vixen *user manual*

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login / logout

Login

In order to access the vixen Telco Management System, you will require an employee Username and Password. Your unique Username and Password must be entered on the login page when requested. The vixen system does not allow simultaneous access from different computers with the same Username and Password, therefore it is important that you do not use another employees Username and Password or allow another employee to use yours.

Note: If someone else logs in with your Username and Password, you will automatically be logged out.

Logout

You can log out of the system by clicking on the following icon in the side menu:

After confirming that you wish to logout, your current session will be ended and your browser will return to the Login page.

Note: If the system is left unused for 20 minutes or more, an automatic logout will occur. Attempting to load a new page or submit data at this time will be unsuccessful, and you will be returned to the Login page.

Employee Console

After you have logged into the system, you will be taken to the employee console. This page provides you with five main options as shown below:

Add Customer

Add a new customer to the system.

Find Customer

Find a customer and access their account.

Recent Customers

View recently accessed customers.

View Available Plans

View details of available plans.

Logout

Logout of the system.

Note: These options are also available in the side menu on every page.

System Navigation

View Available Plans

You can view a list of all available rate plans by clicking on the following icon in the side menu:

To search for a particular rate plan, enter the 'Plan Name' and select a 'Service Type' in the search fields shown below.

Search for a Plan

Plan Name :	contains	
Service Type :	ADSL Connection	

Search

Note: You can view the rates associated with a particular rate plan by clicking on 'View Plan Details' in the displayed list. (see 'View Rate Plan Details')

add customer

System Navigation

Add Customer

To add a new customer to the system, select the 'Add Customer' option from the side menu. Ensure all required fields are entered, as the Customer will not be added to the system without these fields. A description of the different types of required fields can be found at the bottom of the 'Add Customer' page, and is as follows:

* : Required Field

1 : One or both fields required

2 : One or both fields required

: Required only when the associated option is selected

Account details are used to specify general details about the business. The ABN/ ACN fields will turn green when the number entered is valid. A red field signifies an invalid ABN or ACN. ABN & ACN can be entered with or without spaces.

Account Details

* **Business Name** :	Vixen Systems
Trading Name :	
1 **ABN #** :	
1 **ACN #** :	000 000 000
* **Address (Line 1)** :	5 James St
Address (Line 2) :	
* **Suburb** :	Brisbane
* **Postcode** :	4000
* **State** :	QLD
* **Customer Group** :	Telco Blue

Note: The address details on this page are the customers billing address

Direct Debit and Credit Card details are not required unless the customer has elected to use that billing option. Additional Billing details can be added at a later stage if required. (See 'Add Bank Account Details', 'Add Credit Card Details')

Billing Details

* **Billing Method** :	Post ▾
* **Payment Method** :	○ **Invoice**
	⦿ **Direct Debit - from Bank Account**
	# **Bank Name** : Westpac
	# **BSB #** : 123 123
	# **Account #** : 321 321
	# **Account Name** : J Doe
	○ **Direct Debit - from Credit Card**
	# **Card Type** : Visa ▾
	# **Card Holder Name** :
	# **Credit Card Number** :
	# **Expiration Date** : 1 ▾ / 2007 ▾

Note: BSB #, Account # & Credit Card # Can be entered with or without spaces

add customer

Each Account must have a Primary Contact who oversees the Account. Additional Contacts may be added to the Account at a later stage if required. (See 'Add Contact'). Below is an example of the details required to add a Contact.

Primary Contact Details

* Title :	Miss	
* First Name :	Jane	
* Last Name :	Doe	
* Date of Birth :	15 ▼ / 6 ▼ / 1976 ▼	
Job Title :	Manager	
* Email Address :	jdoe@vixen.com.au	
² Phone Number :		
² Mobile Number :	0411 121 323	
Fax Number :		
* Username :	janedoe	
* Password :	password	

Once you have entered all required fields and continued, the 'View Account Details' page will be displayed, indicating that the customer has been successfully added.

Note. This form will add a new Customer. If you wish to add an Account to an existing Customer, you will need to use the 'Add Associated Account' link from the existing account.

System Navigation

```
                    ┌──────────────────┐
                    │ Employee Console │
                    └────────┬─────────┘
                             │
                             ▼
                    ┌──────────────────┐
                    │  Find Customer   │
                    └────────┬─────────┘
              ┌──────────────┴───────────────┐
              ▼                              ▼
   ┌──────────────────┐          ┌──────────────────┐
   │ [Select An Account] │       │ [Select A Contact] │
   └────────┬─────────┘          └────────┬─────────┘
            ▼                              ▼
   ┌──────────────────┐          ┌──────────────────┐
   │  Select A Contact │         │ [Select An Account] │
   └────────┬─────────┘          └────────┬─────────┘
            └──────────┬───────────────────┘
                       ▼
            ┌──────────────────────┐
            │ Customer Verification │
            └──────────┬───────────┘
                       ▼
            ┌──────────────────────┐
            │  View Contact Details │
            └──────────────────────┘
```
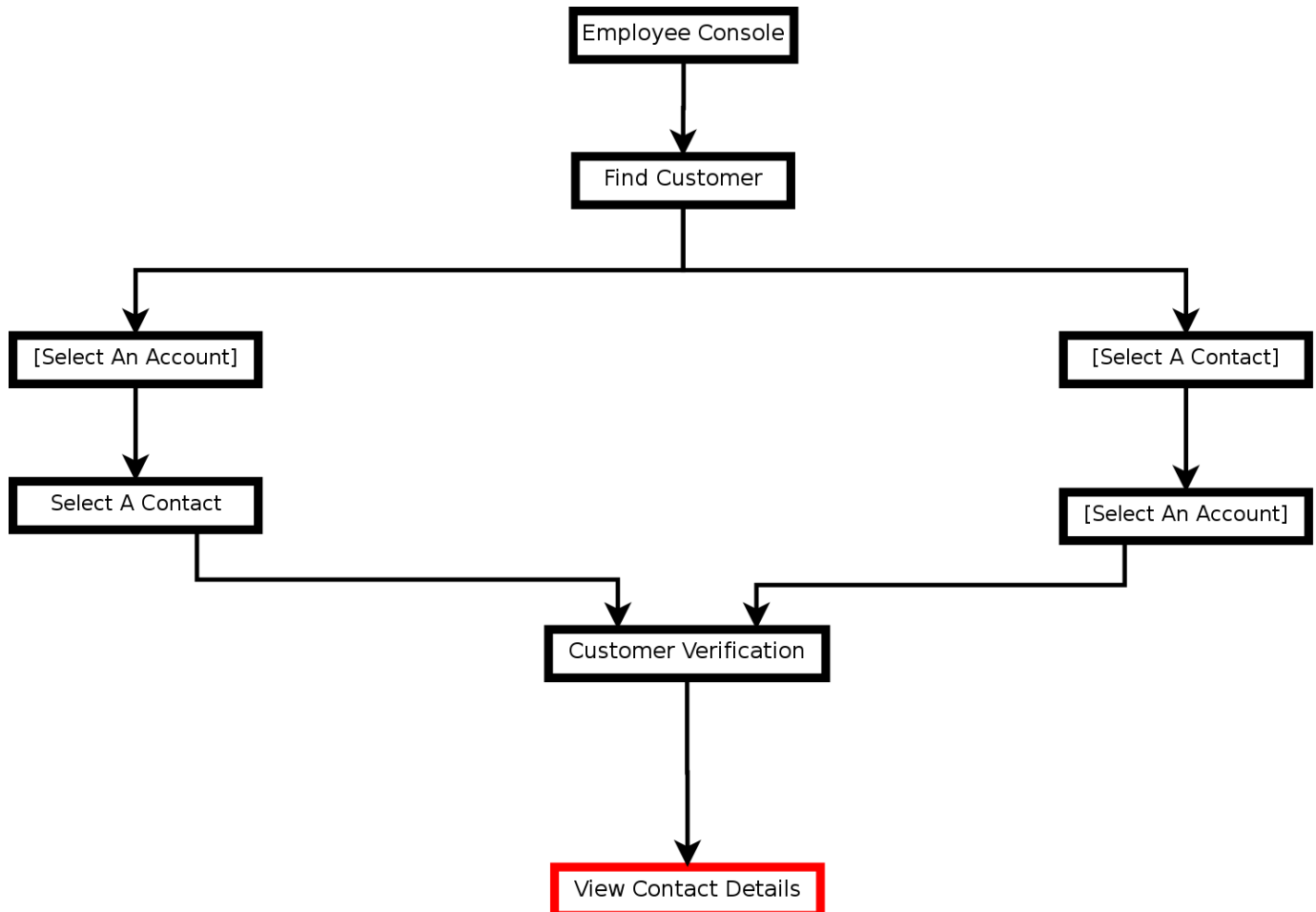
Note: System Navigation diagrams throughout the remainder of this documentation will generally begin with the 'View Account Details' or 'View Contact Details' page, as they will be based on a Verified Customer.

find customer

Find Customer

You can search for a customer by clicking on the following icon in the side menu:

There there are a number of search options on the 'Find Customers' page to help you search for a customer. You may search by any **one** of the first six fields, **OR** by **both** First and Last Name.   Some examples are shown below.

The full business name is not required to find a customer, as all results which contain your search will be displayed. However, the full number must be entered when searching by Account ID, ABN, ACN, Invoice #, or Service #, as these fields will only return exact matches.

Search for a Customer

To search for a Customer, enter **only one** of the following:

Account ID :

ABN # :   1

ACN # :   1

Invoice # :

Service # :   1

Business Name :   vixen

Or, enter **both** of the following:

First Name :

Last Name :

find customer

You are not required to enter the full name of the customer you are searching for, as all results which contain you search will be displayed. However, you are required to enter at least a partial name into both of the name fields. An example is shown below.

Search for a Customer

To search for a Customer, enter **only one** of the following:

Account ID :	
ABN # :	[1]
ACN # :	[1]
Invoice # :	
Service # :	[1]
Business Name :	

Or, enter **both** of the following:

First Name :	j
Last Name :	doe

Note: Some search options include Archived results. These are denoted by a [1] on the right hand side of the field.

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Search For A Customer

Depending on your search, you may be taken via the 'Select An Account' page to further identify the contact before they can be verified. If there is more than one account which matches your search, you will be asked to select an account from a list similar to the one shown below.

Select an Account

Business Name :	vixen

#		Business Name	Trading Name	Suburb / Postcode
1.	⦿	Vixen Systems		Brisbane, 4000
2.	◯	Vixen Ink		Brisbane, 4000

Continue »

Once you have selected an account, or if there was only one result which matched your search, you will be taken to the 'Select A Contact' page. Here you must select the name of the contact who wishes to access the account from a list of available contacts, as shown below.

Select a Contact

Business Name :	Vixen Systems
Full Name :	Jane Doe ▾

Continue »

Note: If the contact does not appear in the list on the 'Select A Contact' page, then they are not authorised to gain access to the account.

find customer

Search For A Customer (By Name)

Depending on your search, you may be taken to a number of pages to further identify the contact before they can be verified. If there is more than one result which matches your search, you will be taken to the 'Select A Contact' page. Here you must select the correct contact from a list similar to the one below.

Select a Contact

| First Name : | j |
| Last Name : | doe |

#		Title	First Name	Last Name	Job Title	Business Name	Suburb / Postcode
1.	⊙	Miss	Jane	Doe	CEO	Vixen Systems	Brisbane, 4000
2.	○	Mr	John	Doe		Vixen Systems	Brisbane, 4000
3.	○	Mr	Jack	Doe		Vixen Ink	Brisbane, 4000

Continue »

Once you have selected a contact from the list, or if there was only one result which matched your search, you may be taken to the 'Select An Account' page. This will only occur if the contact has access to more than one account. Here you must select an account to be used for verification from a list similar to the one below:

Select an Account

| First Name : | j |
| Last Name : | doe |

#		Business Name	Trading Name	Suburb / Postcode
1.	○	Anjuta Systems		Coorparoo, 4151
2.	⊙	Vixen Systems		Brisbane, 4000

Continue »

find customer

Customer Verification

Customers can only gain access to an account once they have been verified. To pass verification, contacts must provide a sufficient number of correct details about themselves or their account. Initially, the verification page will appear similar to the example below. Different fields will appear on the verification page based on the available details for a particular customer.

Customer Verification

Customers must provide verification details before being allowed access to an Account. Input boxes will turn green when correct details have been entered. The continue button will turn green once sufficient verification details have been entered.

Business Name : Vixen Systems

Address : ☐ **Address verified by customer**

5 Edward St

Brisbane, 4000

Account ID : [   ]

ACN # : [   ]

Full Name : Jane Doe

Date of Birth : [▼] / [▼] / [▼]

Email Address : [   ]

Credit Card Number : [   ]

Expiration Date : [▼] / [▼]

⊘ Continue »

Note: The continue button is disabled until sufficient information has been entered.

Note: See Appendix A for details of Customer Verification requirements.

find customer

Any of the fields on this page can be used to verify a customer, however **not all fields are necessarily required**. If the details supplied by the contact are correct, the field will turn **green** once the information is entered, as shown below. Once a sufficient number of correct details have been entered the 'Continue' button will turn **green** and become enabled, also shown below. At this point, the customer has been successfully verified and can access their account.

Customer Verification

> Customers must provide verification details before being allowed access to an Account. Input boxes will turn green when correct details have been entered. The continue button will turn green once sufficient verification details have been entered.

Business Name : Vixen Systems

Address : ☑ **Address verified by customer**

5 Edward St

Brisbane, 4000

Account ID : 1000162948

ACN # :

Full Name : Jane Doe

Date of Birth : 15 ▾ / 06 - JUN ▾ / 1976 ▾

Email Address :

Credit Card Number :

Expiration Date : ▾ / ▾

Continue »

System Navigation

Employee Console	→	Recent Customers

Recent Customers

A list of your 20 most recently verified customers can be found by clicking on the following icon in the side menu:

This feature allows you to re-access a customer's account at a later stage if needed.

Note: Only customers that YOU have verified will appear in this list.

add account notes

System Navigation

Add Account Notes

Notes can be attached to an account from the 'View Account Details' page. To add a note to an account enter the note text into the field shown below. Different note types can be selected from the drop down list below the text field.

Available note types are:

General Notice

Follow Up Required

Attention Notice

Complaint

default

System Notice

Account Notes

Type new note for this account in the field below:

[General Notice ▾] [Add Note »]

add associated account

System Navigation
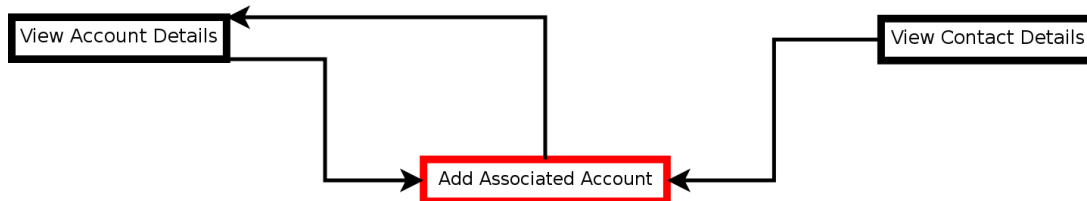
Add Associated Account

To add an additional account to an existing customer, select the 'Add Associated Account' link from the 'View Account Details' or 'View Contact Details' page. Ensure all required fields are entered, as the Account will not be added to the system without these fields. A description of the different types of required fields can be found at the bottom of the 'Add Customer' page, and is as follows:

* : Required Field

1 : One or both fields required

2 : One or both fields required only when the associated option is selected.

: Required only when the associated option is selected

Account details are used to specify general details about the business. The ABN/ ACN fields will turn green when the number is valid. A red field signifies an invalid ABN or ACN.

add associated account

Direct Debit and Credit Card details are not required unless the customer has elected to use that billing option. Additional Billing details can be added at a later stage if required. (See 'Add Bank Account Details', 'Add Credit Card Details')

Billing Details

* **Billing Method** :	Post ▼
* **Payment Method** :	○ Invoice
	○ Direct Debit - from Bank Account
# **Bank Name** :	[_____]
# **BSB #** :	[_____]
# **Account #** :	[_____]
# **Account Name** :	[_____]
	◉ Direct Debit - from Credit Card
# **Card Type** :	Visa ▼
# **Card Holder Name** :	jdoe
# **Credit Card Number** :	8888 1111 2222 3333
# **Expiration Date** :	10 ▼ / 2009 ▼

add associated account

Each Account must have a Primary Contact who oversees the Account. Additional Contacts may be added to the Account at a later stage if required. (See 'Add Contact'). Below is an example of nominating a Primary Contact for an associated account.

Primary Contact Details

○ Select an existing contact from the list below:

Miss Jane Doe ▾

○ Create a new Contact using the following details:

\# Title :

\# First Name :

\# Last Name :

\# Date of Birth :   DD ▾ / MM ▾ / YYYY ▾

Job Title :

\# Email Address :

2 Phone Number :

2 Mobile Number :

Fax Number :

\# Username :

\# Password :

Note: None of the fields for creating a new contact are required when an existing contact is selected.

Once you have entered all required fields and continued, the 'View Account Details' page will be displayed, indicating that the account has been successfully added.

edit account details

System Navigation
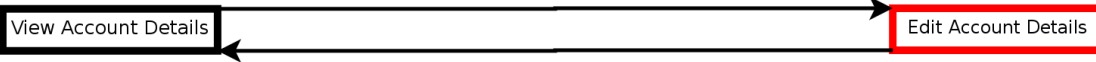
Edit Account Details

The 'Edit Account Details' page allows you to change the business details of an account. Please ensure all required fields have been entered, as the account details cannot be changed without these fields. A description of the different types of required fields can be found at the bottom of the 'Edit Account' page, and is as follows:

* : Required Field

1 : One or both fields required

The ABN/ ACN fields will turn green when the number is valid. A red field signifies an invalid ABN or ACN.

Account Details

Account ID :	1000162948
* Business Name :	Vixen Systems
Trading Name :	
1 ABN # :	
1 ACN # :	000 000 000
* Address (Line 1) :	5 Edward St
Address (Line 2) :	
* Suburb :	Brisbane
* Postcode :	4000
* State :	QLD
Country :	AU

edit account details

The 'Edit Account Details' page also allows you to archive an account. To archive an account, check the archive box shown below. The account can be unarchived if required by unchecking the box.

Once you have edited the account details and continued, you will be returned to the 'View Account Details' page, indicating that any changes have been successfully applied.

view account details

System Navigation


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                        ┌─────────────────────┐
                        │  Employee Console   │
                        └─────────────────────┘
                                  │
                                  ▼
                        ┌─────────────────────┐
                        │   Find Customer     │
                        └─────────────────────┘
                          │                 │
                          ▼                 ▼
          ┌─────────────────────┐   ┌─────────────────────┐
          │ [Select An Account] │   │  [Select A Contact] │
          └─────────────────────┘   └─────────────────────┘
                    │                         │
                    ▼                         ▼
          ┌─────────────────────┐   ┌─────────────────────┐
          │  Select A Contact   │   │ [Select An Account] │
          └─────────────────────┘   └─────────────────────┘
                    │                         │
                    └───────────┬─────────────┘
                                ▼
                    ┌─────────────────────────┐
                    │  Customer Verification   │
                    └─────────────────────────┘
                                │
                                ▼
                    ┌─────────────────────────┐
                    │   View Contact Details   │
                    └─────────────────────────┘
                                │
                                ▼
                    ┌─────────────────────────┐
                    │   View Account Details   │
                    └─────────────────────────┘
```
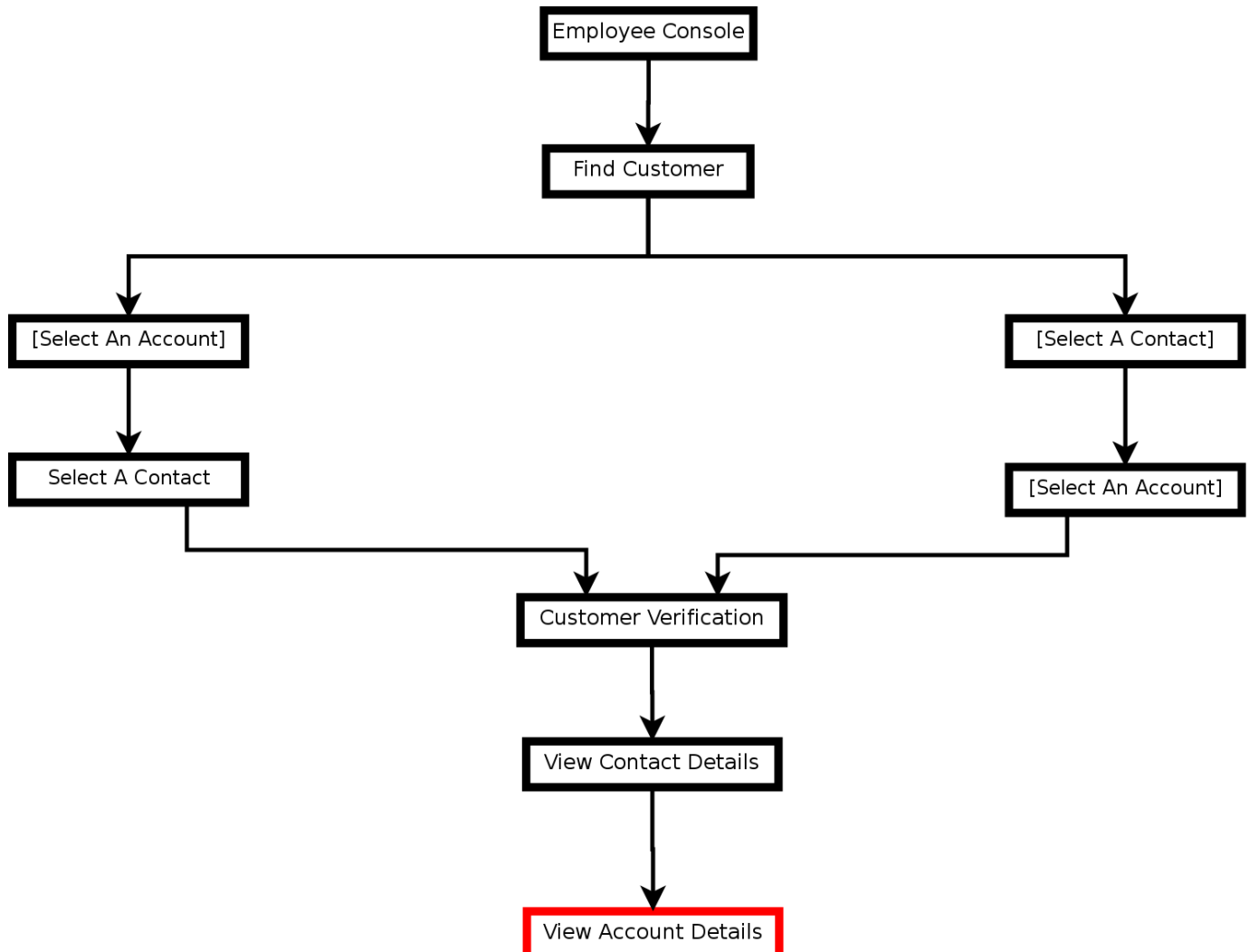
View Account Details

This is the primary page for accessing account details. It allows you to view the details of an account, as well as accessing a number of account options, including 'Edit Account', 'Add Contact' and 'Make Payment'. Below is an example list of the Account details listed on this page.

Account Details

Account ID :	1000162948
Account Balance :	$0.00
Business Name :	Vixen Systems
ACN # :	000 000 000
Address (Line 1) :	5 Edward St
Suburb :	Brisbane
Postcode :	4000
State :	QLD
Country :	AU
Archived :	Currently Available

The 'View Account Details' page also shows a list of contacts associated with the account. These contacts can be viewed via the 'View' link in the 'Actions' column.

Active Contacts

Contact Details	Actions
Jane Doe janedoe	View
John Doe johndoe	View

Additionally, list of services associated with the account is displayed. To view an individual service, click on the service number. You can also access a list of service notes or unbilled charges for a service from the links in the 'Actions' column

Services

#	Service #	Service Type	Plan Name	Archive Status	Actions
1.	0433555888	Mobile Telephone	$35 Cap	Closes On: Friday, Feb 09, 2007	View Notes, View Unbilled Charges
2.	0733334444	Land Line Telephone	Residential	Opens On: Tuesday, Jan 30, 2007	View Notes, View Unbilled Charges

System Navigation

View Account Details		View Contact Details
	View Account Notes	
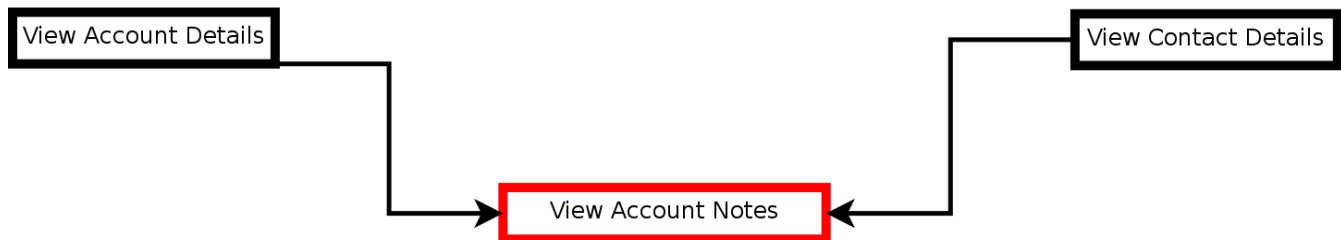
View Account Notes

The five most recent account notes are displayed on the 'View Account Details' page. To view a complete list of notes for an account, select the 'View All Account Notes' link on the 'View Account Details' page.

add recurring charge/credit

System Navigation

View Account Details → View Service Details

Add Recurring Service Charge

Recurring Service Charge Added
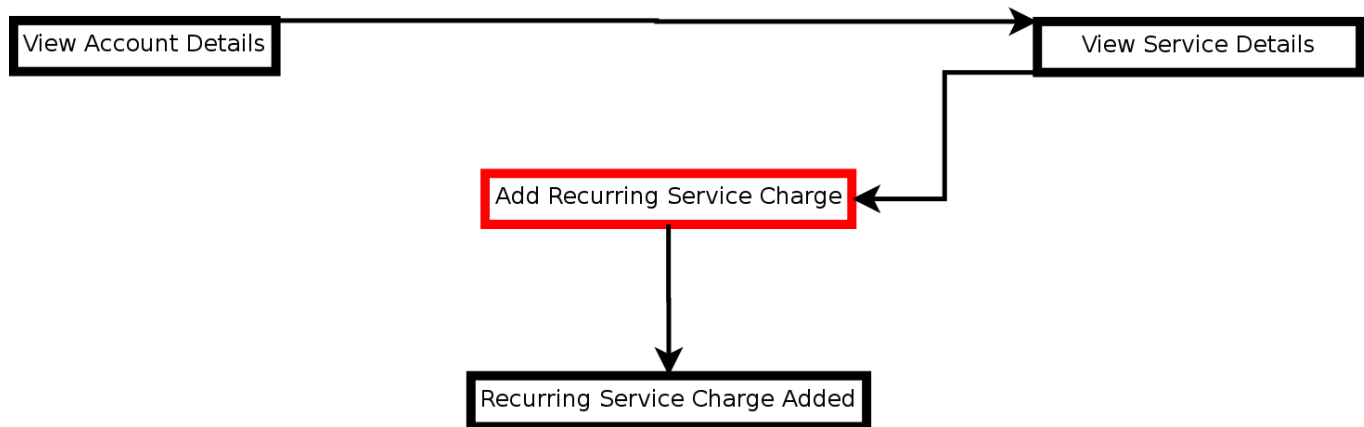
Add Recurring Charge/Credit

To add a recurring charge or credit to a service, go to the 'View Service Details' page for the appropriate service. At the bottom of the first column, there is a list of pre-defined recurring charges and credits which can be added to the service. Select the charge or credit you wish to add, and continue, as shown below.

Add Recurring Charge

Charge Code : [Recurring Charge ▼]

[Add Recurring Charge »]

add recurring charge/credit

After selecting a recurring charge or credit you will be taken to a list of details about the recurring charge, similar to the one below. If the charge is not fixed, you may adjust the recursion charge if required. After clicking the 'Add Charge' button, a message page will be displayed confirming that the charge was added successfully.

Recurring Charge Details

Service ID :	38032
Service # :	0733334444
Charge Code :	10001
Description :	Recurring Charge
Recursion Charge :	$50.00
Nature :	DR
Minimum Charge :	$50.00
Cancellation Fee :	$25.00
Billing Frequency :	Every 1 Month(s)

Add Charge »

Note: Recurring credits will not appear on a customers invoice until they have been approved by an administrator.

add charge/credit

System Navigation
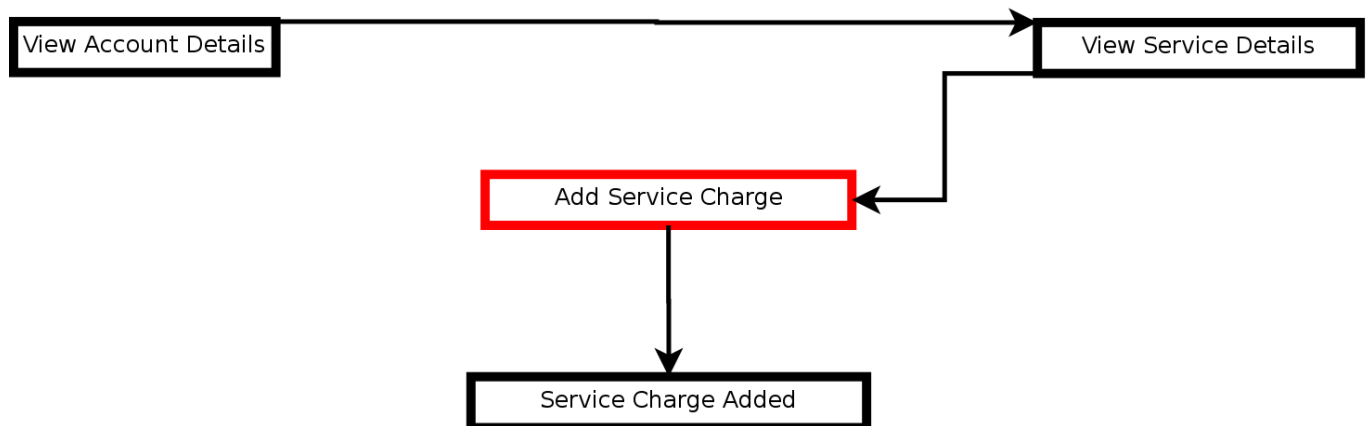
Add Charge/Credit

To add a charge or credit to a service, go to the 'View Service Details' page for the appropriate service. At the bottom of the first column, there is a list of pre-defined charges and credits which can be added to the service. Select the charge or credit you wish to add, and continue, as shown below.

add charge/credit

After selecting a charge or credit you will be taken to a list of details about the charge, similar to the one below. If the charge is not fixed, you may adjust the charge if required. After clicking the 'Add Charge' button, a message page will be displayed confirming that the charge was added successfully.

Charge Details

|	
Service ID :	38032
Service # :	0733334444
Charge Code :	10001
Description :	Charge
Amount :	$35.0000
Nature :	DR

Add Charge »

Note: Credits will not appear on a customers invoice until they have been approved by an administrator.

cancel recurring charge

System Navigation

```
View Account Details  ──────────────────►  View Service Details
        │                                           │
        │           View Recurring Charges          │
        └────────────►  ◄───────────────────────────┘
                            │
                            ▼
                    Cancel Recurring Charge
                            │
                            ▼
                   Recurring Charge Cancelled
```
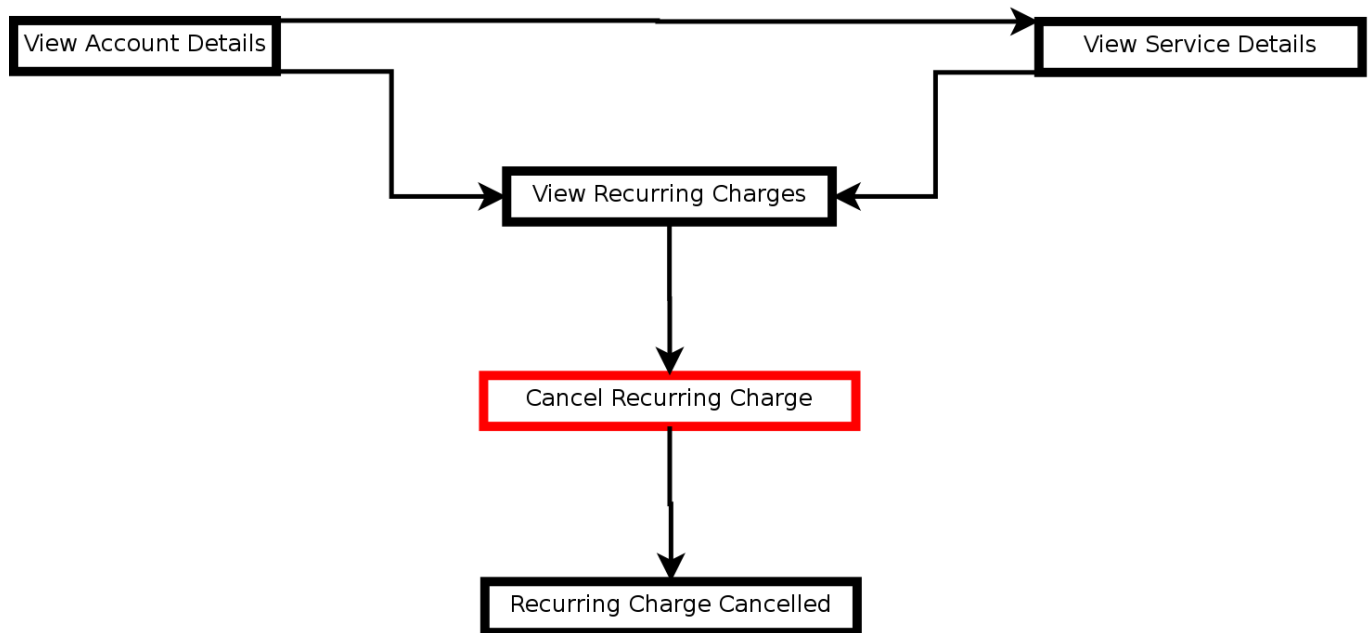
Cancel Recurring Charge

You can cancel a service's recurring charge via the "View Recurring Charge" page. Select the 'Cancel Charge' action from the recurring charges table. As cancelling a recurring charge will often incur a fee for the customer, a list of all outstanding costs associated with the charge will be displayed. An example is shown below.   Confirm these charges to continue the cancellation. A message page will then be shown indicating that your cancellation was successful.

Cancellation Details

Warning : Cancelling this account will incur a cost to the Customer.

Minimum Charge :	$50.00
Additional Charge :	+ $0.00
Cancellation Fee :	+ $25.00
Total Cancellation Cost:	$75.00

Confirm Cancellation »

view cdr

System Navigation
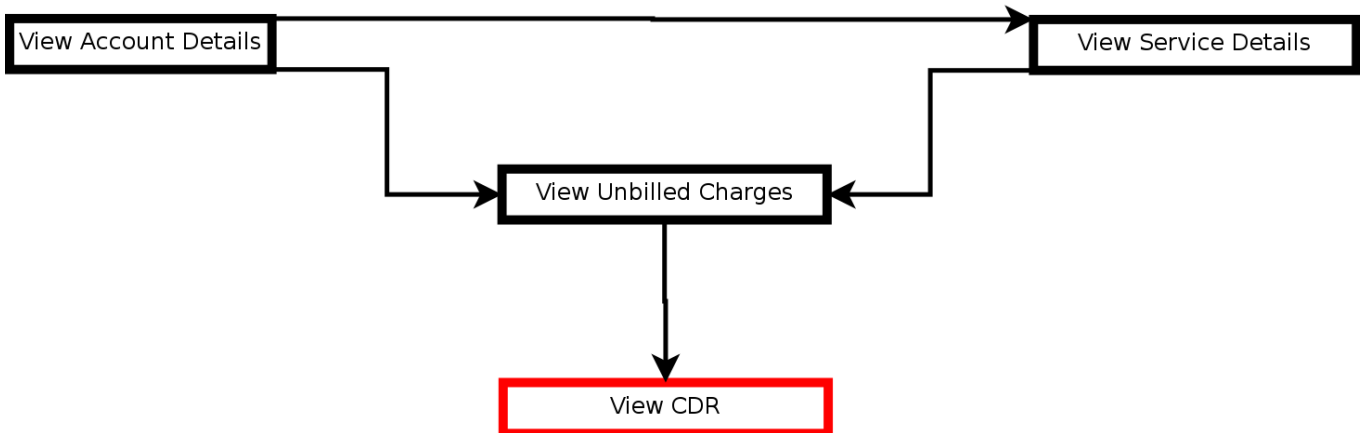
View CDR

Details of the CDR for an unbilled charge can be viewed by clicking on the 'View CDR' action in the "Unbilled Charges" table, located on the 'View Unbilled Charges' page. Below is an example of the details displayed on this page.

Cost : $0.00

Status :   CDR_RATED

Destination Code :

Record Type :   Local

Charge : $0.12

Rate :   Local-12

Normalised On :   Thursday, Feb 01, 2007 03:23:43 PM

Rated On :   Thursday, Feb 01, 2007 11:23:19 PM

Invoice Run # :

Sequence # :   44732

CDR Type :   **Credit**

CDR Information

View CDR Record Information

CLOSE ✖

System Navigation

```
View Account Details  ──────────────────────────►  View Service Details
         │                                                 │
         └──────────►  View Recurring Charges  ◄───────────┘
```
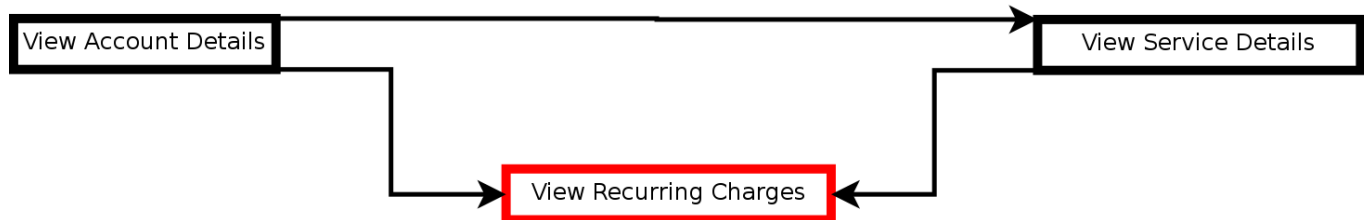
View Recurring Charges

You can view a list of a service's recurring charges by using the 'View Recurring Charges' link on either the 'View Account Details' or 'View Service Details' page. The recurring charges will then be displayed in a table similar to the one below. Further details of the recurring charge can be viewed by selecting the 'View Details' action from the table. (See 'View Recurring Charge Details') The charge can also be cancelled via the 'Cancel Charge' action. (See 'Cancel Recurring Charge')

Recurring Charge Details

#	Charge Type	Description	Service	Amount	Frequency	Archive	Actions
1.	10001	Recurring Charge	0433555888	$50.00 DR	Every 0 Month(s)	**Current Applied**	View Details , Cancel Charge

System Navigation

```
┌──────────────────┐                                    ┌──────────────────┐
│ View Account Details │──────────────────────────────▶│ View Service Details │
└──────────────────┘                                    └──────────────────┘
           │                                                      │
           │         ┌────────────────────────┐                   │
           └────────▶│ View Recurring Charges  │◀─────────────────┘
                     └────────────────────────┘
                                 │
                                 ▼
                     ┌────────────────────────────┐
                     │ View Recurring Charge Details │
                     └────────────────────────────┘
```
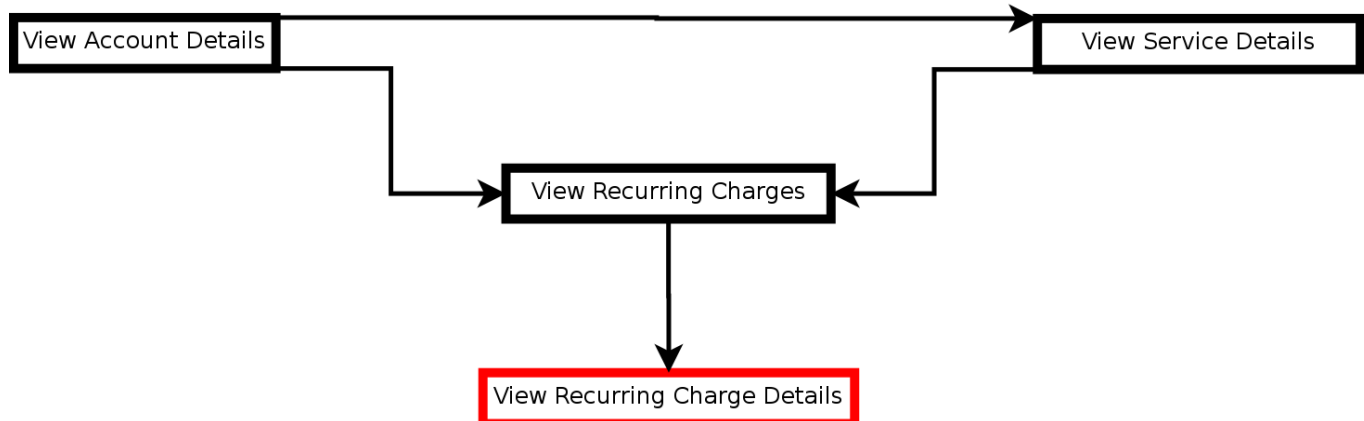
View Recurring Charge Details

Details of an individual recurring charge can be viewed from the 'View Recurring Charges' page. Below is an example of the details displayed about the recurring charge.

View Recurring Charge Details

Service # :	0733334444
Charge Code :	10001
Description :	Recurring Charge
Created On :	Saturday, Feb 03, 2007
Recursion Charge :	$50.00
Recurring Frequency :	Every 1 Month(s)
Minimum Charge :	$50.00
Cancellation Fee :	$25.00

Recurring Charge Details
Information about the attached Recurring Charge

CLOSE ✖

view unbilled charges

System Navigation

View Account Details		View Service Details

View Unbilled Charges
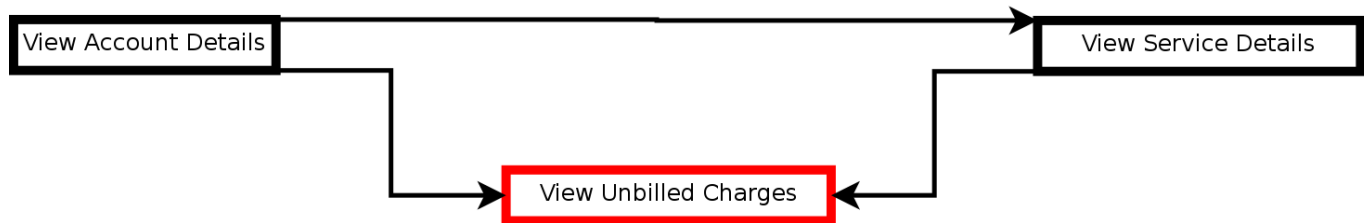
View Unbilled Charges

A list of a service's unbilled charges can be accessed from the 'Services' table on the 'View Account Details' page, or from the options on the 'View Service Details' page. These charges have been applied to the service, but have not yet been invoiced. You can view details of each of the charges by selecting the 'View CDR' action. (See 'View CDR')

Unbilled Charges

#	Source	Start Date/Time	Duration	Charge	Actions
1.	0417856756	Monday, Dec 18, 2006 08:49:13 AM	8	$0.0700	View CDR
2.	0732504212	Monday, Dec 11, 2006 10:36:49 AM	56	$0.0400	View CDR

add contact

System Navigation
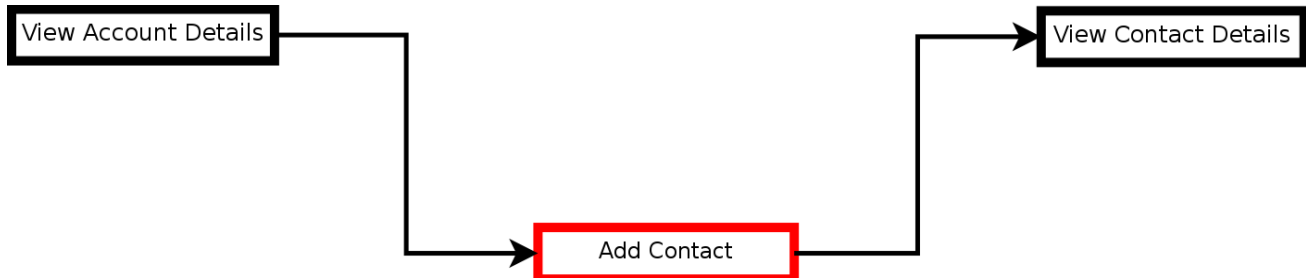
Add Contact

To add a new contact to an existing account select the 'Add Contact' link from the 'View Account Details' page. Ensure all required fields are entered, as the contact will not be added without the required fields. A description of the required fields is shown at the bottom of the 'Add Contact' page, and is as follows:

* : Required Field

1 : One or both fields required

add contact

When adding a new contact, there are two account access levels to choose from. The first option restricts the contacts' access to the current account **only**, while the second allows them access to **all** associated accounts. This can be changed at a later date if required. (See 'Edit Contact')

Contact Details

* Title :	Mr
* First Name :	John
* Last Name :	Doe
Job Title :	
* Date of Birth :	8 / 10 / 1968
* Email Address :	johndoe@vixen.com.au
1 Phone Number :	
1 Mobile Number :	0455 321 123
Fax Number :	
* Username :	johndoe
* Password :	password
* Account Access :	◉ Allow access to this Account only
	○ Allow access to all Associated Accounts

add contact notes

System Navigation

Add Contact Notes

Notes can be attached to a contact from the 'View Contact Details' page. To add a note to a contact enter the note text into the field shown below. Different note types can be selected from the drop down list below the text field. By selecting the 'Show this note in Account Notes' check box (selected by default) you can specify that the note should be displayed in both the contact notes and the account notes.

Available note types are:

General Notice

Follow Up Required

Attention Notice

Complaint

default

System Notice

Contact Notes

Type new note for this Contact in the field below:

☑ Show this note in Account Notes.

General Notice ▾   **Add Note »**

edit contact details

System Navigation
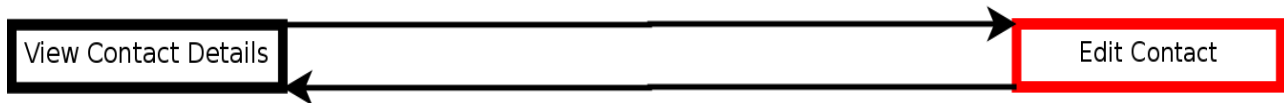
Edit Contact Details

The 'Edit Contact Details' page allows you to change the personal details of a contact. Please ensure all required fields have been entered, as the contact details cannot be changed without these fields. A description of the different types of required fields can be found at the bottom of the 'Edit Contact' page, and is as follows:

* : Required Field

1 : One or both fields required

Contact Details

* **Title** :	Miss	
* **First Name** :	Jane	
* **Last Name** :	Doe	
Job Title :	CEO	
* **Date of Birth** :	15 ▾ / 6 ▾ / 1976 ▾	
* **Email Address** :	jdoe@vixen.com.au	
1 **Phone Number** :		
1 **Mobile Number** :	0411 121 555	
Fax Number :		
* **Username** :	janedoe	
Password :		**Attention** : Leave blank to keep existing password.
* **Account Access** :	⦿ Allow access to this Account only	
	○ Allow access to all Associated Accounts	

edit contact details

The 'Edit Contact Details' page also allows you to archive a contact. To archive a contact, check the archive box shown below. The contact can be unarchived if required by unchecking the box.

Archive Status

This Contact is **Currently Available**.

☐ **Archive** this Contact.

Once you have edited the contacts' details and continued, you will be returned to the 'View Contact Details' page, indicating that any changes have been successfully applied.

view contact details

System Navigation
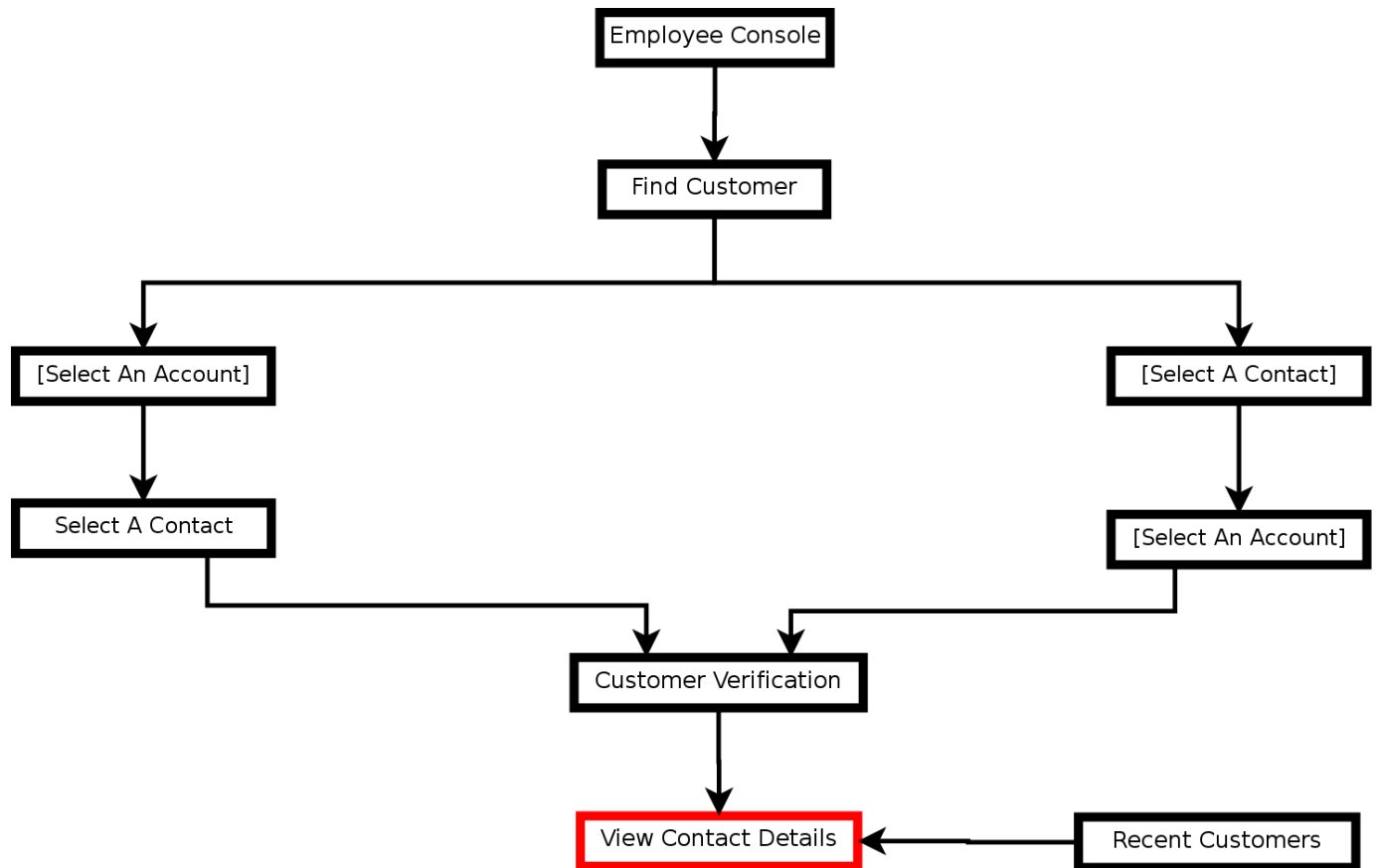
View Contact Details

This is the primary page for accessing contact details. It allows you to view the details of a contact, as well as accessing a number of contact options, including 'Edit Contact', 'Add Associated Account' and 'Make Payment'. Below is an example list of the contact details listed on this page.

Contact Details

Full Name :	Miss. Jane Doe
Job Title :	CEO
Date of Birth :	Jun 15, 1976
Email Address :	jdoe@vixen.com.au
Mobile Number :	0411 121 555
Username :	janedoe
Account Access :	All Associated Accounts
Archived :	**Active Contact**

Edit Contact Details

Additionally, a list of accounts which can be accessed by the contact is displayed. To view an individual account, click on the account number. You can also access a list of account notes or view invoices and payments from the links in the 'Actions' column.

Accounts

#	Account ID	Business Name	Trading Name	Overdue Charges	Actions
1	1000162948	Vixen Systems		$0.0000	View Notes, View Invoices & Payments, Make Payment
2	1000162950	Anjuta Systems		$0.0000	View Notes, View Invoices & Payments, Make Payment

Add Associated Account

view contact notes

System Navigation

View Contact Notes

The five most recent contact notes are displayed on the 'View Contact Details' page. To view a complete list of notes for a contact, select the 'View All Contact Notes' link on the 'View Contact Details' page.

dispute invoice

System Navigation

View Account Details

View Contact Details

View Invoices & Payments

View Invoice Details

Dispute Invoice
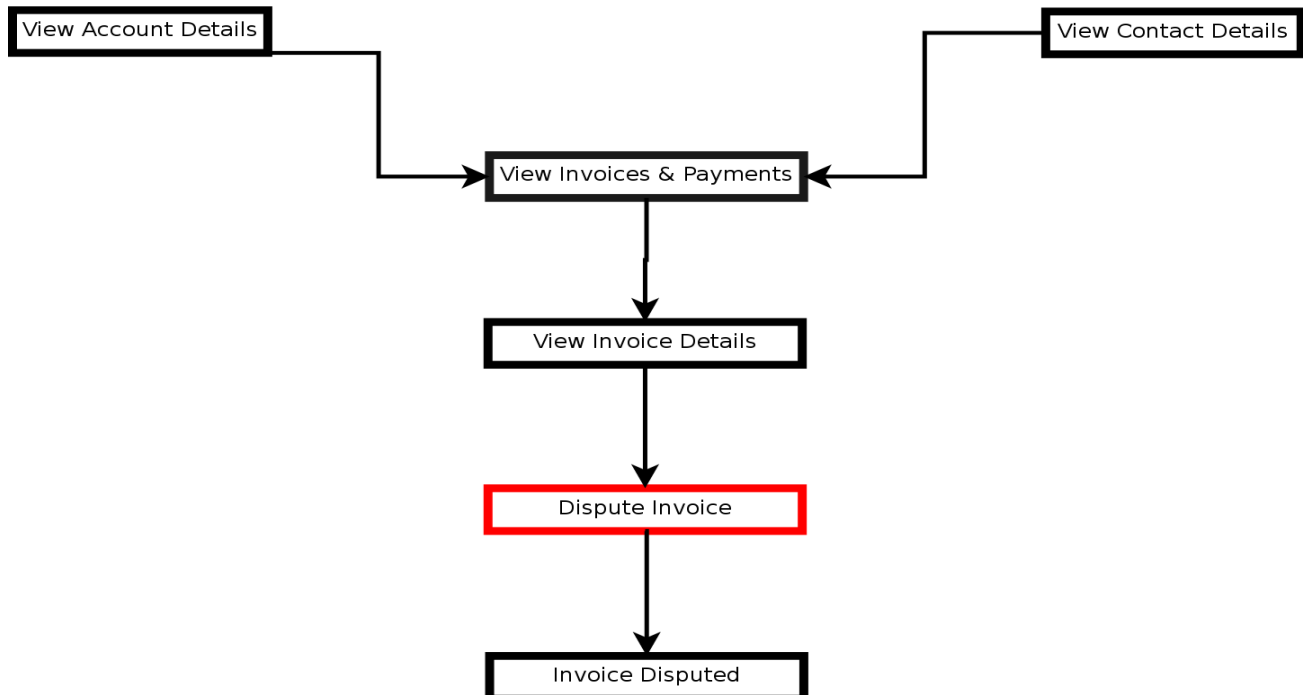
Invoice Disputed

Dispute Invoice

To dispute an invoice, click on the 'Dispute Invoice' link from the 'View Invoice Details' page. A list of costs associated with the invoice will be displayed, as shown in the example below. Enter the amount the customer has disputed in the 'Disputed' field and continue. A confirmation page will be displayed, indicating that the invoice has been successfully marked as disputed. The invoice will be marked as 'In Dispute' on the 'View Invoice Details' page until the dispute is resolved.

Dispute Details

Invoice # :	137549
Debits :	$50.00
Credits :	- $20.00
Tax :	+ $5.00
	_____
Amount :	$35.00
Disputed :	15

Note: Invoice amounts that are in dispute will not be subject to normal collection procedures.

resolve disputed invoice

System Navigation

View Account Details

View Contact Details

View Invoices & Payments

View Invoice Details

Resolve Diputed Invoice

Invoice Dispute Resolved
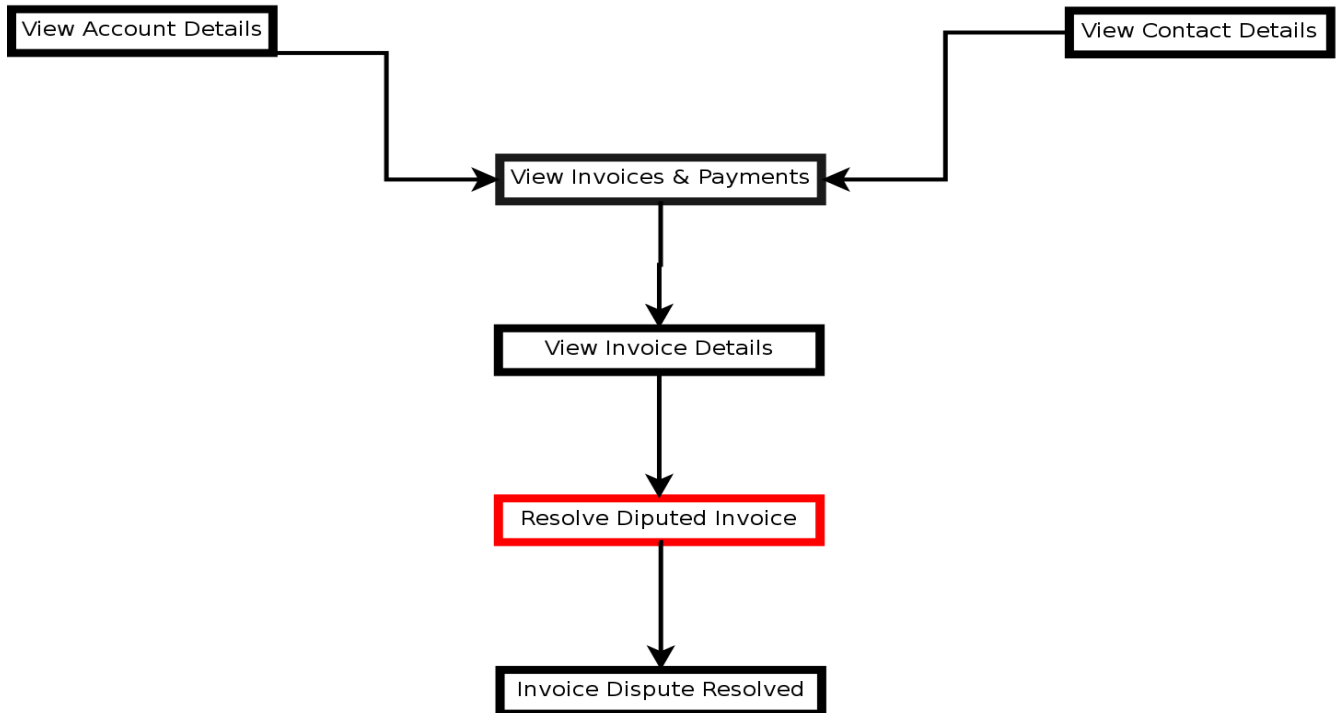
resolve disputed invoice

Resolve Disputed Invoice

To resolve a disputed invoice, click on the 'Resolve Dispute' link on the 'View Invoice Details' page of a disputed invoice. A list of costs associated with the invoice will then be displayed, as shown in the example below. You must then select one of the 3 options available to resolve a disputed invoice. The first option requires that the customer pay the entire disputed amount. The second option allows you to enter a negotiated amount for the customer to pay. The third option waves the entire amount, and the customer will not be required to pay any of the disputed amount. After you have selected an option and continued, a confirmation page will be displayed, indicating that the invoice has been successfully resolved. If either the second or third option is selected, a credit will automatically be generated against the customers' account. This credit will not appear on the customers' invoice until it has been approved by an administrator.

Dispute Details

Invoice # :	137549
Debits :	$50.00
Credits :	- $20.00
Tax :	+ $5.00
Amount :	$35.00
Disputed :	$15.00
Resolve :	⦿ Customer to pay full amount
	○ Customer to pay $15.00
	○ Payment NOT required

view cdr

System Navigation

```
View Account Details                                    View Contact Details
        |                                                       |
        |                                                       |
        +-----------> View Invoices & Payments <----------------+
                                |
                                v
                        View Invoice Details
                                |
                                v
                        View Invoice Details
                                |
                                v
                           View CDR
```
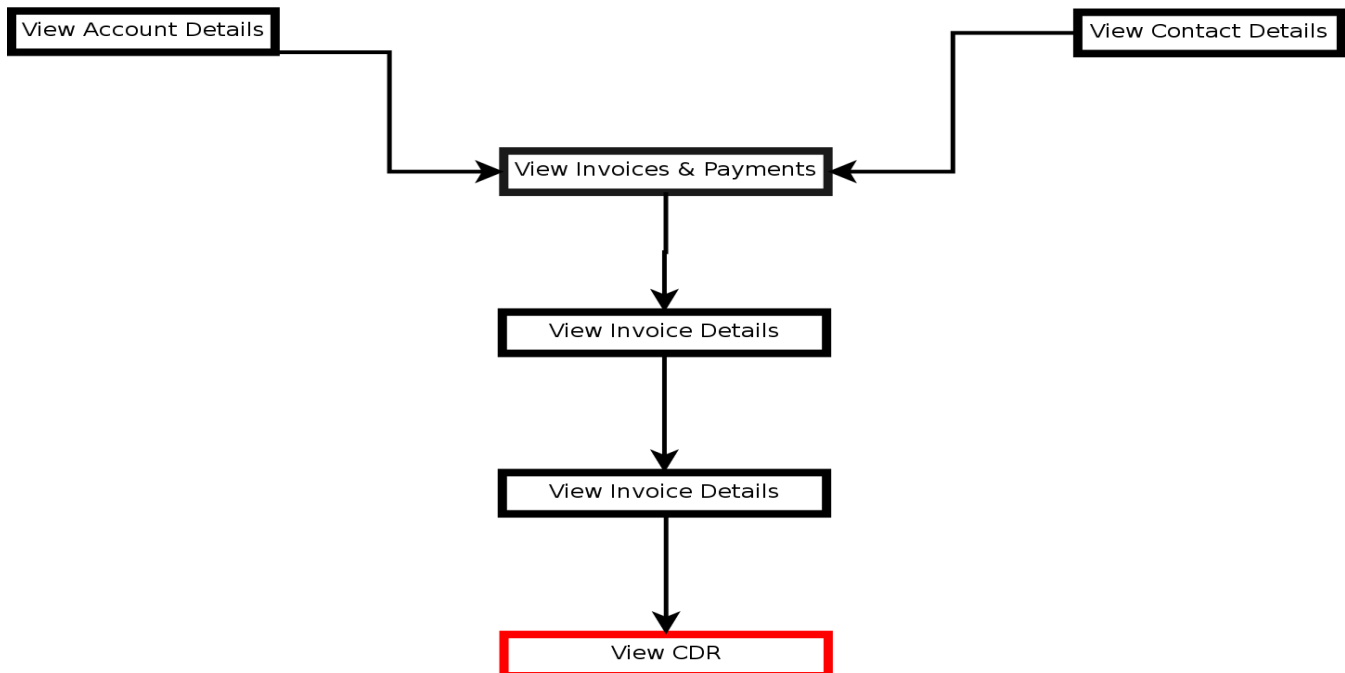
View CDR

Details of the CDR for an invoiced charge can be viewed by clicking on the 'View CDR' action in the 'Usage Charges' table, located on the 'View Invoice Details' page.
Below is an example of the details displayed on this page.

View CDR

Service # :	0733334444
CDR Internal ID :	1222270
File Name :	000792_a_s.dat
Carrier Name :	Optus
Carrier Ref # :	22
Source :	0733334444
Destination :	0409968421
Start Date/Time :	Tuesday, Jan 09, 2007 13:10:02 PM
Cease Date/Time :	Tuesday, Jan 09, 2007 01:13:19 PM
Cost :	$0.70

CDR Information
Client Data Record Information

CLOSE ✖

02 AM	10	$0.02	View CDR

Cost :	$0.70
Status :	CDR_INVOICED
Destination Code :	
Record Type :	Calls to Mobile
Charge :	$0.91
Rate :	Mobile-26c-05f-01s-00m
Normalised On :	Thursday, Feb 01, 2007 06:41:47 PM
Rated On :	Thursday, Feb 01, 2007 10:35:28 PM
Invoice Run # :	45c268017b7de
Sequence # :	19441
CDR Type :	**Charge**

CDR Information
Client Data Record Information

CLOSE ✖

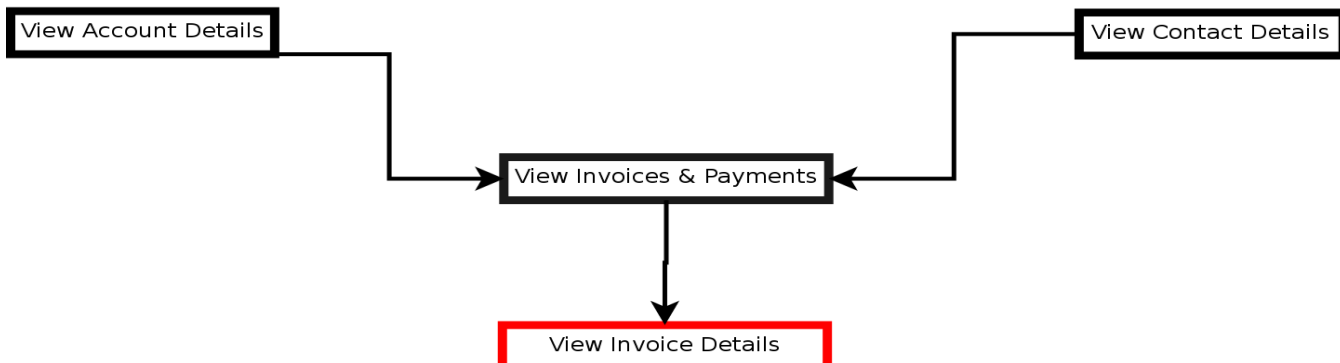|			
2 AM	10	$0.02	View CDR

view invoice details

System Navigation

View Invoice Details

This page shows a list of services associated with the selected invoice. The total charges, credits and debits of each service are also listed. To view further details, click on the service number you wish to view.

Services

#	Service #	Charges	Credit	Debit
1.	0433555888	$5.01	$0.00	$0.00
2.	0733334444	$59.68	$0.00	$0.00
3.	0433553588	$74.44	$0.00	$0.00
4.	0733334473	$4.88	$0.00	$0.00

Note: 'Charges' displays the total of all CDR charges,

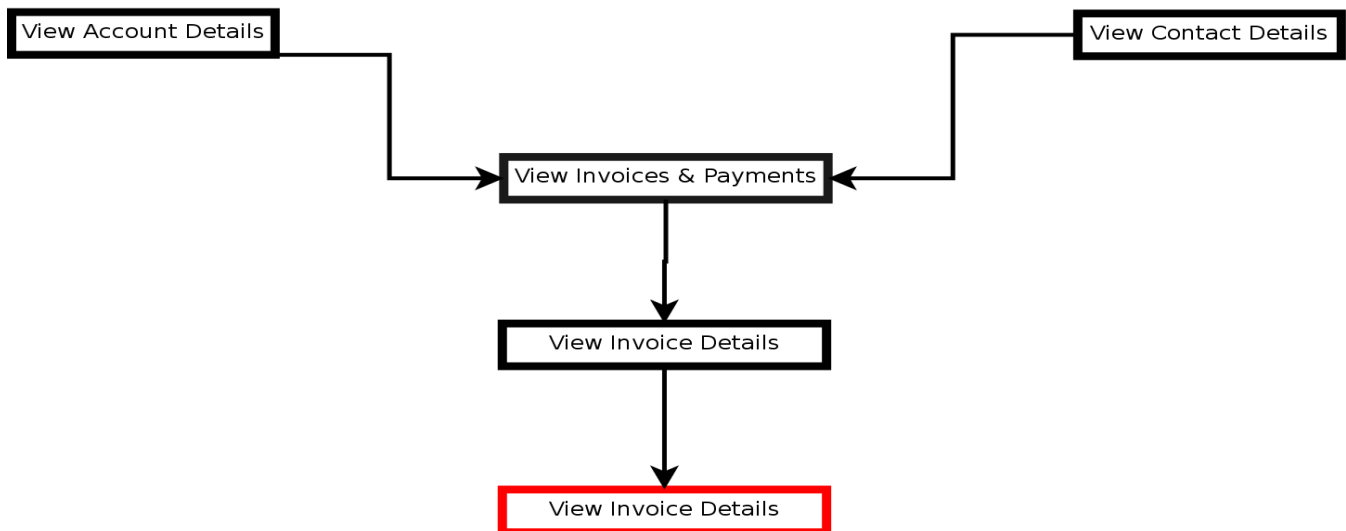*'Credit' displays the total of all other credits,*

'Debit' displays the total of all other charges.

view invoice details

System Navigation

View Invoice Details

This page shows a list of credits and debits associated with a service for a particular invoice. It also shows a list of usage charges for a service, similar to the table shown below. To view further details of a charge, select the 'View CDR' action from the 'Usage Charges' table. (See 'View CDR')

Usage Charges

#	Calling Party	Start Date/Time	Duration	Amount	Actions
1.	0409968421	Tuesday, Jan 09, 2007 01:10:02 PM	197	$0.91	View CDR
2.	0294165644	Monday, Jan 15, 2007 01:27:07 PM	1464	$2.45	View CDR
3.	0299797248	Tuesday, Jan 16, 2007 11:55:07 AM	10	$0.02	View CDR
4.	0287236400	Wednesday, Jan 17, 2007 09:45:04 AM	23	$0.04	View CDR
5.	0732556924	Wednesday, Jan 17, 2007 12:36:33 PM	153	$0.15	View CDR
6.	0746663020	Thursday, Jan 25, 2007 08:35:35 AM	789	$1.32	View CDR
7.	0415822413	Monday, Jan 29, 2007 12:51:03 PM	16	$0.12	View CDR

view invoices & payments

System Navigation

View Invoices & Payments

This page shows a list of invoices associated with an account, as shown below. To view details of an invoice, select the invoice number from the table. (See 'View Invoice Details')

#	Invoice #	Overdue	Credits	Debits	Total	Balance	Disputed
1.	Invoice #200	$0.00	$0.00	$147.49	$147.49	$162.24	$0.00

This page also shows a list of PDF bills which can be viewed, and a list of payments associated with an account.

view pdf bill

System Navigation
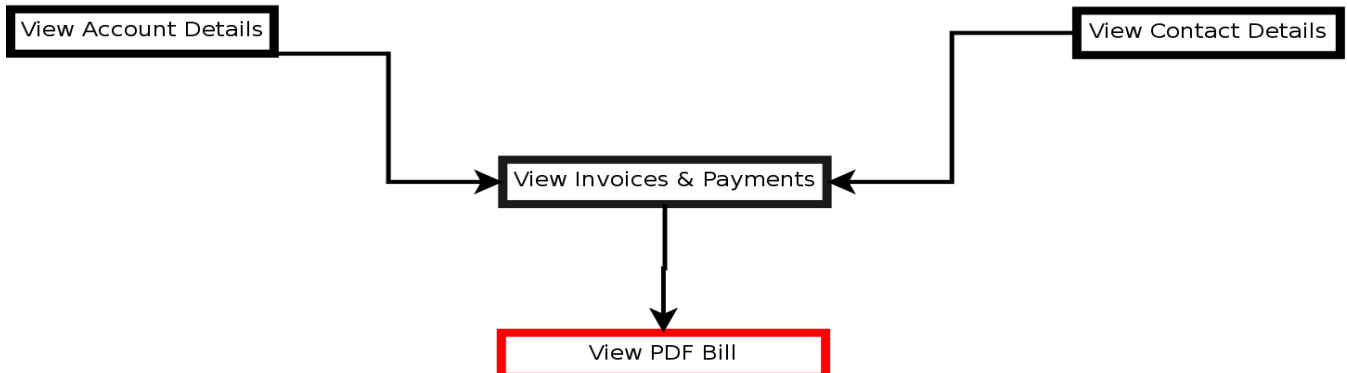
View PDF Bill

To view a PDF bill, select the 'View PDF' action from the 'PDF Bills' table on the 'View Invoices & Payments' page. This will display an exact copy of the invoice that the customer has received.
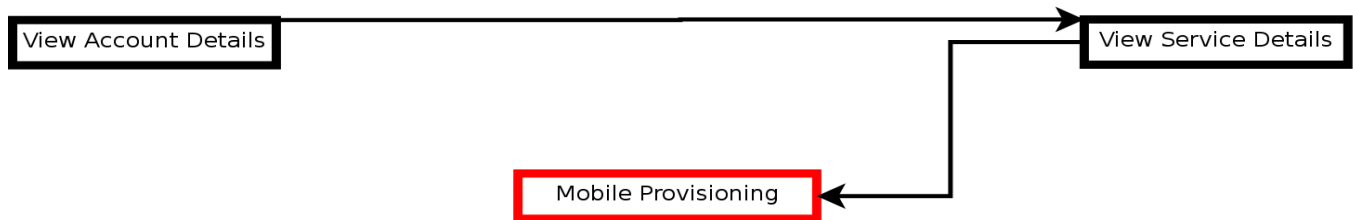
mobile provisioning

System Navigation

Mobile Provisioning

The 'Mobile Provisioning' page displays provisioning details for a mobile service.

Service Details

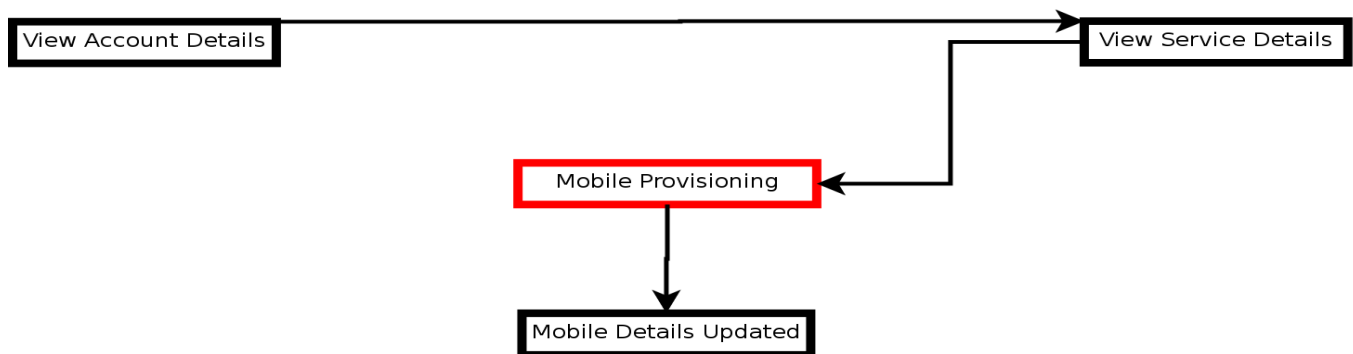|	
Account ID :	1000162948
Business Name :	Vixen Systems
Service ID :	38033
Service # :	0433555888
Service Type :	Mobile Telephone

Note: This page is only available for mobile services.

mobile provisioning

System Navigation

Mobile Provisioning

The provisioning details of a mobile service can be edited from the 'Mobile Provisioning' page. Please note that none of the mobile details are required fields. Once you have edited the details of a mobile service, a page will display confirming that any changes have been successfully applied.

Note: This page is only available for mobile services.

add bank account details

System Navigation
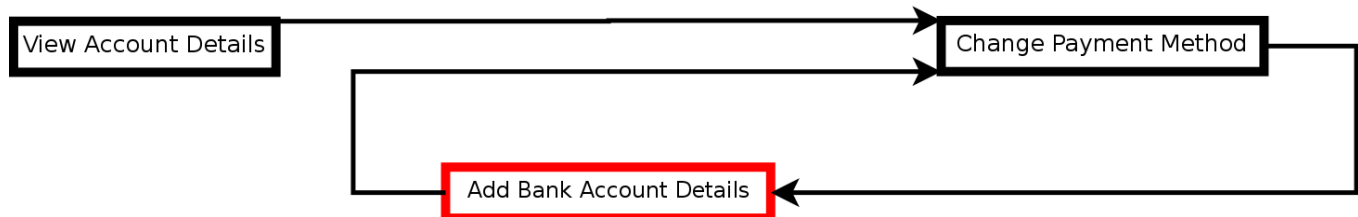
Add Bank Account Details

To add bank account details, select the 'Add Bank Account Details' link from the 'Change Payment Method' page. Enter details into each of the fields, as all fields on this page are required.

Note: When bank account details are added the payment method for the account will automatically default to the new details.

Note: Bank account details are added to an account group, i.e. all associated accounts will have access to these details. However, an associated account will not use the new details unless the payment method for that account is manually changed.

System Navigation
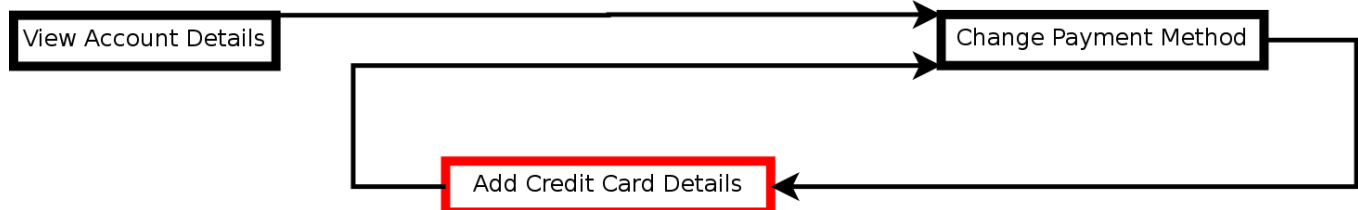
Add Credit Card Details

To add credit card details, select the 'Add Credit Card Details' link from the 'Change Payment Method' page. Ensure that all required fields have been entered, as the new details will not be added without these fields. Required fields are denoted with a '*'.

Credit Card Details

* **Card Type** :	Visa
* **Card Holder Name** :	Jane Doe
* **Credit Card Number** :	3333 4444 5555 6666
* **Expiration Date** :	1 / 2010
CVV# :	

Note: When credit card details are added the payment method for the account will automatically default to the new details.
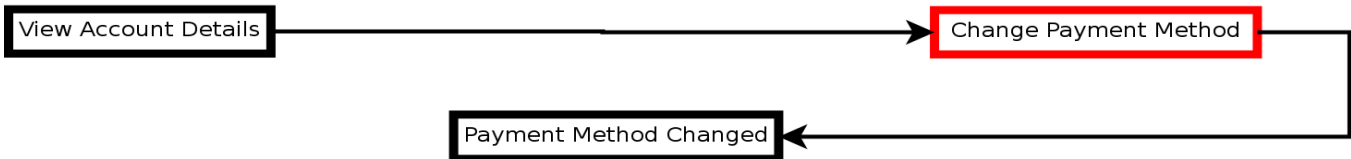
Note: Credit card details are added to an account group, i.e. all associated accounts will have access to these details. However, an associated account will not use the new details unless the payment method for that account is manually changed.

Note: Credit Card details can be added with or without spaces.

change payment method

System Navigation

Change Payment Method

This page allows you to change the method by which an account is paid. To do this, select the 'Change Payment Method' link from the options on the 'View Account Details' page for the required account. There are 3 types of payment methods which can be selected. The 'Invoice' option simply invoices the customer when required. Selecting a bank account will automatically direct debit the amount owed from the bank account.   Similarly, selecting a credit card will automatically direct debit the amount from the selected credit card. Additional bank or credit card details can be added via the links beneath each of the tables. (See 'Add Bank Account Details', 'Add Credit Card Details'). Select the appropriate method, and continue. A page will be displayed confirming that the payment method has been changed.

Payment Method

○ Invoice

Direct Debit from a Bank Account :

#		Bank Name	BSB#	Account Number	Account Name
1.	○	Westpac	123 123	456 456 456	J Doe
2.	○	National	321 321	321 321 321	Jane Doe

Add Bank Account Details

Direct Debit from a Credit Card :

#		Card Type	Card Holder Name	Card Number	Expiry Date	CVV
1.	⊙	MasterCard	Jane Doe	1111 2222 3333 4444	1 / 2010	No CVV Entered

Add Credit Card Details

make payment

System Navigation
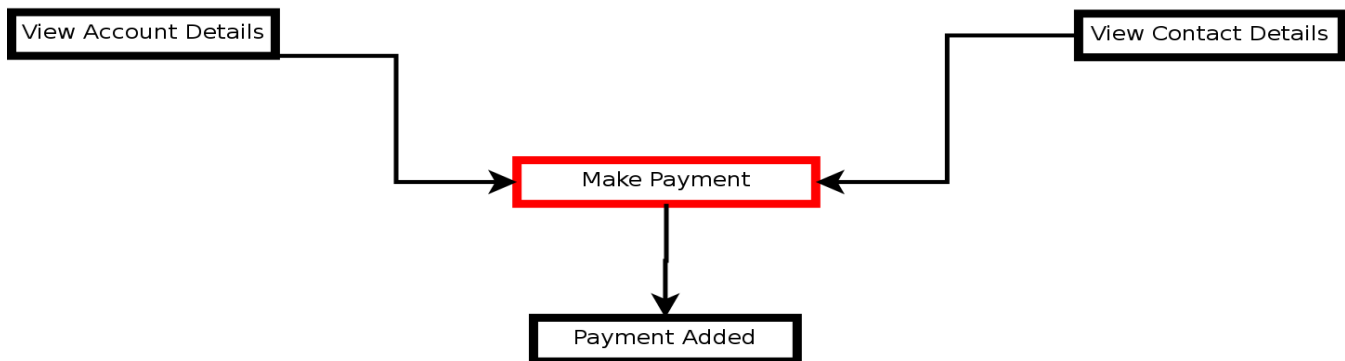
Make Payment

To make a payment, select the 'Make Payment' link from either the 'View Account Details' or 'View Contact Details' page. If there are multiple associated accounts, the account payment options will be displayed as shown below. If you wish to apply the payment to a specific account, select 'Apply this payment against the following account', and select the account from the drop down list. Alternatively, if you wish to apply the payment against all accounts in the group, select 'Apply this payment against all accounts'.

Account Details

Account(s) :
- ⦿ Apply this Payment against all Accounts.
- ○ Apply this Payment against the following Account:
  - 1000162948: Vixen Systems ▾

Enter payment details into each of the fields, as shown below. Ensure all fields are completed, as all payment details are required. The amount should be entered as dollars and cents in the following format: DD.cc

Payment Details

* Payment Type :	Bill Express ▾
* Amount :	50
* Reference # :	1000162948

Note: Payments will be always applied against the oldest invoices first.

view payment details

System Navigation

View Payment Details

This page allows you to view details of individual payments associated with an account. To view these details, click on the 'View Details' action in the 'Payments' table on the 'View Invoices & Details' page.
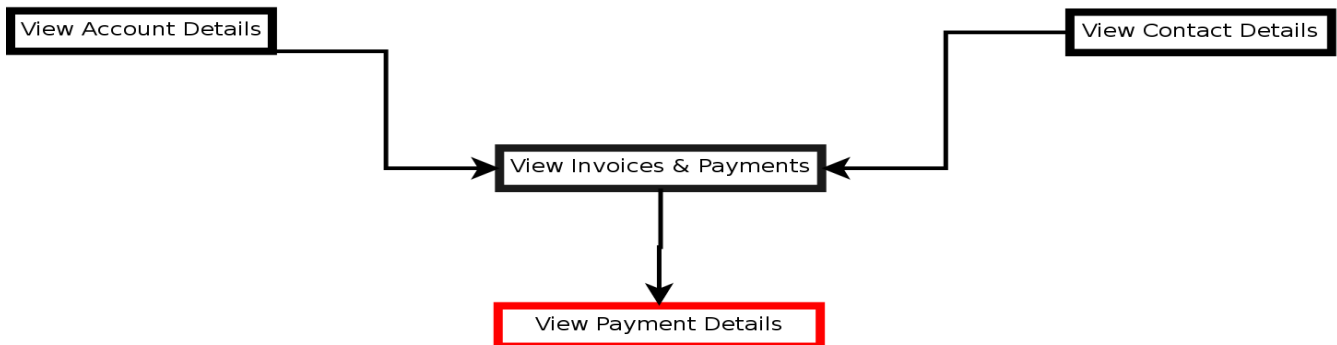
add provisioning request

System Navigation

```
View Contact Details ─────────────────────────────┐     View Account Details
                                                   │              │
                                                   └──────────────┘
                          ┌─────────────────────┐ ◄─────────────┘
                          │ View Service Details │
                          └─────────────────────┘
                                    │
                                    ▼
                          ┌─────────────────────┐
                          │    Provisioning     │
                          └─────────────────────┘
```
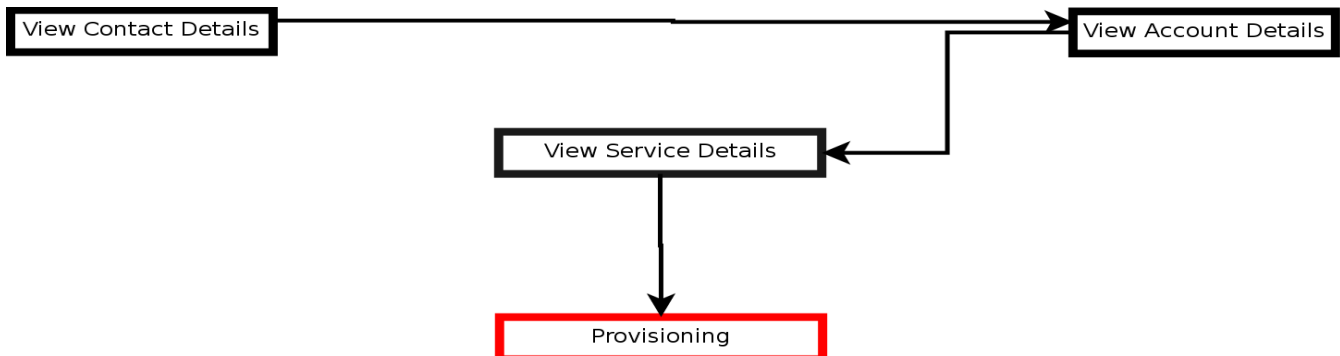
Add Provisioning Request

Provisioning for a service can be requested via the 'Provisioning' page. Select the carrier name and request from the dropdown boxes and click 'Perform Request'. A confirmation page will then display, indicating that the provisioning request has been successfully added to the queue.

Provisioning Request

Carrier Name :	Optus ▾
Request :	Full Service ▾

Perform Request »

Note: This page is only available for landline services.

cancel provisioning request

System Navigation

```
View Contact Details ────────────────────────────────► View Account Details
                                                                │
                              View Service Details ◄────────────┘
                                      │
                                      ▼
                                 Provisioning
                                      │
                                      ▼
                           View Provisioning Requests
                                      │
                                      ▼
                        Provisioning Request Cancelled
```
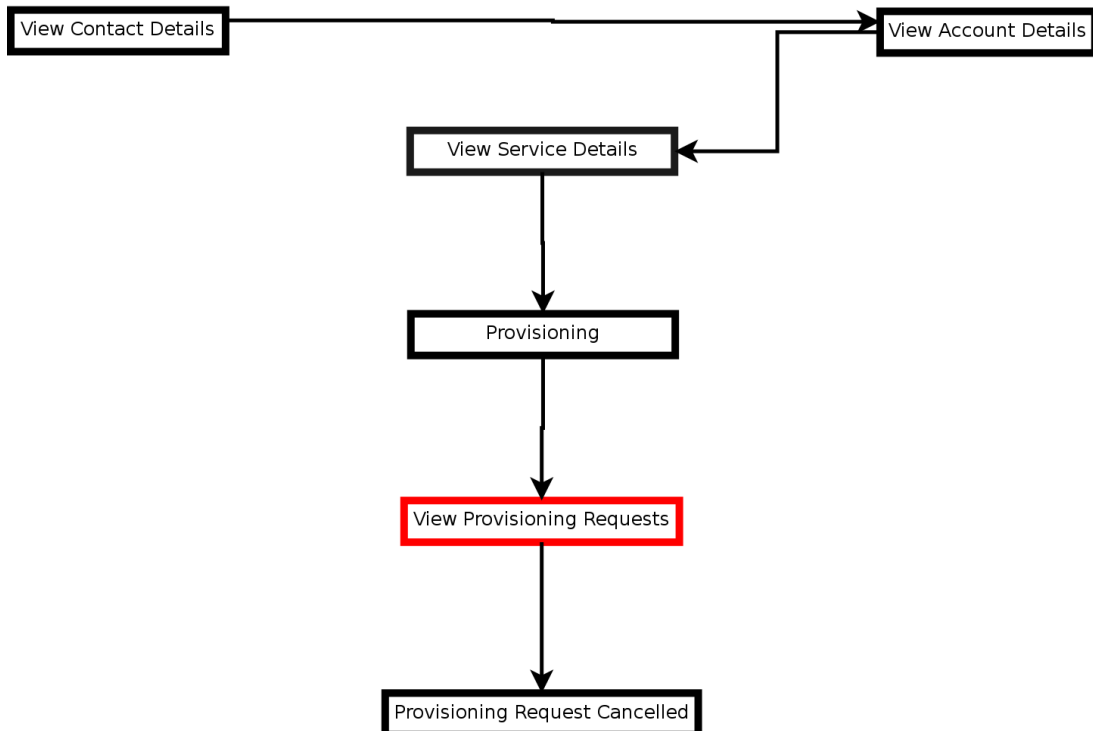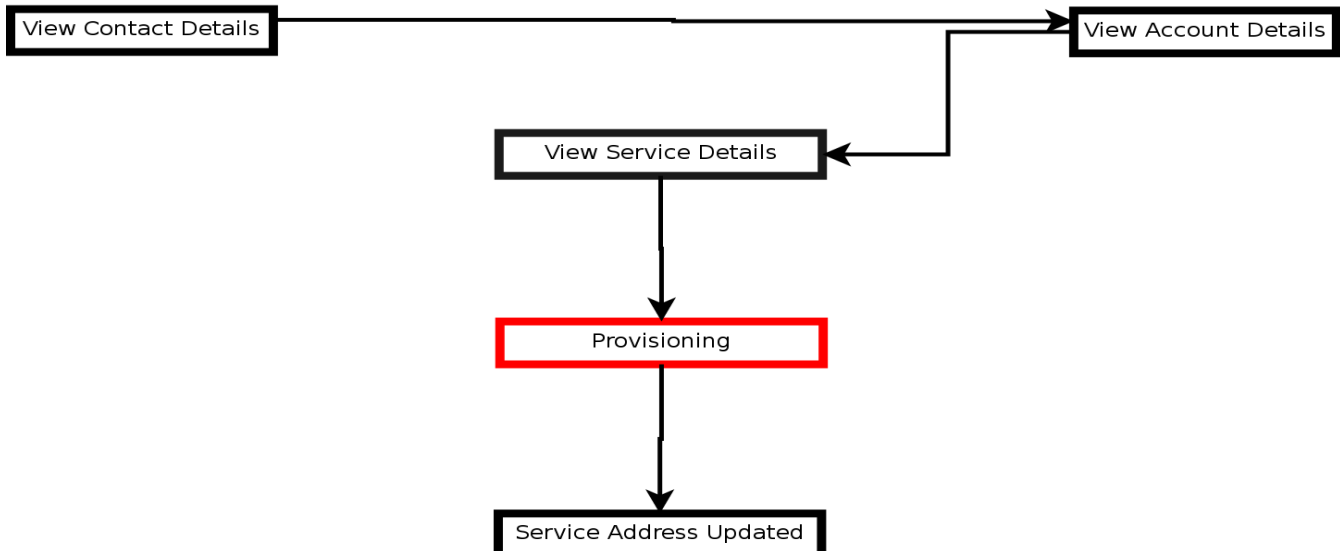
Cancel Provisioning Request

To cancel a provisioning request, select the 'Cancel' action from the 'View Provisioning Requests' page. A confirmation page will then display, indicating that the cancellation was successful.

Note: This page is only available for landline services.

edit service address details

System Navigation

View Contact Details → View Account Details

View Account Details → View Service Details

View Service Details → Provisioning

Provisioning → Service Address Updated

Edit Service Address

Service address details are used for provisioning purposes, and can be edited via the provisioning page. A notice will be displayed if no service address details are found.

Note: The address details on this page are the physical address of the service.

Service Address Details

Recipient :

Address (Line 1) :

Address (Line 2) :

Locality :

Postcode :

edit service address details

There are 2 types of required fields when editing service address details, and these are as follows:

R: Required for residential services

B: Required for business services

Note: While these fields are denoted as required fields, the service address details can be edited even if these fields are not available. Failure to correctly enter all required provisioning details may result in rejection of provisioning requests.

R	Title :	Miss
R	Given Name :	Jane
R	Family Name :	Doe
	Company Name :	Vixen Systems
R	Date Of Birth :	15 / 6 / 1976
	Employer :	
	Occupation :	

The ABN field will turn green when a valid ABN is entered, as shown below. A red field denotes an invalid ABN.

B	ABN # :	32 639 084 466
B	Trading Name :	Vixen Systems

Address Type :	
Address Type Number :	
Address Type Suffix :	
RB Street Number Start :	5
Street Number End :	
Street Number Suffix :	
RB Street Name :	Edward
RB Street Type :	Street
Street Type Suffix :	
Property Name :	
RB Locality :	Brisbane
RB State :	Queensland
RB Postcode :	4000

Note: This page is only available for landline services

69

provisioning

System Navigation
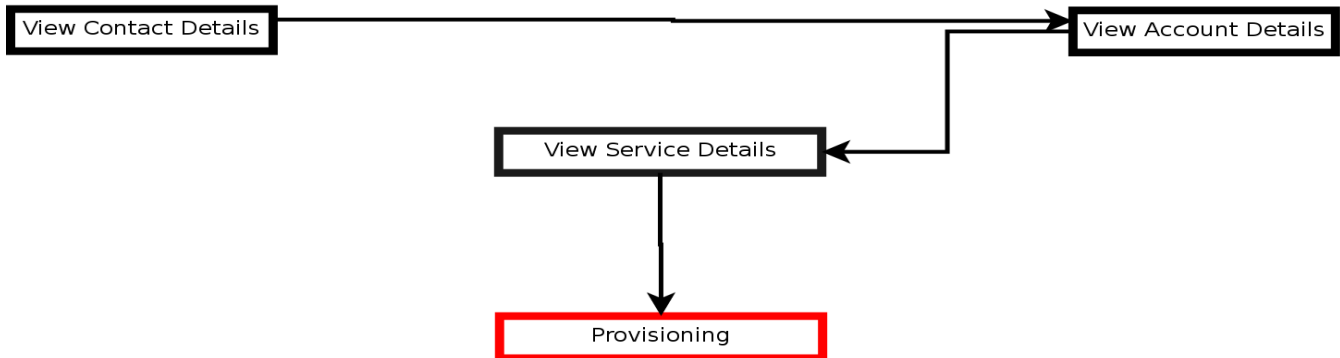
Provisioning

The provisioning page is the primary page for provisioning options, and displays details for the service you are viewing. From this page you can also perform a provisioning request, or edit the service address details. There are also links to the "View Provisioning History" and "View Provisioning Requests" pages. You can also add or view service notes from this page.

Service Details

Account ID :	1000162948
Business Name :	Vixen Systems
Service ID :	38032
Service # :	0733334444
Service Type :	Land Line Telephone

Note: This page is only available for landline services.

System Navigation

View Contact Details → View Account Details

View Service Details
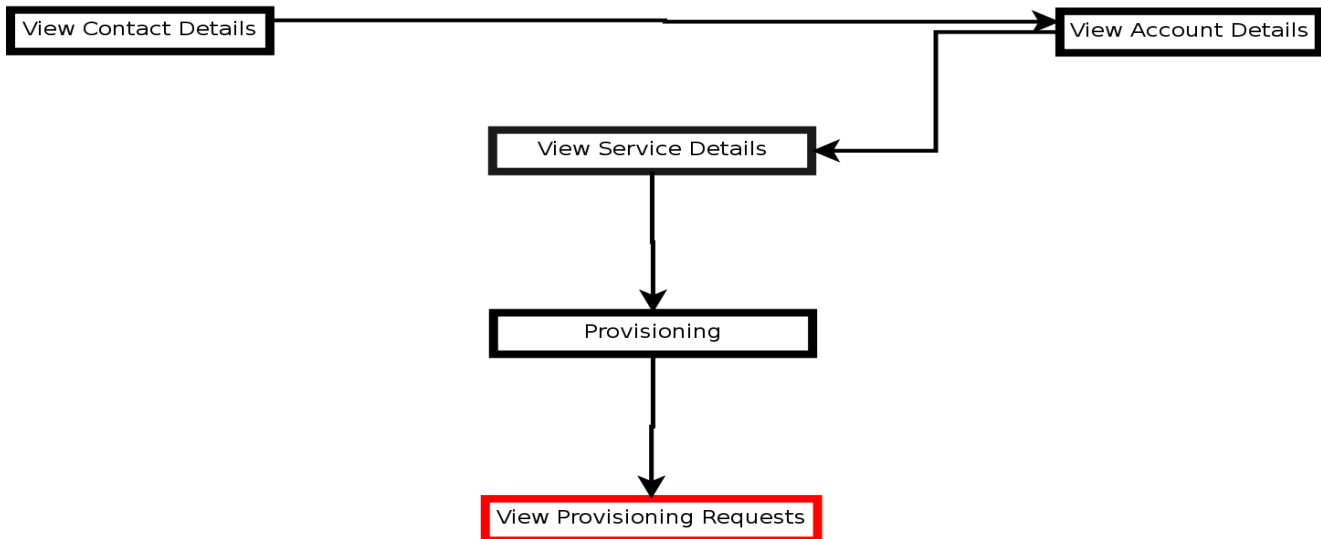
Provisioning

View Provisioning History
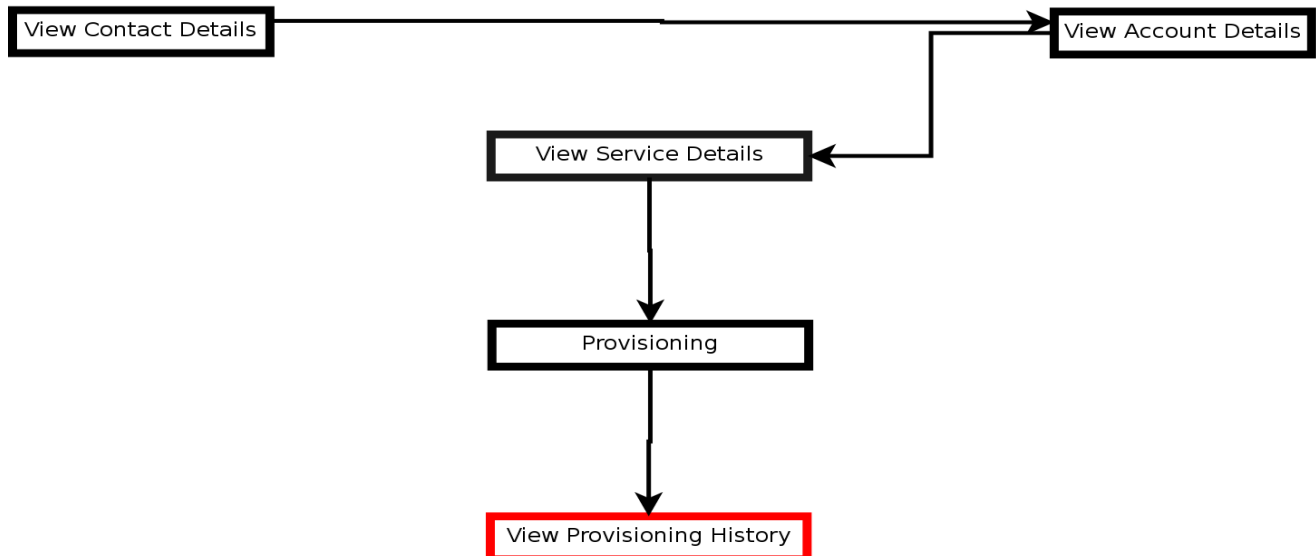
View Provisioning History

This page shows a list of sent and received provisioning requests for the service. It includes details such as the date, carrier, and type of provisioning request.

System Navigation

| View Contact Details | View Account Details |

| View Service Details |

| Provisioning |

| **View Provisioning Requests** |

View Provisioning Requests

This page shows a list of provisioning requests, including the response status. You can cancel any unprocessed provisioning requests from this page by selecting the 'Cancel' action. (See Cancel Provisioning Request)

- View Provisioning History
- View Provisioning Requests

Provisioning Requests

#	Date	Carrier	Type	Probable Response	Actions
1.	Wednesday, Jan 31, 2007	Optus	Full Service	**Unprocessed**	Cancel

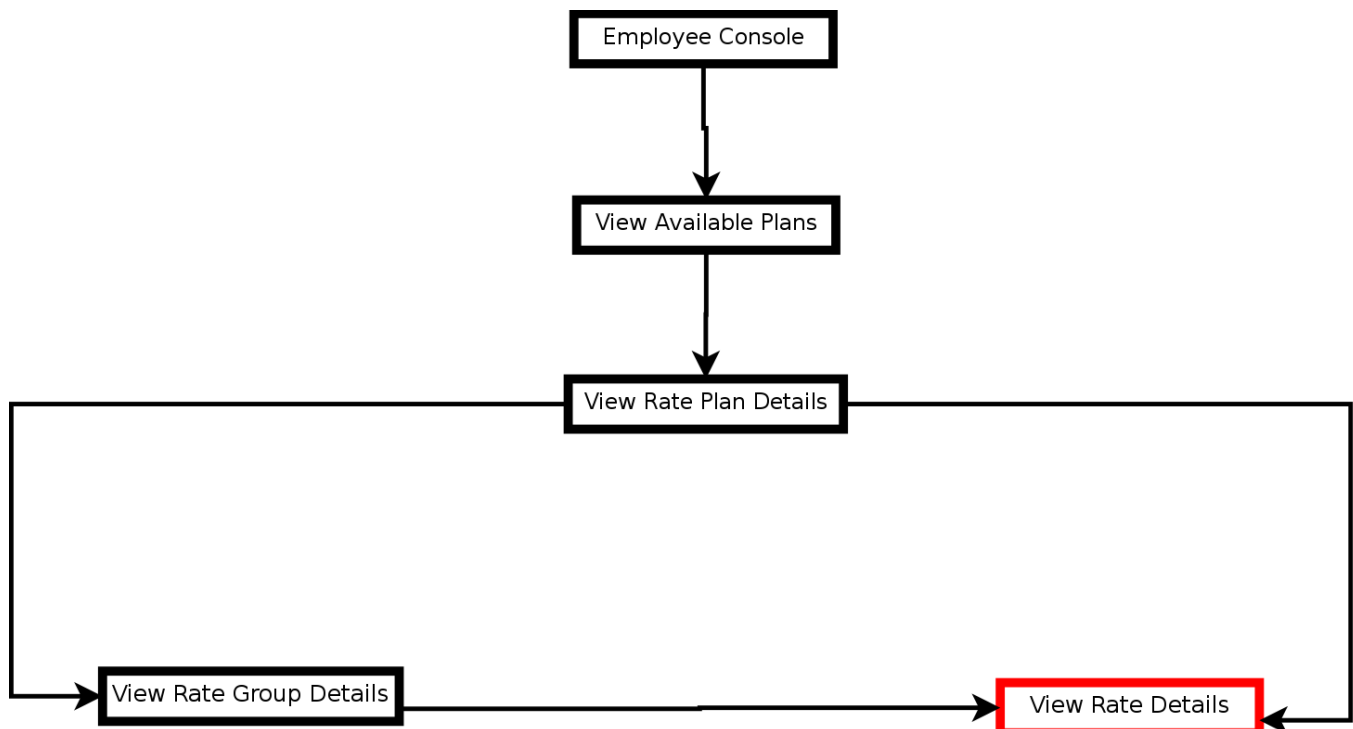**Provisioning Requests**
Requests that have been (or will be) Sent

CLOSE ✕

view rate details

System Navigation

```
          ┌─────────────────────┐
          │   Employee Console  │
          └─────────────────────┘
                     │
                     ▼
          ┌─────────────────────┐
          │ View Available Plans│
          └─────────────────────┘
                     │
                     ▼
   ┌──────────────────────────────┐
   │    View Rate Plan Details    │
   └──────────────────────────────┘
   │                              │
   ▼                              ▼
┌─────────────────────┐   ┌─────────────────────┐
│View Rate Group Details│→│  View Rate Details  │
└─────────────────────┘   └─────────────────────┘
```

View Rate Details

This page shows a list of details for an individual rate. To view a rates' details, select the rate from the 'View Rate Plan Details' or 'View Rate Group Details' pages. Below is an example of the details that can be viewed on this page.

View Rate Details

Rate Id:	52
Rate Name:	Local-14
Rate Description:	14c/ff, Untimed
Service Type:	Land Line Telephone
Record Type:	Local
Archive Status:	**Currently Available**
Avalible Time:	12:00:00 AM to 11:59:59 PM
Duration:	24 hours, 0 minutes

Rate Details

Information about this Rate and its Charges

CLOSE ✖

view rate group details

System Navigation

Employee Console → View Available Plans → View Rate Plan Details → View Rate Group Details
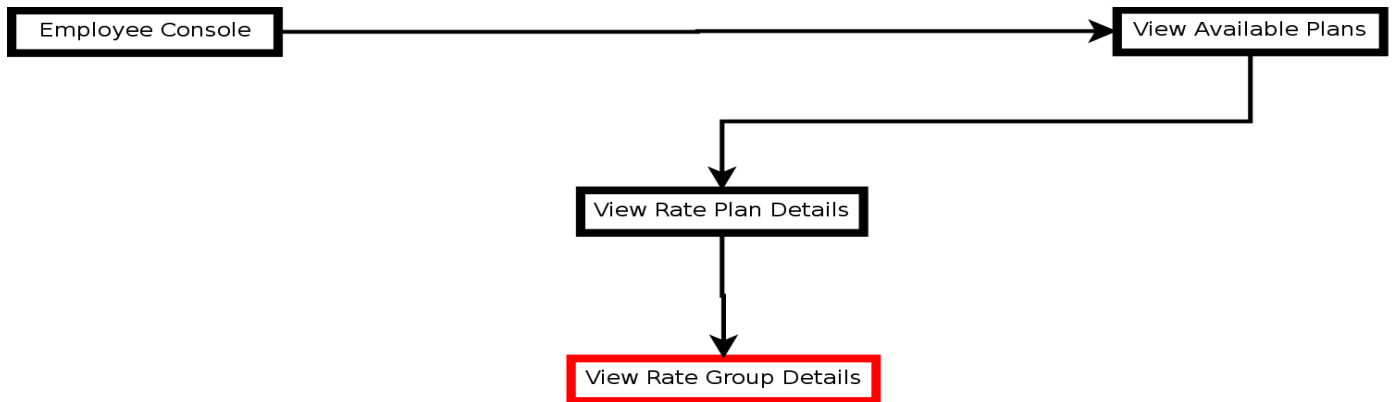
View Rate Group Details

This page can be viewed by clicking on the rate group name on the 'View Rate Plan Details' page. It displays a list of rates associated with the rate group.

Charges

Local (Local-14)		
14c/ff, Untimed	Mo Tu We Th Fr Sa Su	12:00:00 AM to 11:59:59 PM

view rate plan details

System Navigation

Employee Console → View Available Plans → View Rate Plan Details
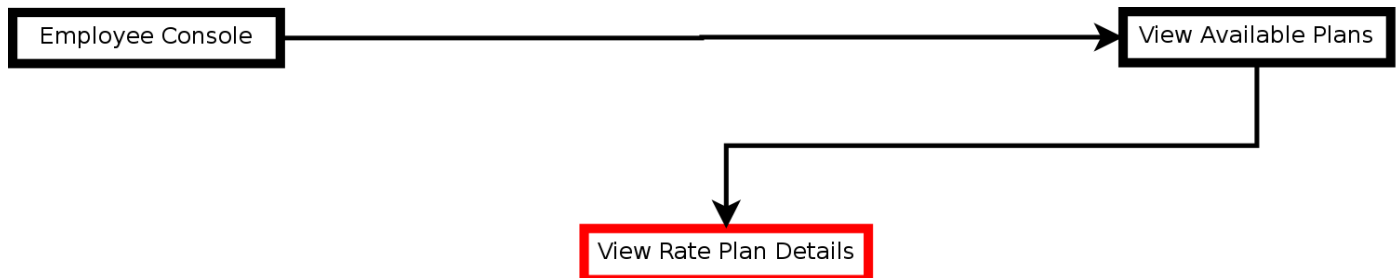
View Rate Plan Details

The 'View Rate Plan Details' page can be viewed by selecting a rate plan from the 'View Available Plans' page. This page lists each of the rate groups and rates associated with the plan. It also lists the details of the plan, as in the example below.
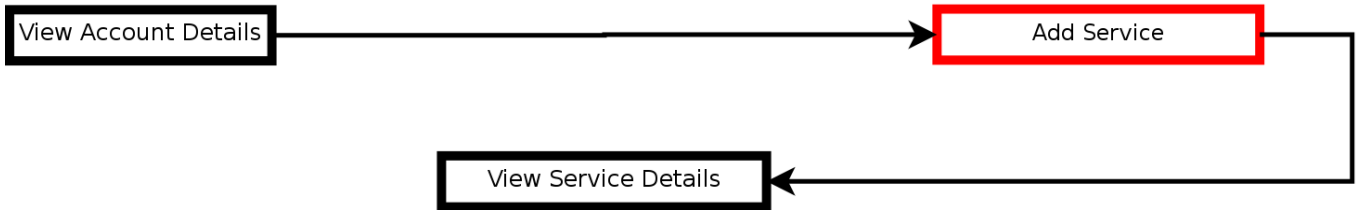
Plan Details

Rate Plan Name :	Demo
Rate Plan Description :	Demo
Service Type :	ADSL Connection
Archive Status :	Currently Available
Charge Cap :	$0.00
Usage Cap :	$0.00
Minimum Monthly :	$0.00
Shared Cap :	Non-Shared Plan

add service

System Navigation

View Account Details → Add Service → View Service Details

Add Service

To add a service to an account, select the 'Add Service' link from the 'View Account Details' page. There are 4 service types which can be added to an account. These are:

ADSL Connection

Mobile Telephone

Land Line Telephone

Inbound Call Number

Select the required service type and continue. This will display additional options for the service.

Service Details

* **Service Type** :   Land Line Telephone ▼

add service

If a service number is entered at this time, it must be confirmed by repeating the service number in the 'Confirm Service #' field. The service will not be added until the service number has been correctly confirmed.

Service Details

* Service Type :	Land Line Telephone
Service # :	0733334444
Confirm Service # :	0733334444
Indial 100 :	☐ this service is the GDN for a 100 number Indial Range
* Select Plan :	Blue 15 CTM ▼ **View Plan Details »**

To add a 100 number indial range, enter the GDN as the service number, and tick the checkbox next to 'Indial 100'.

Note: The Indial 100 option is only available for landline services.

System Navigation

| View Account Details | ──────────────────────────➤ | View Service Details |

Add Service Notes

Notes can be attached to a service from the 'View Service Details' page. To add a note to a service enter the note text into the field shown below. Different note types can be selected from the drop down list below the text field. By selecting the 'Show this note in Account Notes' check box (selected by default) you can specify that the note should be displayed in both the service notes and the account notes.

Available note types are:

General Notice

Follow Up Required

Attention Notice

Complaint

default

System Notice

Service Notes

Type new note for this service in the field below:
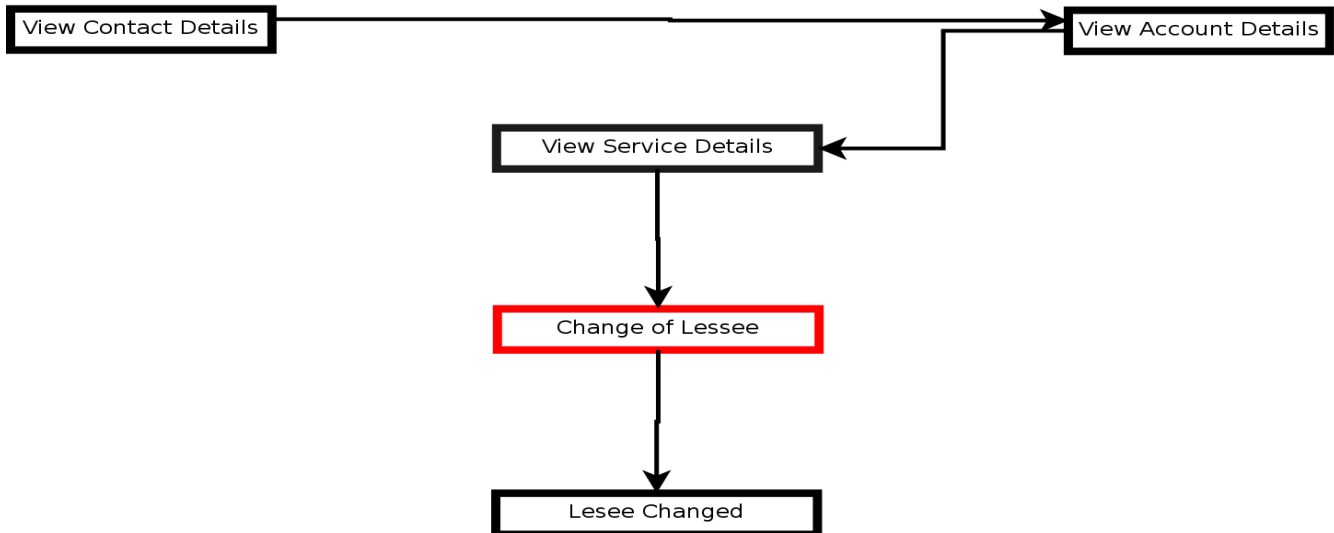
☑ Show this note in Account Notes.

General Notice ▾   Add Note »

change of lessee

System Navigation

Change Of Lessee

This page is used to transfer a service from one account to another. Initially, this page will display the service details, and the details of the account to which the service currently belongs.

Service Details

Service ID :	38033
Service # :	0433555888

Current Account Details

Account ID :	1000162948
Business Name :	Vixen Systems

change of lessee

To transfer a service you will need to enter the Account ID of the account which is to receive the service.

Receiving Account Details

* **Account ID :**   1000162950

After you continue, the details of the receiving account will be displayed, as shown below.

Receiving Account Details

Account ID :	1000162950
Business Name :	Anjuta Systems

You will then need to enter the date on which the lessee will be changed. This date must be a minimum of 48 hours after 12:00 AM on the current date.

Date of Change

* **Change Date :**   10 / 2 / 2007

A page will then be shown indicating that the change of lessee was successful. This page will display the following information:
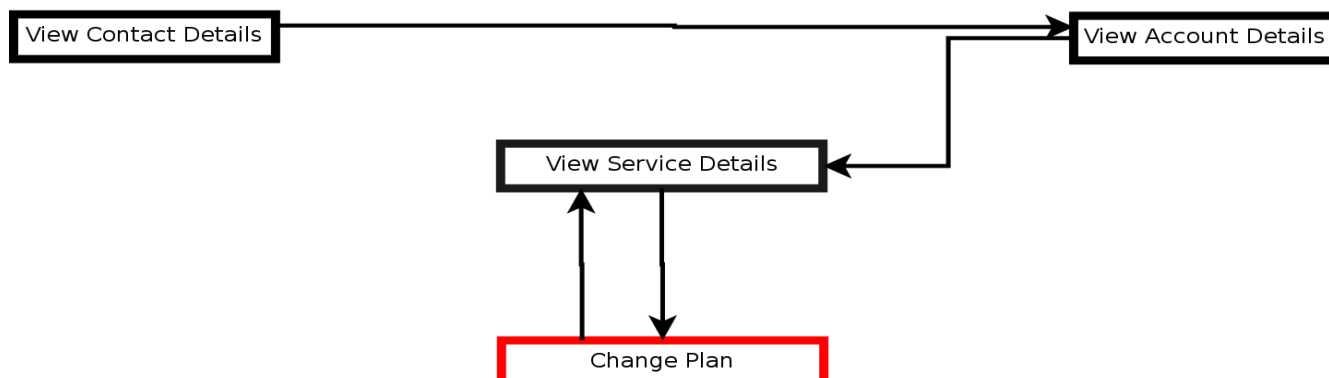
Option	Old Details	New Details
Account	View Account	View Account
Service	View Service	View Service
Line Number	0433555888	0433555888
Start Date	Tuesday, Jan 30, 2007	Saturday, Feb 10, 2007
Cease Date	Friday, Feb 09, 2007	**No Close Date**

System Navigation

Change Plan

To change the rate plan for a service, select the 'Change Plan' link from the 'View Service Details' page and select the new plan from the drop down list. Plan details can be viewed by selecting a plan and clicking the 'View Plan Details' button. Once a plan is selected and you have clicked 'Continue', the 'View Service Details' page will be displayed. The name of the new plan will appear in 'Service Details', indicating that the plan has been successfully changed.
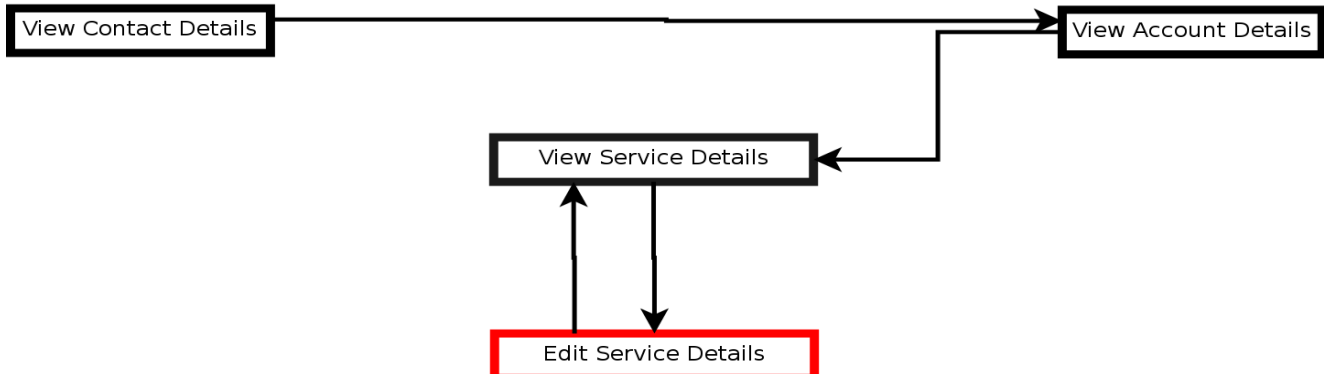

Plan Details

Current Plan :	**Blue 15 CTM**
Select Plan :	Residential ▾ **View Plan Details »**

edit service details

System Navigation

Edit Service Details

The 'Edit Service Details' page allows you to change the 'Service #' for a service. If the 'Service #' is changed, it must be confirmed. The 'Service #' cannot be changed unless it has been confirmed correctly.

The 'Edit Service Details' page also allows you to archive a service. To archive a service, check the archive box shown below. The service can be unarchived if required by unchecking the box.
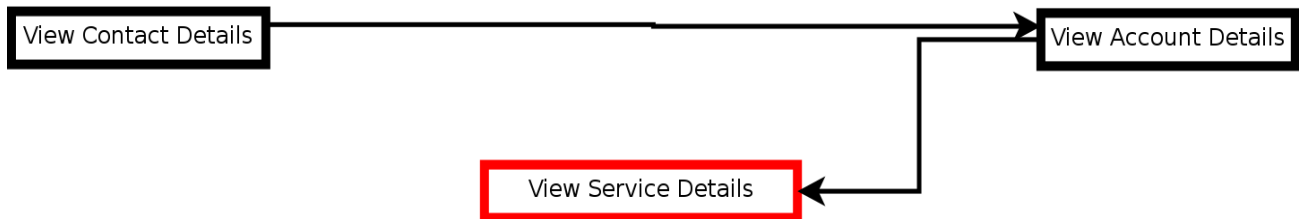

Once you have edited the service details and continued, you will be returned to the 'View Service Details' page, indicating that any changes have been successfully applied.

System Navigation

View Service Details

This is the primary page for accessing service details. It allows you to view the details of an service, as well as accessing a number of service options, including 'Edit Service Details', 'View Unbilled Charges' and 'Change Plan'. Below is an example list of the service details listed on this page.

Account Details

Account ID :	1000162948
Business Name :	Vixen Systems

Service Details

Service ID :	38033
Service # :	0433555888
Service Type :	Mobile Telephone
Created On :	Tuesday, Jan 30, 2007
Closed On :	Friday, Feb 09, 2007
Unbilled Charges :	$0.0000
Current Plan :	$35 Cap

Edit Service Details

System Navigation

| View Contact Details | → | View Account Details |

View Service Details

View Service Notes

The five most recent service notes are displayed on the 'View Service Details' page. To view a complete list of notes for a service, select the 'View All Service Notes' link on the 'View Service Details' page.

help

Pablo 'the helpful donkey'

Pablo appears throughout the vixen system to offer his helpful advice. On many pages, labels appear blue with a dotted underline, as shown below.

Username :

Clicking on this text will display a Pablo help box, similar to the one below. Pablo will offer a description of the field to help you understand its purpose.

Pablo 'the helpful donkey' says:

Contact Username

The user name which the contact will use to log into their personal profile online.

Pablo 'the helpful donkey'
Pablo provides helpful online documentation

CLOSE ✕

Pablo will also appear immediately after login to share his 'Tip of the Day'.

report a bug

Bug Reporter

If you find an occasion where the vixen system does not work as expected, click on the ⬤ icon in the top right corner of the page. This will display a Bug Reporter, shown below. Describe in detail the problem which is occurring, and click 'Report Bug' to submit the problem.

Bug Report

Please describe the problem that occurred :

Report Bug »

Report a System Bug
Let us know when something isn't working the way you expect

CLOSE ✕