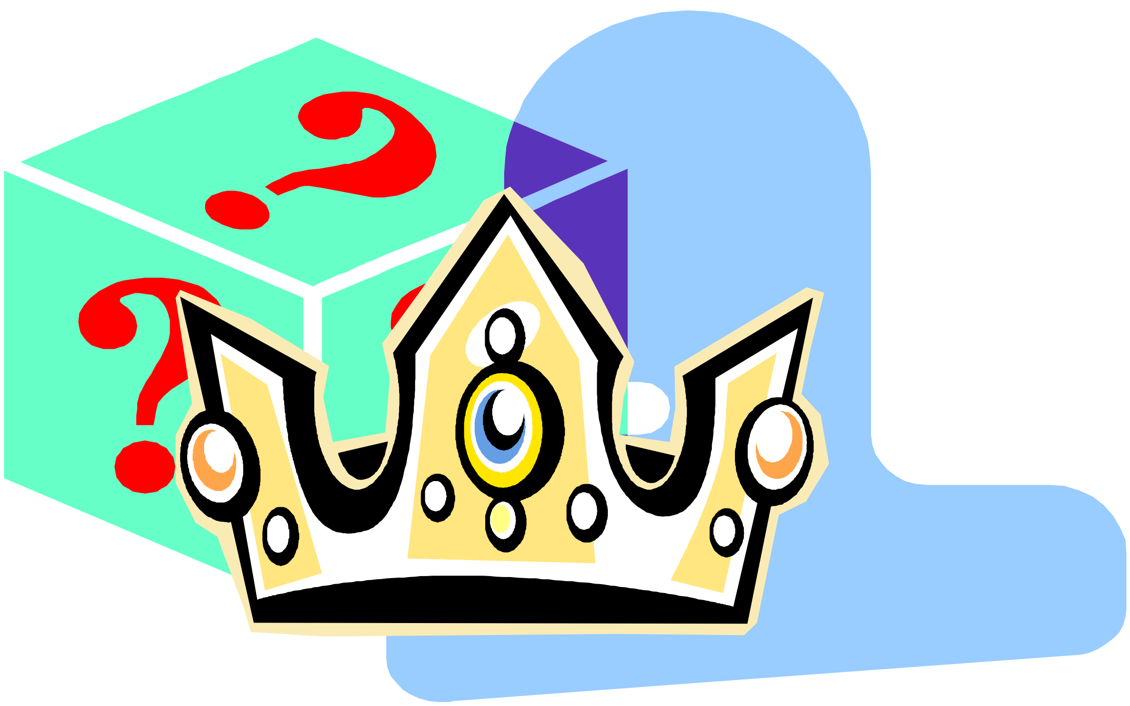
CANON SOLUTIONS AMERICA

Customer Care Manual



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Customer Care Application

Overview and Assumptions:

This procedure discusses the process to be used when a customer calls, e-mails or faxes CSA a billing or non-billing issue. It outlines steps to be taken to ensure customers' receive a response in a timely manner. This improves customer relationships as well as improves our collection process.

The Customer Care Module is intended for logging and recording all internal, external, and third party issues (both billing and non-billing) that need timely resolution and tracking capability.

Assumptions:

This process can be used to log and track the following issues:

- Contracts related items – including, but not limited to, incorrect meter reads, cancellation of contract (both for nonpayment and customer request), correction of overage/base rates, unused service portion refunds, incorrect copy allowance, upgrade/downgrade contract, change bill-to/ship-to information, machine no longer at location, incorrect purchase order, reinstatement of contract, contract not updated, incorrect test copies, duplicate billings, customer inquiries on existing contract, equipment additions to contract, request copy of existing contract

- Service related items – including, but not limited to, incorrect billing rates, machine covered under contract, warranty, service settlements, duplicate billing, missed billing, billing to incorrect account, invoice amount does not match Field Service Report left by technician, incorrect purchase order.

- Supplies related items – including, but not limited to Returned Merchandise Authorizations (RMA) - damaged/defective goods, incorrect shipments, incorrect quantity of supplies shipped, short shipment, duplicate shipments, incorrect billing rate, items covered under contract, incorrect purchase order, supply related settlement, freight

- Accounts Receivable related items - including, but not limited to miscellaneous issues with credit card payments, refund existing credits on account to credit card, request to apply open credits to open invoices, refund for open credits on account, copies of invoices, statement questions.

- Tax related items – including, but not limited to tax exemption, incorrect tax rates, rebilling for tax not charged on invoices

- Merchandise related items – including, but not limited to, equipment pick up issues, cash discounts, incorrect pricing, customer inquiries on merchandise billing

- Data Management related items – including, but not limited to bill to/ship to address changes, changes to attention lines on invoices

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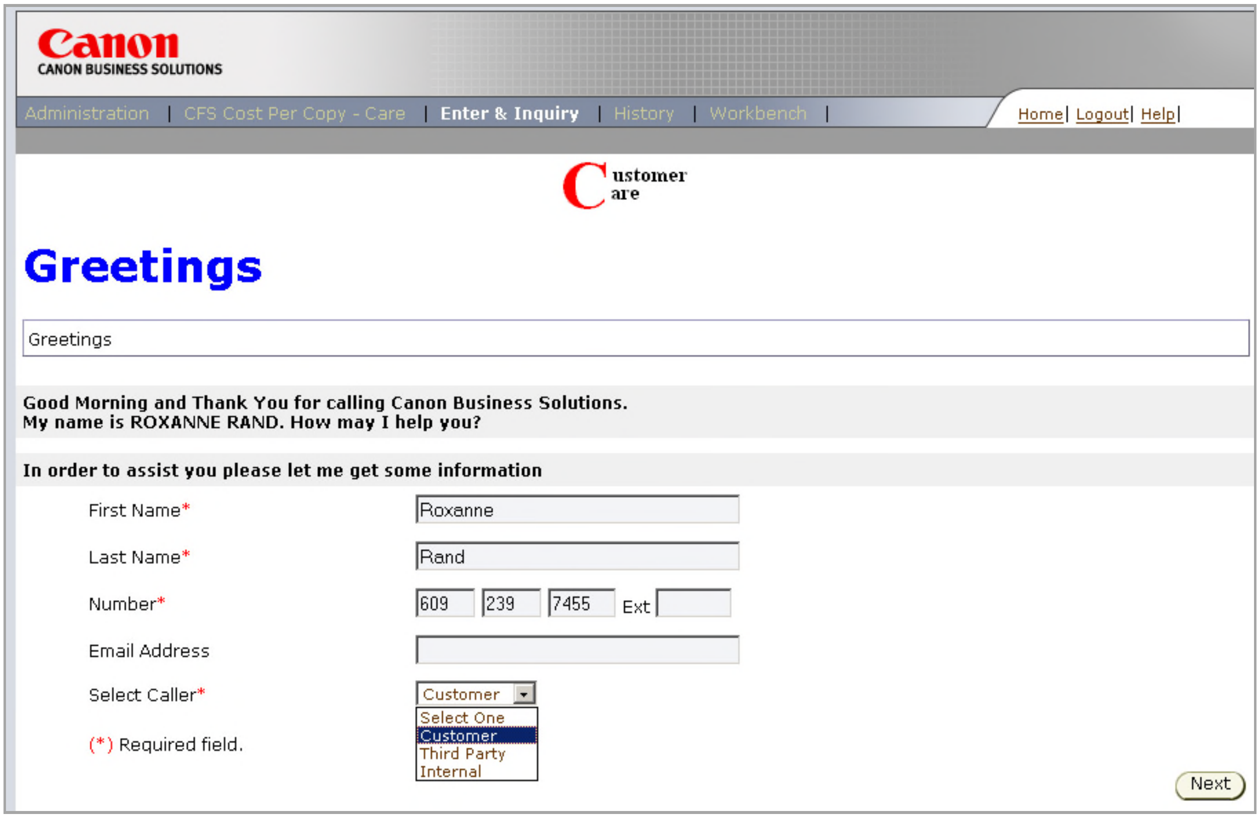
Process for Logging Tickets

This screen is used to enter issues into the Customer Care Module. Once the customer has advised you of their issue/inquiry, you should begin to ask questions that will help you log the ticket and get the issue resolved.

Ticket Creation

1. Open Customer Care User Responsibility and select Enter and Inquiry.



2. Enter Customers First and Last Name

3. Enter Customers Telephone Number

4. Enter Customers Email Address (Optional)

5. Click on the Select Caller drop down to select type of person reporting issue.

   - External Customer – Customer is reporting issue.

   - Internal Customer – CSA Employee is reporting issue.

   Note: If incoming information is from a CSA employee, the employee's information is entered on the Greetings screen. The customer information is entered on the next screen.

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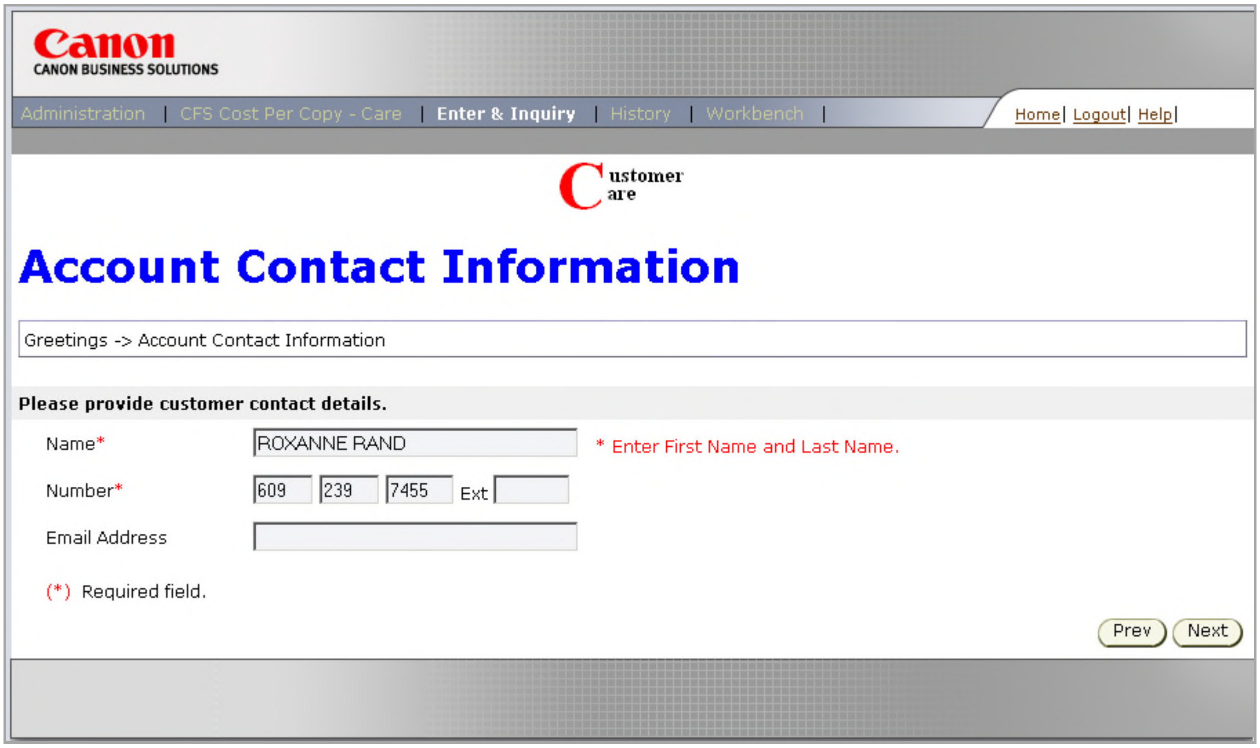
6. Click Next to proceed



7. In the Name Field (required), enter Customers First and Last Name

8. In the Number Field (required), enter Customers Telephone Number

9. In the Email address field, Enter Customers Email Address (Optional)

10. Click Next to proceed

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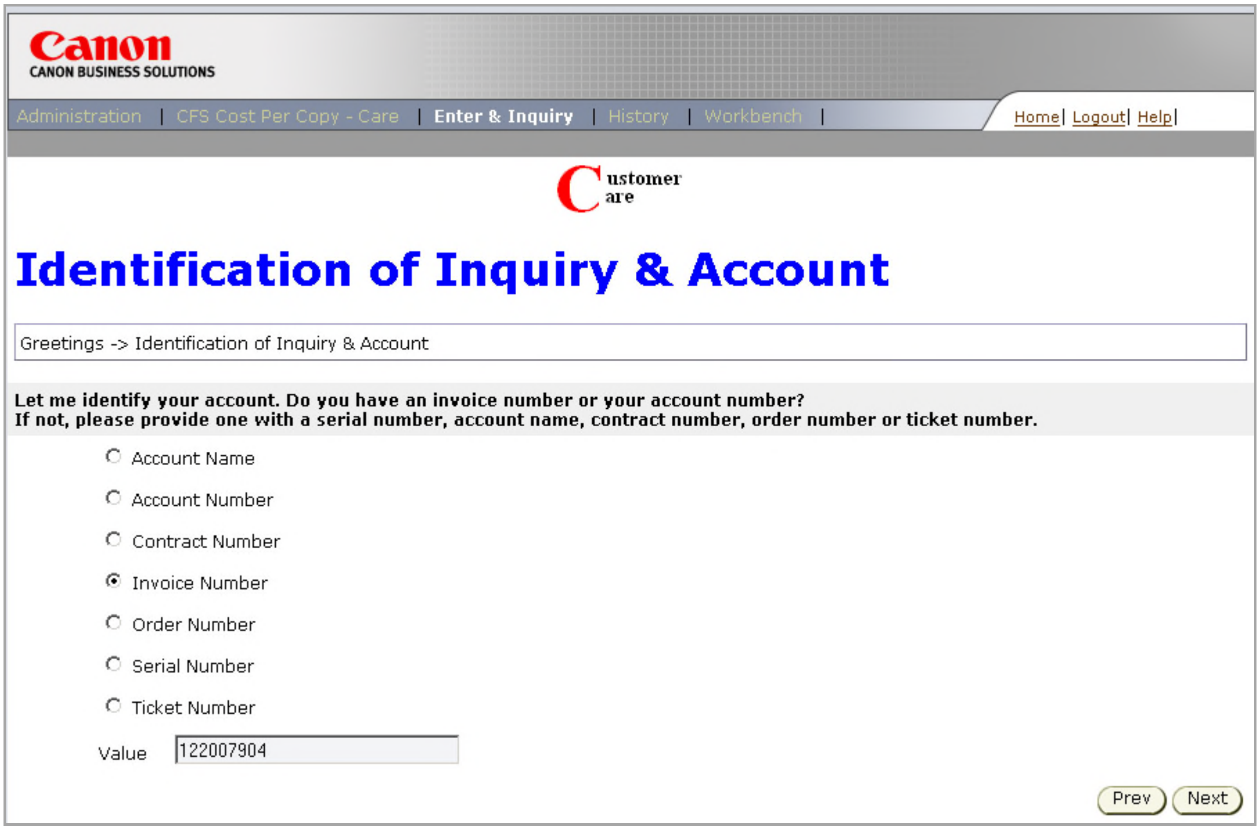

- If the issue pertains to an invoice, enter the invoice number.
- If the issue pertains to a non-billing issue; enter the customer's account number.

11. Click Next to proceed

 The customer's name will appear under Below Account is Selected heading.

12. Verify the company name matches invoice or account number.

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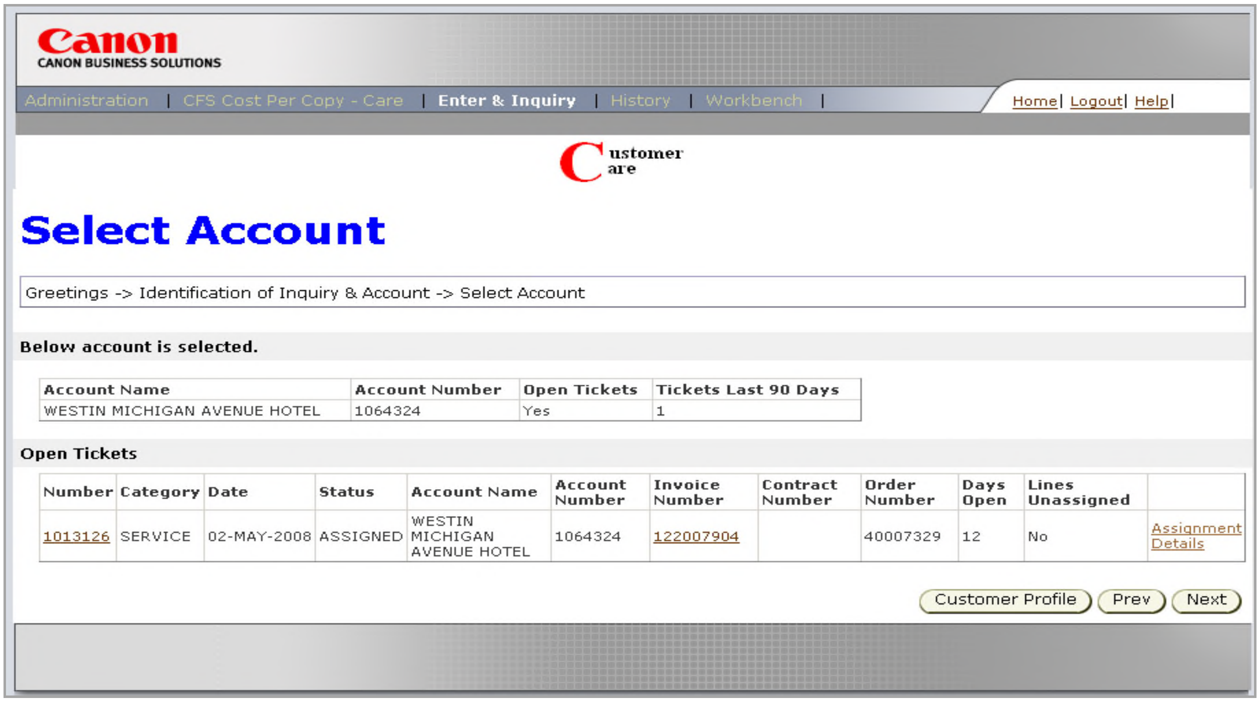
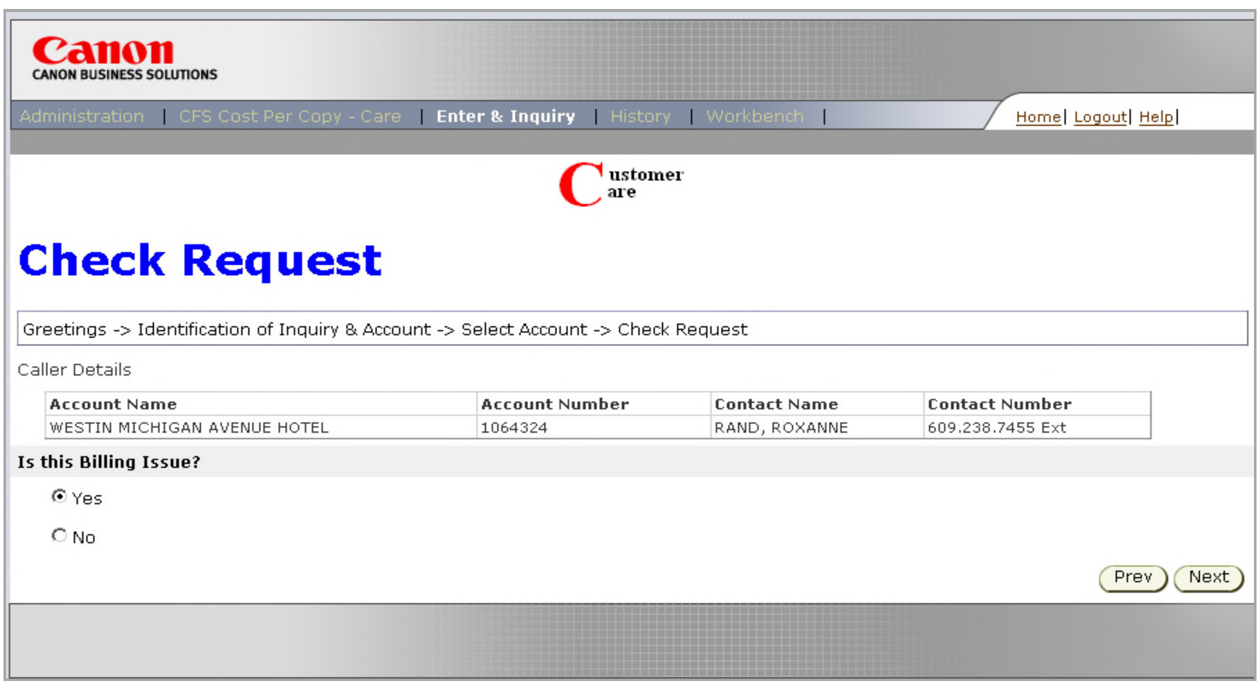


All open tickets for the customer will appear.

13. Verify there is not a ticket open for the same issue.

14. To view the details of the open ticket, click the Number under Open Tickets.

15. Click Next to proceed



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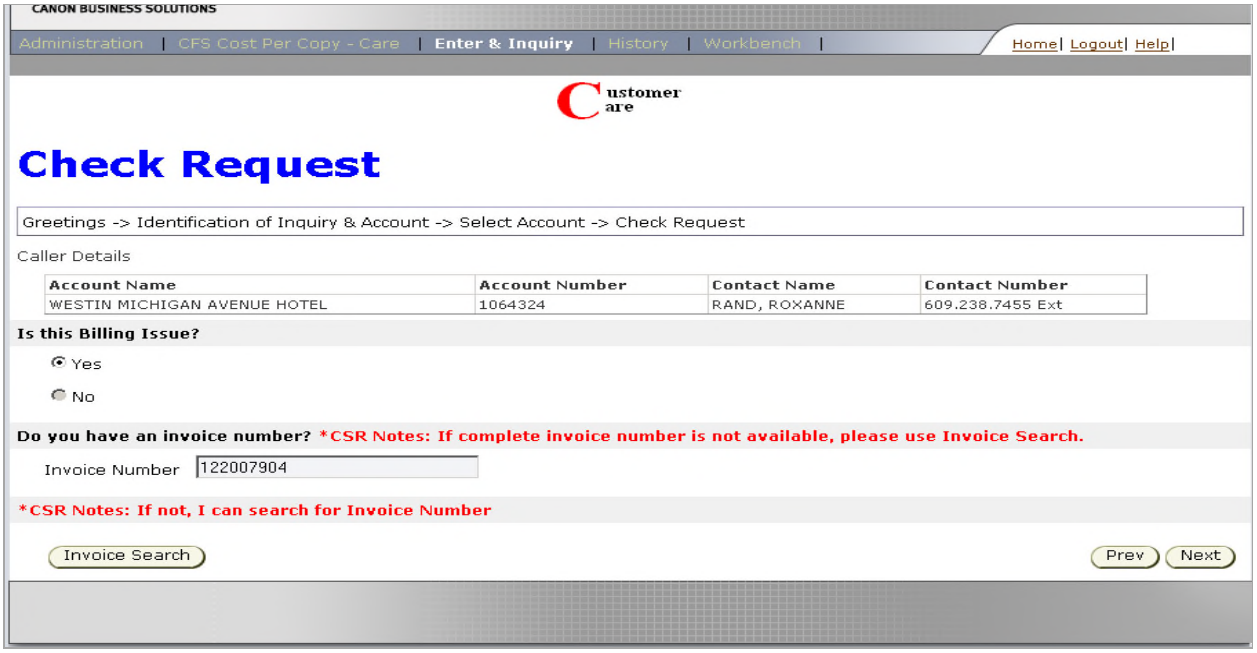
16. Click Next to proceed



This screen will recap the information you have recorded, if the ticket was logged by the invoice number. If a ticket is already open for the same invoice, a message will appear with the open ticket number.

17. Click Next to proceed

18. Once an invoice is selected, you will be prompted to select the appropriate issue pertaining to the invoice and customer issue. The remainder of the document details the various scenarios.

Ticket Creation – Final Steps

A resource will automatically be assigned to the ticket.

1. Validate the ticket has been assigned to the correct person.

   Note: If ticket was not assigned to correct person, refer to Assign Customer Care Ticket section to reassign the ticket.

2. Provide the ticket number to the customer for reference.

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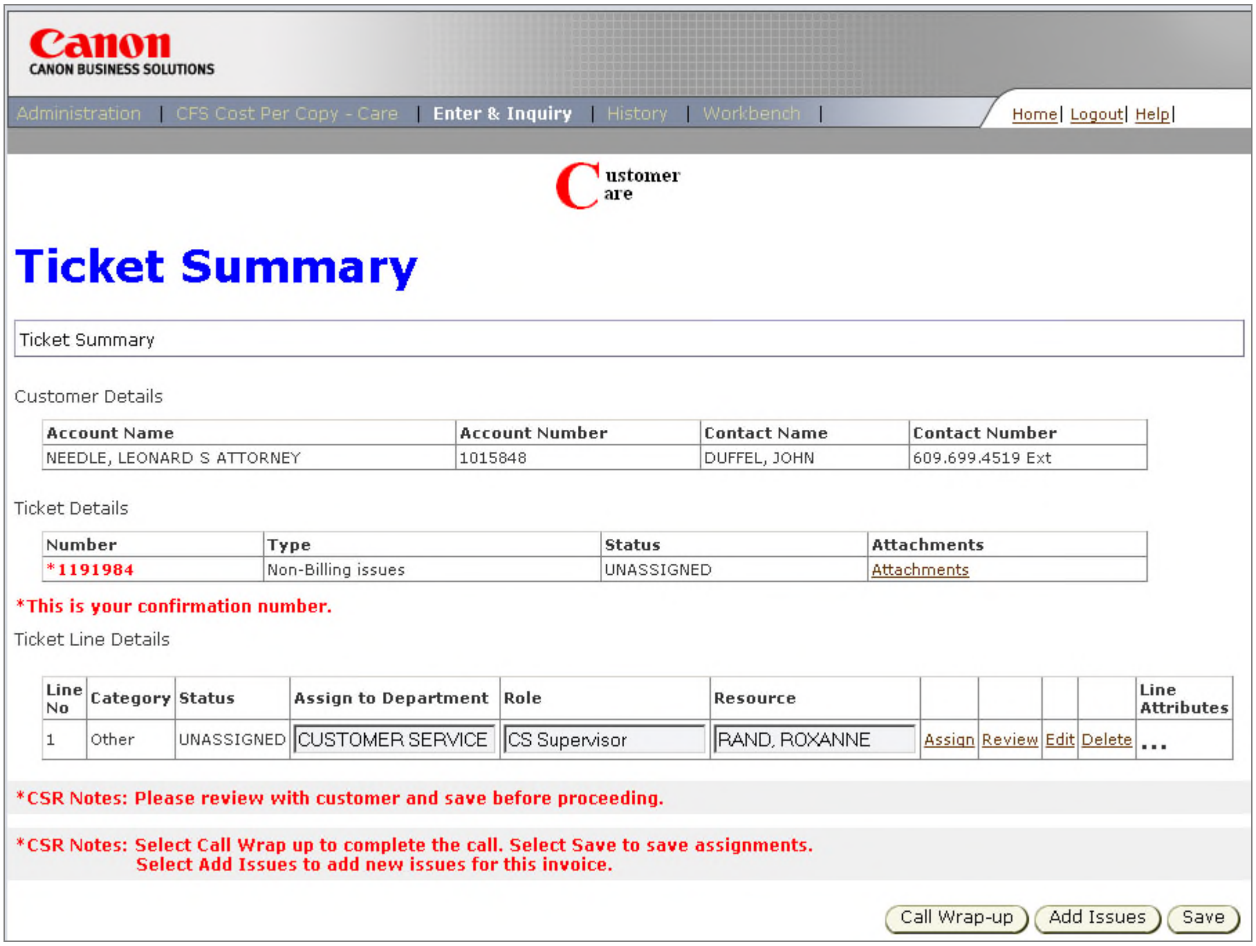

Adding Issues to a Ticket

Additional issues for the same customer may be added to a ticket unless the ticket contains a line that will be processed through E218 (correction to base service charge, allowable (copy volume), cost per copy or meter read correction). Tickets that will be processed through E218 may only contain one line.

1. Click Add Issues button. (button also available on the Status and Resolution Screen).

2. Select the type of issue and continue to complete the remaining screens.

Attachments in Customer Care

Attaching Documents to a Ticket

On the Ticket Summary screen, you may attach supporting documentation for a ticket such as signed cancellation letter from customer, Purchase Orders, email communications, etc.

1. Under Ticket Details section, click on Attachments link.

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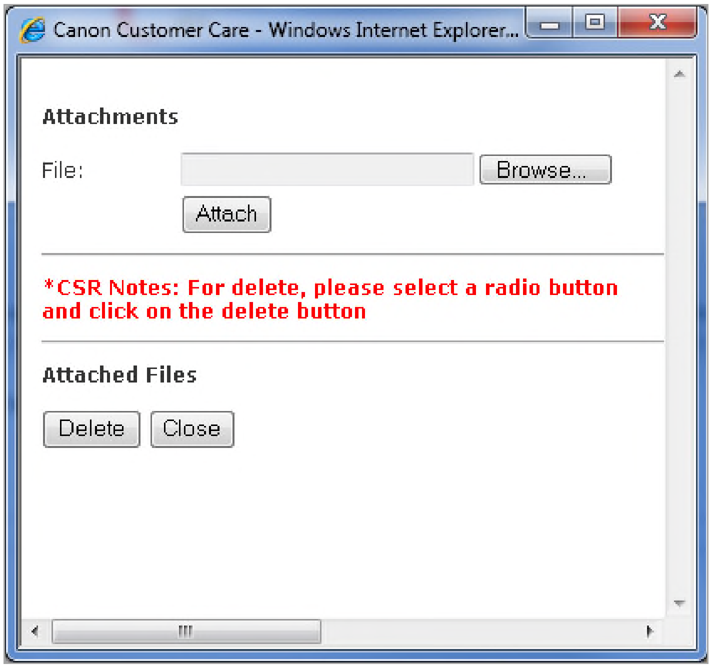
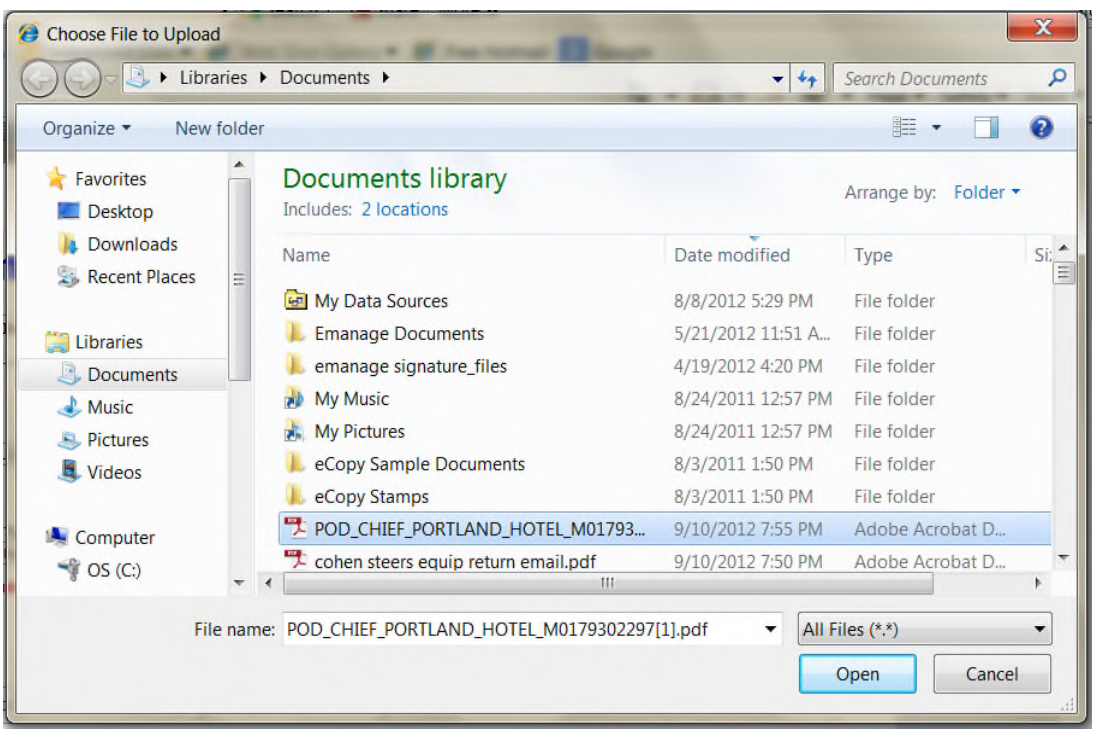
The Attachments window will open.



2. Click Browse.

The Choose File to Upload window will open.



3. Navigate to location where file is saved.

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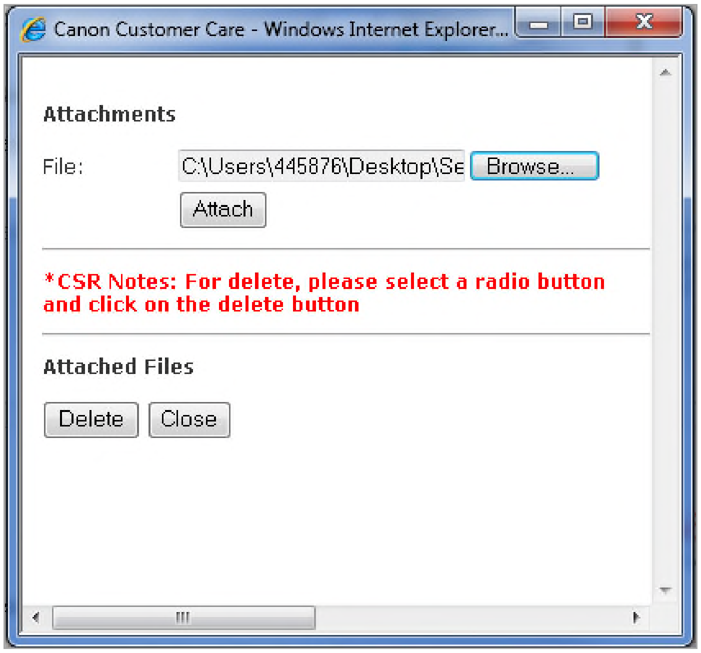
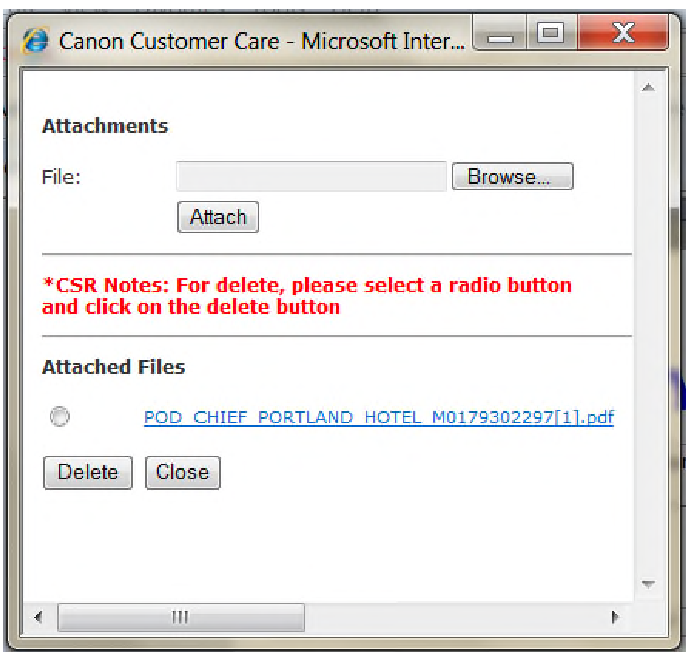
4. Select file and click Open.

   The file name will appear in the Attachments File field.



5. Click Attach.

   The Document will appear in Attached Files section of Attachment window.



6. Click Close to return to Ticket Summary screen.

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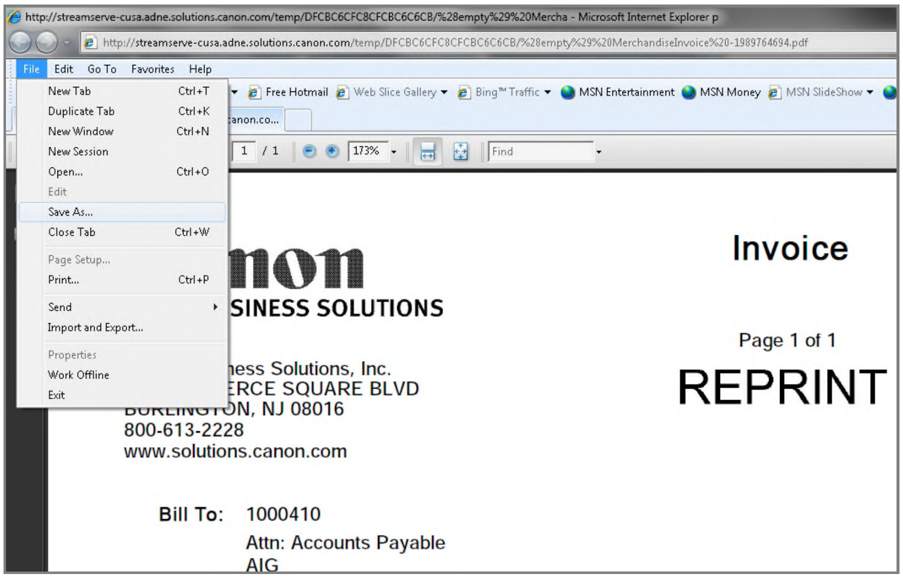
Note: If you would like to Delete an attachment, select the attachment and click Delete. A confirmation screen will appear. Click Yes to continue with deletion.

Saving an Invoice from StreamServe:

1. Open Invoice in StreamServe.

2. Select File: Save As from the toolbar.

   The Save a Copy window will open.



3. Select your Desktop

4. In File Name field, type in name of the document.

5. Click Save

Saving Other Document Types

You can attach documents that have been eCopied or e-mailed.

1. Open up the document in your e-mail.

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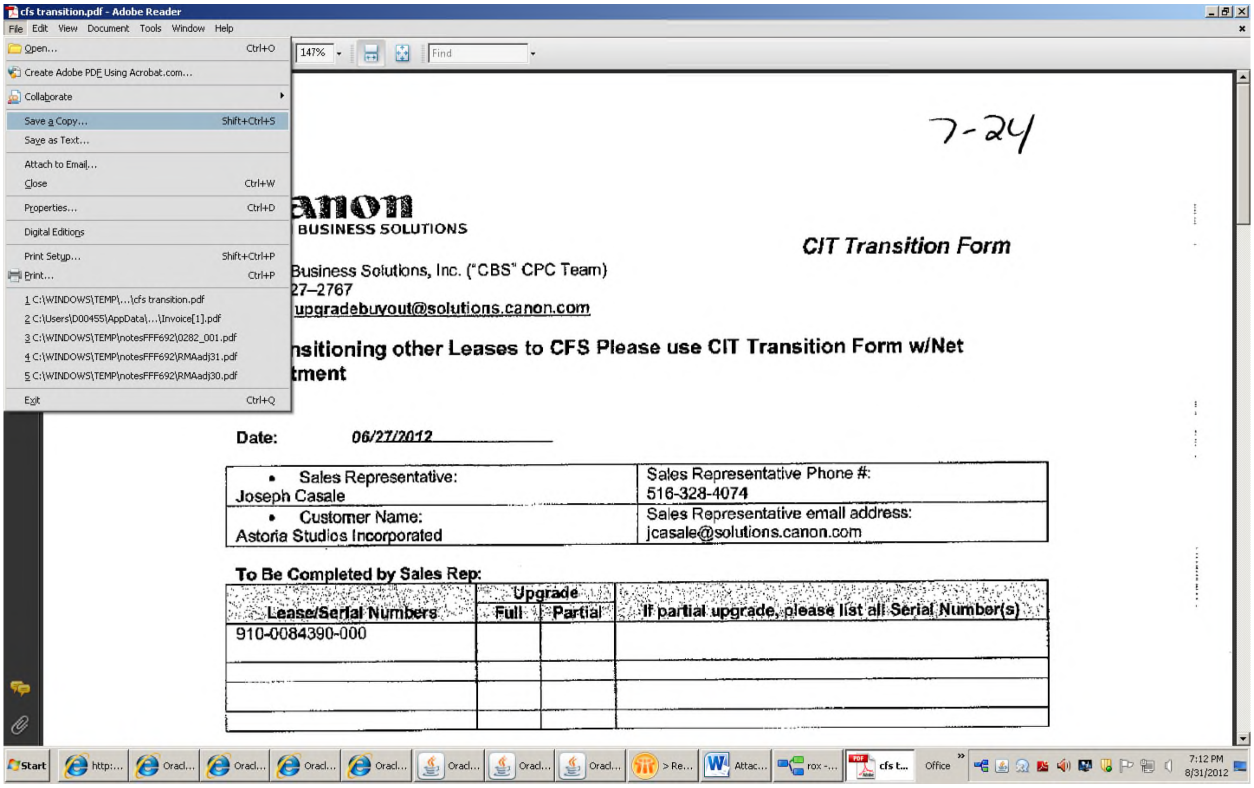
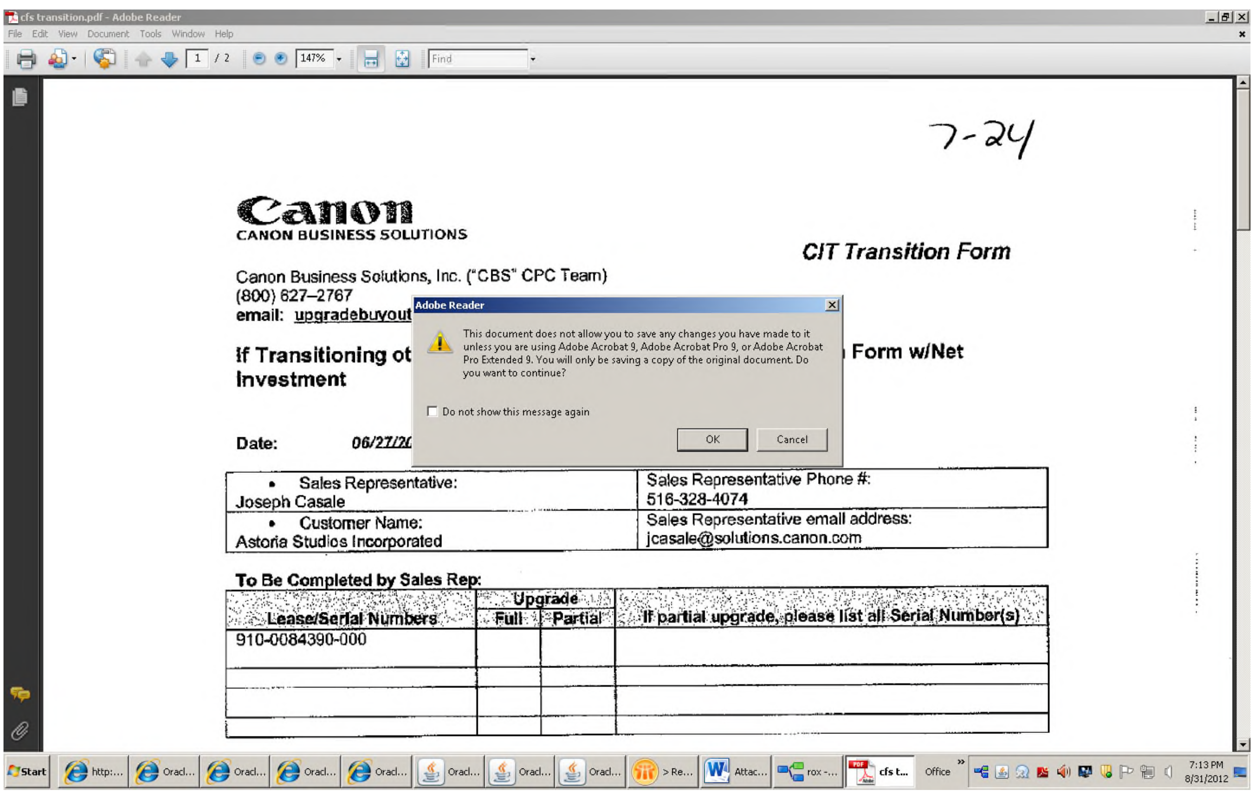


2. Once the document is opened, select File>Save a Copy from the tool bar.



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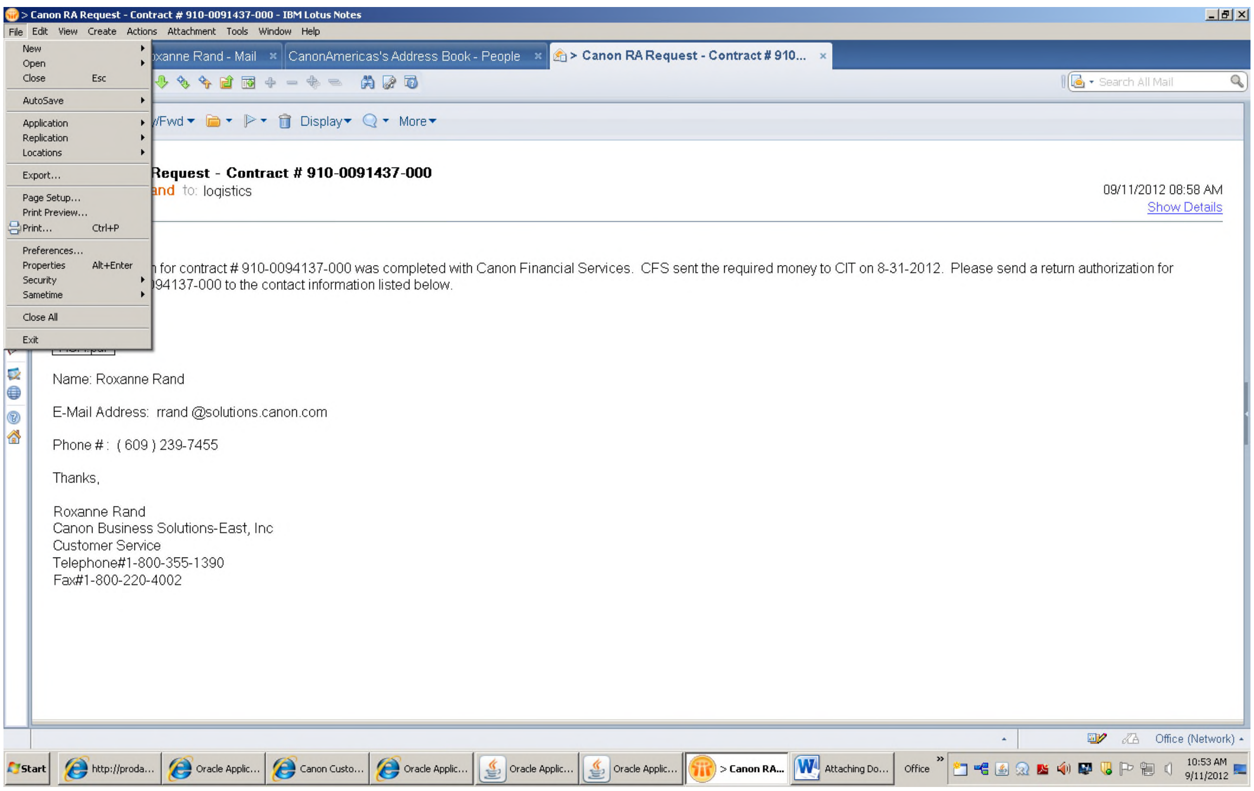
3. Click Ok
4. Select your Desktop
5. In File Name field, type in name of the document.
6. Click Save

Saving an Email to PDF

1. You can attach an e-mail to a ticket by converting to a PDF file.
2. Open the e-mail and select File>Print from toolbar.



The Print Document window will open.

3. Click in the Name field and select the PDF option.

   Note: May state eCopy Desktop 9.0 Printer or ScanSoft PDF Create.

4. Click Ok.

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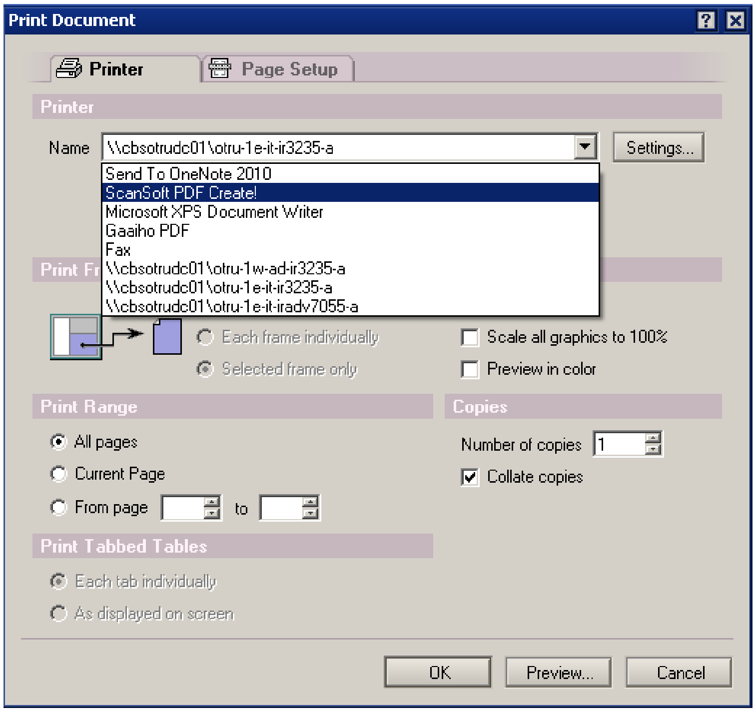
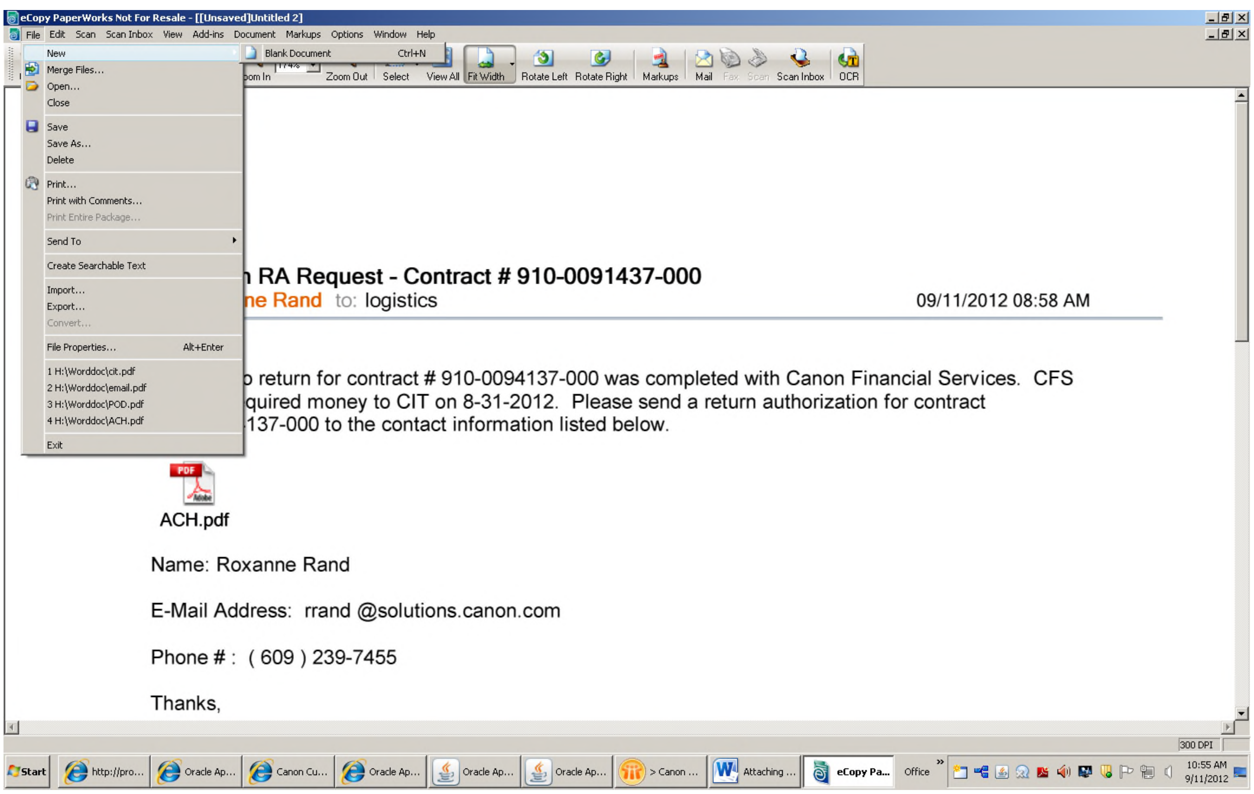


If the eCopy Desktop opens up, select File>Save As from the tool bar.



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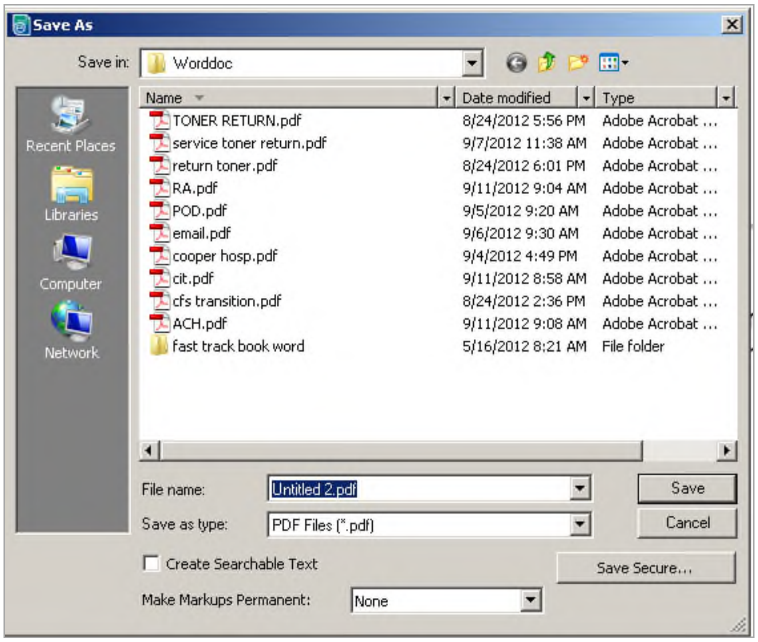

5. Select your Desktop

6. In File Name field, type in name of the document.

7. Click Save

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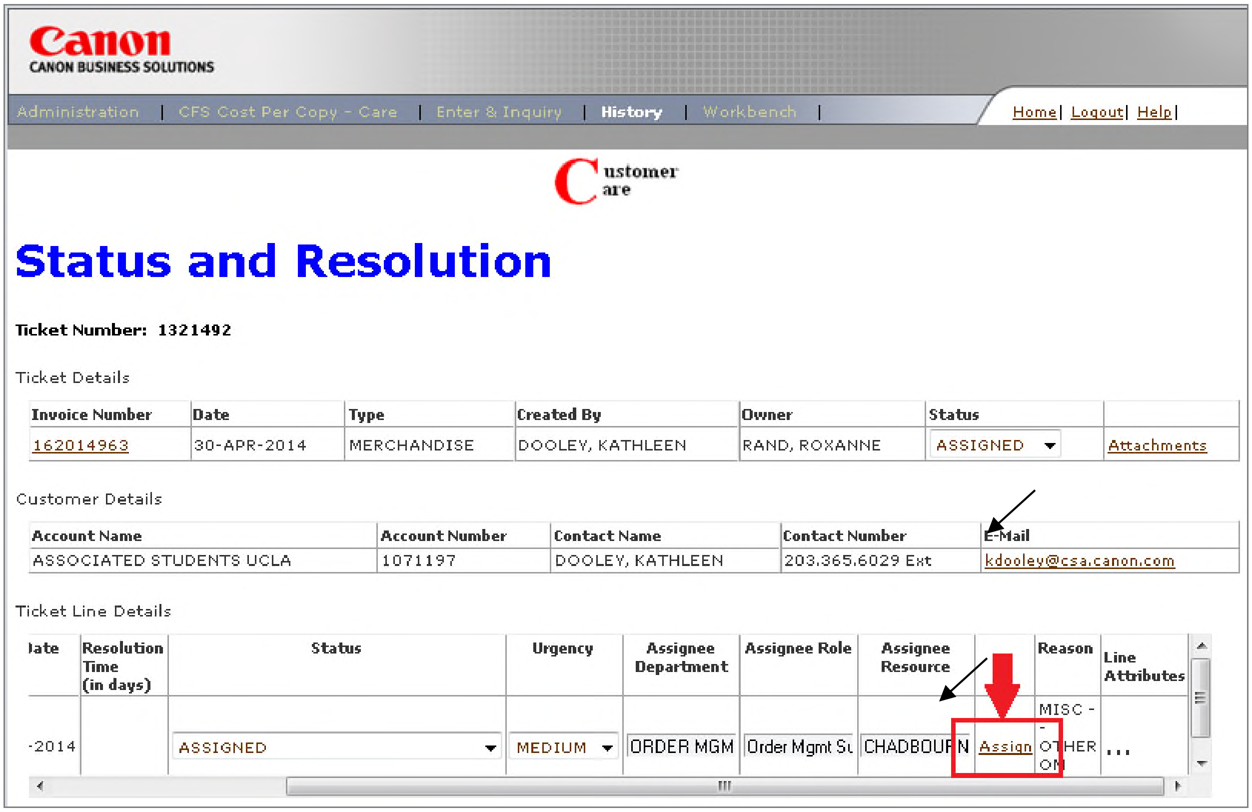
Assigning Customer Care Tickets

A ticket will automatically be assigned to a person through the workflow.

In some cases the assign person may need to be changed. You need to check the ticket matrix and make sure the person who the ticket is going to is correct before Saving and clicking Call Wrap-Up on the ticket.



1. Click link for Assign.

   The Ticket Assignments window will open.

   - If ticket has been logged by Invoice Number, the applicable department will appear based on invoice type (i.e. contract billing, equipment, service or supplies)

   - If the ticket has not been logged by invoice number or created as a Non-Billing Issue, the Select Department field will default to Customer Service.

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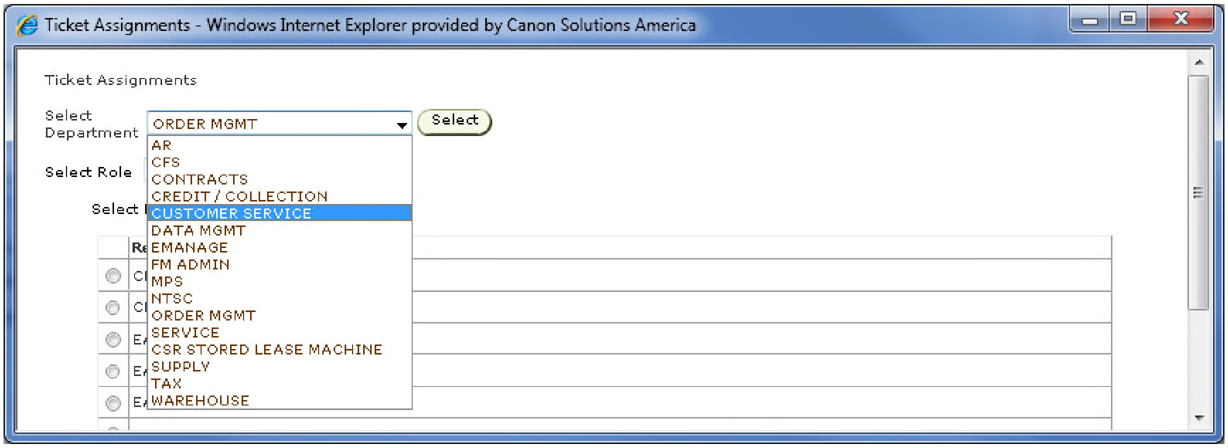
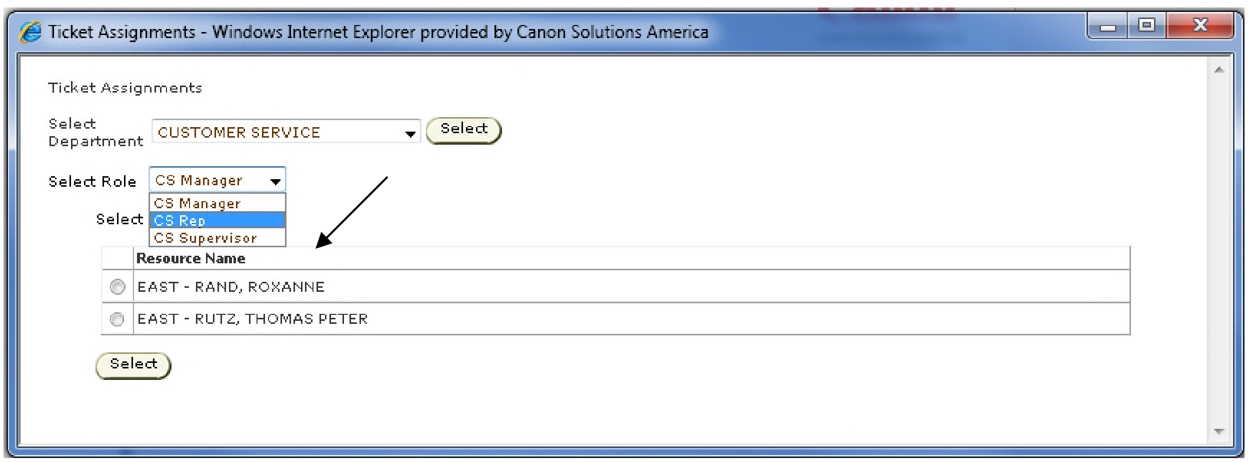
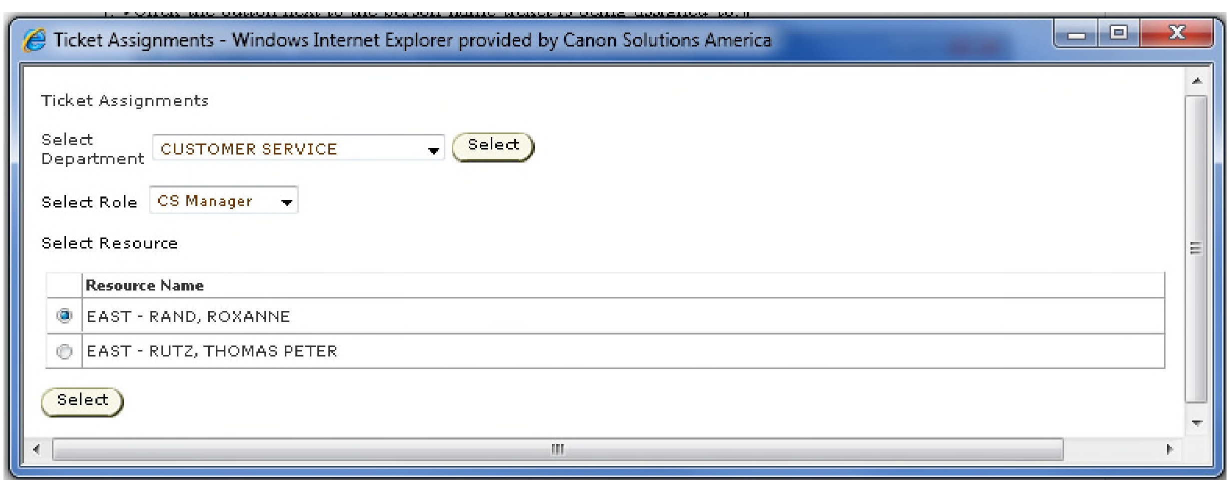


2. Click on Select Department drop down and select department ticket needs to be assigned to.
3. Click Select Role and select job role of person ticket needs to be assigned to.

   A list of employee's within department and role selected will display.



4. Click the button next to the person name ticket is being assigned to.



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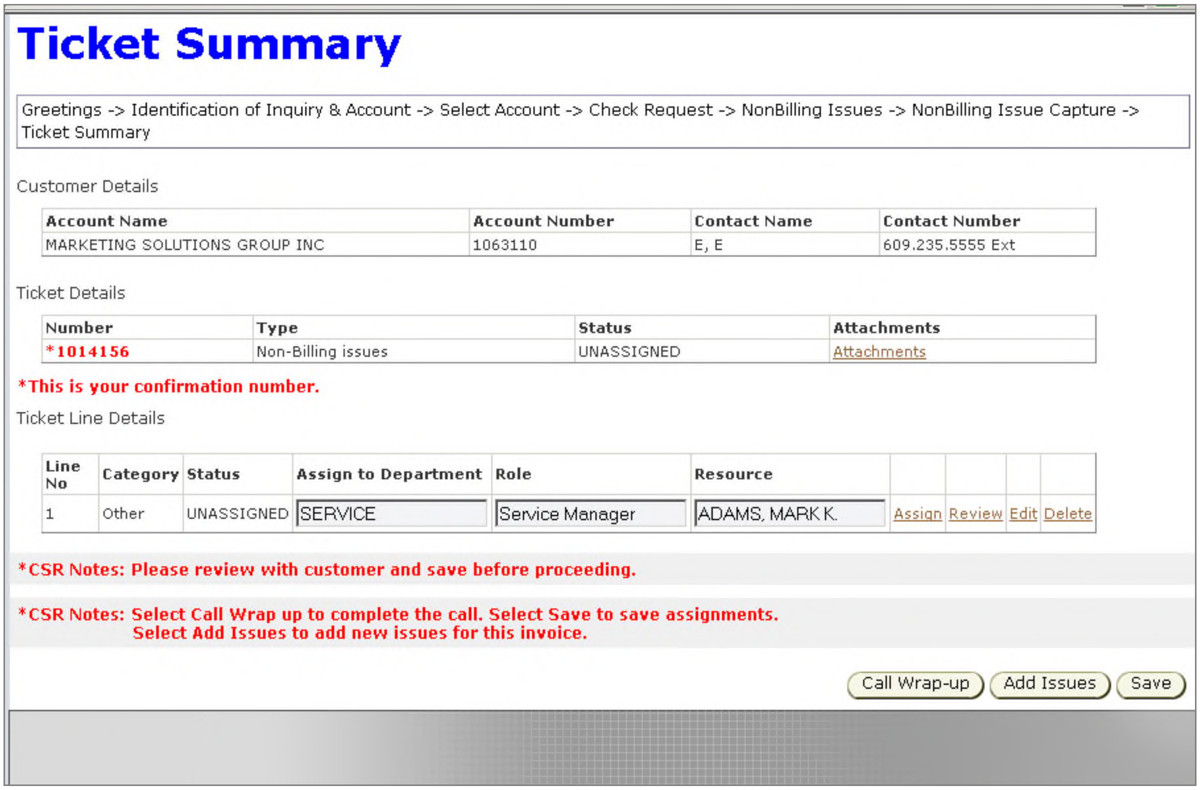
5. Click Select.

The assigned person on ticket will change.



6. Click Save to save changes to assignment.

7. Click Call Wrap-Up to submit ticket.

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Logging Tickets for Billing Issues

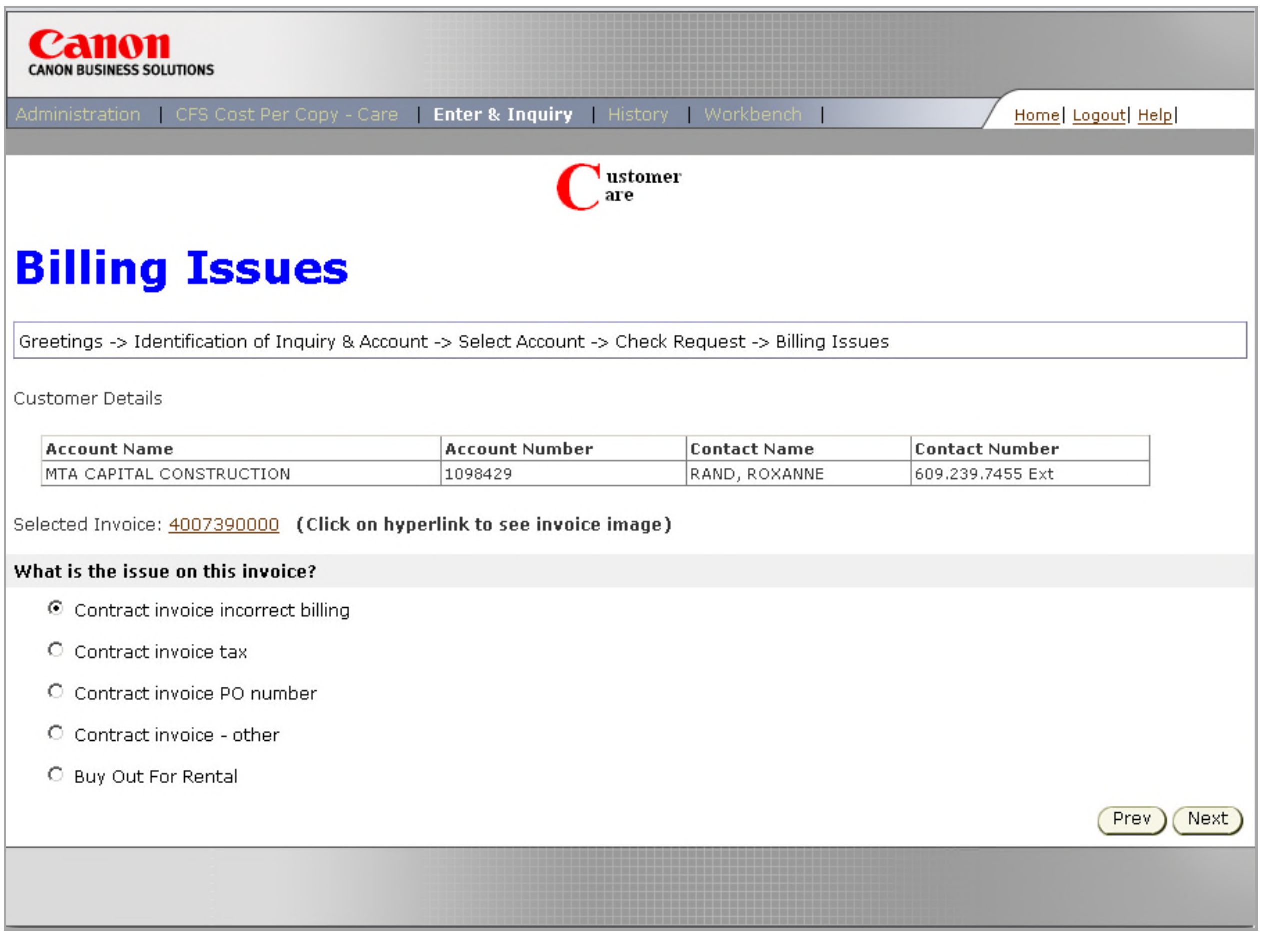
Contract Invoice Incorrect Billing

Contract Invoice Incorrect Billing is used for all corrections to meter reads and contract pricing for invoices generated in CSA Oracle. This includes start/end meter reads, test copies, copy allowance, cost per copy charge and incorrect base charge. If invoice is a converted invoice from another system (i.e. Océ Oracle or OMD), you select Contract Invoice Other.

A ticket will generate that will be processed through the Automated Credit/Rebill System (E218) by contracts. All required approvals are obtained through the workflow which is part of E218.

Please note: If ticket is being processed through E218, only one invoice may be selected on the ticket.

- If there are multiple serials on the same invoice, they may be processed on the same ticket.
- If there are multiple serials on different invoices, they must be processed through separate tickets. This also applies if they are on the same consolidated bill.



1. Select Contract invoice incorrect billing.

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2. Click Next to proceed.

Note: The columns displayed on the next screen are dynamic depending on whether the invoice contains both service & usage, only service or usage.

- If the invoice contains both service and usage lines, a column for Meter Read and Pricing will display on form.

Service Program Name	Overage Period	Invoice Number	Serial Number	Item Code	Model Description	Meter Read ☐	Pricing ☐
Supply Inclusive Service Program	27-MAR-2012 - 26-JUN-2012	4007390000	JFZ00879	011ZZ016	CLC4000 BLACK AND WHITE USAGE	☐	☐
		4007390000	JFZ00879	011ZZ018	CLC4000 COLOR USAGE	☐	☐

- If the invoice contains only a service or a usage line, one column will display for pricing related issues (base or cost per copy - cpc) and is not labeled.

Service Program Name	Base Period	Invoice Number	Serial Number	Item Code	Model Description	☐
Supply Inclusive Service Program	01-MAR-2013 - 31-MAR-2013	4008965710	HJZ50360	MASUPINCL	ADVC7055	☑
		4009300617	HJZ50360	MASUPINCL	ADVC7055	☐

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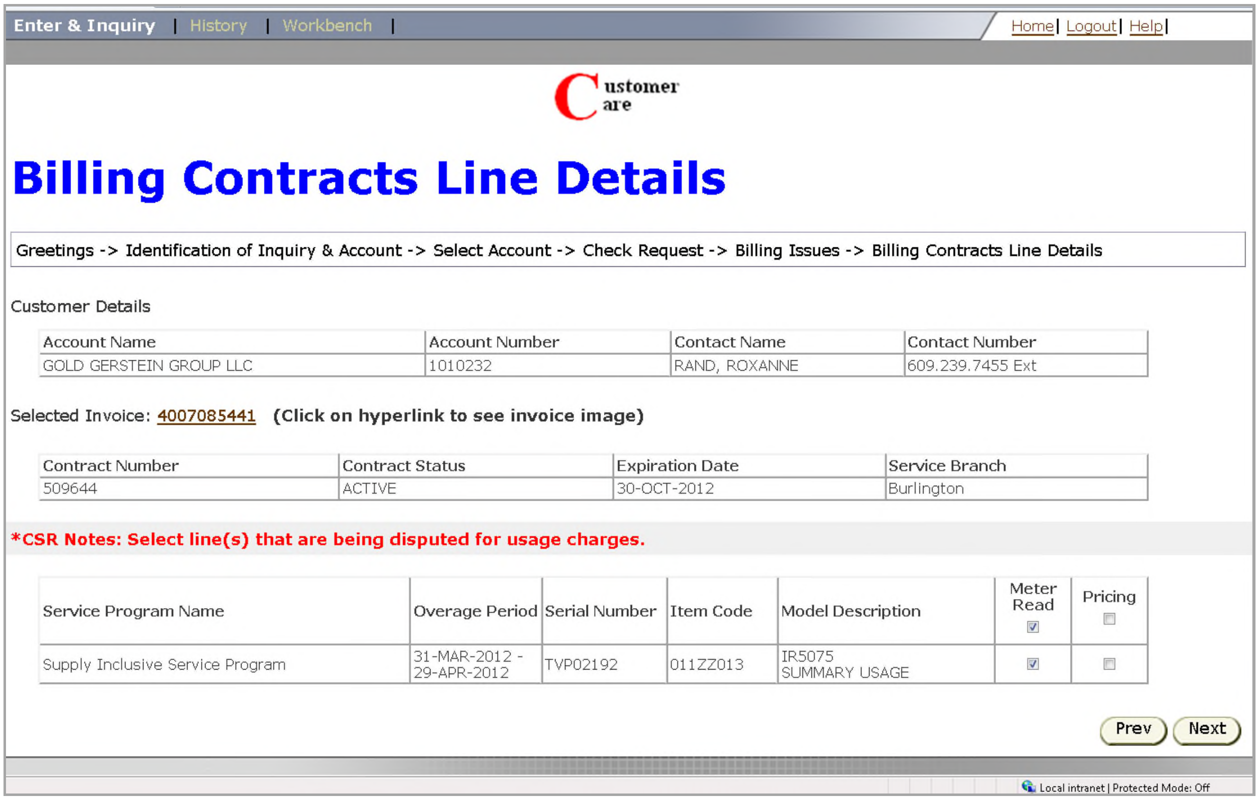
Contract Invoice Incorrect Billing - Incorrect Meter Correction

Customer states the meter read on the invoice is incorrect. This includes the start/end read or service copies. The invoice details will be provided for invoice selected and may contain a line for base charge and/or usage charges.

1. Identify the usage line for the applicable model/serial.



2. Click Meter Read checkbox for applicable model/serial usage line.

3. Click Next to proceed

   You will be prompted to enter the meter corrections for the invoice. The following example is for an incorrect End Read on an invoice.

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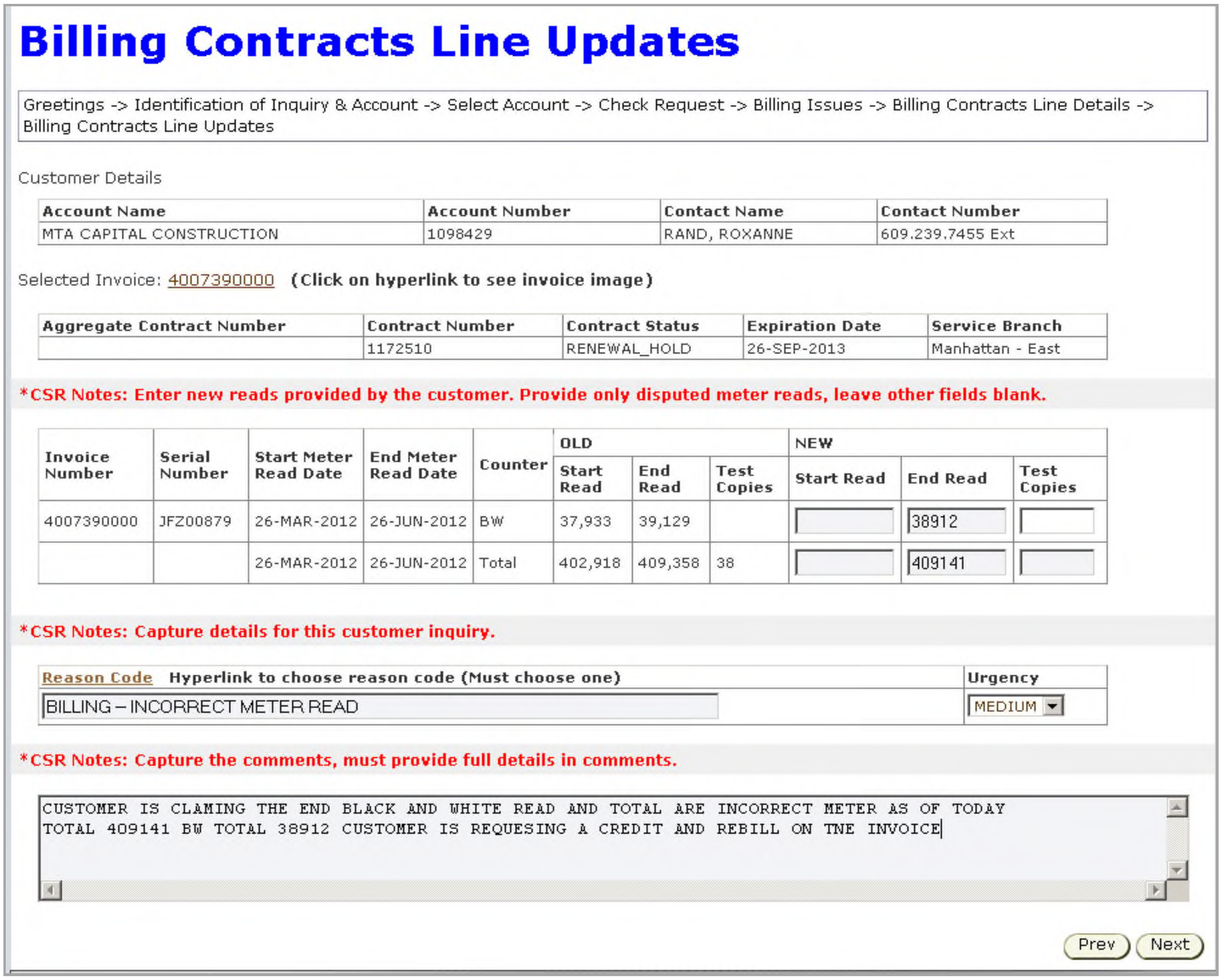

Billing Contracts Line Updates

Greetings -> Identification of Inquiry & Account -> Select Account -> Check Request -> Billing Issues -> Billing Contracts Line Details -> Billing Contracts Line Updates

Customer Details

Account Name	Account Number	Contact Name	Contact Number
MTA CAPITAL CONSTRUCTION	1098429	RAND, ROXANNE	609.239.7455 Ext

Selected Invoice: 4007390000 (Click on hyperlink to see invoice image)

Aggregate Contract Number	Contract Number	Contract Status	Expiration Date	Service Branch
	1172510	RENEWAL_HOLD	26-SEP-2013	Manhattan - East

*CSR Notes: Enter new reads provided by the customer. Provide only disputed meter reads, leave other fields blank.

Invoice Number	Serial Number	Start Meter Read Date	End Meter Read Date	Counter	OLD			NEW		
					Start Read	End Read	Test Copies	Start Read	End Read	Test Copies
4007390000	JFZ00879	26-MAR-2012	26-JUN-2012	BW	37,933	39,129			38912	
		26-MAR-2012	26-JUN-2012	Total	402,918	409,358	38		409141	

*CSR Notes: Capture details for this customer inquiry.

Reason Code Hyperlink to choose reason code (Must choose one)	Urgency
BILLING – INCORRECT METER READ	MEDIUM

*CSR Notes: Capture the comments, must provide full details in comments.

CUSTOMER IS CLAMING THE END BLACK AND WHITE READ AND TOTAL ARE INCORRECT METER AS OF TODAY TOTAL 409141 BW TOTAL 38912 CUSTOMER IS REQUESING A CREDIT AND REBILL ON TNE INVOICE

Prev Next

4. In the New Section > End Read field, enter the correct end reading.

5. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

6. Enter in detailed notes on the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

7. Click Next to proceed.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

8. Validate the ticket has been assigned to the correct person.

   Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

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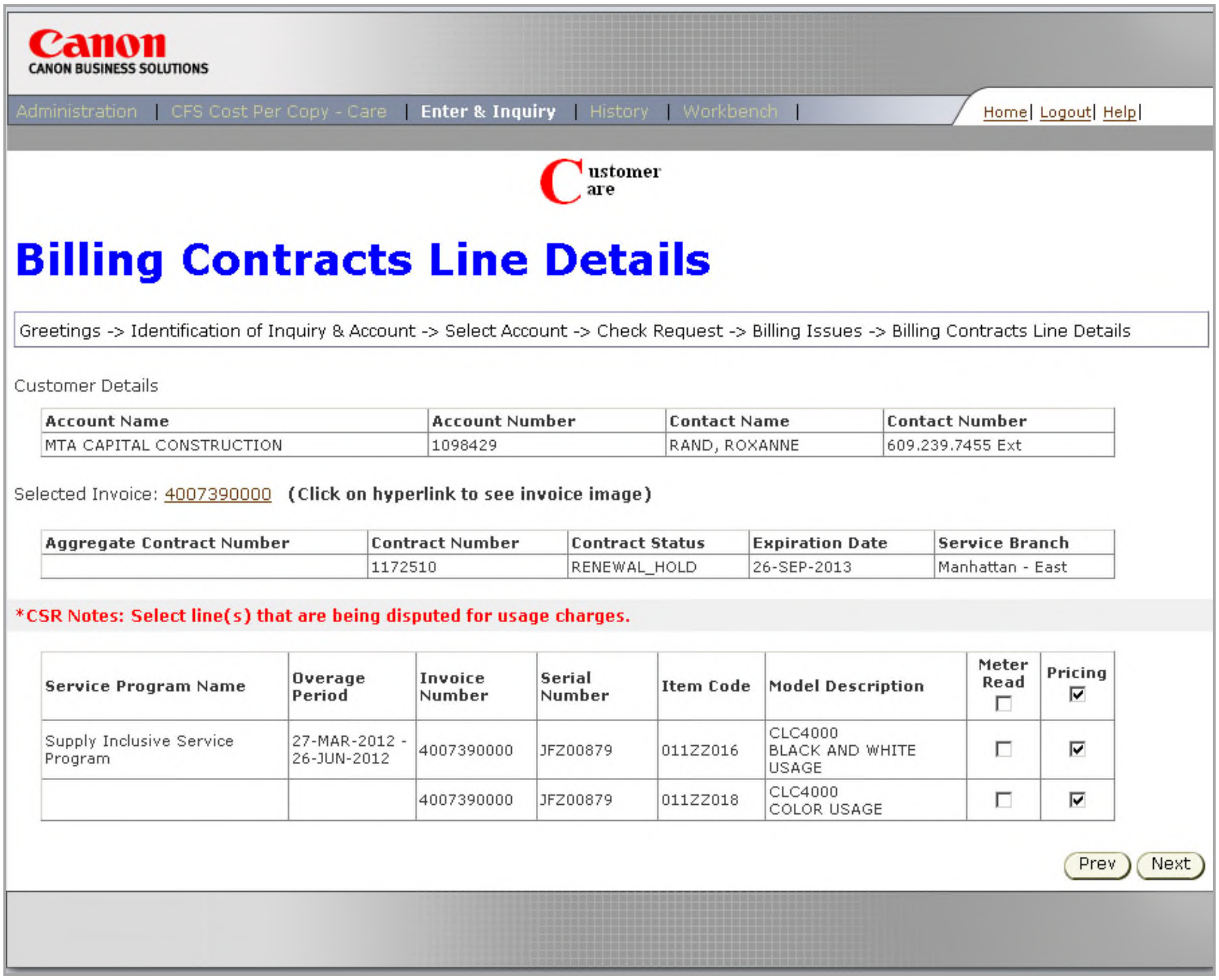
9. Provide the ticket number to the customer for reference.

Contract Invoice Incorrect Billing - Incorrect Overage Rate Correction

Customer states the overage rate (cost per copy) on the invoice is incorrect. The invoice selected will provide you with the details of the invoice and may contain a line for base charge and/or usage charges.

1. Identify the usage line for the applicable model/serial.



2. Click Pricing check box for applicable model/serial usage line.

   Note: Pricing is selected when correcting the cost per copy or allowance for usage.

3. Click Next to proceed

   You will be prompted to enter the cost per copy corrections for the invoice.

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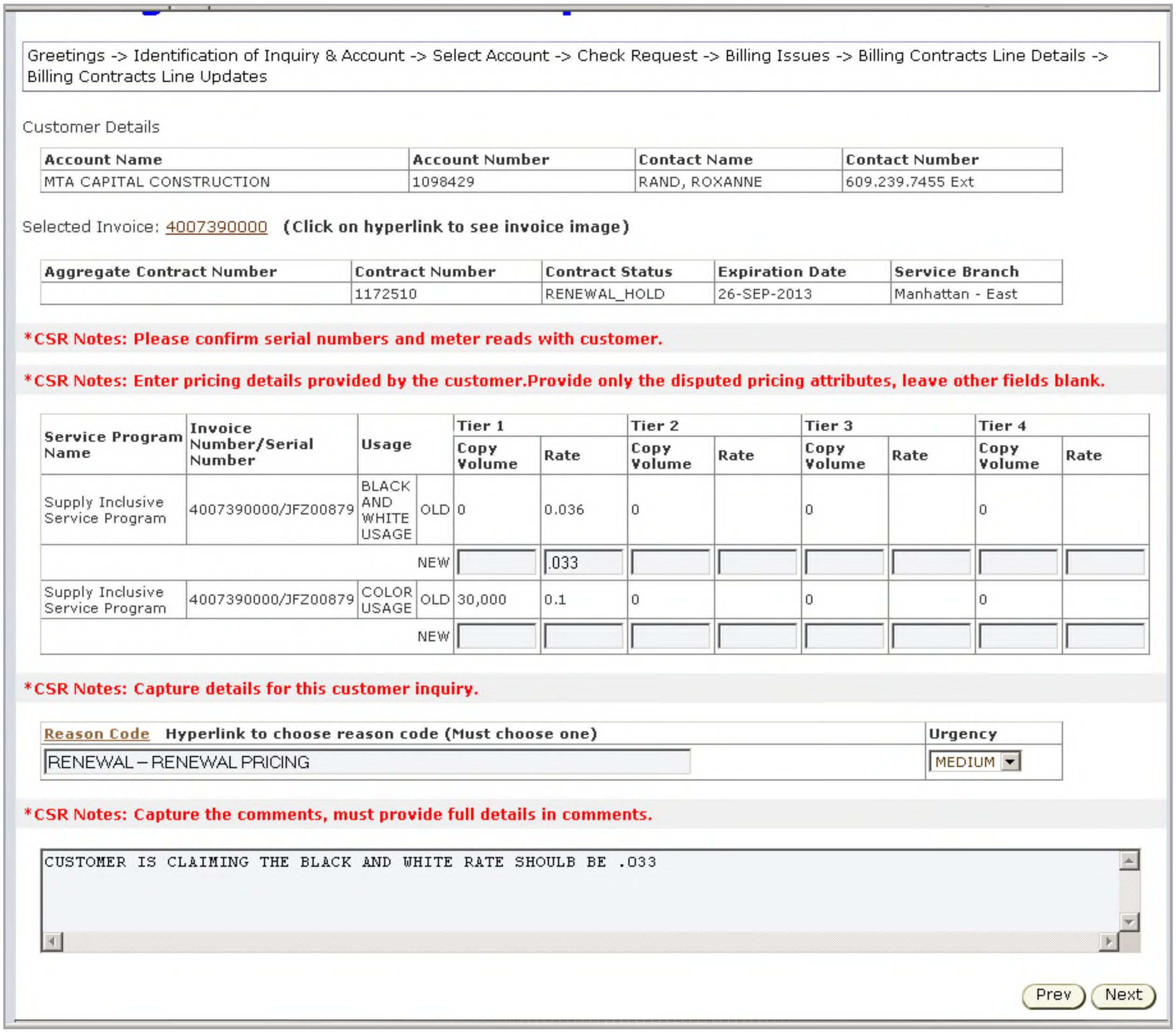

Greetings -> Identification of Inquiry & Account -> Select Account -> Check Request -> Billing Issues -> Billing Contracts Line Details -> Billing Contracts Line Updates

Customer Details

Account Name	Account Number	Contact Name	Contact Number
MTA CAPITAL CONSTRUCTION	1098429	RAND, ROXANNE	609.239.7455 Ext

Selected Invoice: 4007390000 **(Click on hyperlink to see invoice image)**

Aggregate Contract Number	Contract Number	Contract Status	Expiration Date	Service Branch
	1172510	RENEWAL_HOLD	26-SEP-2013	Manhattan - East

***CSR Notes: Please confirm serial numbers and meter reads with customer.**

***CSR Notes: Enter pricing details provided by the customer.Provide only the disputed pricing attributes, leave other fields blank.**

Service Program Name	Invoice Number/Serial Number	Usage		Tier 1 Copy Volume	Tier 1 Rate	Tier 2 Copy Volume	Tier 2 Rate	Tier 3 Copy Volume	Tier 3 Rate	Tier 4 Copy Volume	Tier 4 Rate
Supply Inclusive Service Program	4007390000/JFZ00879	BLACK AND WHITE USAGE	OLD	0	0.036	0		0		0	
			NEW		.033						
Supply Inclusive Service Program	4007390000/JFZ00879	COLOR USAGE	OLD	30,000	0.1	0		0		0	
			NEW								

***CSR Notes: Capture details for this customer inquiry.**

Reason Code Hyperlink to choose reason code (Must choose one)	Urgency
RENEWAL – RENEWAL PRICING	MEDIUM

***CSR Notes: Capture the comments, must provide full details in comments.**

CUSTOMER IS CLAIMING THE BLACK AND WHITE RATE SHOULB BE .033

Prev Next

4. In the Rate field, enter the correct copy rate (cost per copy) for applicable tier.

5. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

6. Enter in detailed notes for the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

7. Click Next to proceed.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

8. Validate the ticket has been assigned to the correct person.

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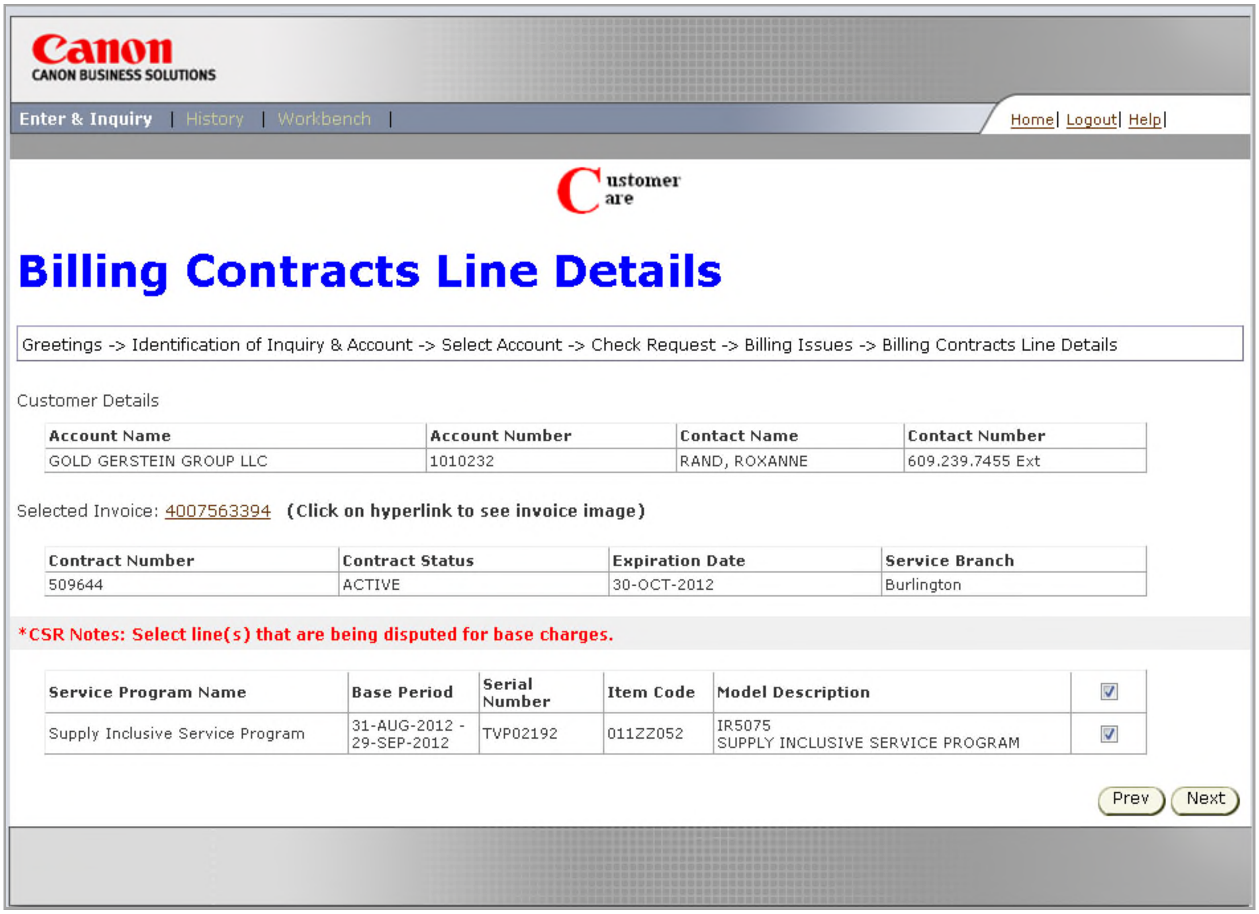
Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

9. Provide the ticket number to the customer for reference.

Contract Invoice Incorrect Billing - Contract Incorrect Base Charge

Customer states the recurring base charge on the invoice is incorrect. The invoice selected will provide you with the details of the invoice and may contain a line for base charge and/or usage charges.



1. Check the box next to the service line for applicable model/serial.

   Note: The screen in the example is displaying one column of checkboxes because the invoice only contains a service line.

2. Click Next to proceed.

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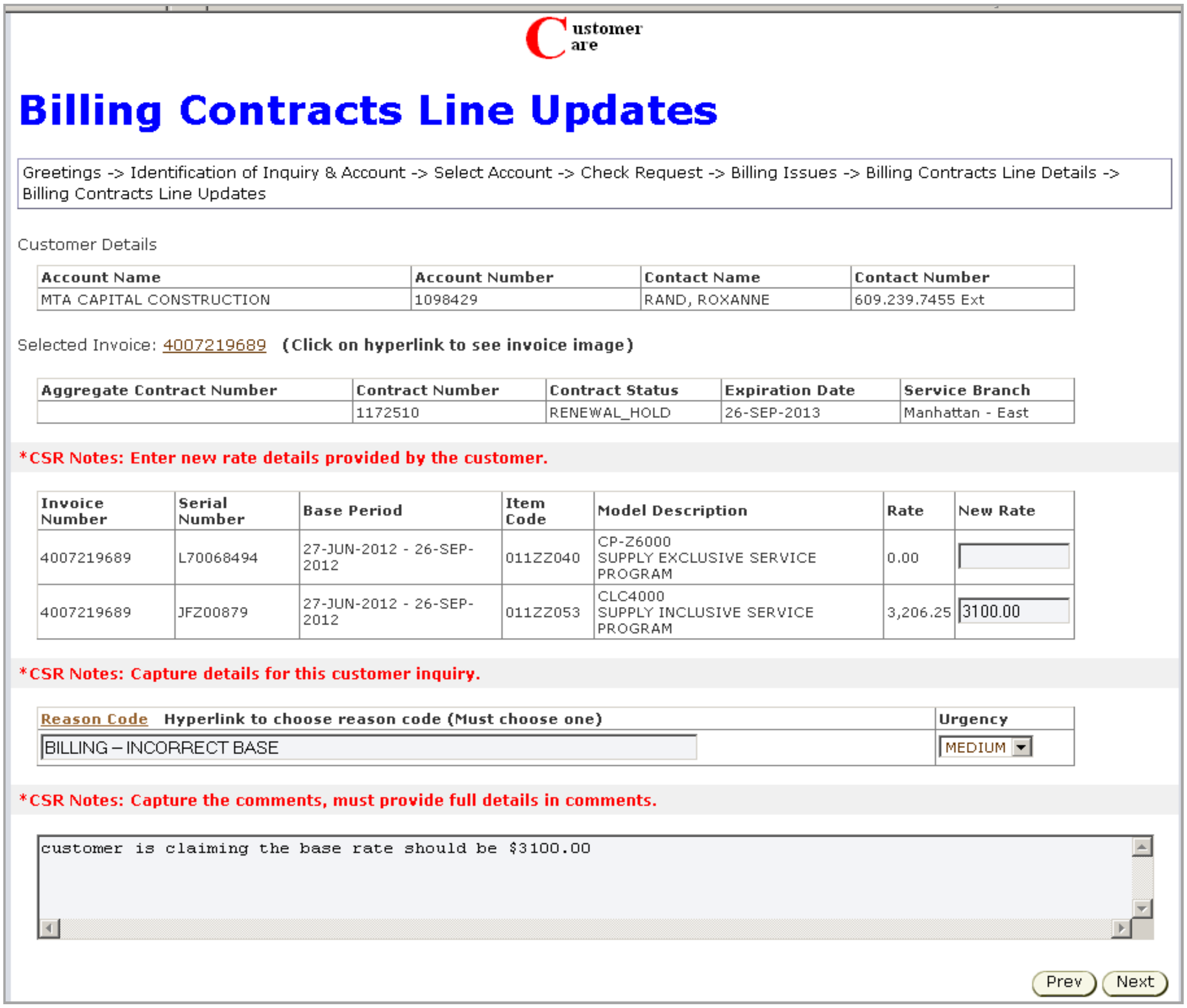

Customer Care

Billing Contracts Line Updates

Greetings -> Identification of Inquiry & Account -> Select Account -> Check Request -> Billing Issues -> Billing Contracts Line Details -> Billing Contracts Line Updates

Customer Details

Account Name	Account Number	Contact Name	Contact Number
MTA CAPITAL CONSTRUCTION	1098429	RAND, ROXANNE	609.239.7455 Ext

Selected Invoice: 4007219689 **(Click on hyperlink to see invoice image)**

Aggregate Contract Number	Contract Number	Contract Status	Expiration Date	Service Branch
	1172510	RENEWAL_HOLD	26-SEP-2013	Manhattan - East

***CSR Notes: Enter new rate details provided by the customer.**

Invoice Number	Serial Number	Base Period	Item Code	Model Description	Rate	New Rate
4007219689	L70068494	27-JUN-2012 - 26-SEP-2012	011ZZ040	CP-Z6000 SUPPLY EXCLUSIVE SERVICE PROGRAM	0.00	
4007219689	JFZ00879	27-JUN-2012 - 26-SEP-2012	011ZZ053	CLC4000 SUPPLY INCLUSIVE SERVICE PROGRAM	3,206.25	3100.00

***CSR Notes: Capture details for this customer inquiry.**

Reason Code **Hyperlink to choose reason code (Must choose one)**	Urgency
BILLING – INCORRECT BASE	MEDIUM

***CSR Notes: Capture the comments, must provide full details in comments.**

customer is claiming the base rate should be $3100.00

Prev Next

3. Enter the correct service rate in the New Rate box for applicable model/serial.

4. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

5. Enter in detailed notes for the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

6. Click Next to proceed

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

7. Validate the ticket has been assigned to the correct person.

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Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

8. Provide the ticket number to the customer for reference.

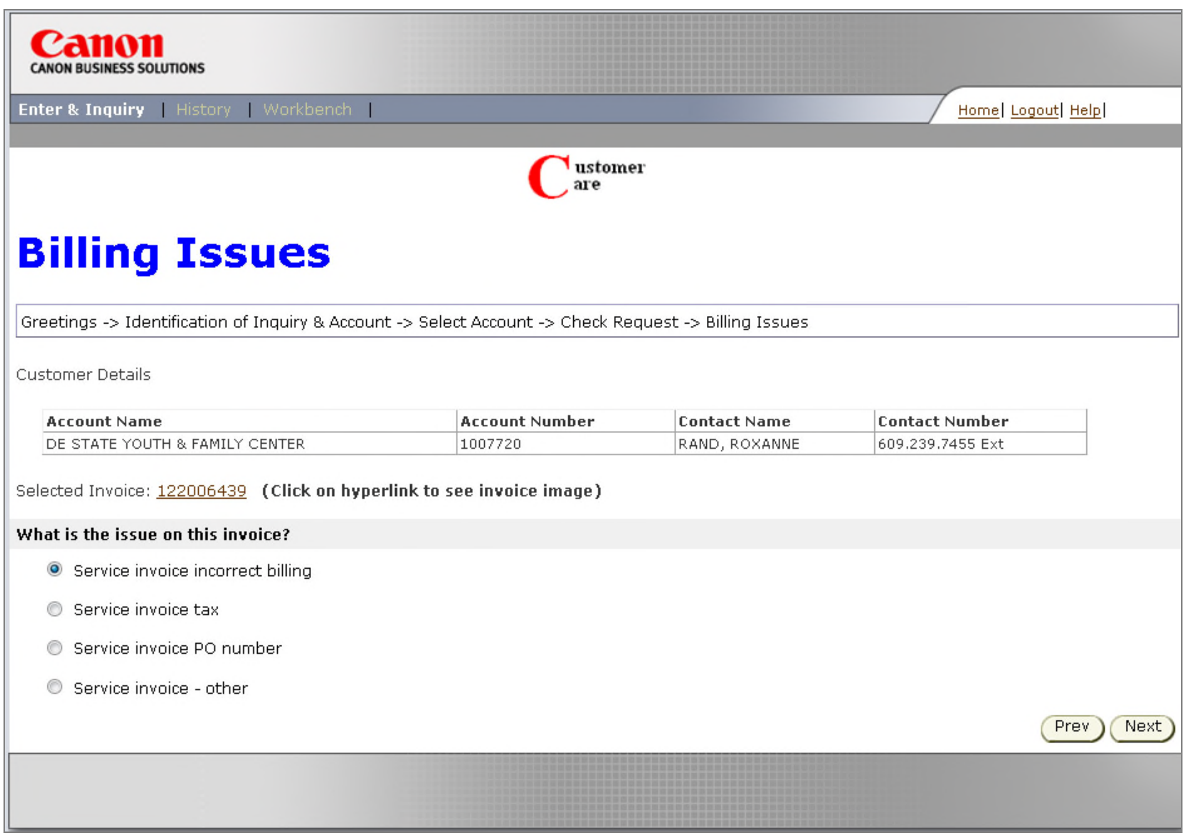
Equipment, Service or Supply Invoice Incorrect Billing

Once an invoice is selected, you will be prompted to select the appropriate issue pertaining to the invoice type and customer issue.

This process is followed for logging and tracking equipment, service and supply related issues.

- Equipment issues such as cash discounts.
- Service issues such as incorrect billing rates, machine covered under contract/warranty, service settlements, duplicate billing, missed billing, billing to incorrect account or discrepancy in invoice amount.
- Supply Issues such as Returned Merchandise Authorizations (RMA), damaged/defective goods, incorrect shipments, quantity of supplies shipped incorrect, short shipment, duplicate shipments, incorrect billing, items covered under contract, supply related settlement or freight.

The Customer Care Module will ask if this is a billing issue. You will answer yes for anything that affects billing: incorrect billing, tax, billed wrong account, missing or incorrect purchase order number.



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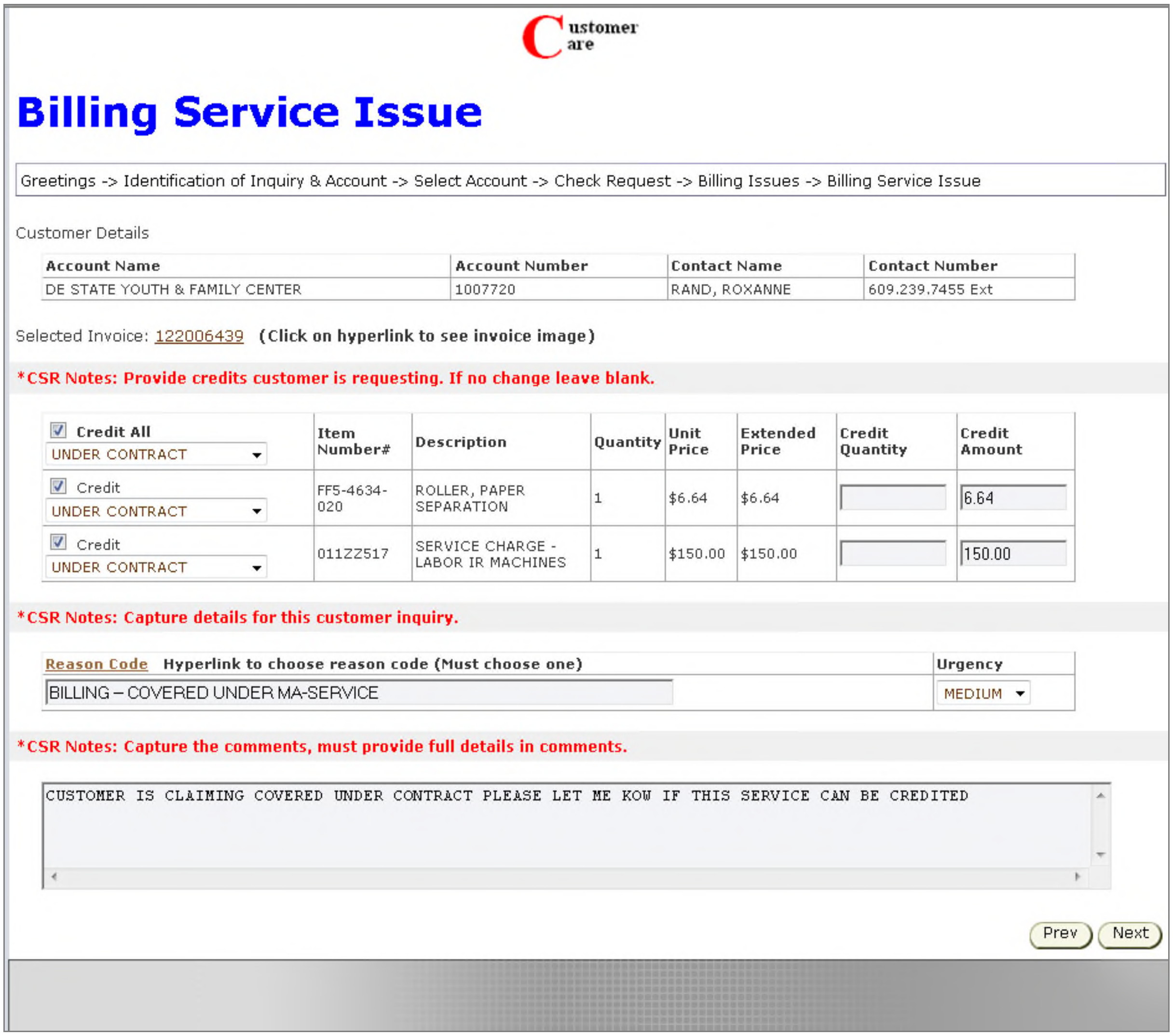
1. Select issue of [Invoice Type] invoice incorrect billing.

2. Click Next to proceed.

   In this example, the customer is stating they have a service contract and should not be charged for service.



3. Select Credit All if all lines of the invoice are to be credited or select individual lines.

4. Click in field under Credit All or Credit of line being credited and select reason for credit.

   Note: This does not apply to Equipment Invoices.

5. Enter in Credit Amount for each line the customer is disputing.

6. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

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7. Enter in detailed notes on the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

8. Click Next to proceed.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

9. Validate the ticket has been assigned to the correct person.

   Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

10. Provide the ticket number to the customer for reference.

Tax Issues on Invoice

Customer states they are tax exempt and they were charged tax on the invoice or they were not taxed on their invoice. A tax exempt form must be obtained prior to creating the ticket. Once received, the ticket can be created and the tax exempt form must be attached to the ticket.

The Customer Care Module will ask if this is a billing issue. You will answer yes for anything that affects billing: incorrect billing, tax, billed wrong account, missing or incorrect purchase order number.

The first question, What is the issue on this invoice? Will state Contract Invoice Tax, Equipment Invoice Tax, Service Invoice Tax or Supply Invoice Tax depending on the source of the invoice.

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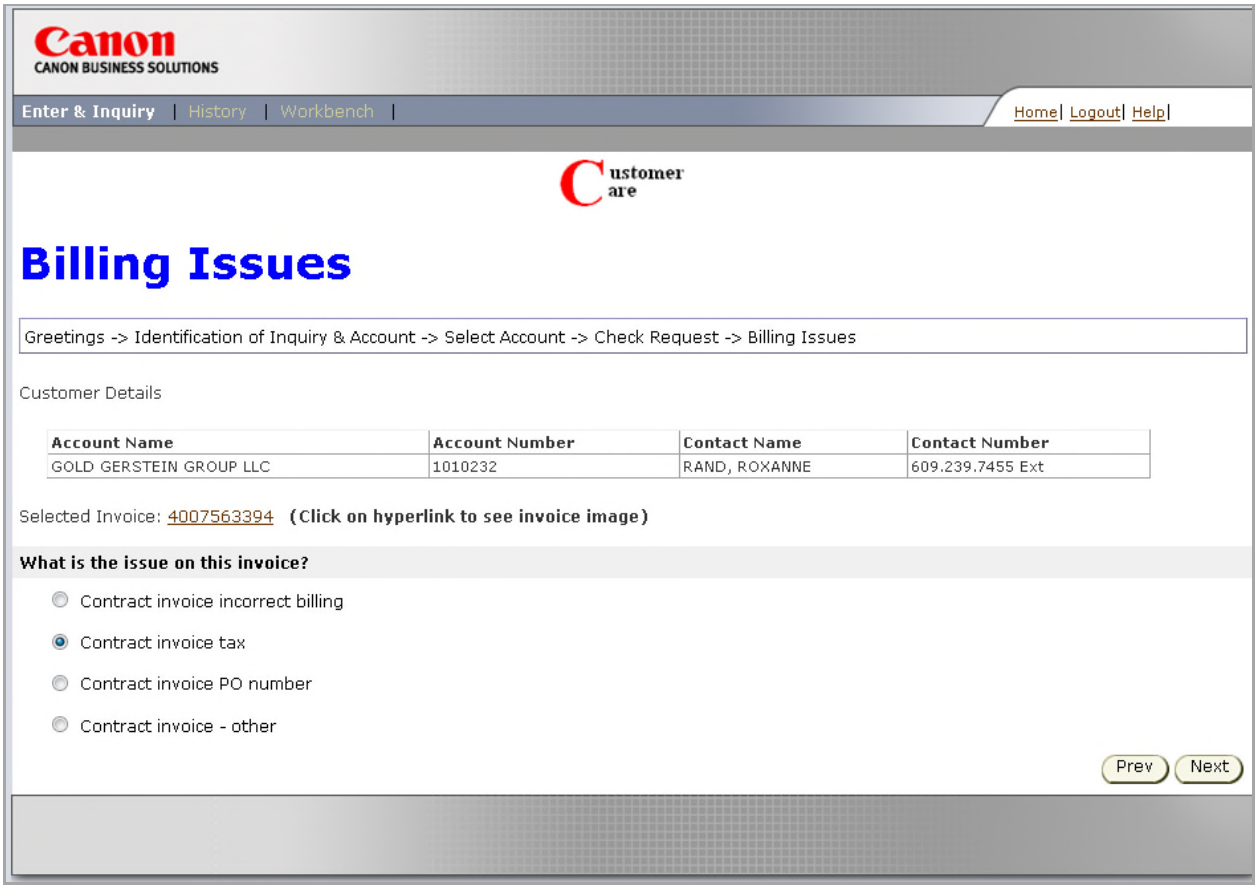

1. Select [Invoice Type] Invoice Tax.
2. Click Next to proceed.

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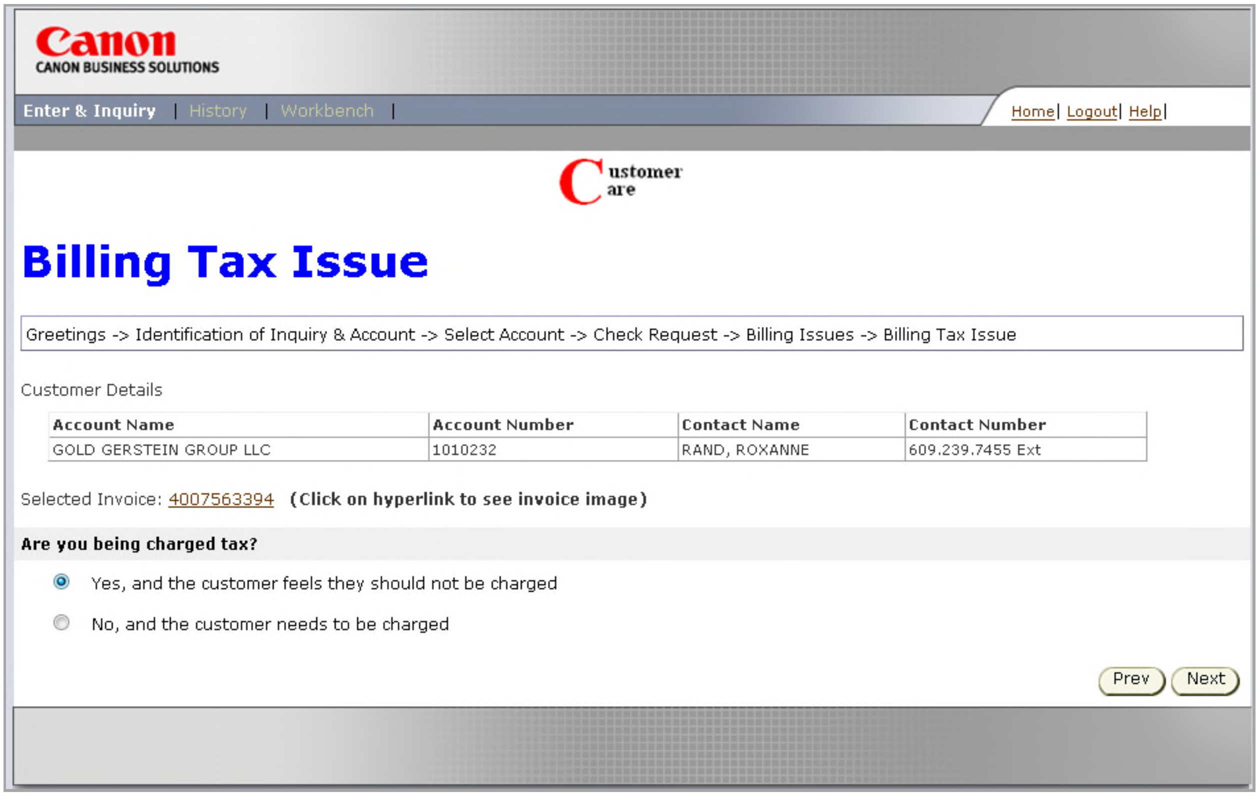

- Check Yes if tax was charged and customer is disputing.
- Check No if tax was not charged and customer is disputing.

3. Click Next to proceed

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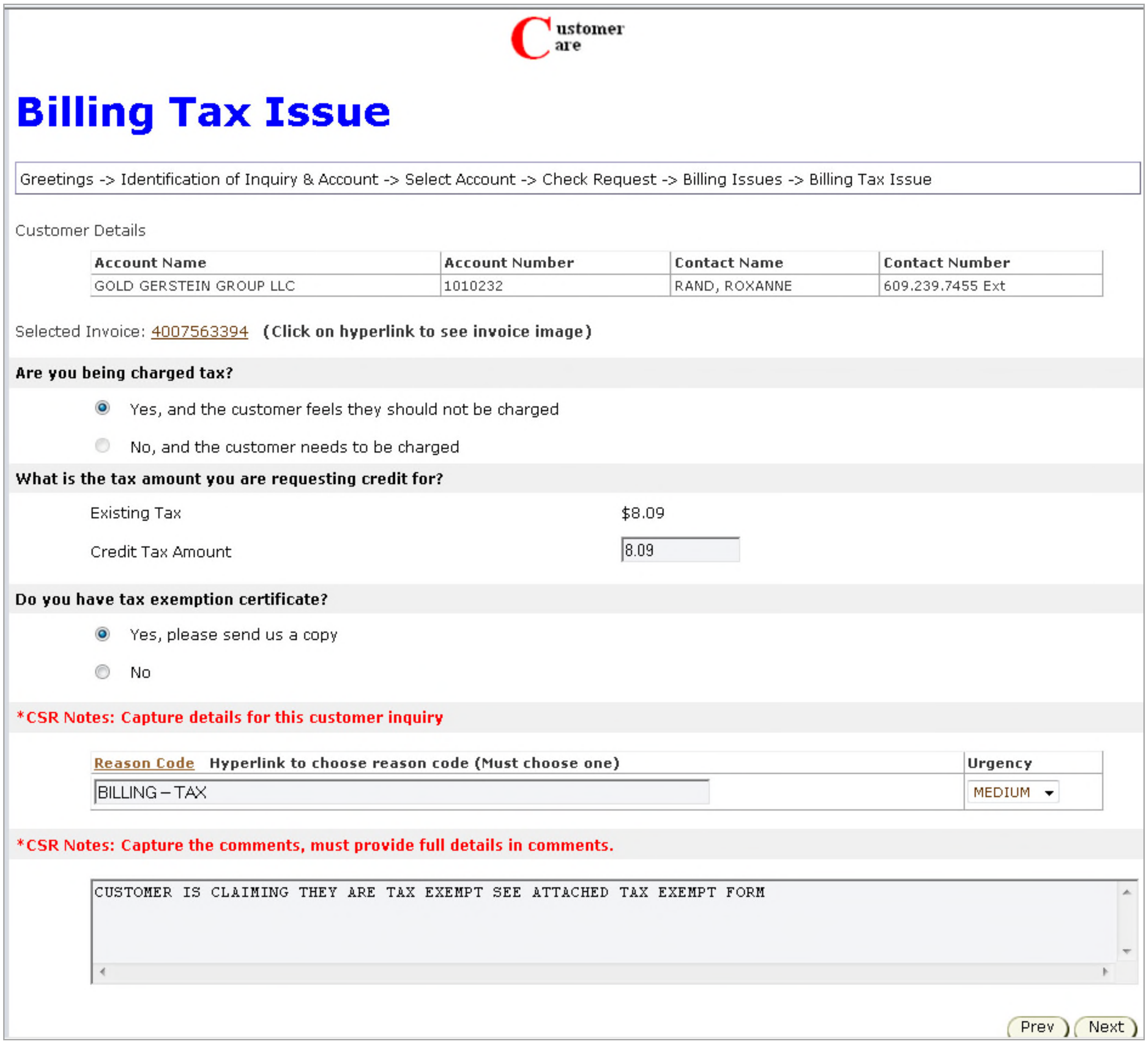
Customer Care

Billing Tax Issue

Greetings -> Identification of Inquiry & Account -> Select Account -> Check Request -> Billing Issues -> Billing Tax Issue

Customer Details

Account Name	Account Number	Contact Name	Contact Number
GOLD GERSTEIN GROUP LLC	1010232	RAND, ROXANNE	609.239.7455 Ext

Selected Invoice: 4007563394 (Click on hyperlink to see invoice image)

Are you being charged tax?

- (selected) Yes, and the customer feels they should not be charged
- No, and the customer needs to be charged

What is the tax amount you are requesting credit for?

Existing Tax	$8.09
Credit Tax Amount	8.09

Do you have tax exemption certificate?

- (selected) Yes, please send us a copy
- No

*CSR Notes: Capture details for this customer inquiry

Reason Code Hyperlink to choose reason code (Must choose one)	Urgency
BILLING – TAX	MEDIUM

*CSR Notes: Capture the comments, must provide full details in comments.

CUSTOMER IS CLAIMING THEY ARE TAX EXEMPT SEE ATTACHED TAX EXEMPT FORM

Prev Next

4. Enter the amount of tax to be credited in the Credit Tax Amount field.

   - If the customer is exempt, enter full amount of Existing Tax charged on invoice.
   - If the customer is disputing the tax rate, enter the difference. Example: Customer was charged 7% tax (8.09) for $115.50 total of invoice line. Customer is stating the tax rate is 6.5% (7.51). Enter in .58 in Credit Tax Amount field (8.09-7.51).

5. In the CSR Notes section, click on the Reason Code hyperlink and select Billing – Tax Reason Code.

6. Enter in detailed notes on the issue in the Notes section.

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Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation number will create.

7. Click Next to proceed.

8. In the ticket details section, click on Attachments link to attach supporting paperwork which must include tax exemption certificate. Refer to How to Attach Documents section for complete directions.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

9. Validate the ticket has been assigned to the correct person.

   Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

10. Provide the ticket number to the customer for reference.

Purchase Order Correction

Customer is requesting a purchase order update on an invoice. If the customer indicates PO's are required for the account, notification must be sent to Data Management to update the customer record. A PO is attached to the ticket if available. Additionally, if this PO is to appear on all contract invoices, PO must be updated in Installed Base or Contracts.

The Customer Care Module will ask if this is a billing issue. You will answer yes for anything that affects billing: incorrect billing, tax, billed wrong account, missing or incorrect purchase order number.

The first question, What is the issue on this invoice? Will state Contract PO Number, Equipment PO Number, Service PO Number or Supply PO Number depending on the source of the invoice.

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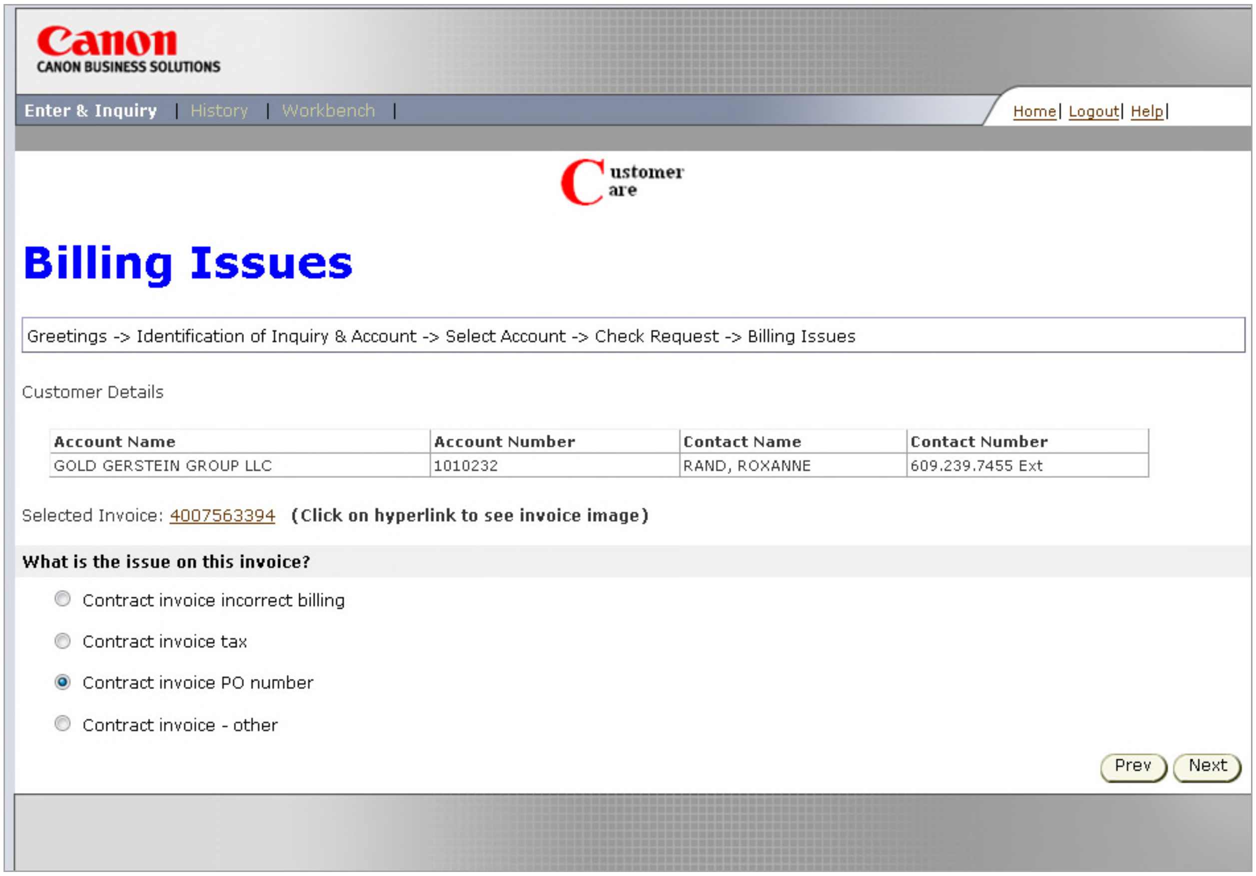

11. Select [Invoice Type] invoice PO number.

12. Click Next to proceed.

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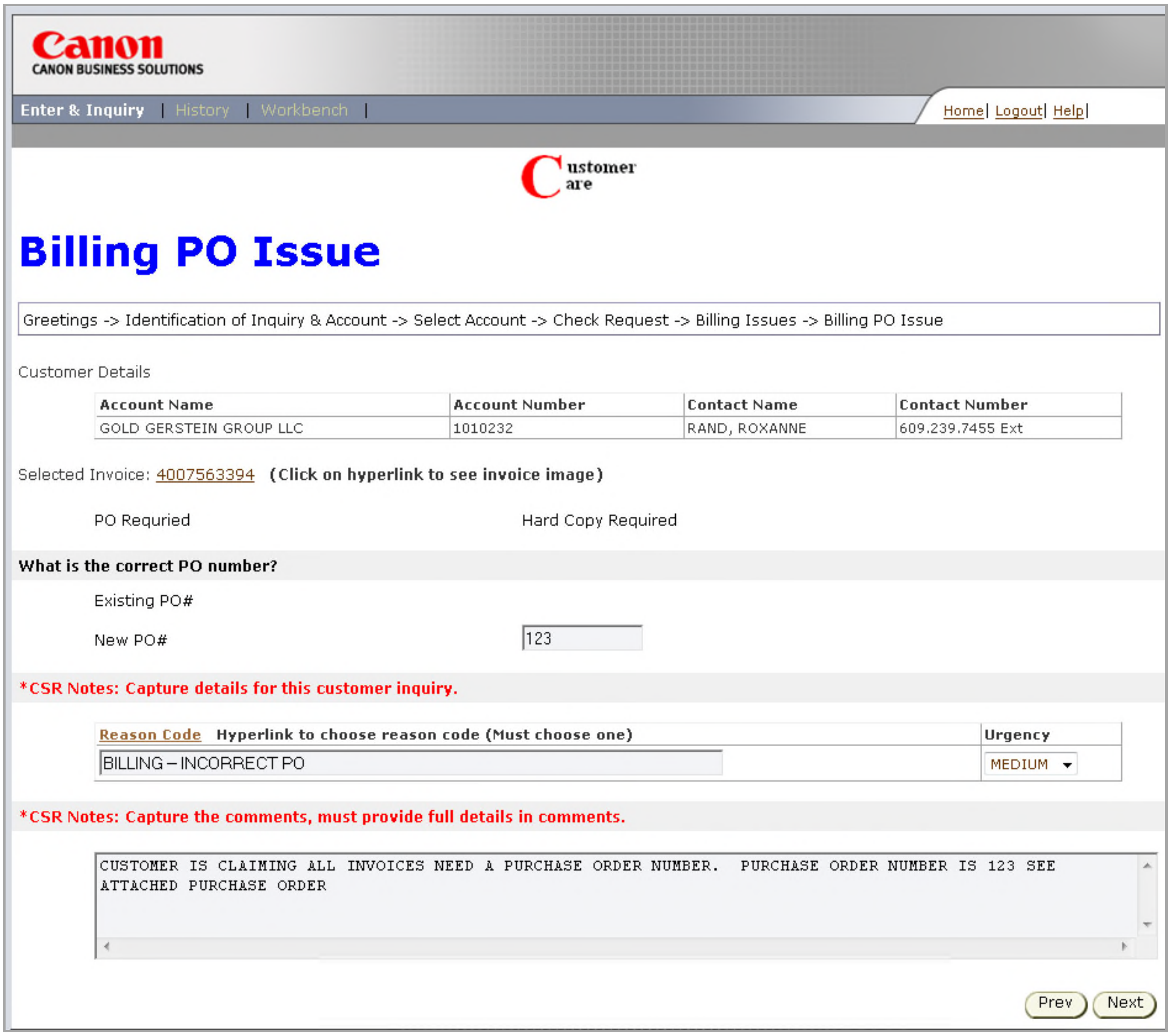

13. Type in PO provided by customer in the New PO# field.

14. In the CSR Notes section, click on the Reason Code hyperlink and select Billing – Incorrect PO Reason Code.

15. Enter in detailed notes on the issue in the Notes section.

    Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

16. Click Next to proceed.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

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17. Validate the ticket has been assigned to the correct person.

    Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

18. Provide the ticket number to the customer for reference.

19. If this is a contract invoice and the customer requires PO appear on all contract invoices, the PO must be updated in IB or Contracts.

    - Enter the PO on the IB record, if the PO applies to a specific serial number.

    - Enter the PO on the Contract, if the PO applies to all machines on the contract.

    Note: If a PO appears on the IB records for the machine and on the machines contract, the PO in IB will appear on invoice.

Other Invoice Issues

Customer has general inquiries related to a Contract, Equipment, Service or Supply Invoice and issue does not fall under one of the other issue types. This could include explanation of pricing, change of address, cancellation of contract, pick up of equipment, etc. This option is also used for pricing/meter corrections to invoices converted from another system (i.e. Océ Oracle or OMD) which cannot be processed through E218 automated Credit /Rebill.

The Customer Care Module will ask if this is a billing issue. You will answer yes for anything that affects billing: incorrect billing, tax, billed wrong account, missing or incorrect purchase order number.

The first question, What is the issue on this invoice? Will state Contract Invoice Other, Equipment Invoice Other, Service Invoice Other or Supply Invoice Other depending on the source of the invoice.

Note: If the customer is requesting cancellation of a contract or pick up of equipment, request must be received in writing prior to entering Customer Care ticket. Cancellation request must be attached to ticket.

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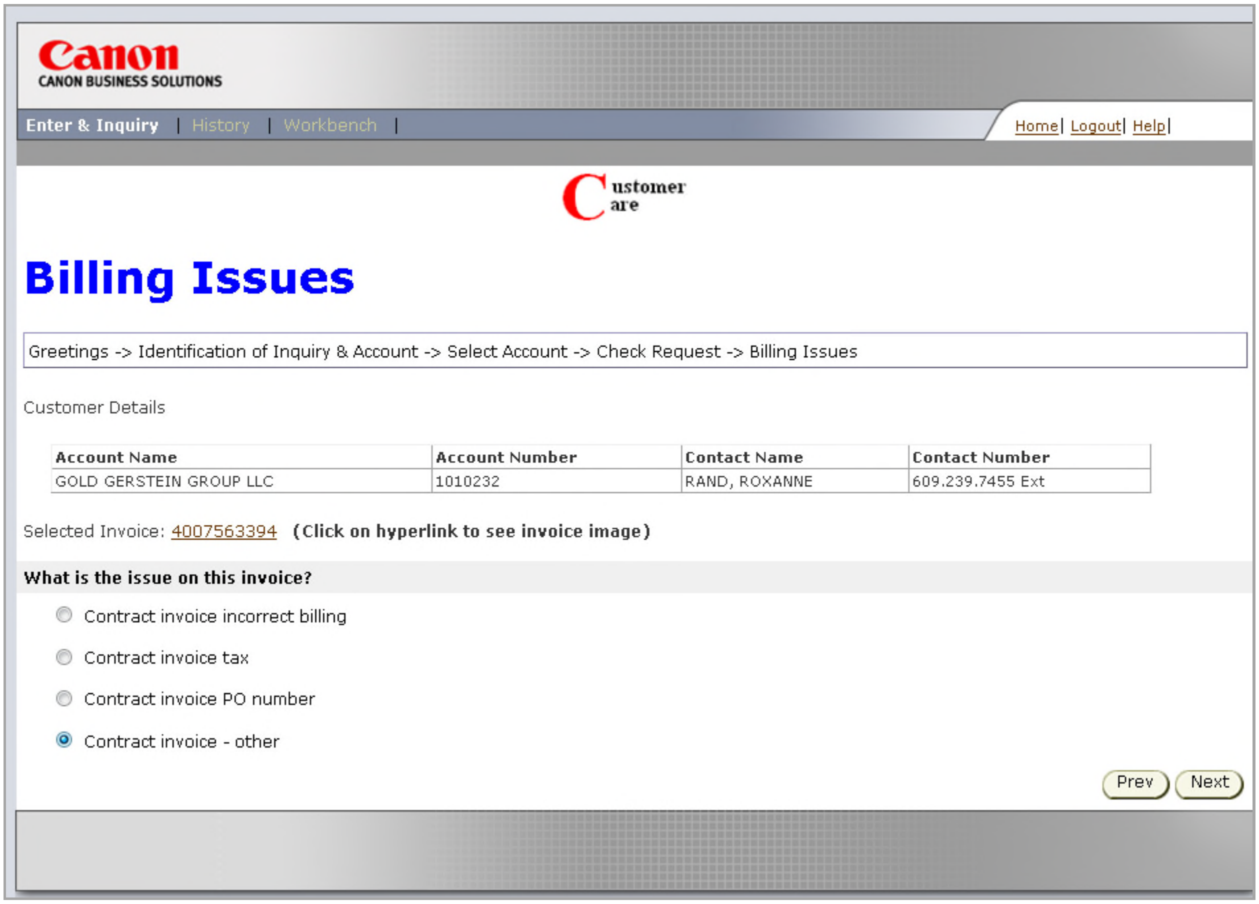

1. Select [Invoice Type] Invoice – Other
2. Click Next to proceed

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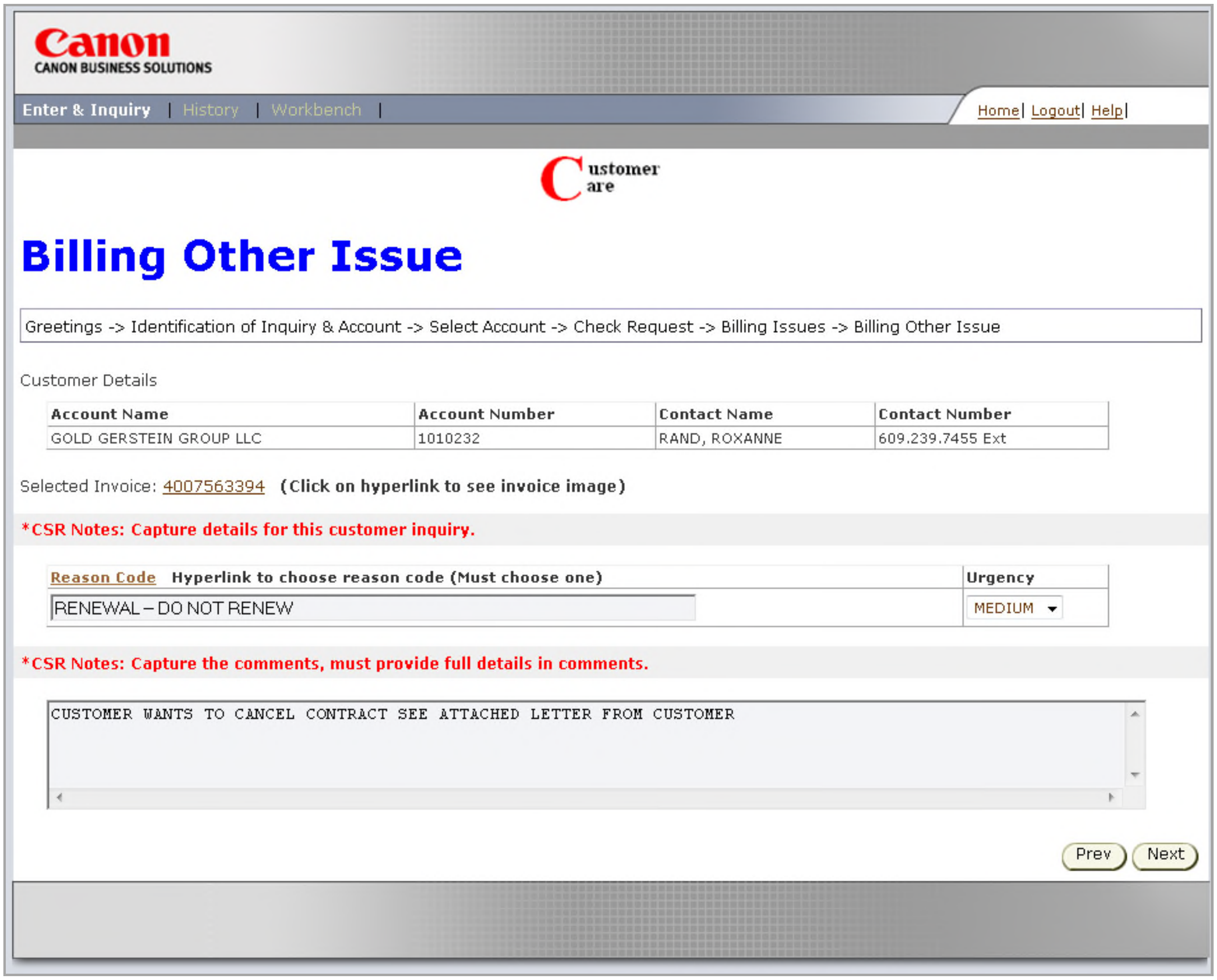

3. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

4. Enter in detailed notes on the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

5. Click Next to proceed.

6. In the Ticket Details section, click on Attachments link to attach supporting paperwork. Refer to How to Attach Documents section for complete directions.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

7. Validate the ticket has been assigned to the correct person.

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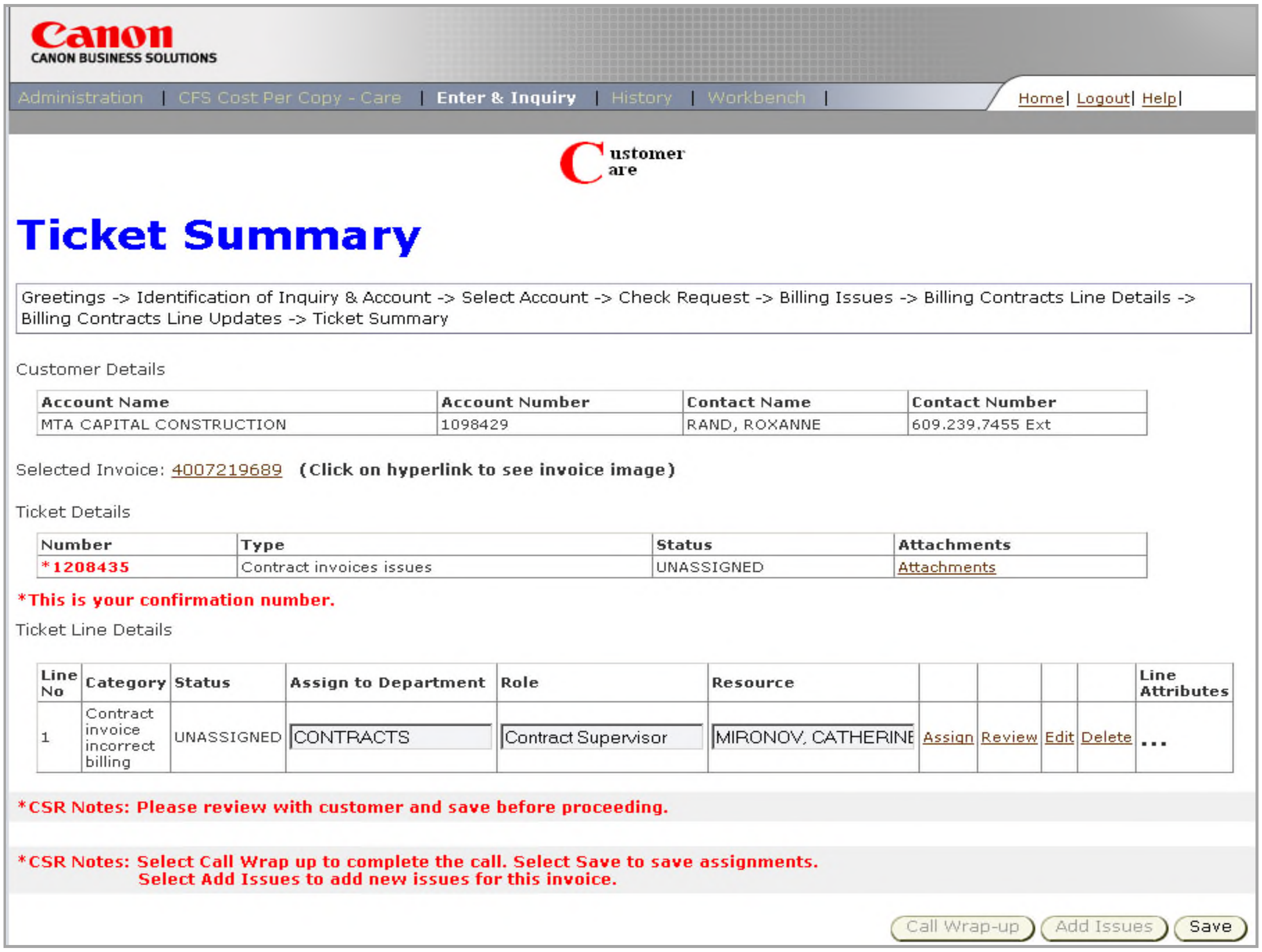
Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

8. Provide the ticket number to the customer for reference.



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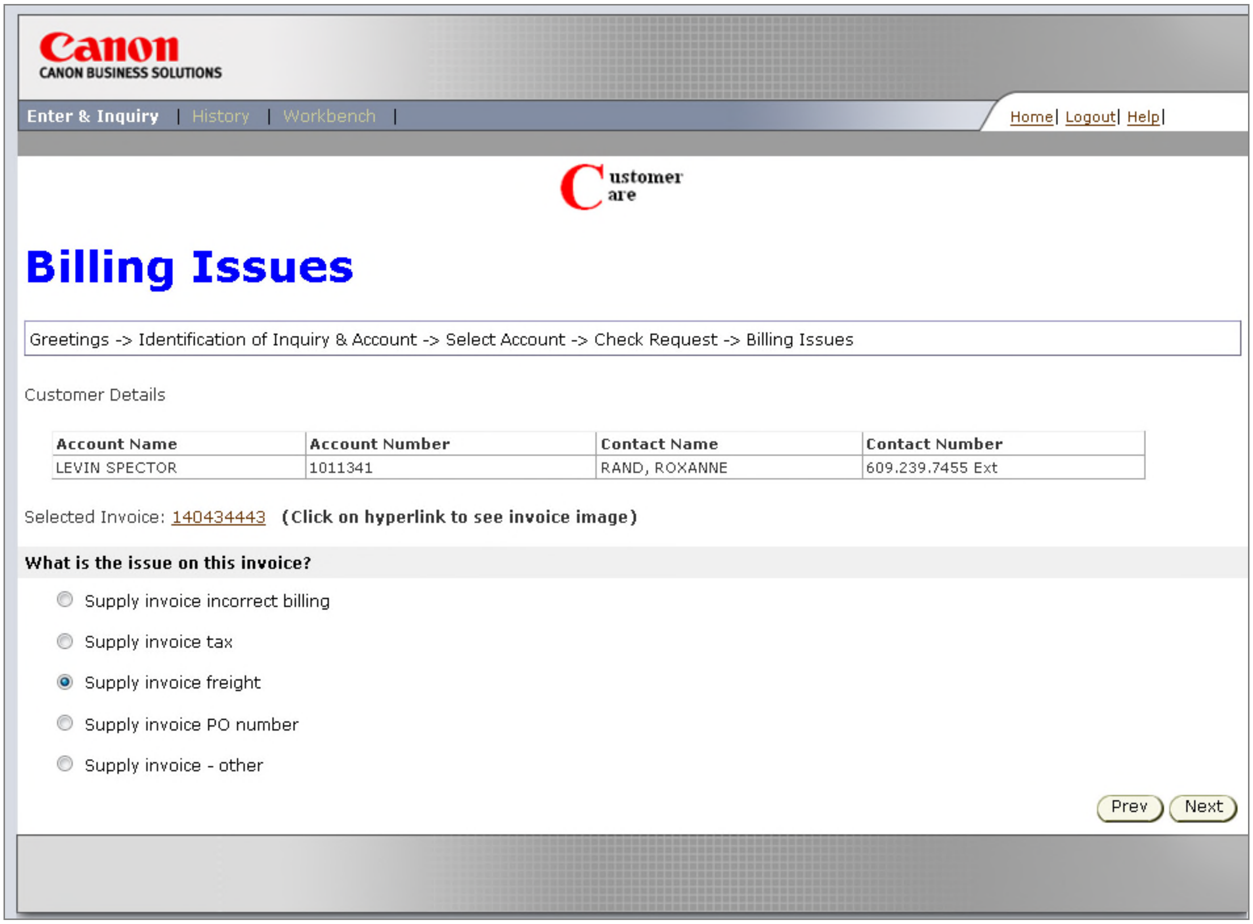
Freight Issue on Supply Invoice

Supply Invoice Incorrect Billing is used if the customer is disputing the freight charge on the invoice they received for supplies. Supply invoices often contain many lines for items ordered. You will need to select the pertinent line for the issue.



1. Select Supply invoice freight.
2. Click Next to proceed.

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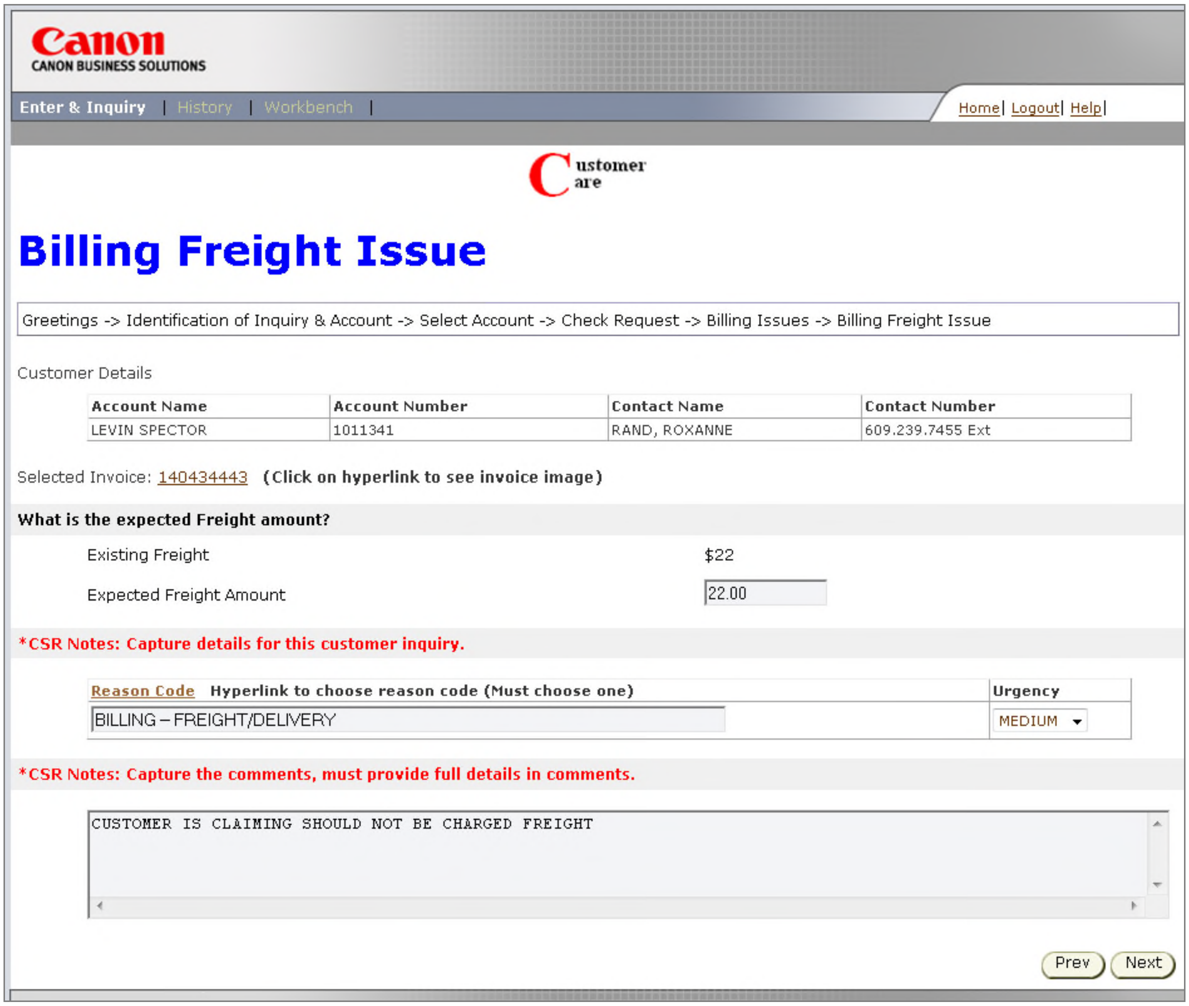

3. Enter in the Expected Freight Amount.

4. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

5. Enter in detailed notes on the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

6. Click Next to proceed.

7. In the ticket details section, click on Attachments link to attach supporting paperwork. Refer to How to Attach Documents section for complete directions.

When a ticket is logged by the invoice number, the workflow will automatically assign a person to the ticket.

8. Validate the ticket has been assigned to the correct person.

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Note: If ticket was not assigned to correct person, refer to How to Assign Ticket section to reassign the ticket.

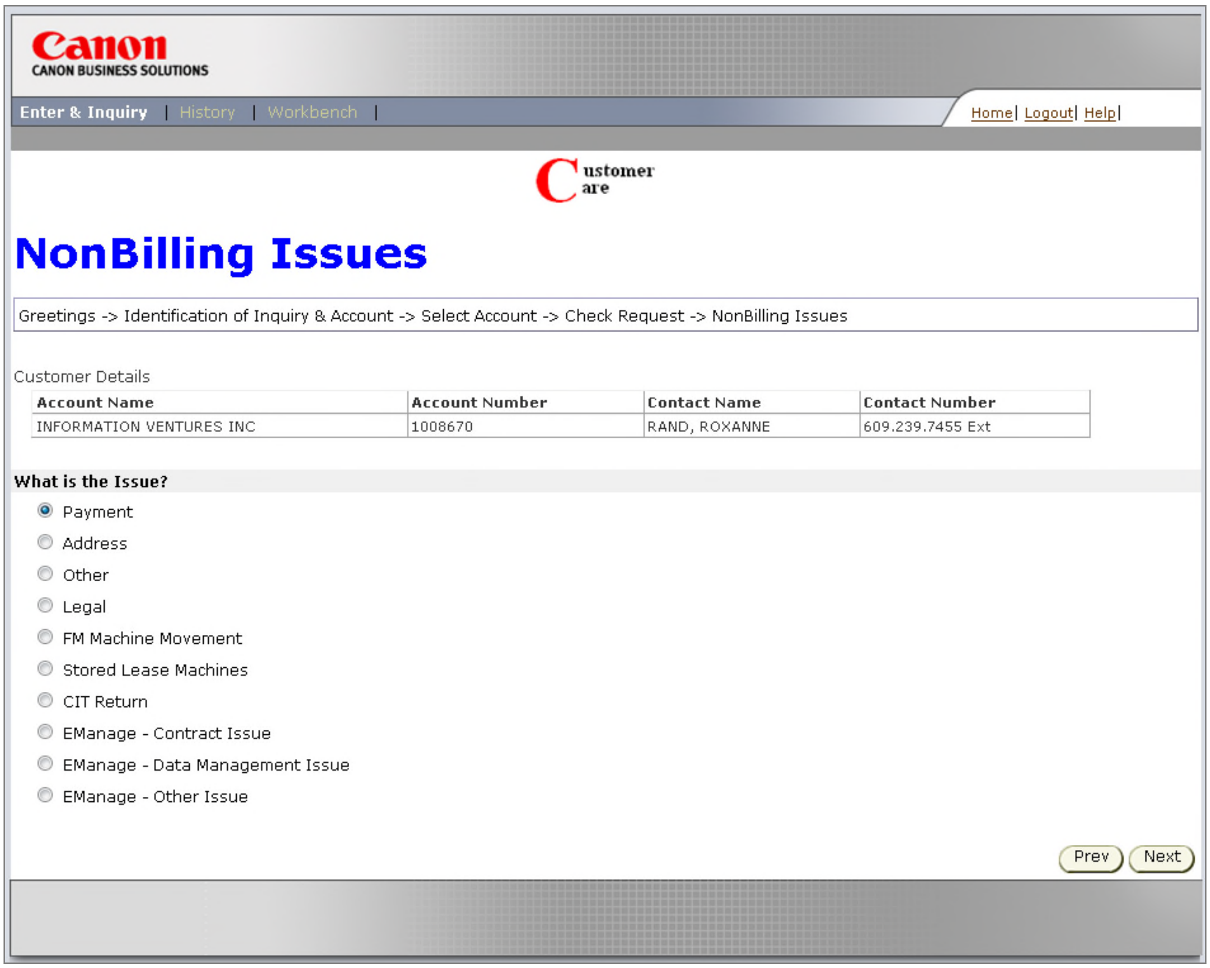
9. Provide the ticket number to the customer for reference.

Logging Tickets for Non Billing Issues

This process is followed for logging and tracking primarily Accounts Receivable related issues. This includes but is not limited to miscellaneous issues with credit card payments, refund with existing credits on account, statement questions, payment inquires, applying credits on account to open invoices.

Non Billing Issues – Claim of Payment

Customer has received a statement and claims invoice was paid. Customer has a copy of cancelled check. After checking customers account, invoice is still open.



1. Select issue of Payment.

2. Click Next to proceed.

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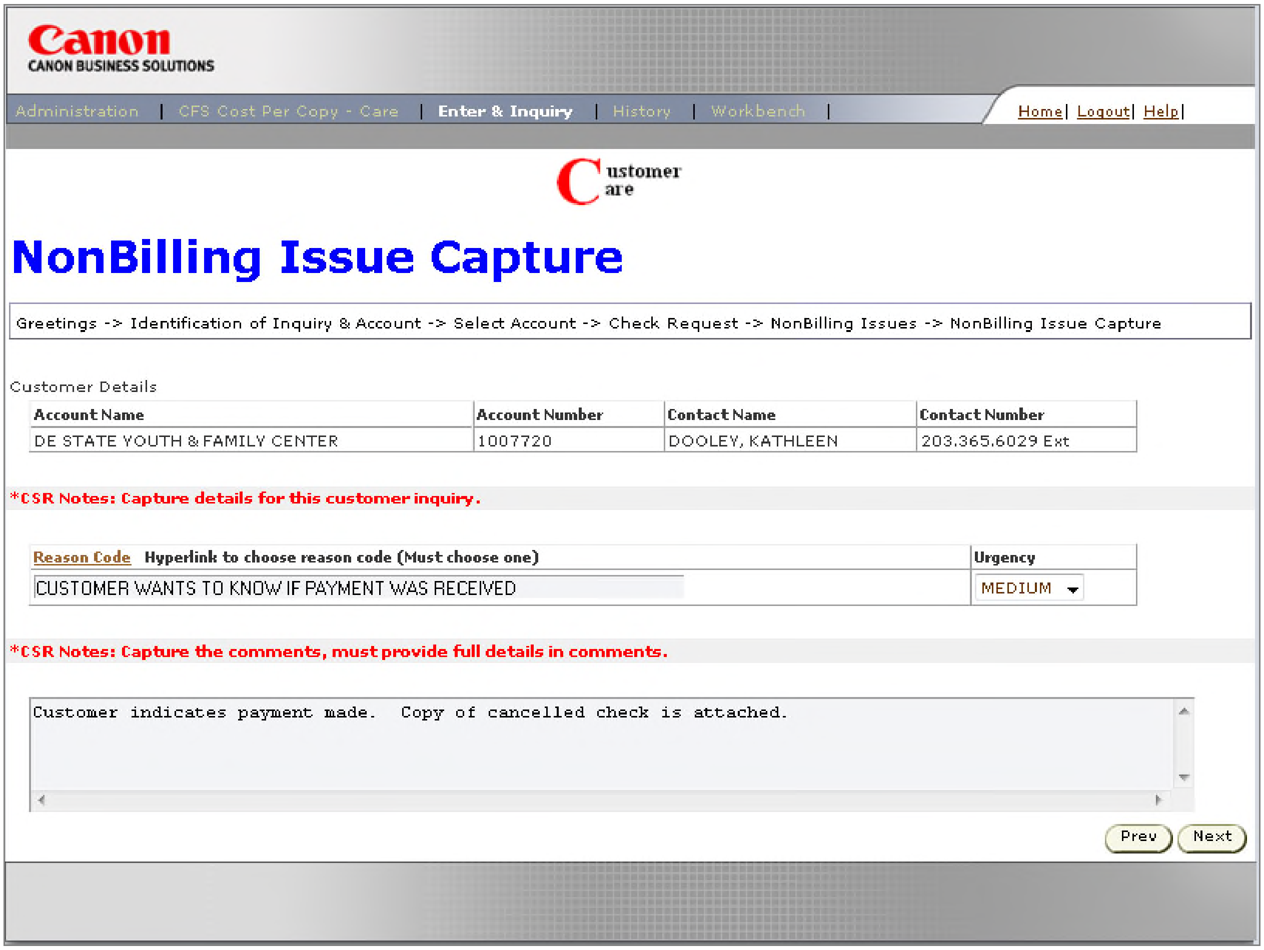

3. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

4. Enter in detailed notes on the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

5. Click Next to proceed.

Non Billing Issues – Open Credits on Account

Customer has received a statement and has credits on account that they would like applied to open invoices.

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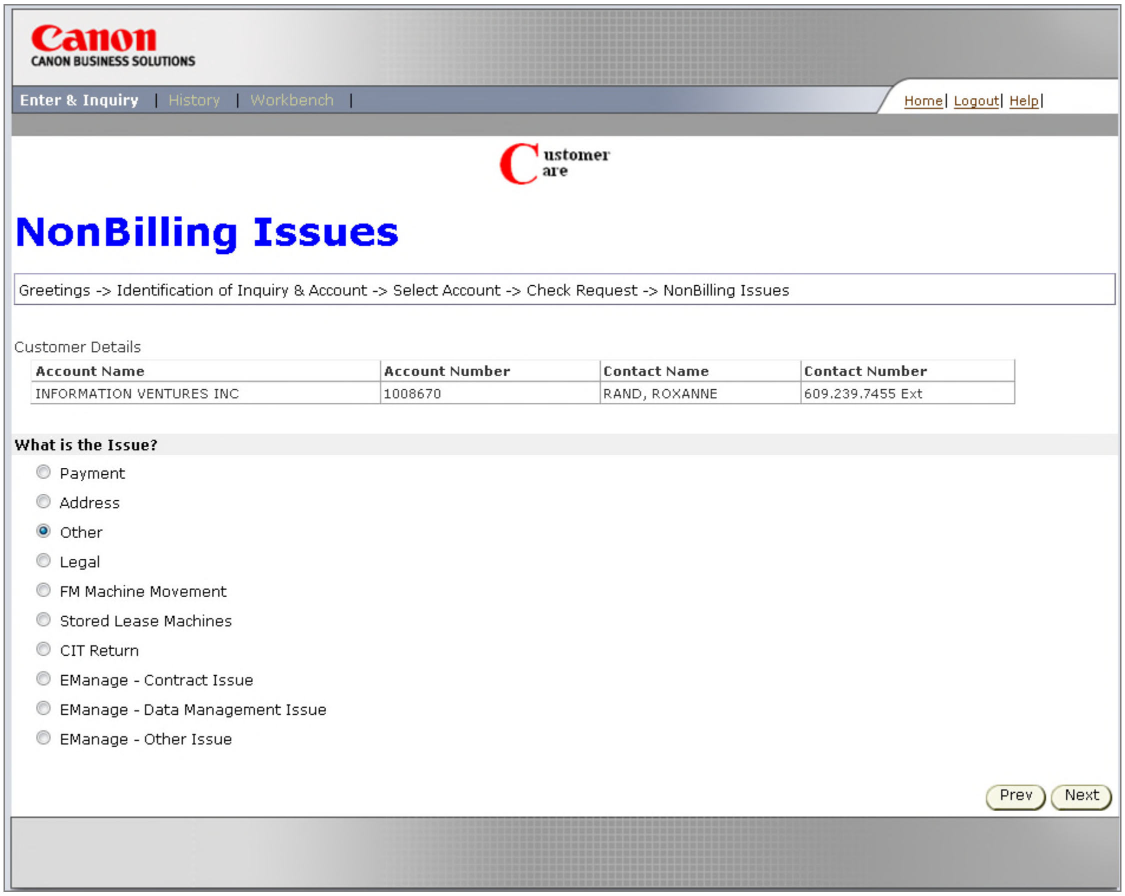

1. Select issue of Other.
2. Click Next to proceed.

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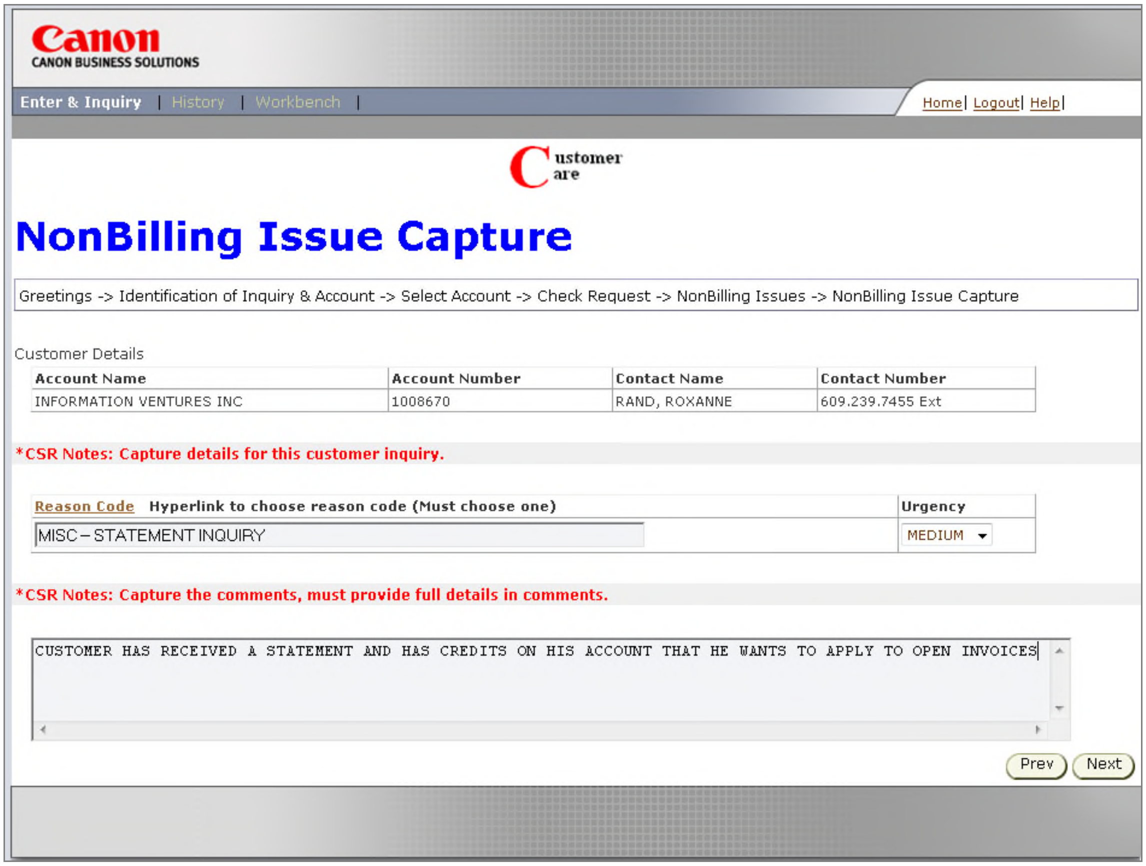

3. In the CSR Notes section, click on the Reason Code hyperlink and select applicable Reason Code.

4. Enter in detailed notes on the issue in the Notes section.

   Note: This is the last time you can back out of the ticket before it is actually created. After you press Next, the confirmation ticket number will create.

5. Click Next to proceed.

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