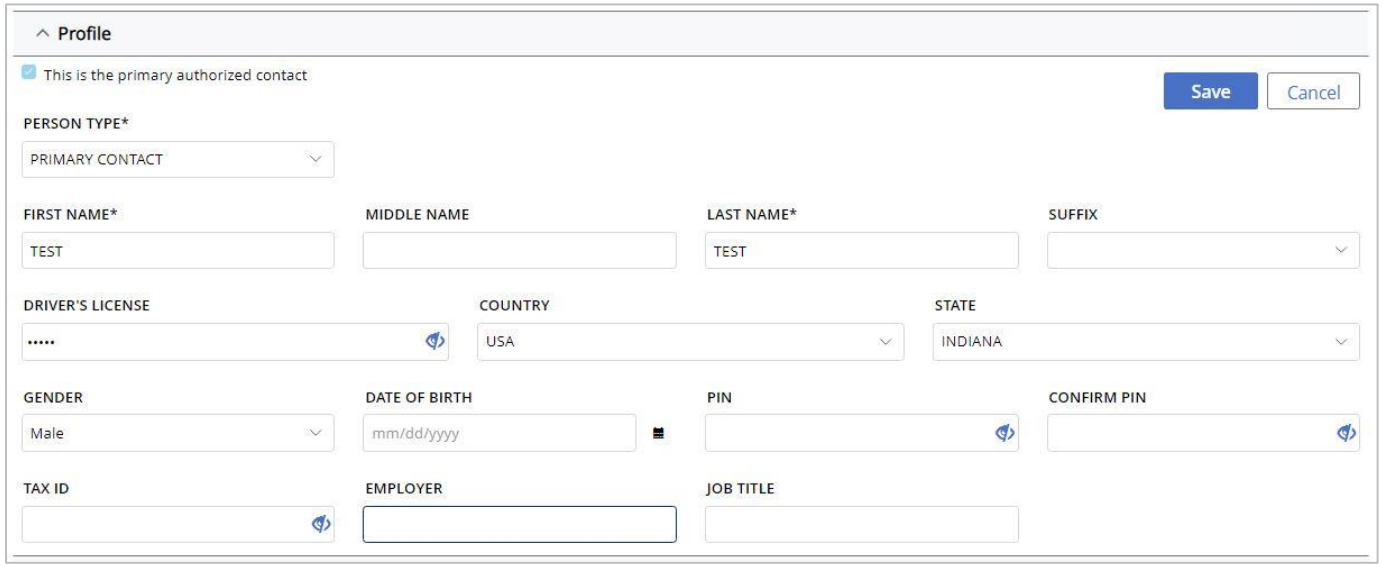
2. Select the contact. The contact is highlighted, and the Profile form displays the contact profile details.



3. Update the profile information as needed, click Save. The contact information is saved, and a success message displays.

4. Click Ok.

6.9. Toll Adjustments

The toll adjustments functionality allows you to perform toll adjustments on multiple toll transactions for a single account at the same time.

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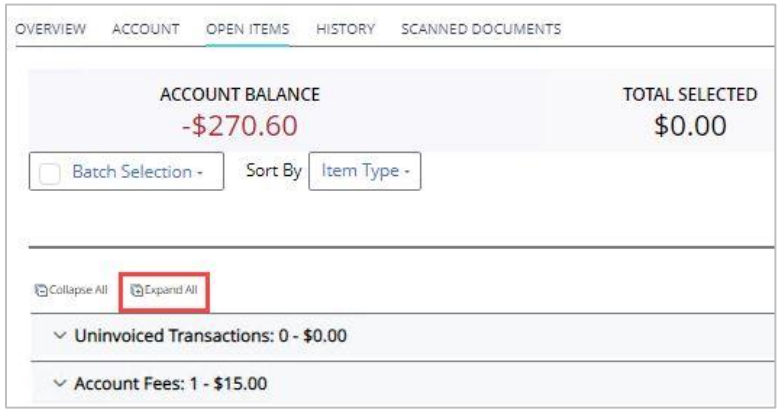
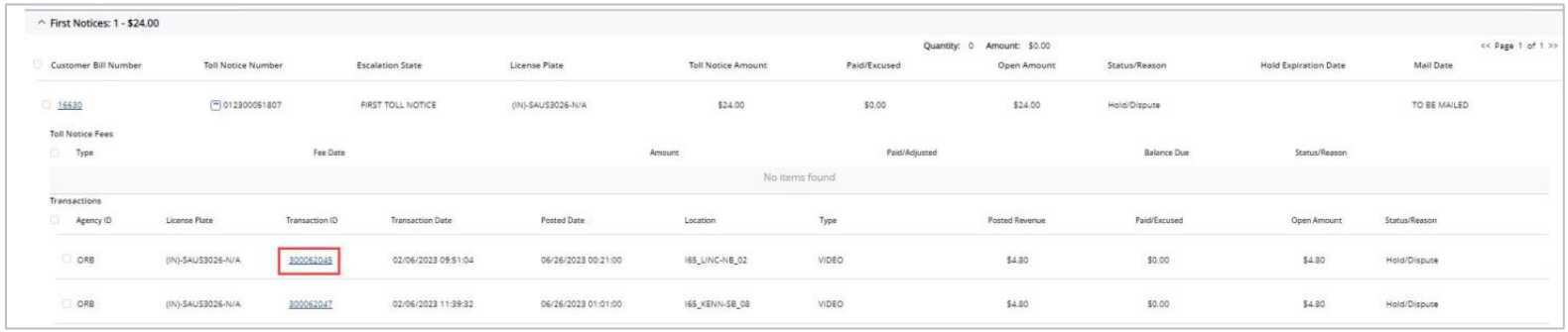
6.9.1. Making Toll Adjustments

To make a toll adjustment on an account:

1. From the Account View screen, do one of the following:
   - To make toll adjustment from the Toll Adjustment screen, select Activities > Toll Adjustments, then continue to Step 4.
   - To make toll adjustment from the Account screen, continue to the next step.



2. Select Open Item tab and click Expand all to display all sections. The open items are displayed. Refer to section *Managing Open Items* for information about the different types of open items.



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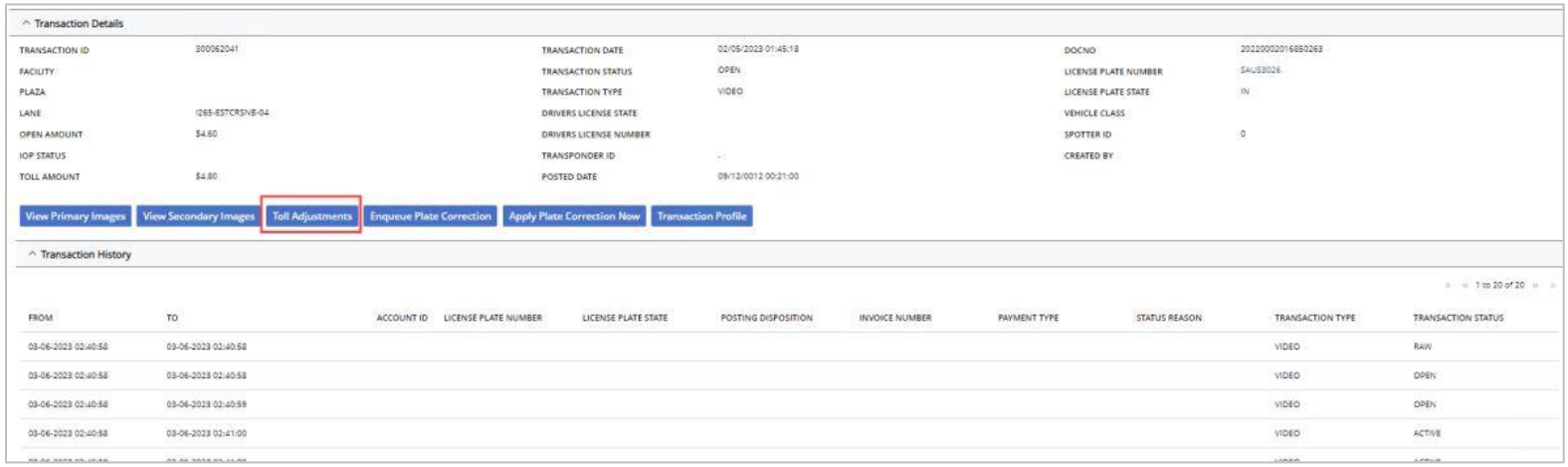
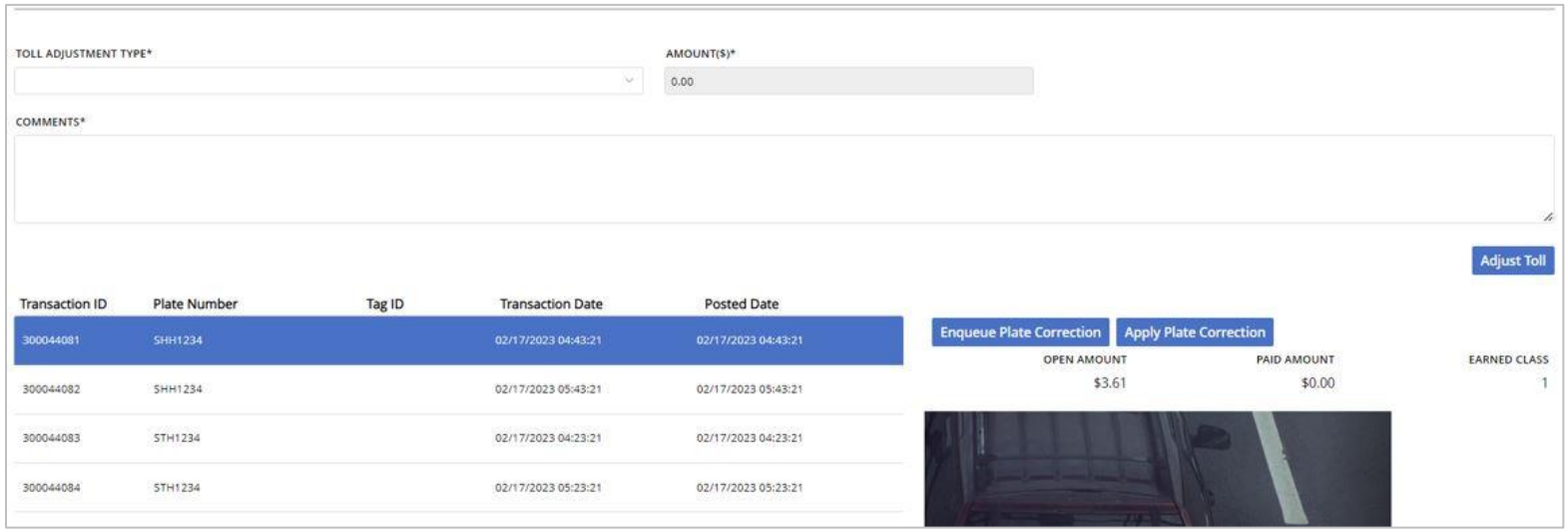
3. Click the Transaction ID hyperlink for which toll adjustment is requested. The Transaction Details screen displays.



4. Click Toll Adjustments. The screen to adjust tolls displays.



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5. Select or enter the following:
   - Toll Adjustment Type
   - Comments
6. Click Adjust Toll. A confirmation message displays.

7. Click Yes. The following things occur:
   - The success message displays, and toll amount is adjusted.
   - The adjusted amount displays on the account balance on the Open Items tab.
   - The adjusted amount is displayed against the transaction.

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6.10. Account History

The Account History displays information about activity in the customer's account. The menu option displays the History tab on the Account View screen.

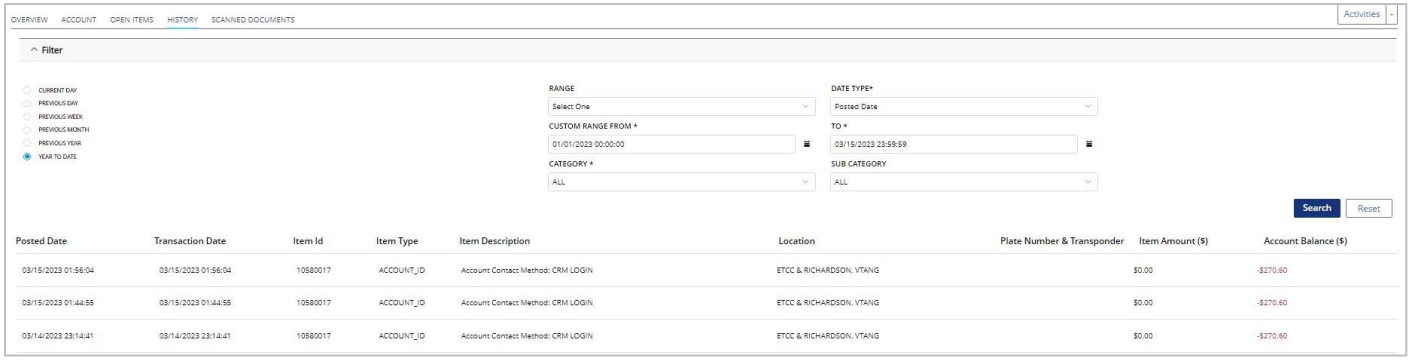
The History tab provides a single screen location in the application where a user can search for and view account history activities such as comments, payments, and transactions. The search criteria help the user reduce the time it takes to research items. You can view account items by selecting an item from the search results and clicking Search.

6.10.1. Searching for and Viewing Account History

The Account History menu option displays the History tab on the Account View screen. The History tab allows searching for and viewing account history activities such as comments, payments, and transactions.

To search the account history:

1. From the Account View screen, do one of the following to display the History screen.
   - Select the History tab.
   - Select Activities > Account History.



2. Select or enter the search criteria, click Search. The search results display.

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6.11. Managing Bankruptcy

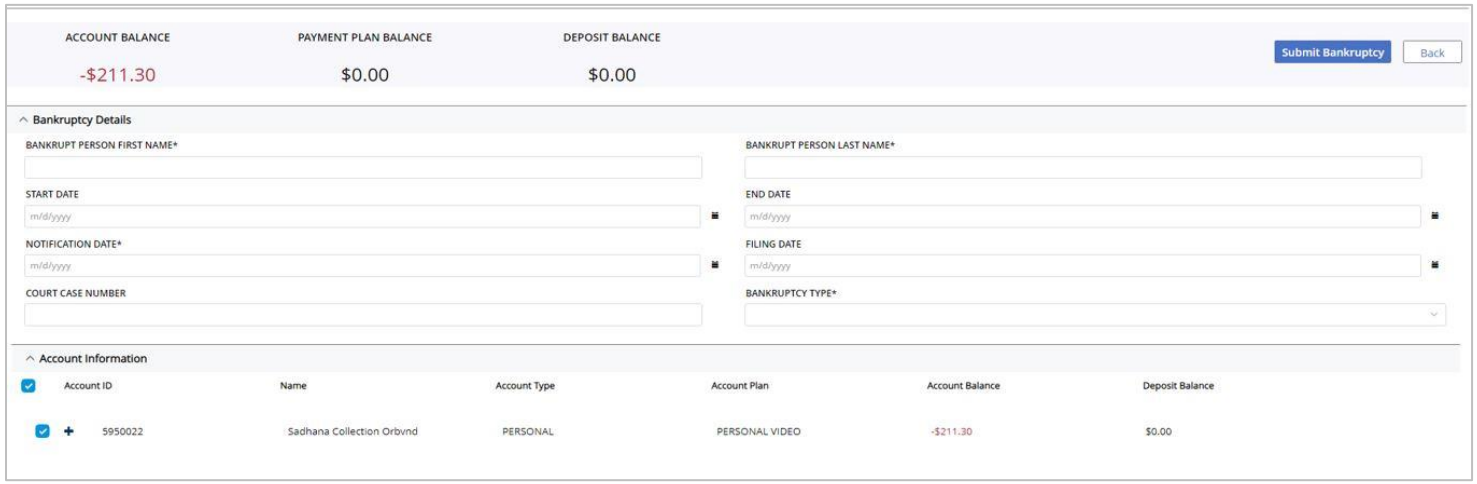
Bankruptcy can be applied at the account or vehicle level for a user-defined period. Once an account holder or vehicle owner is in bankruptcy status, the application places all the open items falling within the bankruptcy period on hold and stops all escalation processes.

6.11.1. Entering Bankruptcy

Bankruptcy can be entered for an account holder or vehicle owner once the account holder or the vehicle owner has been put on a bankruptcy status. Until the bankruptcy status is resolved, the system places a hold on all open items. If an item is in collection, you can pull the item back from collections.

To enter a bankruptcy:

1. From the Account View screen, click Activities > Enter Bankruptcy. The Bankruptcy Details screen displays.



2. Select or enter the following:
   - Bankruptcy Person First Name
   - Bankruptcy Person Last Name
   - Start Date
   - End Date
   - Notification Date

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- Filing Date
- Court Case Number
- Bankruptcy Type

3. Click Submit Bankruptcy. The Edit Bankruptcy Cases Comment window displays.

4. Enter a comment, click Save. The comment is saved, and the bankruptcy is submitted. An alert is created on the account to notify users of the bankruptcy.

5. Click Ok to the confirmation message.

6.11.2. Managing Bankruptcy

The Manage Bankruptcy functionality allows you to manage a case for bankruptcy that has been assigned to you. You can edit the details of a bankruptcy case. You also discharge or cancel the bankruptcy.

To manage a bankruptcy:

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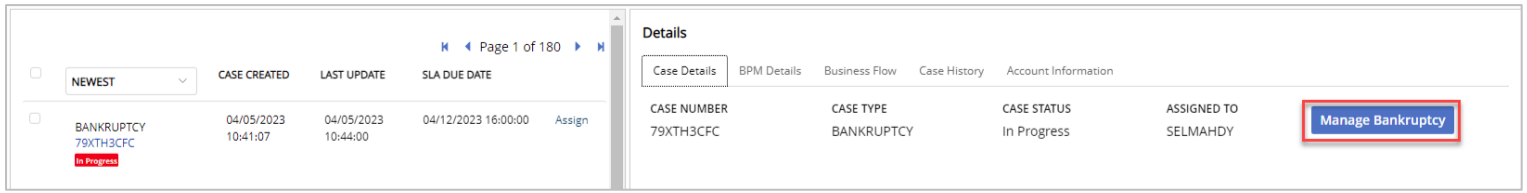
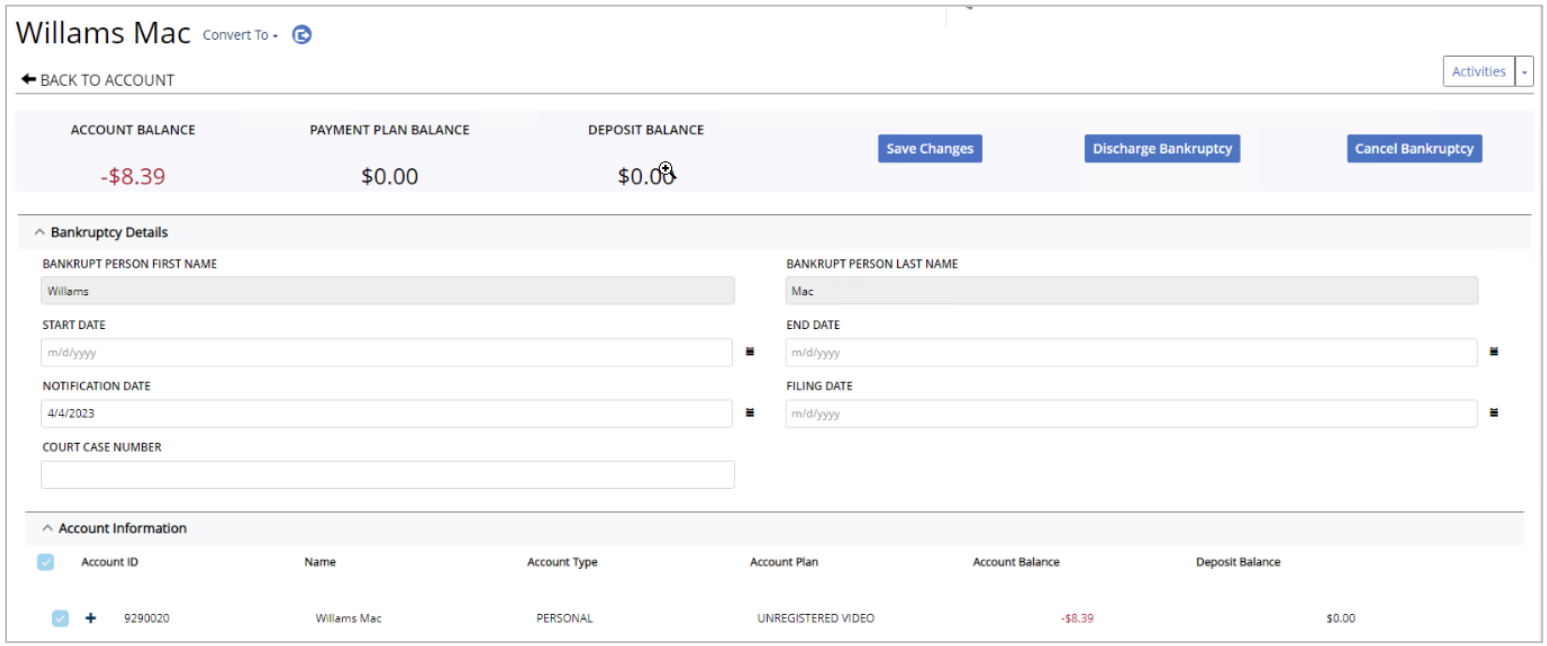
1. Select Case Management from the hamburger menu. The Case screen displays.
2. From the Case screen, click the arrow to the right of the Filter list. Additional search fields display.
3. Enter any of the search criteria, then click Search. The search results display.
4. Select the case.
5. Click Manage Bankruptcy.



The Bankruptcy Details screen displays.



From this screen you can:

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- Change the start date and end date.
- Update the notification date.
- Update
- Filing Date
- Add a court case number.

6. Click Save Changes to save the updates.

6.11.3. Cancelling Bankruptcy

You can remove the bankruptcy filed for an account as part of managing the bankruptcy case assigned to you. A bankruptcy may be cancelled if the customer calls about cancelling a bankruptcy or the customer was not able to provide documentation.

To cancel a bankruptcy:

1. Click Cancel Bankruptcy from the Bankruptcy Details screen.
   The Remove Bankruptcy pop-up displays.
2. Enter the reason for the cancellation.
3. Click Save.
   A success message displays. The bankruptcy alert is removed from the account.

6.11.4. Discharging Bankruptcy

You can discharge the bankruptcy filed for an account as part of managing the bankruptcy case assigned to you. The discharge date is the date of the court case.

To discharge a bankruptcy:

1. Click Discharge Bankruptcy from the Bankruptcy Details screen.
   The Discharge Bankruptcy screen displays.

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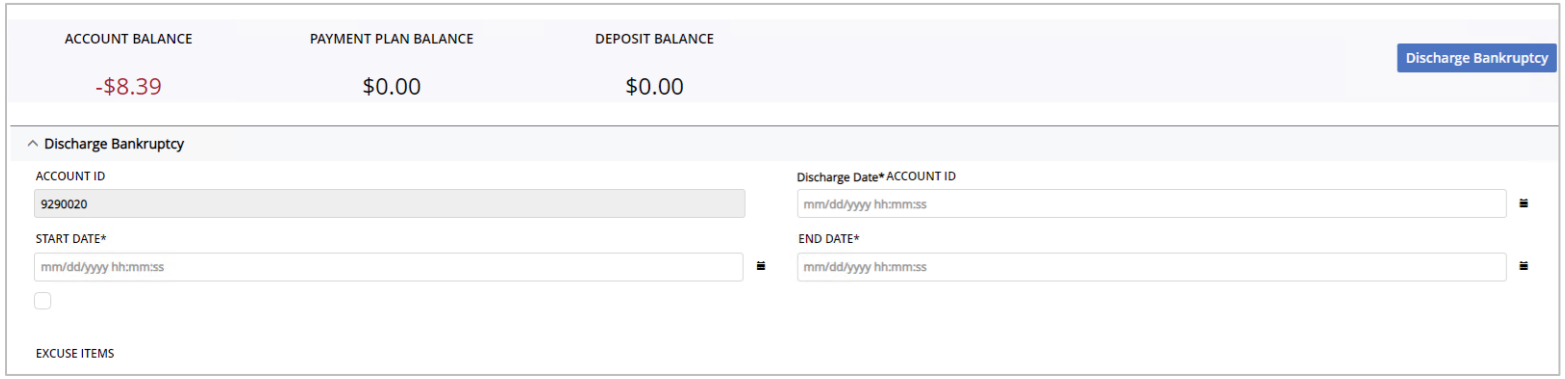

2. Enter the Discharge Date, Start Date, and the End Date.
3. If you want transactions within the bankruptcy date range to be excused, click the Excuse Items checkbox.
4. Click Discharge Bankruptcy.
5. Enter the reason for discharging the bankruptcy.
   A success message displays. The bankruptcy alert is removed from the account.

6.12. Special Rate Classification

The Special Rate Classification functionality is used to flag selected vehicles for reduced rates. This functionality provides the capability to not charge an account for tolls that occurred at certain tolling locations. These Special Classification Tolls are configured by account vehicle for specific facilities, the associated plazas, and the associated lanes. Additionally, a vehicle may be non-revenue only for specific times of the day, such as during High Occupancy Vehicles (HOV) hours. A plate assigned to a special rate is effective immediately.

The Special Rate Classification screen has the following tabs:

- Special Rate Class Association - Displays a list of all vehicles associated with the account and allows you to edit or set up the special rate class association.
- Special Rate Association History - Allows you to view all additions and updates to special rate class associations for all vehicles on the account.

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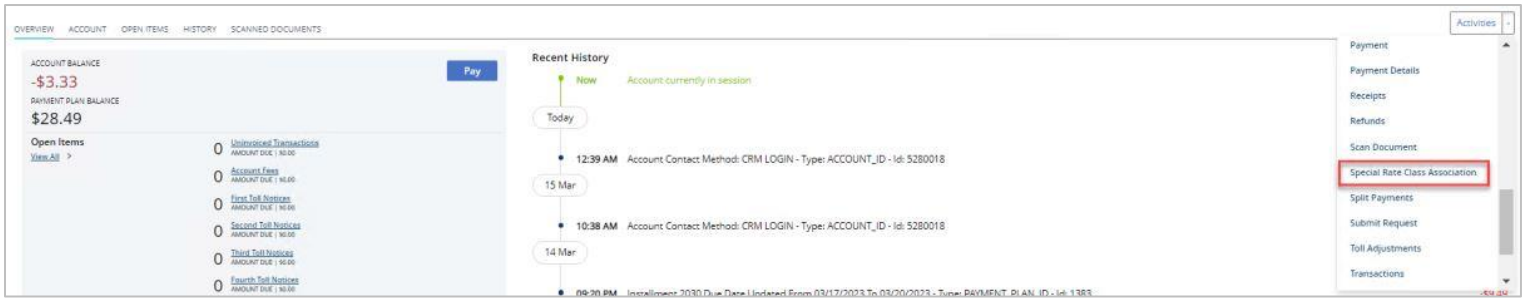
6.12.1. Assigning/Editing Special Rate Class Association

The Special Rate Classification Association tab on the Special Rate Classification screen allows you to assign or edit a special rate classification on a vehicle.

To assign or edit a special rate classification to a vehicle:

1. From the Account View screen, select Activities > Special Rate Class Association. The Special Rate screen displays the Special Rate Classification Association tab by default. This tab displays all vehicle on the account.



2. Select the vehicle to be edited. The row is highlighted.

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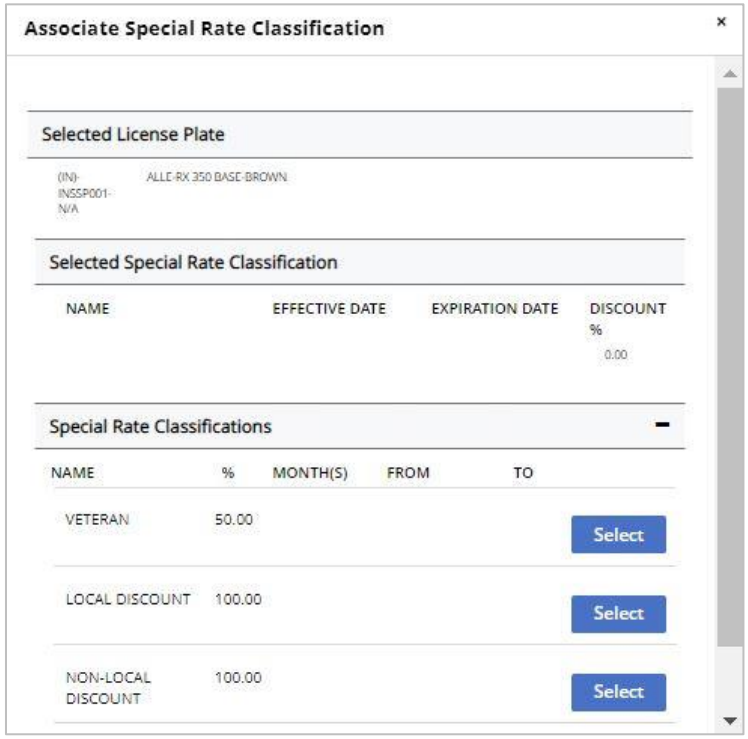
3. Click the three vertical dot icon and click Associate. The Associate Special Rate Classification window displays the list of special rate classifications.



4. Scroll to the desired special rate classification and click Select. The special rate classification is assigned, and a success message displays.

5. Click Ok.

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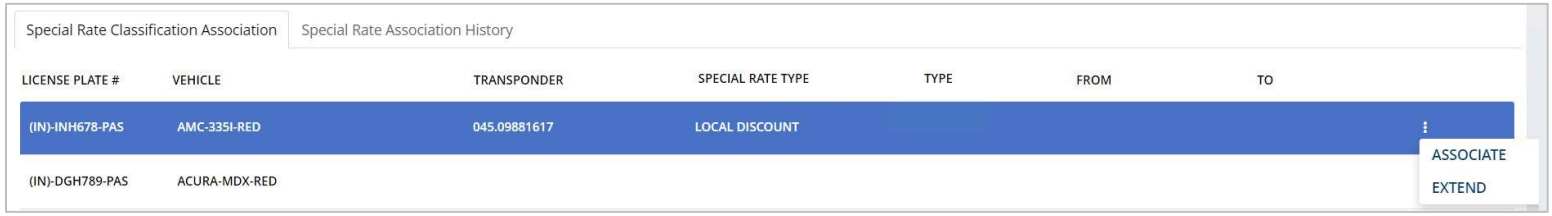
6.12.2. Expiring Special Rate Class Association

The Special Rate Classification Association tab on the Special Rate Classification screen allows you to expire or remove a special rate classification from a vehicle.

To expire or remove a special rate classification from a vehicle:

1. From the Special Rate Classification Association screen, select the vehicle for which the special rate classification is to be removed.



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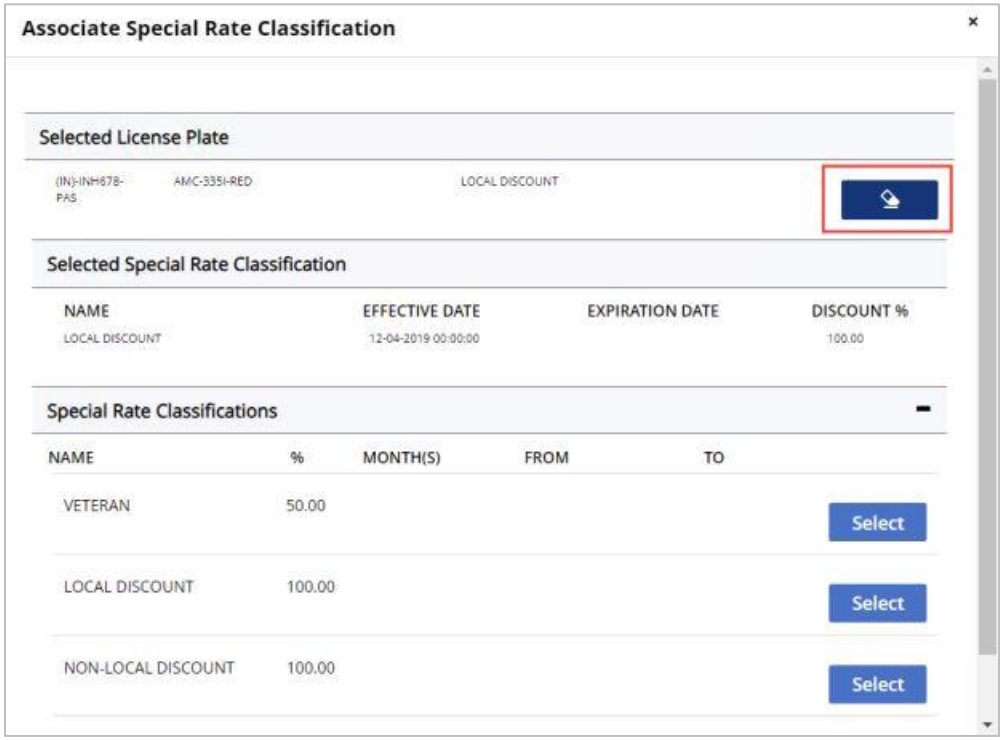
2. Click the three vertical dot icon and click Associate. The Associate Special Rate Classification window displays.



3. Click Expire Association. The special rate classification is removed from the vehicle and a message displays.

4. Click Ok.

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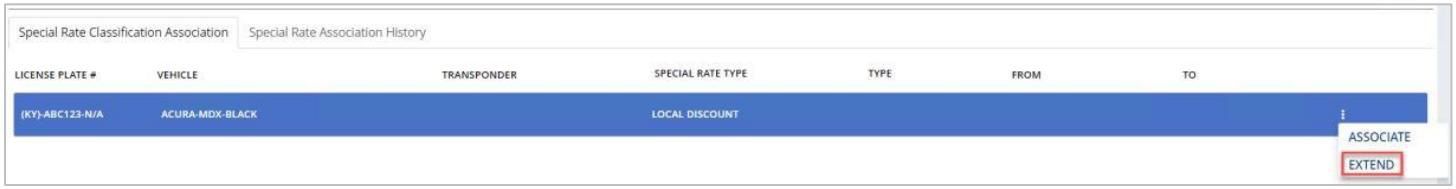
6.12.3. Viewing Special Rate Classification Information

The Special Rate Classification Association tab on the Special Rate Classification screen allows you to view the special rate class information for a vehicle.

To view the special rate classification information:

1. From the Special Rate Classification Association screen, select the vehicle for which you want to see the special rate classification information.



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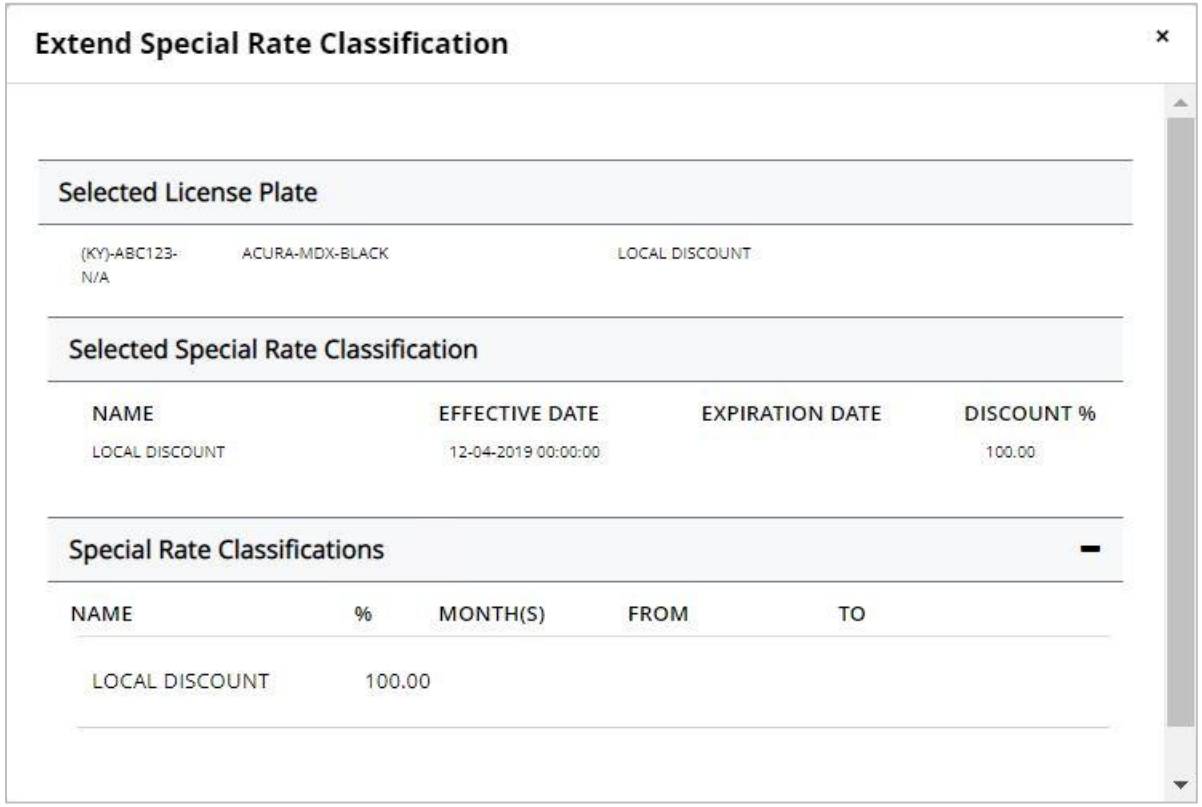
2. Click the three vertical dot icon and click Extend. The Extend Special Rate Classification window displays with license plate and Special Rate Classification information as read only.



6.12.4. Viewing Special Rate Association History

The Special Rate Association History tab on the Special Rate Classification screen allows you to see all special rate associations for this account.

To see all special rate association for an account:

1. From the Account View screen, select Activities > Special Rate Class Association. The Special Rate screen displays the Special Rate Classification Association tab by default. This tab displays all vehicle on the account.

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2. Click on the Special Rate Association History tab to see all special rate associations for this account.

Special Rate Classification Association | Special Rate Association History

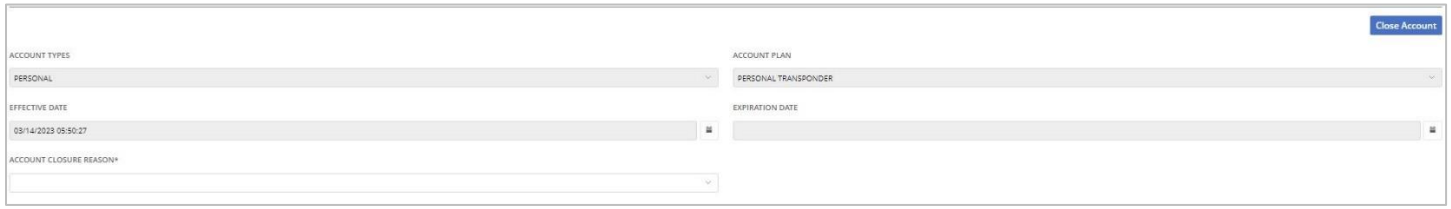
LICENSE PLATE NUMBER	SPECIAL RATE CLASSIFICATION	TRANSPONDER	EFFECTIVE DATE	EXPIRATION DATE
TYU789	LOCAL DISCOUNT		03-16-2023 01:16:54	
INH678	LOCAL DISCOUNT	045.09881617	03-16-2023 01:36:49	
SAHK124	LOCAL DISCOUNT		03-16-2023 03:34:51	
JKL667	NON-LOCAL DISCOUNT		03-16-2023 03:35:10	

6.13. Closing Accounts

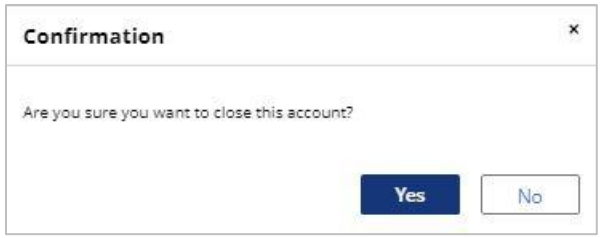
An account which has a zero or positive account balance and no payment plan balance can be manually closed. This changes the status of the account from Active to Pending to Close.

To manually close an account:

1. From the Account View screen select Activities > Close Account. The Close Account screen displays.



2. Click Close Account. A confirmation message displays.



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3. Click Yes. The status of the account changes from Active to Pending to Close.

6.14. Scanned Documents

The Scanned Documents tab on the Account View screen allows you to upload, view, print and save the scanned documents.

6.14.1. Viewing Scanned Documents

The Scanned Documents tab allows you to view scanned documents.

To view a scanned document:

1. From the Account View screen select the Scanned Documents tab.
2. Select a scanned document. The row is highlighted.

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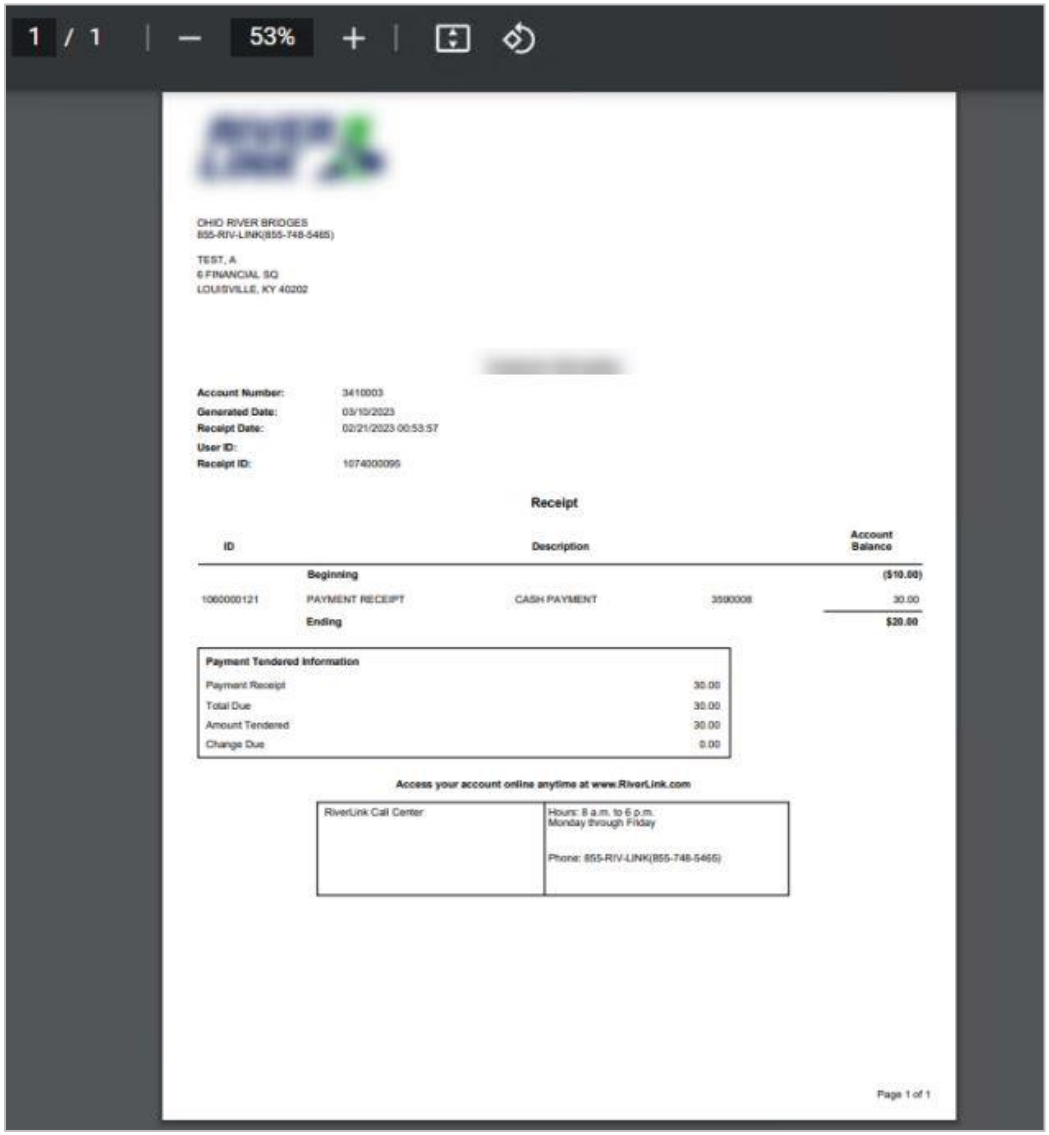
3. Click View. The document opens in your browser.



OHIO RIVER BRIDGES
855-RIV-LINK(855-748-5465)

TEST, A
6 FINANCIAL SQ
LOUISVILLE, KY 40202

Account Number: 3410003
Generated Date: 03/10/2023
Receipt Date: 02/21/2023 00:53:57
User ID:
Receipt ID: 1074000095

Receipt

ID		Description		Account Balance
	Beginning			**($10.00)**
1060000121	PAYMENT RECEIPT	CASH PAYMENT	3000008	30.00
	Ending			**$20.00**

Payment Tendered Information	
Payment Receipt	30.00
Total Due	30.00
Amount Tendered	30.00
Change Due	0.00

Access your account online anytime at www.RiverLink.com

RiverLink Call Center	Hours: 8 a.m. to 6 p.m. Monday through Friday Phone: 855-RIV-LINK(855-748-5465)

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6.14.2. Printing Scanned Documents

The Scanned Documents tab allows you to print the scanned documents.

To open a scanned document:

1. From the Account View screen select the Scanned Documents tab.
2. Select a scanned document. The row is highlighted.

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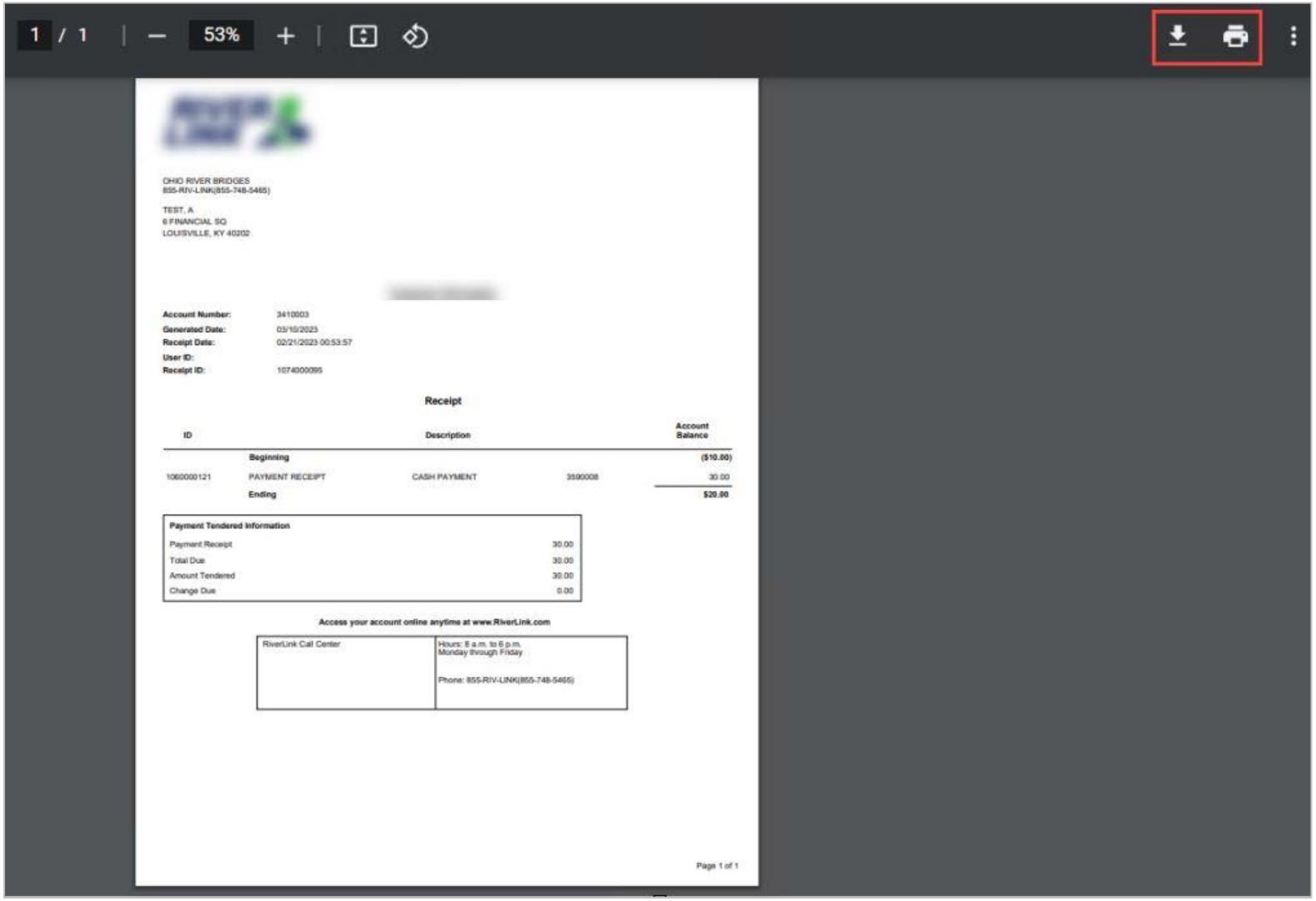
3. Click View. The document opens in your browser.



4. Click Print icon to print the document or Download icon to save the document in your local folder.

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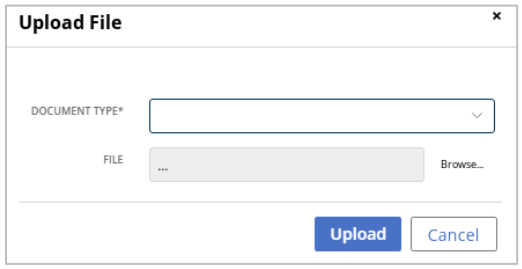
6.14.3. Uploading Scanned Document

The Scanned Documents tab allows you to upload scanned documents.

To upload a scanned document:

1. From the Account View screen select the Scanned Documents tab.

2. Click Upload. The Upload File screen displays.



3. Select a Document Type
4. Click Browse to navigate to the location where the scanned document is saved.
5. Select the file and click Upload. The file is uploaded to the Scanned Documents tab and a success message displays.

6. Click Ok.

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6.14.4. Uploading Scanned Documents from the Printer

The Scanned Documents tab allows you to upload scanned documents from the printer.

To upload a scanned document:

1. From the Account View screen select the Scanned Documents tab.

2. Click Add files from Printer. The screen to upload scanned files from printer displays.

3. Select the file and click Add this file. The file is uploaded to the Scanned Documents tab. You can view the contents of the file by clicking View.

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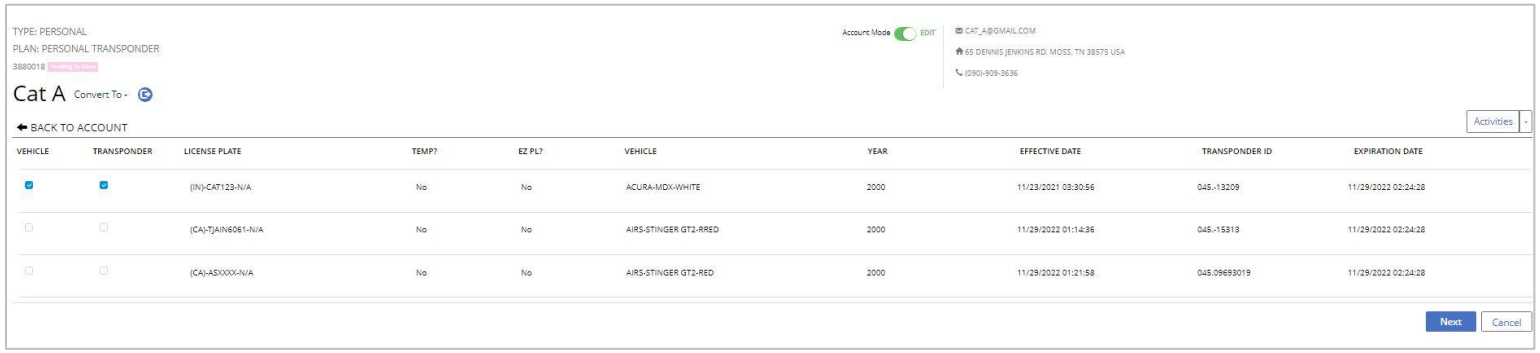
7. Account Reopen

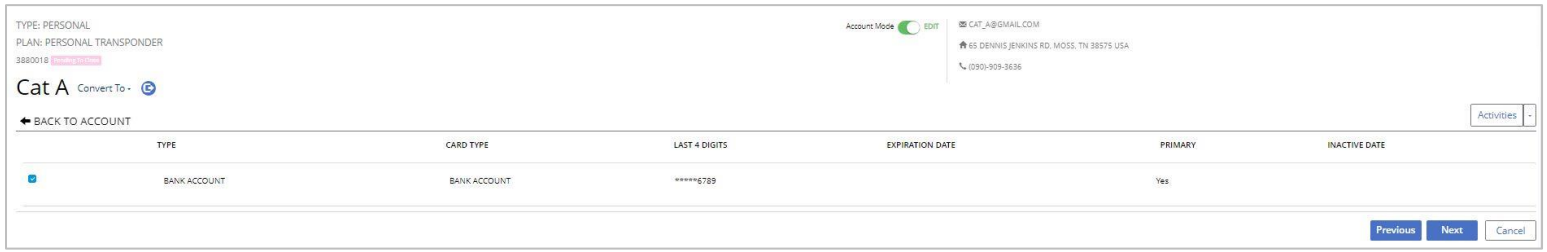
The Account Reopen functionality allows you to reopen closed or pending-to-close accounts.

To reopen a pending to close account:

1. From the Account View screen, select Activities > Account Reopen. The account's vehicles and transponders information displays.



2. Select the Vehicle to be added and click Next. The Reactive Account Billing Types screen displays.



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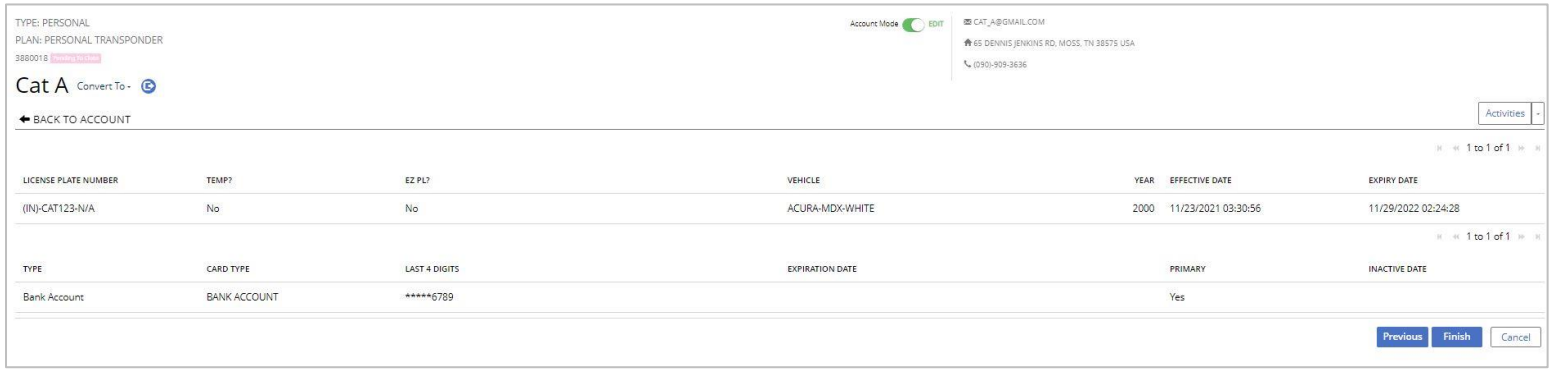
3. Select the Billing Method and click Next. The Confirmation screen displays.



4. Click Finish, then click Yes to the confirmation message.

5. The account is reopened and a success message displays.

6. Click Ok.

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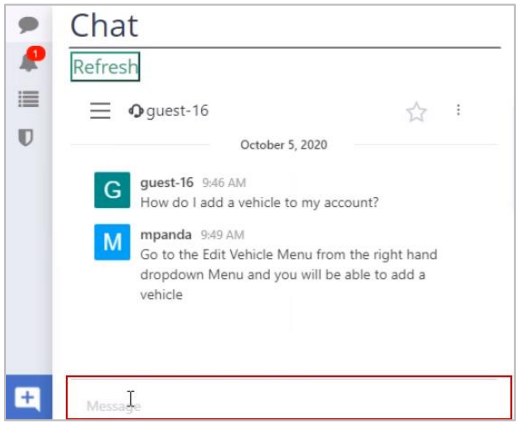
8. Chatting with Online Customers

The Chat functionality allows you to engage in live chats with a customer. When the customer initiates a chat, the system makes a beep when it sends the message to your chat queue. The system will only send a chat message if you are in an account.

To chat with a customer:

1. When you hear the beep for a pending chat, click the Chat icon. The Chat panel displays.

2. Enter a response in the Message, then press the Enter. Your response is sent to the customer.



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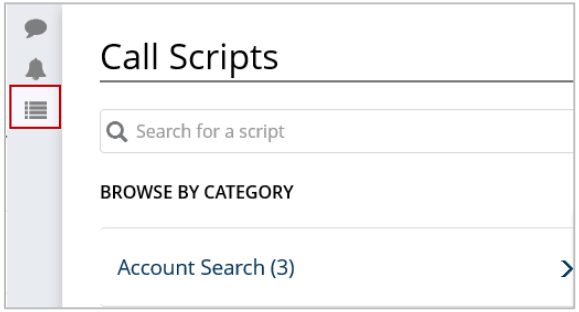
9. Viewing Call Scripts

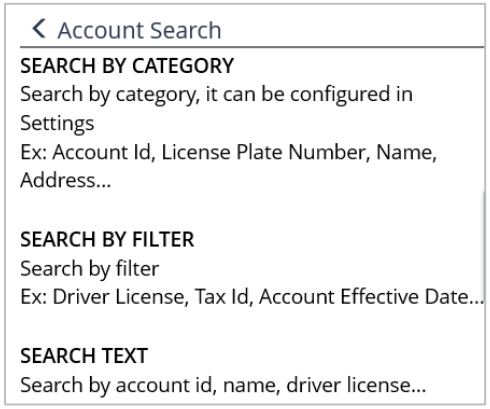
The Transcript icon, which is available on any screen, displays the Call Scripts panel. Call scripts are conversation starters that are relevant for the current screen. The call scripts are grouped by category. The Call Scripts panel allows you to search for and view call scripts.

To view the call scripts:

1. From any screen, click the Transcripts icon. The Call Scripts panel displays.



2. Expand the category.



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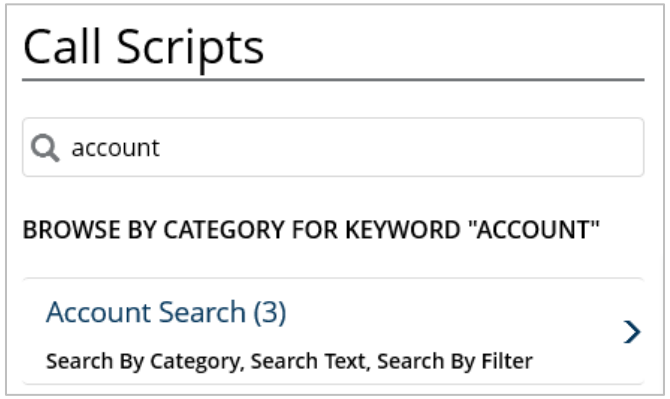
3. To search for a category, enter a key keyword and click the Search icon or press Enter.



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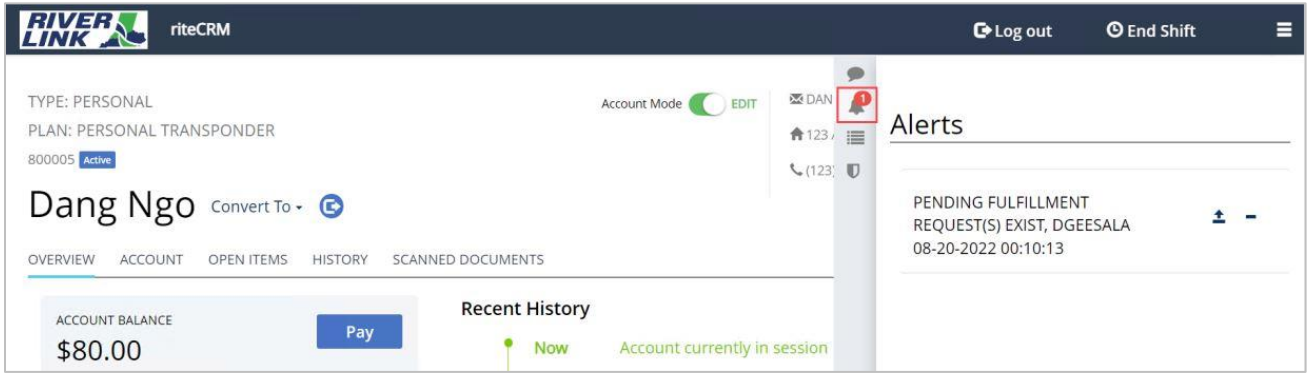
10. Viewing Account Alert

Account Alert functionality allows you to view any alert messages related to the account.

To view an account alert:

1. From the Account View screen, do one of the following to display the Alert screen.
   - Click the Alerts icon.



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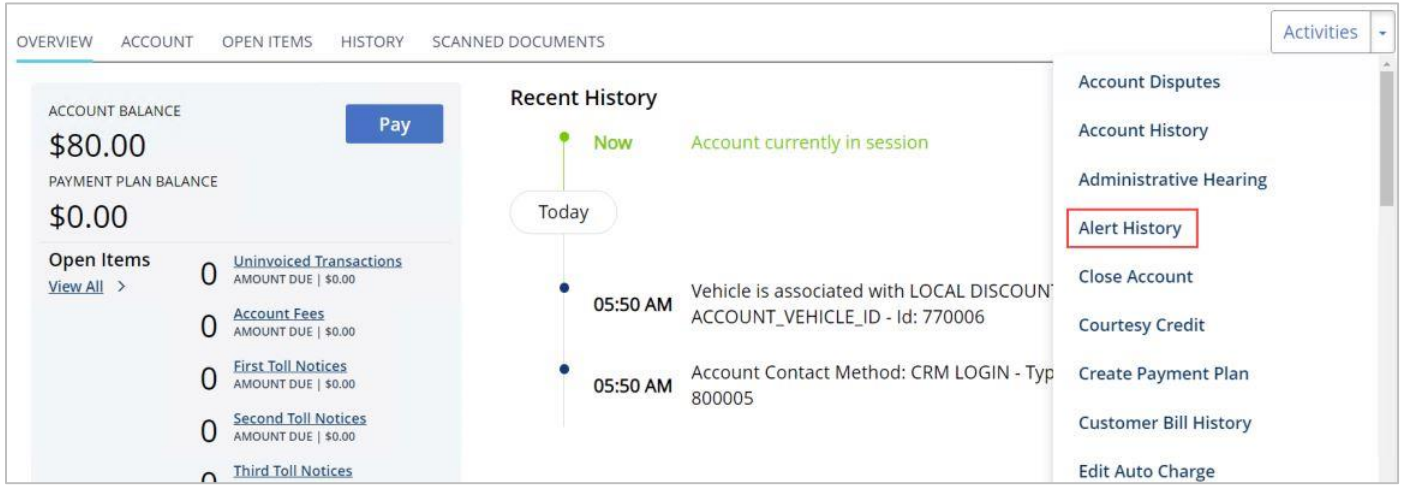
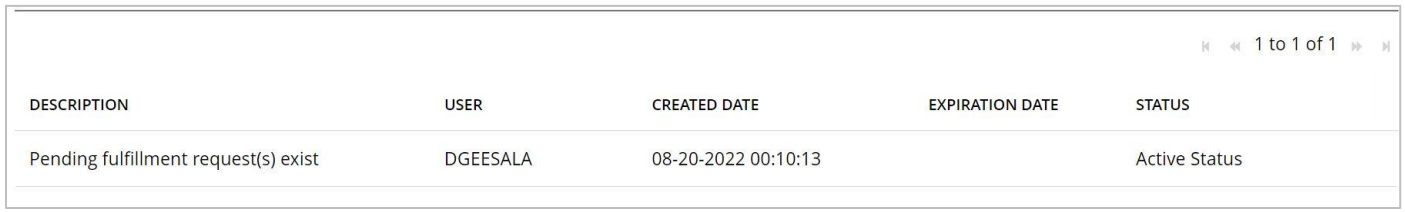
- Select Activities > Alert History.



2. The Alert screen displays with Account Alert details.



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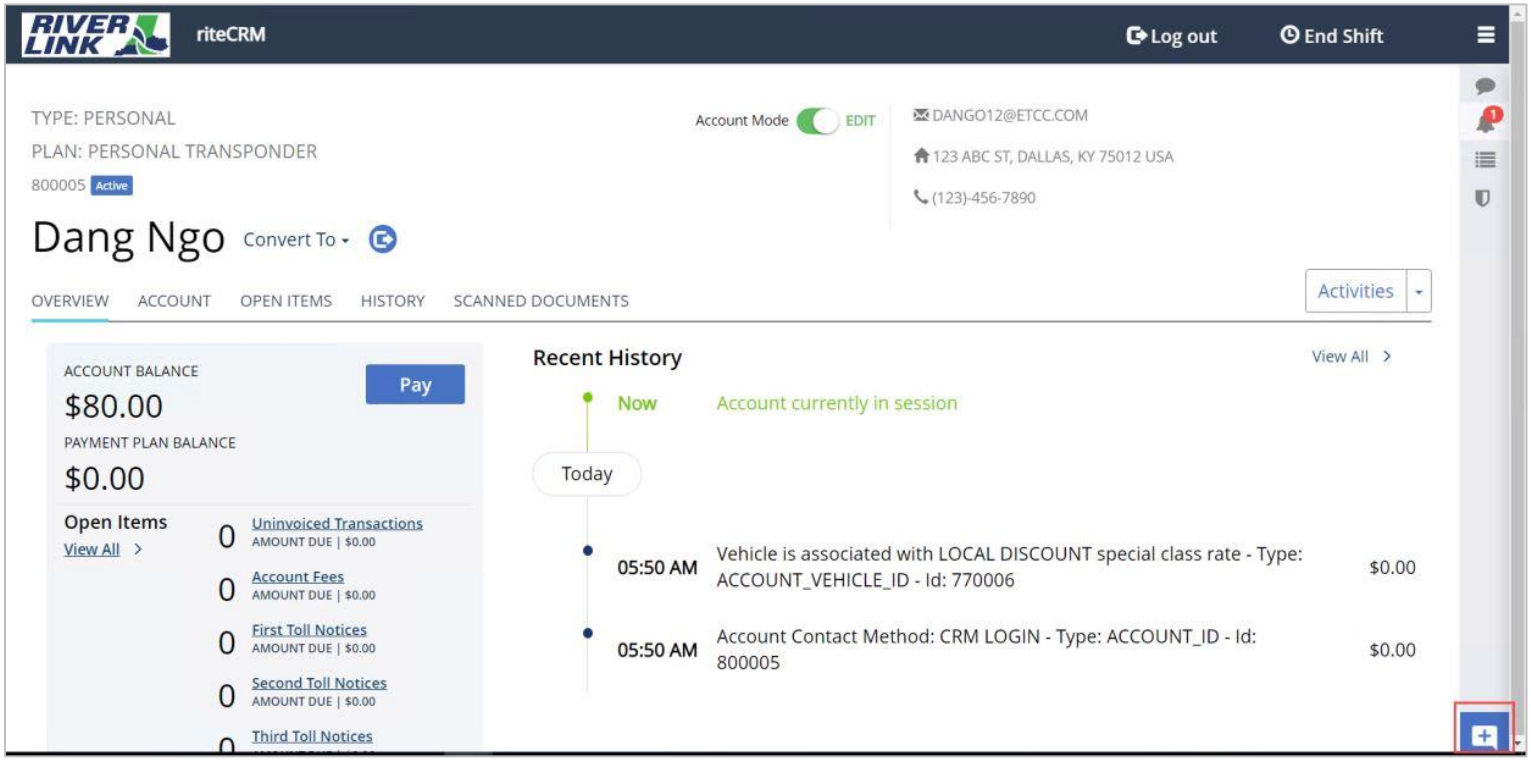
11. Account Comments

The Comments icon, which is available on any screen, displays the Session Log & Comments panel. The Session Log & Comments panel allows you to add or read comments regarding any changes made to the account, updates, or general information related to the account.

11.1. Viewing Account Comments

To view an account comment:

1. From any screen, click the Comments icon. The Session Log & Comments panel displays.



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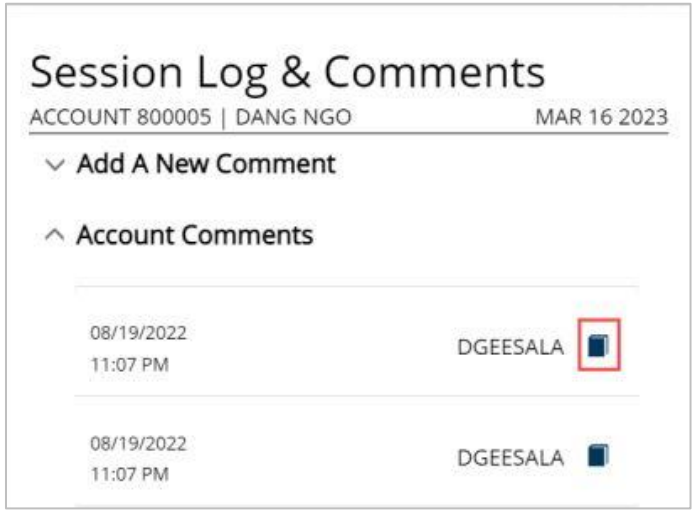
2. Click Account Comments. The Account Comment scree expands and displays list of all the comments associated with the account.

3. Select the desired comment and click View Note. The View Comment window displays with the Subject and Comment.



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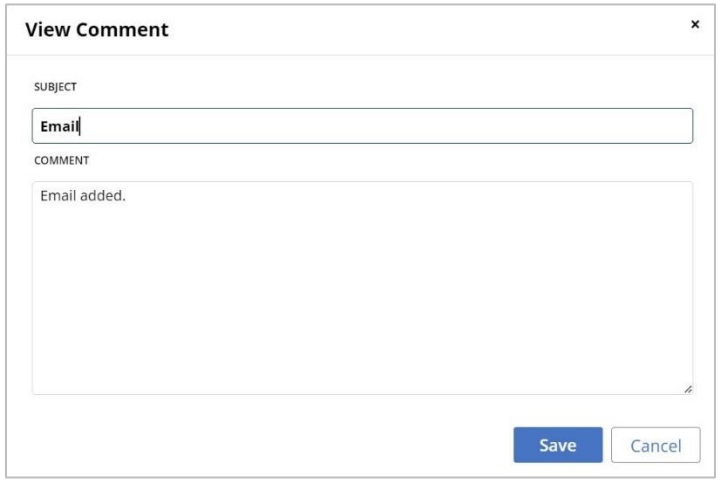
4. Click Cancel to close the View Comment window.



11.2. Adding Account Comments

To add an account comment:

5. From any screen, click the Comments icon. The Session Log & Comments panel displays.
6. Click Add a New Comment. The Account Comment window displays.

7. Enter the following:
   - Subject

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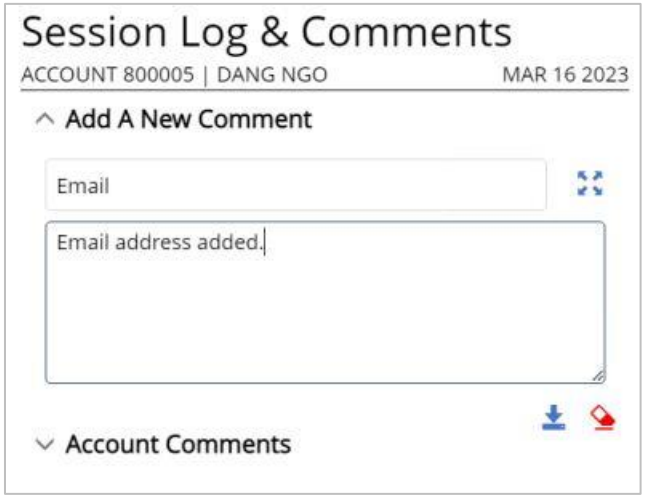
- Comment



8. Click the blue Save Comment icon. The comment is added and displays in Account Comments.

11.3. Editing Account Comments

To edit an account comment:

9. From any screen, click the Comments icon. The Session Log & Comments panel displays.
10. Click Account Comments. The Account Comment scree expands and displays list of all the comments associated with the account.

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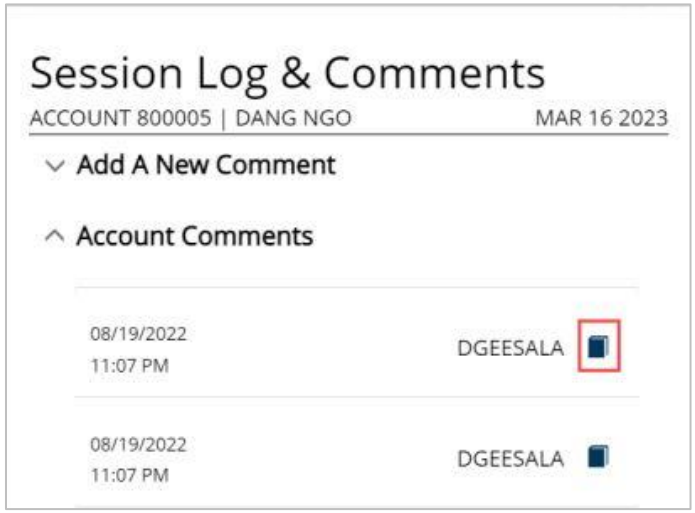
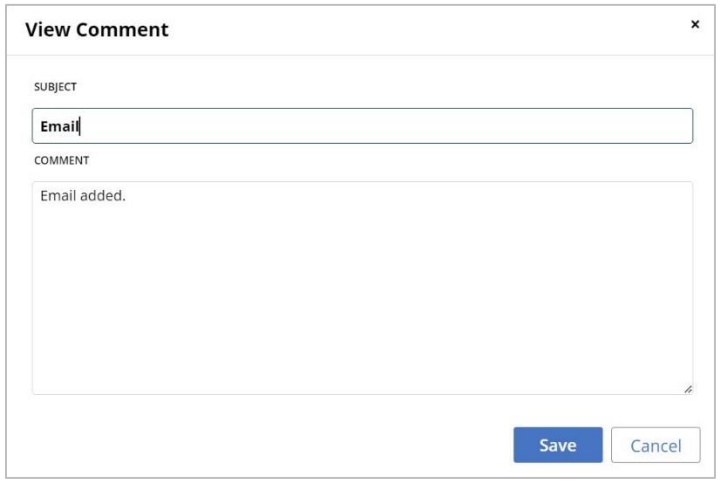
11. Select the desired comment and click View Note. The View Comment window displays with the Subject and Comment.



12. Make the update as needed and click Save. A confirmation message displays.



13. Click Proceed. The Account Comment is updated and saved.

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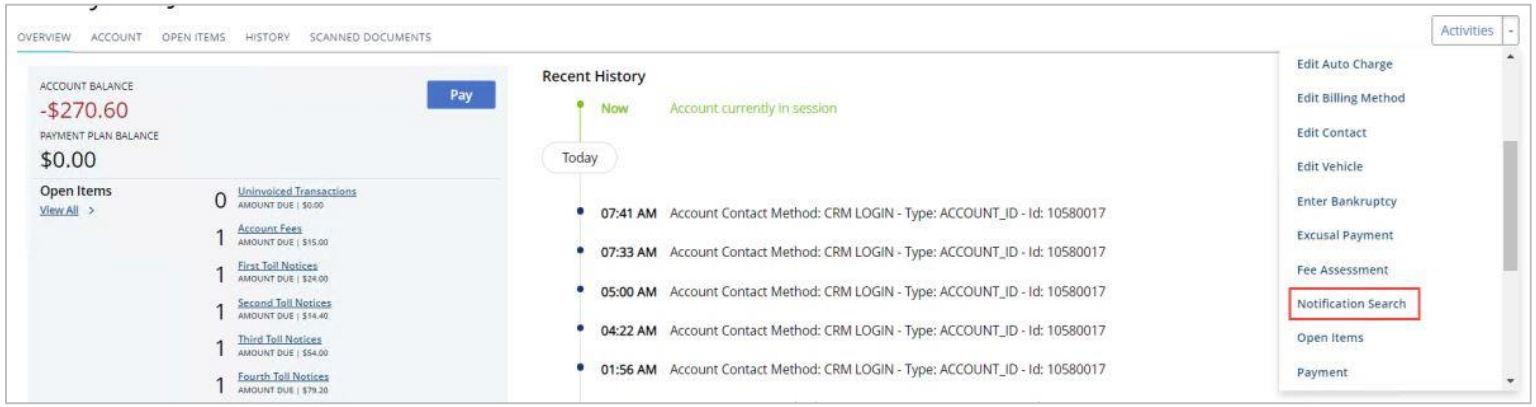
12. Searching Notifications

The Notification Search menu option displays the Notification Search screen. This screen allows you to search notifications based on the selected criteria.

To search for a notification:

1. From the Account View screen, select Activities > Notification Search. The Notification Search screen displays.



2. Select or enter the following:
   - Notification Types
   - Notification Groups
   - Notification Statues
   - Delivery Method
   - Notification Start Date
   - Notification End Date
   - First Name
   - Las Name

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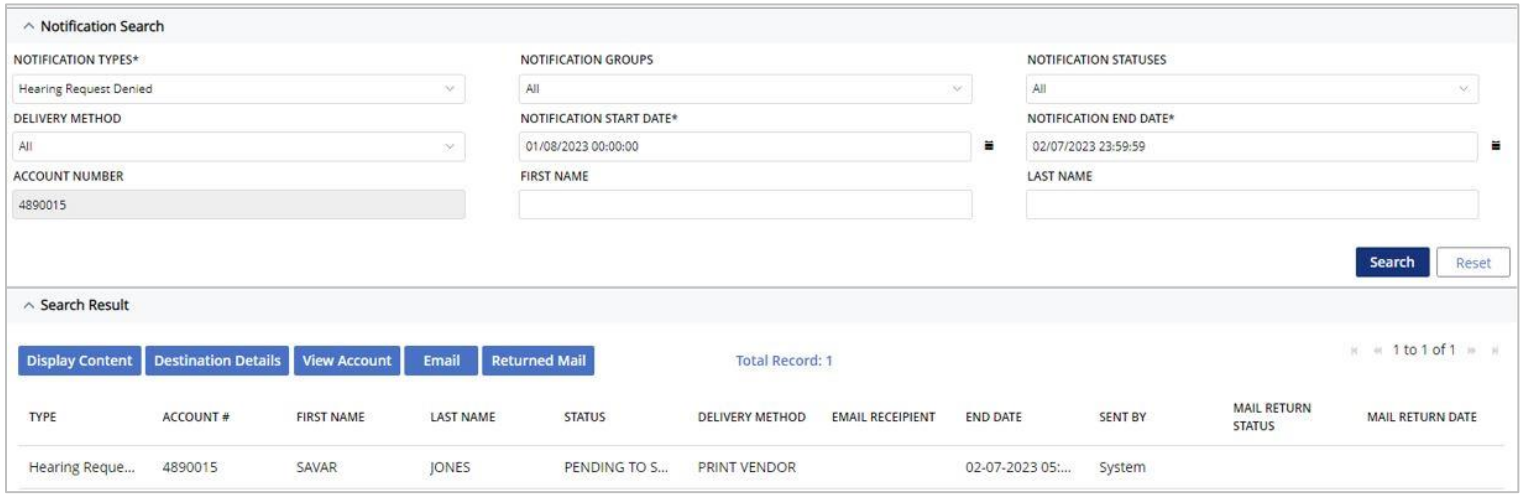
3. Click Search. The search results display.



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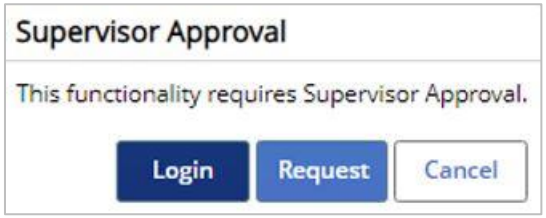
13. Supervisor Override

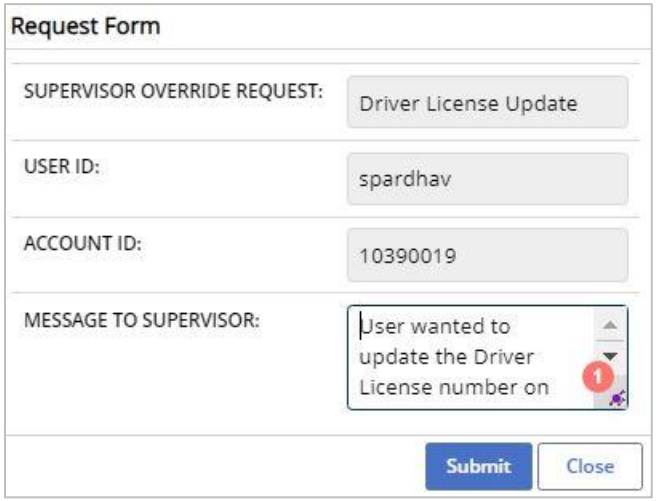
The Supervisor Override functionality is invoked when the CSR does not have the authority to perform an action item, such as adding a DL number that exist on another account. This functionality allows a CSR to get immediate supervisor approval or to send an approval request to the Supervisor Override Queue.

To get supervisor approval:

1. When the function being performed requires supervisor approval, the Supervisor Approval message displays.



2. To get immediate supervisor approval, contact your supervisor. The Supervisor will log in and issue the approval.
3. To send a request to the Supervisor Override Queue, click Request to the message. The Request Form displays.



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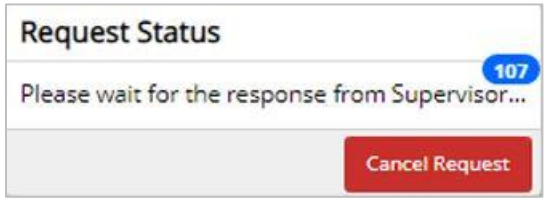
4. Enter a message for the Supervisor, then click Submit. The Request Status message displays. Wait for the supervisor to respond.



5. Once the Supervisor approves your request, the action being performed will be completed and a confirmation message will display. Click OK to the message.

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