



Back Office Training Manual Table of Contents

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What Can I Find On the Home Page?

- Inbox**- You will find your customers that have been entered into the back office here. The customers listed in your Inbox are waiting to be placed into an accepted status in your sales funnel.

You have 1 solution request from your sub-agents pending approval.

Co.	Type	Customer Name	BTN/Service/LEC	Contact/Phone	Lead/Date	Action
	ANGELA TEST COMPANY	9:48 AM MDT (RPL Free)	(801) 879-2238 INTERNET T1 CELLCO PARTN..	ANGELA (801) 938-3664	CLOSER 10/04/12 02:00 PM	
	TW TELECOM TEST QUOTE	10:48 AM CDT (RPL Free)	(703) 386-2421 ETHERNET (F.I. TW TELECOM O..	MATT RABA (913) 780-5574	CLOSER 10/02/12 02:54 PM	
	TW TELECOM TEST QUOTE	10:48 AM CDT (RPL Free)	(703) 386-2421 ETHERNET (F.I. TW TELECOM O..	MATT RABA (913) 780-5574	CLOSER 10/02/12 02:50 PM	
	ALPHEUS TEST QUOTE	11:48 AM EDT (RPL Free)	(512) 219-5408 ETHERNET (CO.. SOUTHWESTERN..	JAMES KNIGHT (877) 257-4387	CLOSER 10/02/12 12:55 PM	
	ALPHEUS TEST QUOTE	11:48 AM EDT (RPL Free)	(210) 340-0032 ETHERNET (F.I. SOUTHWESTERN..	JAMES KNIGHT (877) 257-4387	CLOSER 10/02/12 12:53 PM	

* = customer comments present

[View Complete Inbox](#) | [Sales Funnel](#)

- Manual Quote Request Updates** – Current status of your Manual Quotes that have been submitted through the back office.

Manual Quote Request Updates

Last Update	Customer Name/Location	Contact/BTN/Service	Carriers
THERE ARE NO MANUAL QUOTE REQUESTS IN THIS CATEGORY			

[View Complete List](#)

Orders Pending Activation (1 Order Pending Activation)

Aff	Customer Name	Service	Carrier	Last Update
	ALPHEUS TEST 800 BELL STREET HOUSTON, TX 77002	T1		09/25/12

- Search for Tool Box**- This allows you to search for customer using any of the fields in the drop down box to the right.

Search for: business name

Inbox

Co.	Type	Customer Name	BTN/Service/LEC	Contact/Phone	Lead/Date	Action
	ANGELA TEST COMPANY	9:48 AM MDT (RPL Free)	(801) 879-2238 INTERNET T1 CELLCO PARTN..	ANGELA (801) 938-3664	CLOSER 10/04/12 02:00 PM	
	TW TELECOM TEST QUOTE	10:48 AM CDT (RPL Free)	(703) 386-2421 ETHERNET (F.I. TW TELECOM O..	MATT RABA (913) 780-5574	CLOSER 10/02/12 02:54 PM	
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* = customer comments present

[View Complete Inbox](#) | [Sales Funnel](#)

Manual Quote Request Updates

4. **View Full Graveyard**- This report will show you all of your orders that have cancelled after installation and commissions have started to pay. *Note- An order placed in the Graveyard means you will no longer see commission payments from that account.

The screenshot shows the Telarus Back Office inbox. A tooltip for 'View Full Graveyard' is displayed over a list of customer entries. The tooltip contains the text: 'Congratulation, the Telarus undertaker hasn't found any customers that died in Jun or Jul.' Below the tooltip are two buttons: 'View Full Graveyard' and 'Snooze'.

5. **Tasks** – View upcoming and past due tasks. Mark as “Done” or “Snooze”.

The screenshot shows the Telarus Back Office inbox. A tooltip for 'View Full Graveyard' is displayed over a list of customer entries. The tooltip contains the text: 'Congratulation, the Telarus undertaker hasn't found any customers that died in Jun or Jul.' Below the tooltip are two buttons: 'View Full Graveyard' and 'Snooze'.

6. **Upcoming Training**- A list of all training sessions being held by our Suppliers. Select “View Full Schedule” to see ALL trainings coming up in the near future. *Note- Check this section frequently as trainings are always being added.

The screenshot shows the Telarus Back Office inbox. A tooltip for 'View Full Graveyard' is displayed over a list of customer entries. The tooltip contains the text: 'Congratulation, the Telarus undertaker hasn't found any customers that died in Jun or Jul.' Below the tooltip are two buttons: 'View Full Graveyard' and 'Snooze'.

7. **Where are the spiffs?** – This is fastest and best way to access the current promos and spiffs being offered by Telarus Suppliers. This link will take you to promos.telarus.com, where you will see the current list of what's available.

The screenshot shows a sidebar with links: Agent Bulletin Board, Agent Support, Vendor Contacts. Below is a yellow box with text: "Got a deal and need help? easy click here". Another yellow box below it says: "Where are the SPIFs? CLICK HERE" with a yellow star over it. The main content area lists four promotional offers:

(RPL Free)	
	TW TELECOM TEST QUOTE 10:48 AM CDT (RPL Free)
	TW TELECOM TEST QUOTE 10:48 AM CDT (RPL Free)
	ALPHEUS TEST QUOTE 11:48 AM EDT (RPL Free)
	ALPHEUS TEST QUOTE 11:48 AM EDT (RPL Free)

* = customer comments present

7. **How do I find my commission report?** – By clicking on the “Info” link, it will send you to your commission report, where you can select the specific month you would like to view.

The left side shows the Financial Dashboard with "Your October Sales: \$0.00" and "our September Check: \$0.00". The right side shows the "Manual Quote Requ" page with three entries:

Last Update	Customer Name/Location
VIEW MOR 10/04/12 05:12 PM	AUTOMATION TEST - DO NOT 480 EAST BROAD STREET COLUMBUS, OH 43215
VIEW MOR 10/04/12 05:12 PM	AUTOMATION TEST - DO NOT 408 BRAZOS STREET AUSTIN, TX 78701
VIEW MOR 10/04/12 05:12 PM	AUTOMATION TEST - DO NOT 480 EAST BROAD STREET COLUMBUS, OH 43215

8. **Agent Support**- This will send you to the Telarus Trouble Ticket system for back office and commission related questions and issues.

The left sidebar has links: Customer Management, VAR Program, GeoQuote, Training, Marketing, Reports, Agent Bulletin Board, **Agent Support** (circled in red), and Vendor Contacts. The main area shows an inbox with one request:

You have 1 solution request from you

Inbox			
Co	Type	Customer Name	BTN/Service
	ANGELA TEST COMPANY	(801) 879-223	
	TW TELECOM TEST QUOTE	(703) 386-242	
	TW TELECOM TEST QUOTE	(703) 386-242	

9. **Reports**- Here you can find direct links to valuable reports in your back office.

- **Commission Reports** -This will take you directly to your commission reports for viewing.

You are here > Home

change to vertical view ▾

Inbox				
	Co	Type	Customer Name	BTN/Service/LEC
	ANGELA TEST COMPANY		(801) 879-2238 INTERNET T1 CELLCO PARTN..	ANGELA (801) 938-
		TEST	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..	MATT RAB (913) 780-
			(703) 386-2421	MATT RAB
Got a deal and need help?  click here				

- **Customer Graveyard**- A second way to access your Customer Graveyard report.

Marketing		ANGELA TEST COMPANY	(801) 879-2238 INTERNET T1 CELLCO PARTN..
Reports	Commission Reports		
Agent Bulletin Board	VAR Equipment Commissions		
Agent Support	Customer Graveyard	TEST	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..
Vendor Contacts	Customer Fallout Report		
	Agent Recruitment Report		
Got a deal and need help?  click here		 TW TELECOM TEST QUOTE 10:48 AM CDT (RPL Free)	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..
		 ALPHEUS TEST QUOTE 11:48 AM EDT (RPL Free)	(512) 219-5408 ETHERNET (CO.. SOUTHWESTERN..
Where			

- **Customer Fallout Report** – A second way to access your Fallout Report

Marketing		ANGELA TEST COMPANY	(801) 879-2238 INTERNET T1 CELLCO PARTN..
Reports	Commission Reports		
Agent Bulletin Board	VAR Equipment Commissions		
Agent Support	Customer Graveyard	TEST	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..
Vendor Contacts	Customer Fallout Report		
	Agent Recruitment Report		
Got a deal and need help?  click here		 TW TELECOM TEST QUOTE 10:48 AM CDT (RPL Free)	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..

10. **Marketing** – You can find assistance with adding XML Plug-Ins, listen to a recording of our Tuesday call for Partner's and find information on how Telarus can help you with a complete marketing package for your business here. Plus lots more!

- **Marketing Call Recordings**- Listen to a recording of the Tuesday morning call here. You can also find a library of calls conducted by Patrick Oborn, Telarus V.P. of Marketing that talk about how you can grow your business.

Co	Type	Customer Name	BTN/Service/LEC	Contact/Phone
	Customer Connect	(801) 879-2238 INTERNET T1 CELLCO PARTN..	ANGELA (801) 938-3664	
	Marketing Call Recordings	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..	MATT RABA (913) 780-5574	
	Video Training Library			
	Complete Marketing Package			
	XML Plug-Ins			
	GeoQuote Premium Sites			
	Online Marketing	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..	MATT RABA (913) 780-5574	
	Real-World Marketing			

Got a deal and need help? easy click here

Where are the SPIFs?

- **Complete Marketing Package**- Want to learn more on how Telarus can help you with a complete package to help market your business? Interested in a new logo, website and business card design at a low cost? Find more information out about these services available to you here.

Co	Type	Customer Name	BTN/Service/LEC	Contact/Phone
	Customer Connect	(801) 879-2238 INTERNET T1 CELLCO PARTN..	ANGELA (801) 938-3664	
	Marketing Call Recordings	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..	MATT RABA (913) 780-5574	
	Video Training Library			
	Complete Marketing Package			
	XML Plug-Ins			
	GeoQuote Premium Sites			
	Online Marketing	(703) 386-2421 ETHERNET (FI.. TW TELECOM O..	MATT RABA (913) 780-5574	
	Real-World Marketing			

Got a deal and need help? easy click here

Where are the SPIFs?

- **XML Plug-Ins**- Want to add the Geoquote™ tool to your website? You can find the plug-in information here.

The screenshot shows a software interface with a sidebar on the left containing links like 'Training', 'Marketing', 'Reports', etc. The main area is titled 'Inbox' and lists various items. One item, 'XML Plug-Ins', is highlighted with a yellow background. To the right, there's a table with columns for 'Customer Name', 'BTN/Service/LEC', and 'Contact'. Below this table, there's a section for 'ALPHEUS TEST QUOTE' with details like '12:43 PM EDT (RPL Free)' and contact information for 'JAMES'.

11. **Geoquote™**- A direct link to Geoquote™ to begin pricing.

This screenshot shows the 'VAR Program' section of the software. The left sidebar has a yellow box around the 'GeoQuote' link. The main area lists various service options like 'Dedicated Internet Access', 'Voice - Local, PRI, LD and SIP Pricing', etc. On the right, there's a table for 'TN/Service/LEC' and 'Contact/Phone' with entries for 'ANGELA' and 'MATT RABA'. Below this, there are two entries for 'TW TELECOM TEST QUOTE' with details like '12:07 PM CDT (RPL Free)' and contact information for 'MATT RABA'.

12. **VAR Program** – How to add VAR's, manage VAR's, VAR lead tracking and information about the VAR program call all be found here.

This screenshot shows the 'Customer Management' section. The left sidebar has a yellow box around the 'VAR Program' link. The main area lists various management tools like 'VAR Introduction', 'VAR Administration', etc. On the right, there's a table for 'BTN/Service/LEC' and 'Contact' with entries for 'ANGELA' and 'MATT RABA'. Below this, there are three entries for 'TEST QUOTE' with details like '12:07 PM CDT' and contact information for 'MATT RABA'.

13. **Customer Management** – In this section you will find links to create a customer record, your Inbox, the Sales Funnels, Manual Quote Request results, your Task Manager, a report of your orders you have submitted, your Renewal Report and a forms library. Most of your time in the back office is spent in this section.

You are here > Home

[change to vertical](#)

Customer Management	Create New Customer Record
VAR Program	Inbox (3367 new leads)
GeoQuote	Sales Funnel
Training	Lead Pool (0 Available)
Marketing	Manual Quote Requests
Reports	Task Manager
Agent Bulletin Board	Important Contact Dates
Agent Support	Customer Email Tool
Vendor Contacts	Orders Submitted
Got a deal and need help? 	Upcoming Renewals
	Forms Library
	Vendor Contacts

12:07 PM CDT

- **Create New Customer Record** – Have a customer and need to get their information into their back office? Select “**Create New Customer Record**” to get them added into your back office.

You are here > Home

[change to vertical](#)

Customer Management	Create New Customer Record
VAR Program	Inbox (3367 new leads)
GeoQuote	Sales Funnel
Training	Lead Pool (0 Available)
Marketing	Manual Quote Requests
Reports	Task Manager
Agent Bulletin Board	Important Contact Dates
Agent Support	Customer Email Tool
Vendor Contacts	Orders Submitted
Got a deal and need help? 	Upcoming Renewals
	Forms Library
	Vendor Contacts

12:07 PM CDT

- **Sales Funnel**- Get a quick view of which of your customers are currently in a particular sales funnel or status.

	Create New Customer Record	on request from your sub-agents pe
VAR Program	Inbox (3367 new leads)	
GeoQuote	Sales Funnel	Accepted Leads
Training	Lead Pool (0 Available)	Attempted Contact
Marketing	Manual Quote Requests	Contacted
Reports	Task Manager	Sent Proposal
Agent Bulletin Board	Important Contact Dates	Accepted Proposal
Agent Support	Customer Email Tool	Paperwork Submitted
Vendor Contacts	Orders Submitted	Provisioning
	Upcoming Renewals	Activated
	Forms Library	Cancelled Orders
	Vendor Contacts	Call Back Later
		Junk - Residential
		Junk - Deleted
		JAMES KNIGHT (877) 257-4387
		MATT RABA (913) 780-5574
		MATT RABA (913) 780-5574
		ANGELA (801) 938-3664
		MATT RABA (913) 780-5574
		ETHERNET (CO..
		ALPHEUS TEST QUOTE 1:07 PM EDT
		12:07 PM CDT (RPL Free)

- **Manual Quote Requests** – Check on the status of a back office submitted Manual Quote Request here.

	Create New Customer Record	on request from your su
VAR Program	Inbox (3367 new leads)	
GeoQuote	Sales Funnel	
Training	Lead Pool (0 Available)	
Marketing	Manual Quote Requests	BTN/Service/LEC
Reports	Task Manager	(801) 879-2238 A INTERNET T1 CELLCO PARTN..
Agent Bulletin Board	Important Contact Dates	
Agent Support	Customer Email Tool	
Vendor Contacts	Orders Submitted	
	Upcoming Renewals	
	Forms Library	
	Vendor Contacts	
		(703) 386-2421 M ETHERNET (FI.. TW TELECOM O..
		(703) 386-2421 M ETHERNET (FI.. TW TELECOM O..

- **Orders Submitted** – You can find a list of all your orders here. You can view them either by their status, or you can view all.

	Create New Customer Record	on request from your sub-
VAR Program	Inbox (3367 new leads)	
GeoQuote	Sales Funnel	
Training	Lead Pool (0 Available)	
Marketing	Manual Quote Requests	
Reports	Task Manager	
Agent Bulletin Board	Important Contact Dates	
Agent Support	Customer Email Tool	
Vendor Contacts	Orders Submitted	BTN/Service/LEC
	Upcoming Renewals	(801) 879-2238 ANK INTERNET T1 (80 CELLCO PARTN..
	Forms Library	
	Vendor Contacts	
		(703) 386-2421 MA ETHERNET (FI.. (91 TW TELECOM O..
		(703) 386-2421 MA ETHERNET (FI.. (91 TW TELECOM O..

- **Upcoming Renewals** – Telarus lets you know when you have a customer whose contract is expiring in six months or less, so you can renew their current services or upgrade their services. To see a report of the customers that fall into this status, you can go to the “Upcoming Renewal” section.

You are here > Home [change to vertical view](#)

Customer Management	Create New Customer Record	on request from your sub-
VAR Program	Inbox (3367 new leads)	
GeoQuote	Sales Funnel	
Training	Lead Pool (0 Available)	
Marketing	Manual Quote Requests	
Reports	Task Manager	
Agent Bulletin Board	Important Contact Dates	
Agent Support	Customer Email Tool	
Vendor Contacts	Orders Submitted	
Upcoming Renewals		
Forms Library		
Vendor Contacts		

12:07 PM CDT (RPL Free)

 **ALPHEUS TEST QUOTE** (512) 219-5408
1:07 PM EDT (RPL Free)
 **ALPHEUS TEST QUOTE** (210) 340-0032

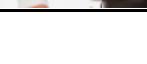
Got a deal and need help? 
Where are the 

- **Forms Library** – Need customer forms, marketing or training documents for services on a particular supplier? This is the place to find them.

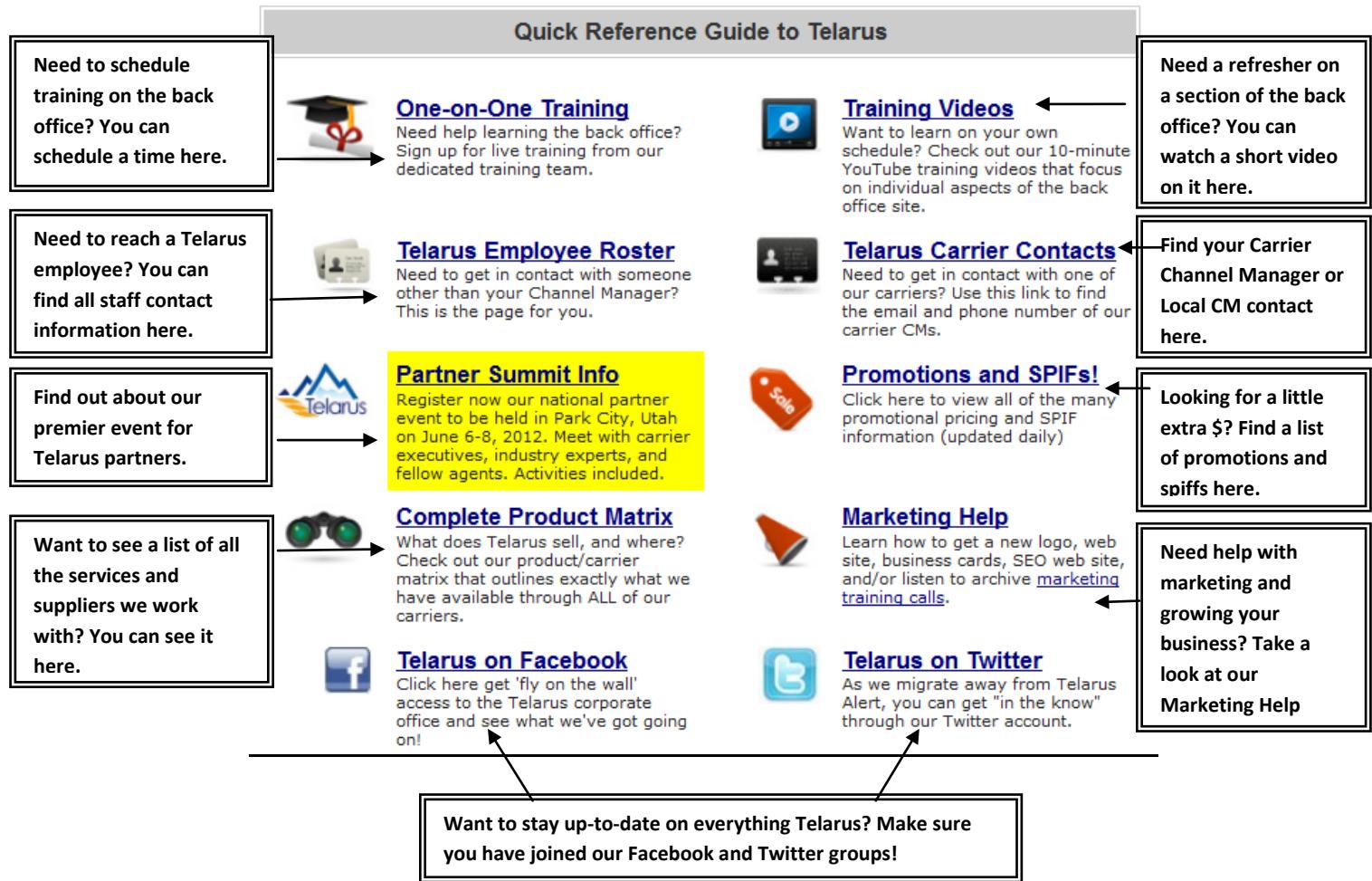
Customer Management	Create New Customer Record	on request from your sub-
VAR Program	Inbox (3367 new leads)	
GeoQuote	Sales Funnel	
Training	Lead Pool (0 Available)	
Marketing	Manual Quote Requests	
Reports	Task Manager	
Agent Bulletin Board	Important Contact Dates	
Agent Support	Customer Email Tool	
Vendor Contacts	Orders Submitted	
Upcoming Renewals		
Forms Library		
Vendor Contacts		

12:07 PM CDT (RPL Free)

 **ALPHEUS TEST QUOTE** (512) 219-5408
1:07 PM EDT (RPL Free)
 **ALPHEUS TEST QUOTE** (210) 340-0032

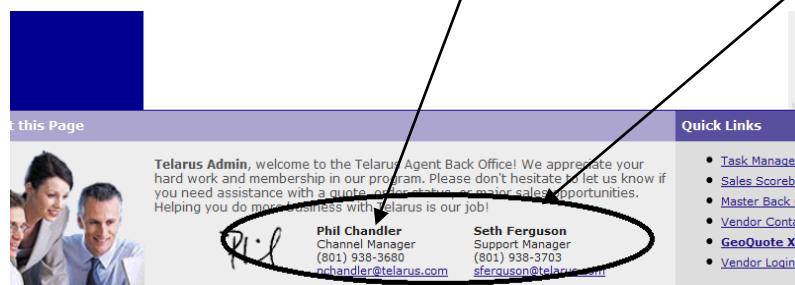
Got a deal and need help? 
Where are the 

Quick Reference Guide



Need Sales Help?

Contact Your Telarus Sales Team. Your Telarus Channel Manager is the one who you contact for business strategizing, planning and talk to about how Telarus can help you grow your business. Who do you go to for quotes, provisioning and anything else customer related? Your Support Manager will assist you with customer related questions.



Creating and Using Customer Records

Need to create a customer record? Select “**Customer Management**” from the menu bar and then select “**Create a New Customer Record**”.

You are here > Home



Complete the information boxes and select “**Create New Record**”.

(*Note- When creating a Customer Record you will want to use the legal business name.)

New Customer Record Entry Portal

The screenshot shows a web-based form for creating a new customer record. It is divided into sections: "Company Information", "Contact Information", and "Customer Location Information".

- Company Information:** Fields include "Company Name" (set to yellow), "Lead Gen AgentID / Affiliate" (set to "Telarus"), and "Customer Notes" (text area).
- Contact Information:** Fields include "Contact Name", "Contact Email", "Contact Country" (set to "United States"), and "Contact Phone".
- Customer Location Information:** Fields include "Physical Address Line 1", "Address Line 2", "City", "Country" (set to "United States"), "State" (set to "AL"), "Zip", and "Location BTN".

A yellow diamond-shaped road sign icon with an upward arrow is positioned next to the "Address Line 2" field. A callout box with the text "If necessary" points to the "Address Line 2" field.

At the bottom left, there is a note: "* = required fields". At the bottom right, there is a "Create New Record" button.

3. Your completed customer record will look like the page below:

The screenshot shows a detailed view of a customer record for "TEST TRAINING CUSTOMER". The page is organized into several sections:

- Customer Information:** Includes address (45 W 5600 LILY DR STE 220, SANDY, UT 84070-2656), primary contact (Jessica Martin), and various notes.
- Solution Requests:** A section for managing solutions or proposals.
- Location Information:** Shows the physical address (45 W 5600 LILY DR STE 220, SANDY, UT 84070-2656) and a map.
- Inventory Management:** Shows no equipment quotes generated.
- Proposals:** Shows no proposals have been generated.
- VAR Lead History:** Shows no leads assigned to this customer.
- Customer Contacts:** Lists a single contact: Jessica Martin (4-22 PM, Added: 10/30/2012).
- Order Info:** Shows no orders attached to this customer.
- Email Templates:** Shows various email template options.
- Funnel Metrics:** Displays lead counts for various stages: PENDING OUTBOUND (2), ACTIVE OUTBOUND (9), INBOX (348), ACCEPTED LEADS (232), ATTEMPTED CONTACT (4), CONTACTED (37), SENT PROPOSAL (22), and so on.

4. You will need to click on either “Accept Lead”, or the green arrow to take the lead out of your Inbox and begin to track the customer status progression in the sales funnels.



5. A dropdown box will appear and you can now move the customer into the appropriate sales funnel and track their progression as you work with them.

Accepted
Accepted
Attempted Contact
>Contacted
Sent Proposal
Accepted Proposal
Paperwork Submitted
Provisioning
Activated
Cancelled
Call Back Later
Residential
Junk

6. To edit a Customer Record, you will need to go to the “Customer Contact” section on the record page, and then select “Edit”.

7. Edit the appropriate information and select “Edit Record”.

What You Can Find In a Customer Record

Remember to "Accept Lead" once you add your customer record.

Main Location Information

TEST COMPANY
45 W SEGO LILY DR STE 220
SANDY, UT 84070-3656

Primary Contact: Mary Smith
Email Address: msmith@telarus.com
Website: http://closer.back_office
Initial Interest: Call me later but email me now.
Office Phone: (801) 523-2100

Record ID: 1218893
Lead Generator: closer
IP Address: 50.73.35.249
Referer Link: agent.telarus.com/closer/
Entry Page: agent.telarus.com/closer/
Quote Page: agent.telarus.com/closer/

Record Added: 10/10/12 04:01 PM
Record Modified: 10/10/12 04:01 PM
Permissions: hide assigned contacts

Add

Tasks for Customer
No tasks found in the database.

Agent Notes
No agent notes for this account.

Private Agent Notes
No agent notes for this account.

Attached Documents
No documents are attached to this customer.

Agents With Access - SME's
Telarus Admin (CLOSER) Primary

Customer History
10/10/12 Customer Record Created 04:01 PM

Commission History
No commissions found in the database.

LPS Reasoning
Added broadstring / tel from queue - Type Match
Removed broadstring / tel from the Queue - ID = 7570

SME Leads
PENDING OUTBOUND (2)
ACTIVE OUTBOUND (9)

Vendor-Provided Leads
XO LEADS (257)
VERACITY LEADS (31)
WINDSTREAM LEADS (19)
MEGAPATH LEADS (12)
ACC BUSINESS LEADS (474)
NTEL LEADS (10)

Location Information
ADD ONE | ADD BULK
(801) 523-2100
45 W SEGO LILY DR STE 220
SANDY, UT 84070-3656
US POSTAL SERVICE ADDRESS VERIFIED

QUOTE HISTORY
PROPOSAL GEOQUOTE CREATE DIVISION P2P NONE

Inventory Management
ADD

Proposals
ADD
No proposals have been generated

VAR Lead History
No equipment quotes have been run for this customer.

Customer Contacts
Mary Smith 4:04 PM (Added: 10/10/2012)
EDIT

Order Info
ADD
No orders are attached to this customer

Inactive Lead Funnel
CANCELLED (0)
CALL BACK LATER (3)

RESIDENTIAL LEADS (27)
JUNK LEADS (263)

Email Templates
ADD
A new email template. EDIT | DEL
Customized Proposal Email Template 2 EDIT | DEL
Customized Proposal Email Template 2 EDIT | DEL
Personal Contact From ShopForT1
DSL Availability For Your Business
Sorry I Missed You Today
Give Me a Call About Your T1
Regarding Your T1 Line
Thanks For Your Interest In Our Services
More Information Regarding T-1 Service
Please Call Regarding Your T-1 Quote
ShopforT1 Proposal Follow-Up
How was our service?
THANK YOU for visiting ShopforT1.com
Welcome Letter Re-Send (includes passcode)
View Your Footer
* = already sent to customer
Select and Continue >

Outgoing Email
No e-mail is queued to be sent to this customer

Sent Email
No e-mail has been sent to this customer

Leads You Generated
LEADS (4096)

Add additional customer locations either by bulk, or one at a time.

You can add additional customer contacts here

You can edit the existing customer record here.

Add your order here so you can begin receiving commissions.

Create your own custom Email Templates to use here.

Email templates in the white section are back office templates created by Telarus that you can use.

Anytime you send an email out of your back office, it will save in your customer record under the "Sent Email" section.

A closer look at the "Location Information" section

Geoscan allows you to scan for services available at a location.

A direct link to Geoquote™.

Location Information
ADD ONE | ADD BULK
(801) 523-2100
45 W SEGO LILY DR STE 220
SANDY, UT 84070-3656
US POSTAL SERVICE ADDRESS VERIFIED

QUOTE HISTORY
PROPOSAL GEOQUOTE CREATE DIVISION P2P NONE

- Find the customer Loop information.
- Reverse Phone Number Search
- Reverse Address Search
- Direct link to the fiber route maps.
- VAR Search Tool
- USPS Address Verification Tool

How to Upload Additional Locations to a Customer Record

1. In the Customer Record go to “**Location Information**” and select “**Add Bulk**”. *Note- Use the “**Add One**” tool if adding less than 5 locations.

The screenshot shows the 'Customer Information' page for 'TEST CUSTOMER TRAINING'. The 'Location Information' section is highlighted with a yellow oval. It contains a table with columns for Address, City, State, Zip, and a 'POSSIBLE PHONE NUMBER / CO ISSUES' dropdown. Buttons for 'ADD-ON' and 'ADD BULK' are visible. To the right, there are sections for 'SME Leads', 'Vendor-Provided Leads', 'Active Lead Funnel', and 'Active Customer Funnel'.

2. Upload completed XLS file from computer by selecting “**Browse**”, selecting saved file. Click on “**Import Location File Now**” to import. (A template is available to use for bulk location uploading. Please request the template from your Telarus Support Manager if you would like to use it. You will still need to fill in the required customer location information before uploading the XLS template here.)

The screenshot shows the 'Bulk Add Locations' page for 'TEST CUSTOMER TRAINING'. A large callout box highlights the 'Import Location File Now' button at the bottom of the form. The form includes fields for Record ID, Lead Generator, IP Address, Record Added, Record Modified, and a file upload section with a 'Browse' button. To the right, there are sections for 'SME Leads', 'Vendor-Provided Leads', 'Active Lead Funnel', and 'Active Customer Funnel'.

3. Verify fields and locations are correct and then select “Finalize Import”.

The screenshot shows the 'Bulk File Upload - Verify Fields - Test Customer Training' page. It displays a table with columns: Street Address, Street Address, City, Country, State, Zip, and Phone Number. There are two rows of data. Below the table, there is a note: 'Please make sure to check these field names which will be used to transfer your file into locations for the customer record.' At the bottom left is a 'Finalize import' button, which is circled in red. On the right side, there are various lead categories and their counts.

4. Verify that the correct number of locations have been added under “File Upload Results” and then select “Return to Customer Record”.

The screenshot shows the 'Bulk File Upload - Finalized - Test Customer Training' page. It displays a message: 'Your bulk file location upload is completed for Test Customer Training'. Below this, a yellow box says '6 New Locations Inserted'. At the bottom left is a 'Return to Customer Record' button, which is circled in red. On the right side, there are various lead categories and their counts.

5. Your added locations will now appear under the “Location Information” section in the customer record. *Note- The back office will default to show only the first **THREE** locations. If you would like to see all of them, you will need to select “View All” and the additional locations will drop down.

The screenshot shows the 'View Test Customer Training' page. Under the 'Customer Information' section, there is a 'Location Information' table with three entries. To the right of the table is a 'View All' link, which is circled in red. Other sections visible include 'Solution Requests', 'Tasks for Customer', 'Agent Notes', and 'Private Agent Notes'.

Using GeoScan & the Multi Location Scan Tools

GeoScan allows you to quickly find services and carriers that are available at a particular customer address.

- Once in the customer record, you will need to go to the eyeball icon next to the address you would like to do a GeoScan search for.

View Test Company

Customer Information

TEST COMPANY
45 W SEGO LILY DR STE 220
SANDY, UT 84070-3656

Primary Contact: Mary Smith
Email Address: msmith@telarus.com
Website: http://closer back office

Initial Interest: Call me later but email me now.
Office Phone: (801) 523-2100

Record ID: 1218893
Lead Generator: closer
IP Address: 50.73.35.249
Referer Link: agent.telarus.com/closer/

Solution Requests

Need help with a custom solution or manual quote?
[Click here for assistance.](#)

Location Information

(801) 523-2100

45 W SEGO LILY DR STE 220
SANDY, UT 84070-3656

US POSTAL SERVICE
ADDRESS VERIFIED

QUOTE HISTORY

PROPOSAL GEOQUOTE

CREATE **DIVISION** **P2P**

NONE

- The first results page will show you EVERYTHING that is available near that address.

GeoScan™ Results for:
(801) 523-2100
45 W SEGO LILY DR STE 220 | SANDY | UT 84070

Serving CO: DRPRUTMA - SANDY, UT (QWEST) Product Filter: View All

Carriers in the Area:

Carrier	Calculation Method	Products Offered by Carrier
ACC BUSINESS	CO/CLLI	T1 , Bonded T1 , Frac DS3 , DS3
ACCEL NETWORKS	ZIP CODE	DSL , Frac T1 , Fixed Wireless , Satellite
ACCUCONFERENCE	LATA	Conferencing
AT&T	CO/CLLI	DSL , Frac T1 , T1 , Bonded T1
CENTURYLINK	CO/CLLI	Frac T1 , T1 , Bonded T1 , Frac DS3
COMCAST	ZIP CODE	DSL , Cable , T1 , Bonded T1
ERNEST COMMUNICATIONS	LATA	Integrated T1 , Integrated PRI , Integrated Analog , Local PRI
INTEGRA TELECOM	CO/CLLI	T1 , Bonded T1 , DS2 , Ethernet (Copper)
LEVEL3 COMMUNICATIONS	CO/CLLI	T1 , Bonded T1 , Frac DS3 , DS2
MEGAPATH	CO/CLLI	DSL , Frac T1 , T1 , Bonded T1
MOSAIC NETWORKS	LATA	T1 , Frac DS3 , DS3 , Ethernet (Fiber)
NETWOLVES	LATA	DSL , T1 , Bonded T1 , Satellite
NTEL	CO/CLLI	T1 , Bonded T1 , Frac DS2 , DS2
POWERNET GLOBAL	CO/CLLI	T1 , Bonded T1 , Frac DS2 , DS2
REALLINK	LATA	Hosted PBX , SIP Trunks
TELNE	CO/CLLI	DSL , Frac T1 , T1 , Bonded T1
VOCALIP NETWORK	LATA	Local T1 , Hosted PBX , SIP Trunks , SIP Buckets

- You can narrow down your results by product by selecting your product choice in the “**Product Filter**” drop-down list.

GeoScan™ Results for:
(801) 523-2100
45 W SEGO LILY DR STE 220 | SANDY | UT 84070

Serving CO: DRPRUTMA - SANDY, UT (QWEST) Product Filter: View All

Carriers in the Area:

Carrier	Calculation Method	Products Offered by Carrier
ACC BUSINESS	CO/CLLI	T1 , Bonded T1 , Frac DS3 , DS3
ACCEL NETWORKS	ZIP CODE	DSL , Frac T1 , Fixed Wireless , Satellite
ACCUCONFERENCE	LATA	Conferencing
AT&T	CO/CLLI	DSL , Frac T1 , T1 , Bonded T1
CENTURYLINK	CO/CLLI	Frac T1 , T1 , Bonded T1 , Frac DS3
COMCAST	ZIP CODE	DSL , Cable , T1 , Bonded T1
ERNEST COMMUNICATIONS	LATA	Integrated T1 , Integrated PRI , Integrated Analog , Local PRI

Product Filter:

- View All
- View All
- DATA - DIA**
- DSL
- Cable
- Frac T1
- T1
- Bonded T1
- Fixed Wireless
- Satellite
- Frac DS3
- DS3
- Ethernet (Copper)
- Ethernet (Fiber)
- Mobility
- Fixed Wireless
- 4G WiMax
- OC-3
- OC-48
- OC-12
- INTEGRATED**
- Integrated T1

4. Once narrowed down, your final results will show, and you can go directly into GeoQuote™ by selecting the product in the “**Products Offered**” column. At this stage, you can begin to run a quote.

The screenshot shows the GeoScan™ Results interface. At the top, it displays "GeoScan™ Results for:" followed by a phone number and address: "(801) 523-2100" and "45 W SEGO LILY DR STE 220 | SANDY | UT 84070". Below this, a banner indicates "Serving CO: DRPRUTMA - SANDY, UT (QWEST)" and "Product Filter: T1". A callout arrow points from the text "Once narrowed down, your final results will show, and you can go directly into GeoQuote™ by selecting the product in the ‘Products Offered’ column." to the "Products Offered by Carrier" column in the table below. The table is titled "Carriers in the Area:" and lists various carriers with their calculation methods and the specific product offered (T1). Each row includes a "view all" link.

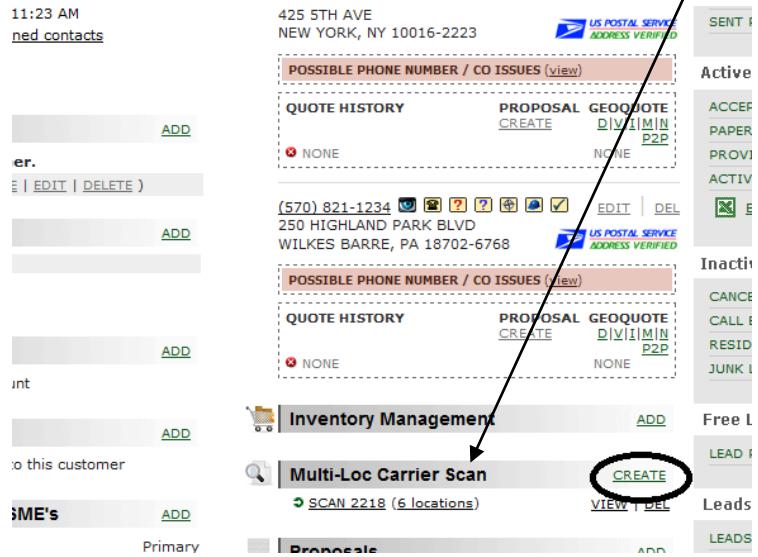
Carrier	Calculation Method	Products Offered by Carrier	
ACC BUSINESS	CO/CLLI	T1	view all
ATRIBAND	GPS (~0.00 mi)	T1	view all
ATRESPRING	CO/CLLI	T1	view all
AT&T	CO/CLLI	T1	view all
CENTURYLINK	CO/CLLI	T1	view all
COMCAST	ZIP CODE	T1	view all
INTEGRA TELECOM	CO/CLLI	T1	view all
LEVEL3 COMMUNICATIONS	CO/CLLI	T1	view all
MEGAPATH	CO/CLLI	T1	view all
MOSAIC NETWORKS	LATA	T1	view all
NETWOLVES	LATA	T1	view all
NITEL	CO/CLLI	T1	view all
POWERNET GLOBAL	CO/CLLI	T1	view all
TELNES	CO/CLLI	T1	view all
XO	CO/CLLI	T1	view all

Using the Multi-Loc Carrier Scan

You have the ability to scan multiple customer locations at once to see which carrier can service all, if not most of the locations. This tool is our Multi-Loc Carrier Scan.

- Under the customer record, is where you will find the “Multi-Loc Carrier Scan” section.

Select “Create” to begin using the tool.



- Multi-Loc Carrier Scan Step 1 allows you to select a product from the Product Filter dropdown box for you to scan and begin a search for the best carrier fit for your customer.

The screenshot shows the 'Multi-Loc Carrier Scan - Step 1' interface. At the top, there is a note: "Please check the locations that you would like to scan for carrier availability. Make sure to select at least two locations in order for the scan to run properly." Below this is a table of locations with columns for 'include?', 'Host Location', 'Description', and 'Address'. One location is checked under 'include?'. To the right of the table is a 'Product Filter' dropdown menu. A large arrow points from the previous step to this dropdown. The dropdown menu lists various internet products, such as 'D - Internet T1 (1.5 MB)', 'D - Business DSL', 'D - Business Cable', etc. At the bottom of the interface, there is a link 'Click here to see which carriers offer service (on-net T1) for the locations selected above' and a button 'Run Multi-Loc Carrier Scan >'.

Select the product and then select “**Check All**”, or just select the locations that will need that type of service by clicking in the box next to the location(s). Once locations and the product type has been selected, click on “**Run Multi-loc Carrier Scan**”.

Multi-Loc Carrier Scan - Step 1

Please check the locations that you would like to scan for carrier availability. Make sure to select at least two locations in order for the scan to run properly.

Product Filter: D - Internet T1 (1.5 MB)

Include?	Host Location	Description	Address	Install Phone
<input checked="" type="checkbox"/> Check All	<input checked="" type="radio"/>	HENRICO LOCATION	11873 WEST BROAD STREET HENRICO, VA 23233	(804) 360-1234
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	HENRICO LOCATION	200 TOWNE CENTER W BLVD HENRICO, VA 23233	(804) 360-7929
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	HENRICO LOCATION	11873 W BROAD ST HENRICO, VA 23233	(804) 360-9874
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	TEST COMCAST PROMO DISCOUNT	3200 DOWNTOWN CIR NW GEORGIA, GA 30327	(310) 643-9595
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	TEST COMCAST PROMOS	45 W SEGO LILY DR, SUITE 200 SAND, UT 84070	(801) 790-4905
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	TEST COMCAST PROMOS	45 W SEGO LILY DR, SUITE 200 SAND, UT 84070	(801) 790-4905

Click here to see which carriers offer service (on-net T1) for the locations selected above **Run Multi-loc Carrier Scan >**

3. Your **Multi-Loc Carrier Scan Results** page will then show you the percentage of coverage by a particular carrier, the number of your customer locations they can service, and also view the actual locations they can service.

Multi-Loc Carrier Scan Results

Product Filter: Internet T1

Carriers	View Locations	Coverage	Percentage	Match Type
<input type="checkbox"/> ACC Business	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> AT&T	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> AireSpring	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> CenturyLink	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> Level3 Communications	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> MegaPath	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> Nitel	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> Powernet Global	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> Telnes	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> XO	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> Comcast	VIEW	6 out of 6	100%	ZIP CODE
<input type="checkbox"/> Netwolves	VIEW	6 out of 6	100%	LATA
<input type="checkbox"/> Mosaic Networks	VIEW	6 out of 6	83%	LATA
<input type="checkbox"/> Integra Telecom	VIEW	2 out of 6	33%	CO/CLLI
<input type="checkbox"/> tw telecom	VIEW	2 out of 6	33%	CO/CLLI
<input type="checkbox"/> Windstream	VIEW	1 out of 6	17%	CO/CLLI
<input type="checkbox"/> Accel Networks		0 out of 6	0%	

4. To request pricing (it will be a manual quote request), select up to three carriers by clicking the boxes next to their names, and then the “**Request Pricing**” button found at the bottom of the page.

Multi-Loc Carrier Scan Results

Product Filter: Internet T1

Carriers	View Locations	Coverage	Percentage	Match Type
<input checked="" type="checkbox"/> ACC Business	VIEW	6 out of 6	100%	CO/CLLI
<input checked="" type="checkbox"/> AT&T	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> AireSpring	VIEW	6 out of 6	100%	CO/CLLI
<input type="checkbox"/> CenturyLink	VIEW	6 out of 6	100%	CO/CLLI
<input checked="" type="checkbox"/> Level3 Communications	VIEW	6 out of 6	100%	CO/CLLI

5. The “Please Tell Us What You Need For This Customer” box will appear. Please enter any additional information that will be useful to your Telarus Support Manager when they gather the pricing for you. (Example: terms length, with or without a router, budget of your customer.) You can have your quote sent to one of your Agency Contacts if you would like by selecting them from the “To whom should we respond” box. Click on “Submit” when done. You have now sent a manual quote off for this customer and their locations. Your pricing will be emailed back to you when completed by your Telarus Support Manager.

The screenshot shows a modal window titled "Please Tell Us What You Need For This Customer". Inside, there's a text area with placeholder text "Tell us what you need here." A red arrow points to the dropdown menu labeled "To whom should we respond?" which is set to "Telarus Admin". Below it is another dropdown for "Select a location for this request" showing "11873 W BROAD ST | HENRICO VA, 23233". At the bottom right of the modal is a "Submit" button, which is circled in red.

GeoQuote™

GeoQuote™ is the patented tool that allows you to quickly run a quote in the Telarus back office.

1. You can access GeoQuote a few ways in your back office. The first one is by selecting “GeoQuote”, and then the service type category from the left side on your home page.

You are here > Home [change to](#)

You have 1 solution request from

Customer Management	Dedicated Internet Access
VAR Program	Voice - Local, PRI, LD and SIP Pricing
GeoQuote	Integrated - Voice and Data Pricing
Training	Multi-Site Networks (VPN/MPLS/WAN)
Marketing	Managed Services Pricing
Reports	
Agent Bulletin Board	
Agent Support	AIRBAND TEST QUOTE 1:34 PM EDT (RPL Free)
Vendor Contacts	AIRBAND TEST 12:34 PM CDT (RPL Free)
Got a deal and need help?	TEST COMPANY (801) 523-2141

2. You can select a specific product type by choosing the appropriate service type from the dropdown box. After the service type has been selected, you will need to complete the boxes highlighted in yellow, and click on “**Next Step**”.

 geoquote™ Real-Time Price Tool

	Welcome to GeoQuote - the patented real-time broadband and dedicated voice calculator tool. As a Telarus agent, you have been granted full access to run quotes at your leisure. Use the form below to create a new lead and generate a real-time quote.
Location Type:	<input type="text" value="High Speed Internet Access"/>
Installation Phone Number:	(<input type="text" value=" "/>) <input type="text" value=" "/> - <input type="text" value=" "/>
Business Name:	<input type="text" value=" "/>
Contact Name(First/Last):	<input type="text" value=" "/> <input type="text" value=" "/>
Contact's Email Address:	<input type="text" value=" "/>
Contact Phone:	(<input type="text" value=" "/>) <input type="text" value=" "/> - <input type="text" value=" "/> Ext. <input type="text" value=" "/>
Lead Agent:	<input type="text" value=" "/> [leave empty if you are the lead agent]
<input type="button" value="Next Step >"/> 	

3. Step 2 is where the type of business service will need to be selected. Real-time next to the service type means GeoQuote™ can quote the service. Manual quote means that a manual quote request will need to be submitted to your Telarus Support Manager for pricing. The installation address will also need to be added before you select “**Continue**”.

 geoquote™ Step 2

Step 2 - Select the service for which you want to generate a quote.

BUSINESS SERVICES		INSTALLATION ADDRESS
<input type="radio"/> Business DSL	real-time	Installation BTN: (801) 523 - 2100
<input type="radio"/> Business Cable	real-time	Address Line 1: _____
<input type="radio"/> Fractional T1 Internet (< 1.5 MB)	real-time	Address Line 2: _____
<input checked="" type="radio"/> Internet T1 (1.5 MB)	real-time	City State Zip: _____ AL <input type="button" value="AL"/>
<input type="radio"/> Bonded Internet (3MB to 12MB)	real-time	
<input type="radio"/> Fixed Wireless Broadband	real-time	
<input type="radio"/> Satellite High-Speed Internet	real-time	
<input type="radio"/> Fractional DS3 Internet (6MB to 45 MB)	real-time	
<input type="radio"/> DS3 Internet(45MB)	real-time	
<input type="radio"/> Ethernet (Copper)	real-time	
<input type="radio"/> Ethernet (Fiber)	real-time	
<input type="radio"/> Mobile Wireless Card	manual quote	
<input type="radio"/> High BW Fixed Wireless (> 2.0MB)	manual quote	
<input type="radio"/> 4G WiMax	manual quote	
<input type="radio"/> OC-3 Internet (155MB)	manual quote	
<input type="radio"/> OC-48 Internet (2.5GB)	manual quote	
<input type="radio"/> OC-12 Internet (622MB)	manual quote	

ENTER NOTES ABOUT THIS CUSTOMER (OPTIONAL)

If you have some notes or comments to add to this customer record, enter them here. Keep in mind that the customer will be able to see these comments!

4. The GeoQuote™ results page will give you a full listing of all carriers available to that address. You can narrow down your results by using the “**Filtering Options**”. You can remove one or more carriers, chose with or without a router, the terms length and to have the *promotional pricing show.

The screenshot shows a web-based application interface for viewing a customer quote. At the top, it says "You are here: Home > Customer Management > Customer Quote Details". Below that is a yellow header bar with the title "View Quote for Telarus Training" and a link to "Return to Customer Record". The main content area has a table with columns: Quote ID (1143230), Date Created (October 15, 2012 12:09 PM MDT), Service Type (Internet T1), Re-Quote (Re-Quote), Proposal (Create), and CO Tools (CO Information, GeoScan). A large black arrow points from the text above to the "Filtering Options" tab in the navigation bar below the table. The "Filtering Options" tab is highlighted, and the "Manual Quote" tab is also visible. The "Warnings (1)" and "Fiber Map" tabs are also present. The "Filtering Options" section contains various checkboxes and dropdowns for filtering carriers, routers, terms, promotions, and accuracy. Below this is a "Quote Color Legend" with three categories: Retail pricing (light blue), Cross Product (light green), and Promotional pricing (light orange). The "Promotional pricing" category is highlighted with a yellow box.

*If you choose “**Show promotional pricing**”, and promotional pricing is available, it will be a line item in green.

A screenshot of a table showing a single line item. The row contains: P19, XO logo, XO Data T1 - GM, Discount Pricing - XO Network - (details), 1.5M x 1.5M, Yes, \$0.00, 3 Year, a yellow box containing \$259.00, \$39.89, 15.40%, and Loop and Port. Below the table, a note says "carrier rating: 7.6".

If the line is a pink color, then we are finding a pricing discrepancy with that particular Supplier and/or service type. Please select the Manual Quote button to request a manual quote from your Telarus Support Manager.

A screenshot of a table showing a single line item. The row contains: 46, Integra Telecom logo, Integra Internet T1 - Integra Network - (details), 1.5M x 1.5M, Yes, \$0.00, 3 Year, a yellow box containing \$299.00, \$41.86, 14.00%, and Loop and Port. Below the table, a note says "carrier rating: 7.9". A yellow arrow points to the "MANUAL QUOTE" button at the bottom left of the table row.

A manual quote can be requested from your results page by selecting the “**Manual Quote**” tab.

The screenshot shows the same "View Quote for Telarus Training" page as before, but now the "Manual Quote" tab is highlighted with a yellow circle. The other tabs ("Filtering Options", "Warnings (1)", "Fiber Map") are visible but not highlighted. The "Filtering Options" section remains the same as in the previous screenshot.

You can select up to three suppliers to get quoting from. Submit your request, or ask for help from your Telarus Support Manager.

The screenshot shows the "Manual Quote Request" page. It starts with a note: "The suppliers listed below offer Internet T1. Please check up to three suppliers for manual quote assistance." Below this is a grid of supplier names, each with a checkbox. The suppliers listed are: ACC Business, Accel Networks, Alpheus, Airband, AireSpring, Broadview, AT&T, Broad Sky Networks, Charter Business, CBeyond, CenturyLink, Ernest Communications, Comcast, Earthlink Business, Layer 2, inContact, Integra Telecom, Mosaic Networks, Level3 Communications, MegaPath, Powernet Global, Netwolves, Ntel, Telnes, RealLinx, TelePacific, VocalIP Networx, Time Warner Cable, tw telecom, Windstream, and XO. At the bottom of the grid are two buttons: "Submit Manual Request" and "I'm not sure. Please help." A large yellow arrow points to the "Submit Manual Request" button.

Access to the Fiber Map for your location can be found by choosing the “Fiber Map” tab. Click on the carrier pin to see how far the carrier LIT building is from your customer location.

The screenshot shows a map of the Sandy area in Utah. It features several purple and orange lines representing fiber routes. A blue marker indicates the 'LIT Building Pin' and a green marker indicates the 'Customer Location Pin'. A legend on the right side defines the symbols: a purple circle for 'XO - Fiber Route' and an orange circle for 'Zayo - Fiber Route'. The map also includes street names like State Route 175, 209, and 89, along with various landmarks and buildings.

- When viewing the pricing results, you can see further details about the plan and service under the “Plan Description” by selecting “details”.

A table listing various service providers and their offerings. The columns include Company, Plan Description (Rating), Bandwidth / Type, Router, Testable (date), Term, Total (click to edit), Comm, and Comm Type. An arrow points to the 'carrier rating' column for the first entry, which is highlighted in yellow.

Company	Plan Description (Rating)	Bandwidth / Type	Router	Testable (date)	Term	Total (click to edit)	Comm	Comm Type
28 nitel	Internet carrier rating: 7.3	1.5M x 1.5M	No	\$0.00	3 Year	\$251.16	\$31.65 12.60%	Loop and Port
40 nitel	Nitel Data T1 - (details) carrier rating: 7.3	1.5M x 1.5M	Yes	\$0.00	3 Year	\$280.18	\$31.65 12.60%	Loop and Port
43 Level(3)	Access Circuit DSL Offset Level3 Network - (details) carrier rating: 7.3	1.5M x 1.5M	No	\$0.00	3 Year	\$293.45	\$41.08 14.00%	Loop and Port
45 Telnes	Telnes T1 [DS-1] 1.5 Telnes Network - (details) carrier rating: 9.0	1.5M x 1.5M	Yes	\$0.00	3 Year	\$298.09	\$41.44 14.00%	Loop and Port
48 Megapath	T1 1.5 - Megapath Network - (details) carrier rating: 7.4	1.5M x 1.5M	No	\$0.00	3 Year	\$299.00	\$41.86 14.00%	Loop and Port
49 Megapath	T1 1.5 - Megapath Network - (details) carrier rating: 7.4	1.5M x 1.5M	Yes	\$0.00	3 Year	\$299.00	\$41.86 14.00%	Loop and Port
51 EarthLink SYSTEMS	EarthLink Data full range EarthLink Network - (details) carrier rating: 7.3	1.5M x 1.5M	Yes	\$0.00	3 Year	\$303.82	\$42.27 14.00%	Loop and Port
55 Telnes	Telnes Managed T1 1.5 mbps (Qwest Balloons) - Telnes Network - (details) carrier rating: 9.0	1.5M x 1.5M	Yes	\$0.00	2 Year	\$312.00	\$54.60 17.30%	Loop and Port

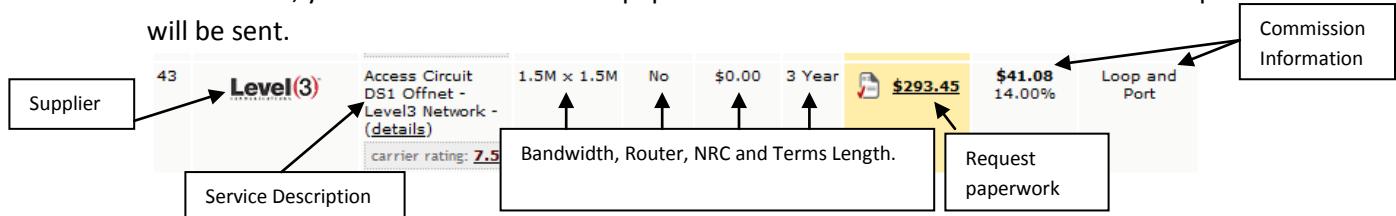
The details for that service will look like the example below:

The Details of the Plan You Selected

THIS PAGE IS FOR AGENTS ONLY! Any unauthorized access is prohibited.

Quote Number	1143230
Quote Line	28
Service Provider	nitel
Service Description	Internet T1 - 1.5M x 1.5M This is a dedicated connection to your location, with the given bandwidth guarantee.
Service Details	Nitel Data T1
Provider Rating	★★★★½
Term	3 Year This is the term of this contract, which is renewable upon completion. Many service providers offer significant discounts for longer term commitments.
Installation Fee	\$0.00
Rebate	\$0.00
Router Included	No The cost of the router is not absorbed by the vendor. You will either need to purchase a router or otherwise provide one for service.
Email Addresses	Not Included
IPs	5 Static IPs This is the number of IP addresses (fixed ports of entry to the internet) that come with this package.
Web Hosting	Not Included
Local Loop	\$196.55 This is the amount of local loop, or the cost charged by the local telephone company to connect your premises to the carrier. This charge is included in the total Monthly Recurring Charge below.
Total	\$251.16 This is the total amount of Monthly Recurring Charges, including LOOP and PORT fees. This price is good through the end of October, 2012.

6. The quote lines will show you the Supplier, a plan description, bandwidth type, installation charges, terms length, the total MRC, the monthly commission amount you would receive for that sale, and also shows you what you will be paid on. If you would like to request paperwork for a service, you can click on the white paper with the red checkmark and a contract request will be sent.



7. You can begin to create your proposal based on your pricing results. See the section on "**Creating Proposals**" in this manual (pg.25) to learn how to create a proposal.

Creating a Proposal

You can create a proposal out of the back office and email it directly to your customer. You can create a proposal with pricing from your GeoQuote™ results or create one from manual pricing results.

- To create a proposal from GeoQuote™ results, you select “Create” at the top of the results page.

The screenshot shows a search bar with the query "Quote for: (801) 523-2100 | 45 W SEGO LILY DR STE 220 | SANDY, UT 84070". Below the search bar are tabs for "Quote ID", "Date Created", "Service Type", "Re-Quote", "Proposal", and "CO Tools". The "Proposal" tab is highlighted with a red circle. A "Create" button is located next to the "Proposal" tab. The main area contains a "Filtering Options" section with checkboxes for various companies like ACC Business, AireSpring, AT&T, etc., and radio buttons for Router (All, with router, without router), Term (1 Year, 2 Years, 3+ Years), and Promotions (Show promotional pricing, Hide promotional pricing). A "Warnings (1)" link is also present.

- You can choose to add or remove suppliers, show with or without a router, or both, what terms length they would like and also show promotional pricing. You can also choose to show all the results on your proposal, or select certain pricing lines by clicking in the box next to the desired service.

Filter your proposal results.

Choose “Check All” or select the particular line items you’d like on the proposal.

Select quote lines to add to the proposal:

Company	Description	Bandwidth / Type	Router	Total (Rebate)	Term	Total	Commission	Commission Type	Details
Nitel	Nitel Data T1 - Commission Network	1.5M x 1.5M	No	\$0.00 (\$0.00)	3 Year	\$251.16	\$31.65 12.60%	Loop and Port	details
Nitel	Nitel Data T1 - Commission Network	1.5M x 1.5M	Yes	\$0.00 (\$0.00)	3 Year	\$280.16	\$31.65 12.60%	Loop and Port	details
Level3 Communications	Access Circuit DS1 Offnet - Level3 Network	1.5M x 1.5M	No	\$0.00 (\$0.00)	3 Year	\$293.45	\$41.08 14.00%	Loop and Port	details
Telnes	Telnes T1 [DS-1] 1.5 - Telnes Network	1.5M x 1.5M	Yes	\$0.00 (\$0.00)	3 Year	\$296.00	\$41.44 14.00%	Loop and Port	details
MegaPath	T1 1.5 - MegaPath Network	1.5M x 1.5M	No	\$0.00 (\$0.00)	3 Year	\$299.00	\$41.86 14.00%	Loop and Port	details
MegaPath	T1 1.5 - MegaPath Network	1.5M x 1.5M	Yes	\$0.00 (\$0.00)	3 Year	\$299.00	\$41.86 14.00%	Loop and Port	details
EarthLink Business	EarthLink Data Full T1 - EarthLink Network	1.5M x 1.5M	Yes	\$0.00 (\$0.00)	3 Year	\$301.95	\$42.27 14.00%	Loop and Port	details
Telnes	Telnes Managed T1 1.5 mbps (Qwest Backbone) - Telnes Network	1.5M x 1.5M	Yes	\$0.00 (\$0.00)	3 Year	\$312.00	\$42.69 14.00%	Loop and Port	details
Telnes	Telnes Un-Managed T1 1.5 mbps (Qwest Backbone) - Telnes Network	1.5M x 1.5M	No	\$0.00 (\$0.00)	3 Year	\$313.00	\$43.78 14.00%	Loop and Port	details
Windstream	Windstream VOIP & Data Bundle (voipF) Full Data T1 - VOIP & Data Bundle Network	1.5M x 1.5M	No	\$0.00 (\$0.00)	3 Year	\$313.95	\$43.93 14.00%	Loop and Port	details
Telnes	Telnes Managed T1 1.5 mbps (Qwest Backbone) - Telnes Network	1.5M x 1.5M	Yes	\$0.00 (\$0.00)	3 Year	\$318.00	\$35.45 11.50%	Loop and Port	details

Include check all

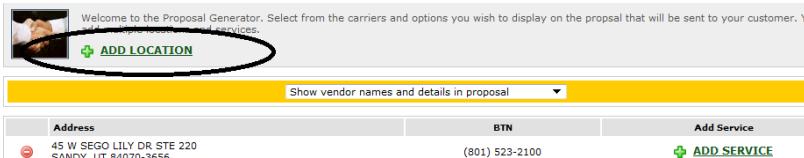
Select “Add Selected Quote Lines”.

The dialog box has two buttons: "CANCEL" and "ADD SELECTED QUOTE LINES".

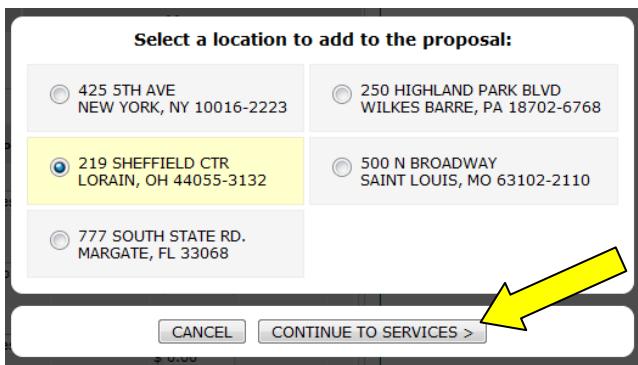
- You will now begin to use the Proposal Generator and can continue to edit your proposal.

The screenshot shows a "Create a Proposal for Telarus Training" page. It includes sections for "Address" (45 W SEGO LILY DR STE 220, SANDY, UT 84070-8586), "BTN" ((801) 523-2100), and "Add Service". Below these are tables for "Dedicated Internet Access" and "WAN/Wireless". The "Dedicated Internet Access" table lists services from Nitel, Level3 Communications, Telnes, and MegaPath with their respective bandwidth, routers, terms, and total costs. Buttons for "ADD A NEW DATA PROPOSAL LINE" and "ADD FROM A PREVIOUS DATA QUOTE" are at the bottom. The "WAN/Wireless" section is currently empty. At the bottom, there are buttons for "ADD LOCATION", "Provide a proposal title (40 char max)", "Save", and "Continue >".

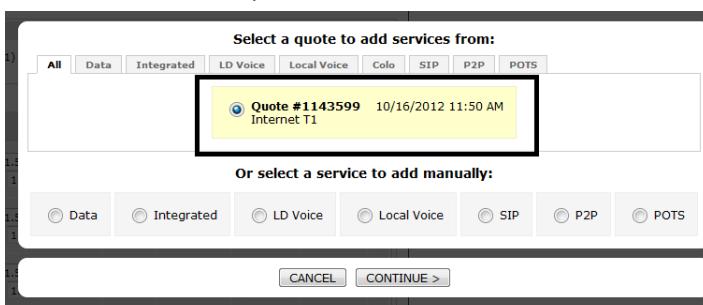
If you have additional locations that you would like to include their GeoQuote™ or manual pricing results on your proposal, select “**Add Location**”.



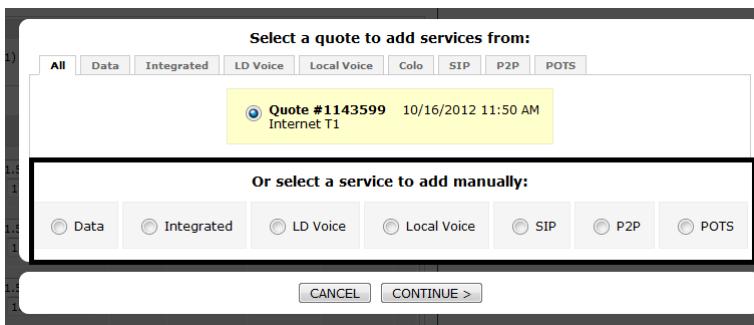
A pop up box will appear listing all locations under your customer record. Check the location you would like to add and then select “**Continue to Services**”.



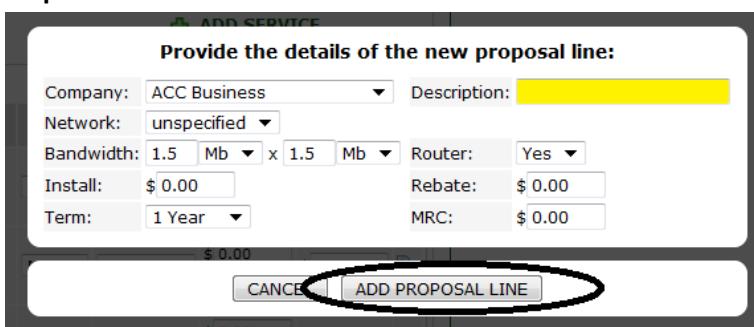
You can select the quote that you would like to add for this location. You can select the Quote that was run in GeoQuote™ like shown below:



Or you can select a service that was priced manually and add it to your proposal.



If you select to add a manual price, you will need to select the correct answer for the information requested in each field. You MUST add a description for the service. Select “**Add Proposal Line**” when done.



You have the ability to hide the vendor names on your proposal. Select the “**Do not show vendor names and details in proposal**” in the dropdown box.

The screenshot shows a dropdown menu with three options: "Show vendor names and details in proposal", "Do not show vendor names and details in proposal", and "Do not show vendor names and details in proposal". The second option is highlighted.

Add additional service quotes that have been done for a location by selecting “**Add Service**”

The screenshot shows a row with an "Address" field containing "45 W SEGO LILY DR STE 220 SANDY, UT 84070-3656", a "BTN" field with "(801) 523-2100", and a "Add Service" button with a green plus sign and the text "ADD SERVICE". A yellow arrow points to the "ADD SERVICE" button.

Line items can be removed by selecting any of the red circles.

The screenshot shows a table titled "Dedicated Internet Access" with columns: "Winner / Del", "Company / Network Description", "Bandwidth down | up", "Router", "Term", "Install / Rebate", and "MRC". There are five rows of data, each with a red circle icon in the "Winner / Del" column. The last row is "MegaPath T1 1.5". At the bottom are buttons for "ADD A NEW DATA PROPOSAL LINE" and "ADD FROM A PREVIOUS DATA QUOTE".

You can suggest a “winner” to your customer by clicking in the box next to the line item you would select as the best fit. That line will be highlighted on your final version of the proposal.

The screenshot shows the same table as above, but the first row ("Nitel unspecified Nitel Data T1") is highlighted in yellow. The checkbox in the "Winner / Del" column for this row is checked, while others are unchecked. The last row is "MegaPath T1 1.5".

You can title your proposal by going to the text box at the bottom of your screen.

The screenshot shows a text input field at the bottom with the placeholder "Provide a proposal title (40 char max)". To its right are two buttons: "Save" and "Continue >". A yellow arrow points to the "Continue >" button.

Select “**Continue**” once you are finished with generating your proposal.

You will now be taken to the second phase of proposal creation where additional text can be added to your final proposal version.

4. Under “Create a Proposal” you can add any additional text you would like to your final proposal copy. There are several text boxes where you can add additional verbiage.

Proposal Template: Default Template | [DELETE](#)

 Your business logo will be shown here.

Official Proposal

The customer contact information.

Telarus Training
c/o David Smith
45 W SEGO LILY DR SUITE 220
SANDY, UT 84070

TO ORDER PLEASE CONTACT:
Telarus Admin
Business Broadband Inc
Office Phone - (405) 755-0528
Toll Free - (888) 606-2505
Fax - (801) 406-0133
Email - amorgan@yahoo.com

Your contact information.

Add additional text to your proposal using any of these fields.

Dedicated Internet Access

Carrier	Service Description	Bandwidth down up	Router	Term	Install	Monthly Cost
nitel	nitel Data T1	1.5M x 1.5M	Yes	3 Year	\$0.00	\$280.16
Level(3)	Access Circuit DS1 Offnet Network: Level3	1.5M x 1.5M	No	3 Year	\$0.00	\$293.45
Telnes	Telnes T1 [DS-1] 1.5 Network: Telnes	1.5M x 1.5M	Yes	3 Year	\$0.00	\$296.00
MegaPath	T1 1.5 Network: MegaPath	1.5M x 1.5M	No	3 Year	\$0.00	\$299.00

** Details of this circuit can be found at the end of this quote

Dedicated Internet Access

Carrier	Service Description	Bandwidth down up	Router	Term	Install	Monthly Cost
ACC BUSINESS	T1 quote	1.5M x 1.5M	Yes	1 Year	\$50.00	\$200.00

** Details of this circuit can be found at the end of this quote

5. The service details can also appear on your proposal. The default is for them to be listed. You can choose to either hide all of them, or hide individual service details. You can make these selections by clicking on the red circle.

Details of the Services in Your Quote:

1		nitel
Quote	1143230	<input type="button" value="hide all"/>
Quote Line	40	<input type="button" value="hide"/>
Email Addresses	Not Included	
IPs	5 Static IPs This is the number of IP addresses (fixed ports of entry to the internet) that come with this package.	
Web Hosting	Not Included	

2		Level(3)
Quote	1143230	<input type="button" value="hide"/>
Quote Line	43	
DNS Hosting	Primary/ Secondary DNS Services	
Features	Included Comprehensive Service level agreement Performance reports delivered through a web-based monitoring tool Any request to expedite an order requires approval	
IPs	/30 (2 usable) Additional addresses may be requested upon order entry at no charge.	

3		Telarus
Quote	1143230	<input type="button" value="hide"/>
Quote Line	45	
DNS Hosting	Included Additional domain name services are available for an additional fee.	
Email Addresses	Not Included	
LinkWatch 24/7 Monitoring	Included Uptime Monitoring, Uptime Monitoring, Latency Monitoring, Utilization Monitoring, Packet Deliver Monitoring	
Web Hosting	Not Included	

4		MegPath
Quote	1143230	<input type="button" value="hide"/>
Quote Line	48	
DNS Hosting	Included DNS Hosting is included for one domain. Additional domain name services are available for an additional fee.	
	50 Email POP3 Accounts	

6. If you would like to create a default template that you can use for every proposal you create, type your desired text and then choose **“Save Changes to Default Template”** at the bottom of the page.

Save changes to "Default Template"

Do not save as a template

Save as a new template with the name:

CONTINUE >

7. Once your proposal is complete, select **“Continue”**.

Save changes to "Default Template"

Do not save as a template

Save as a new template with the name:

CONTINUE >

8. The final step will be to email the proposal directly to your customer. To view the PDF version of the proposal going to the customer, select the http link next to **“Proposal Preview”**.

Send a Proposal to Telarus Training



Proposal Preview: http://docs.telarus.com/proposals/proposal_136231.pdf

9. You can select the time and date your proposal is sent to your customer. You can also customize the emails shown in the “From” box and copy additional people. You are also automatically receiving a copy of the proposal in your inbox via BCC. The subject line can also be changed. The ability to create and use your own email templates is available too. Select “Send Proposal” when you are ready to email your customer.

Proposal Preview:	http://docs.telarus.com/proposals/proposal_136231.pdf		
Time to Send Email:	10/16/12 03:10 PM	Eastern	[To send now, don't change]
From:	"Telarus Admin" <amorgan@yahoo.com>		
To: [check all that apply]	<input type="checkbox"/> Yourself <amorgan@yahoo.com> <input checked="" type="checkbox"/> "David Smith" <davidsmith@smith.com>		
CC:			
BCC:	<input checked="" type="checkbox"/> Yourself <amorgan@yahoo.com> Add More Emails to BCC		
Email Template:	Choose Different Template Create a new proposal email template.		
Subject:	Proposal for Telarus Training (Proposal #136231)		
Email Message:	<p>Official Proposal Prepared for: Telarus Training (c/o David Smith)</p> <p>Dear David,</p> <p>Thank you for your visit. I have analyzed your situation and attached a printable quote for you.</p> <p>This quote is good until the last day of October, 2012 and comes with a low price guarantee!</p> <p>I look forward to hearing from you.</p> <p>Patrick Oborn Broadband Business Product Specialist E. poborn@telarus.com V. 877-606-2505</p> <p>CONFIDENTIALITY NOTICE</p> <p>-----</p> <p>This document was created using our patented GeoQuote technology. The information it generated, found on this page, is for the sole use of the intended recipient(s) and contains confidential and privileged information. Any unauthorized review, use, disclosure or distribution, especially as it relates to making direct contact with these vendors, constitutes</p>		



How to Add an Order In the Back Office

1. First step will be to email or fax the signed and completed contract to the Supplier.
2. Second step will be to go to the customer record in your back office that you need to add the order for. (You can search for the customer record by using the “Search for” tool box at the top of the page.)

3. Once you have located the customer record, find the “Order Info” section on the page and select “Add”.

View Test Customer Training COPY_CUSTOMER Change Accepted Quick GO

Customer Information EDIT

TEST CUSTOMER TRAINING
45 W SEGO LILY DR STE 220
SANDY, UT 84070-3656

Primary Contact: Jessica Martin
Email Address: jmartin@telarus.com
Website: <http://closer.backoffice>
Initial Interest: Call me later but email me now.
Office Phone: (801) 523-2100

Record ID: 1218106
Lead Generator: closer
IP Address: 50.73.35.249
Referrer Link: [agent.telarus.com/closer/](#)
Entry Page: [agent.telarus.com/closer/](#)
Quote Page: [agent.telarus.com/closer/](#)
Record Added: 10/04/12 10:04 AM
Record Modified: 10/04/12 11:24 AM
Permissions: [hide assigned contacts](#)

JohnQ Add

Solution Requests ADD

Need help with a custom solution or manual quote?
[Click here for assistance.](#)

Location Information ADD ONE | ADD BULK EDIT

(801) 523-2100
1011 E MURRAY HOLLOWAY RD
SALT LAKE CITY, UT 84117-4986 US POSTAL SERVICE ADDRESS VERIFIED

POSSIBLE PHONE NUMBER / CO ISSUES (view)

QUOTE HISTORY CREATE VIEW E2P DEL

PROPOSAL GEOQUOTE CREATE VIEW E2P DEL

Inventory Management ADD EDIT | DEL

Proposals ADD 10/04/12 T1 View | Copy Edit & Send

VAR Lead History ADD

No equipment quotes have been run for this customer.

Customer Contacts ADD

Jessica Martin 1:58 PM
(Added: 10/04/2012) EDIT

Attached Documents ADD

No documents are attached to this customer.

Order Info ADD INFO Free

No orders are attached to this customer.

4. Complete all information highlighted in yellow and select “Add Order”.

Add Order to Test Company

Create a new order for Test Company (CustomerID: 1218475)

Step 1 - Which service is your customer ordering?

Carrier Name:	Select a Carrier
Type of Service:	D - Internet T1 (1.5 MB)

Step 2 - Commission split for this order:

Primary Agent: closer	100.0% (you)
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Step 3 - If you are adding this order after-the-fact, please tell us about it:

Vendor Account Number:	(Leave blank for new orders)
Account Status:	Pending Activation (Pending for new orders)
Status From Vendor:	Never been Updated

Step 4 - Tell us about the details:

Monthly Recurring Charge:	\$
Installation Fee (NRC):	\$
Contract Start Date:	10/08/2012 MM/DD/YYYY
Contract Term:	2 Years
Additional Notes for this Order:	Enter price plan details and other comments here
Select Location for this Order:	(801) 523-2100 45 W SEGO LILY DR STE 220 SANDY, UT 84070-3656
Do you expect to receive a SPIFF on this order?:	<input checked="" type="radio"/> NO - I do not expect a spiff of this order <input type="radio"/> YES - I expect a spiff of about \$
Promo Code (optional):	

Add Order

[Return to Customer Record](#)

5. You will know your order has been added correctly, when you see the following on the customer record page.

The screenshot shows the 'Customer Record' page with several sections:

- Tasks for Customer:** Shows a task for '10/08/12 Test task' with status 'Pending'.
- Agent Notes:** Shows a note from 'CLOSER' at '10/08/12 test notes 12:29 PM'.
- Private Agent Notes:** Shows 'No agent notes for this account'.
- Attached Documents:** Shows 'No documents are attached to this customer'.
- VAR Lead History:** Shows 'No equipment quotes have been run for this customer.'
- Customer Contacts:** Shows a contact for 'Jessica Martin' added on '10/08/2012'.
- Order Info:** Shows an order for 'pending Layer 2' with RPU: \$1.00. It includes buttons for 'edit', 'renew', 'auto-renew', 'upgrade', and 'per month'. It also lists location, BTN, and status information.

6. The last step will be to upload the signed contract(s) to the Customer Record. Go to "Attached Documents" and select "Add".

The screenshot shows the same Customer Record page, but the 'Attached Documents' section is highlighted with a black box, and the 'ADD' button is circled in red.

7. For the final step, upload the file from computer, title the document and select "**yes, this is an order-related document**". The Supplier the order is for will automatically be listed, so check the box next to the Supplier name under "**Which order is this for?**". In the "**Have you sent this document to the carrier yet?**" section, enter the date the contract was submitted to the Supplier.

The screenshot shows the 'Add Document - Test Company' form:

- Instructions: 'Use the form below to add a document to the customer record'
- File Upload: 'Upload the File' input field with a 'Browse...' button.
- Document Name: 'Document Name (optional)' input field.
- Order Document Type: Radio buttons for 'Yes, this document is an order-related document.' (selected) and 'No, this document has nothing to do with any orders.'
- Order Selection: 'Which order is this for?' dropdown menu showing 'Layer 2 - T1 - SANDY, UT'.
- Carrier Submission: 'Have you sent this document to the carrier yet?' section with radio buttons for 'Yes I did. I sent it on [redacted] (MM/DD/YYYY)' (selected) and 'No I haven't.'
- Upload File**: A large red circle highlights the 'Upload File' button at the bottom of the form.
- Navigation: 'Return to Customer Record' link at the bottom left.

Need to Edit, Renew, Auto-Renew, Upgrade or if the customer is going per month on the order? Then you will want to select the appropriate tab under the order. For all guidelines and rules for these changes to orders in the back office, please see the list of policies below.



Renew Order:

- 1) To renew an existing order, select “**renew order**” by scrolling over the “**add**” button under the Order Info section. Choose which order you would like to renew and update with new MRC and dates. You may also renew an order by selecting an existing order and choosing “**renew**” from Step 4 in the order details.
- 2) Attach signed contracts using the “**Attached Document**” section on the left side of the customer record. Select “**Add document**” and follow steps to load paperwork.
- 3) Renew orders are credited to the scoreboard under the Renewal category.

Upgrade Order:

- 1) To upgrade an existing order, select “**upgrade order**” by scrolling over the “**add**” button under the Order Info section. Choose which order you would like to upgrade and update with new MRC and dates. You may also upgrade an order by selecting an existing order and choosing “**upgrade**” from Step 4 in the order details.
- 2) Attach signed contracts using the “**Attached Document**” section on the left side of the customer record. Select “**Add document**” and follow steps to load paperwork.
- 3) Upgrade orders are credited to the scoreboard as partial renewal and partial New Sales. The Upgrade value is given in the new Sales category while the original amount is added into the renewal category. Amounts are credited based on Posting Policy.
- 4) If upgrade orders are added incorrectly as new orders, they will be corrected in the system and Revenue reflected correctly on the scoreboard.

Add On and/or Change Orders during Provisioning:

- 1) When an order has changes and/or has add-on's done prior to the time the circuit is provisioned the original order is simply updated with new MRC. To update MRC, Select the original order. Update the detail with the new MRC.
- 2) Notify Commissions of the adjustment for proper adjustment on the scoreboard.

Add On Orders after Provisioning:

- 1) When an order has an Add-on after it has provisioned:
 - a. If the Add-on does not affect the original contract. Add the order as a “**New order**”.
 - b. If the Add-on affects the original contract by renewing all MRC under the original contract then add the full order as an “**Upgrade Order**”.

Order Entry FAQ's

Do I need to enter an order in the Telarus Backoffice if I submit to carrier?

- ❖ Yes, submitting the order to a Carrier initiates the order to be provisioned for your customer. Entering the order in the Telarus backoffice enables Telarus to monitor the commission to ensure you are paid properly by the Carrier. Entering the order in the Telarus backoffice does not place the order with the carrier.

What is a customer record?

- ❖ A customer record is a unique id given when you add a customer into the Telarus system. This customer record number is generated by Telarus. You can find this customer record number in the upper left corner under the Customer Information section.

What is an order id?

- ❖ An order id is a unique number provided when adding an order to your Customer Record. This number can be found on the top line of your order detail. A Customer can have multiple order id's.

How do I enter a new order?

- ❖ You can enter a new order for your customer from the customer record. On the right hand side of the customer record you will see "Order Information". You will see a link for "add order". Click "add order" and a new screen will appear that will ask you the needed information for the order. You do not need to fill in the "acct number" box as this will be completed when commissions arrive. To complete the new order, upload your signed contract to your record by adding to the "Attached Document" section on the lower left side of the record. All orders need a signed document to support it prior to being released to the scoreboard.

How do I enter an upgrade order?

- ❖ To Upgrade an order simply select the "upgrade" option under the "add order" section of the backoffice or within the order detail itself. This will allow you to adjust the MRC, term and start dates for your upgrade. Do not enter a new order as it will duplicate the revenue by having the existing order in addition to the new contract which consist of the existing and upgrade amounts. To complete the upgrade order, upload your signed contract to your record by adding to the "Attached Document" section on the lower left side of the record. All orders need a signed document to support it prior to being released to the scoreboard.

How do I enter a renewal?

- ❖ Renewals are entered by simply clicking on the Account Number link, selecting "renew" and updating any changes to the order. To complete the renewed order, upload your signed contract to your record by adding to the "Attached Document" section on the lower left side of the record. All orders need a signed document to support it prior to being released to the scoreboard.

What is the difference between "Renew" and "Auto-Renew"?

- ❖ When renewing a circuit you have the option to "renew" or "auto-renew" the circuit. Renewing the circuit needs supported documentation as this is telling Telarus that it is "contracted" income by signature of the customer. It also will receive credit on the scoreboard. Auto-renew can be used if the customer's contract has an auto-renew clause that does not require a new contract to be signed. Auto-renews do not count towards RPL or receive credit on the Scoreboard. Auto-renews are for your order tracking convenience and will cause the order to be removed from your renewal reminders until the auto-renewed term expires.

When should I use the ‘MTM’ (Month to Month) option to renew an order?

- ❖ MTM is for customers whose contract does not include an auto-renew clause and who actively choose not to sign a term renewal. MTM renewals do not count receive credit on the Scoreboard. MTM renewals are for your order tracking convenience and will cause the order to be permanently removed from your renewal reminders. This will keep your renewal report clean of any customers who do not intend to renew their contracts at the time of the contract expiration. Telarus recommends you set a follow-up task either in our back office or your own CRM to periodically check to see if there are term options that the customer will sign.

How do I cancel an order?

- ❖ If your order is canceled you will receive a message from the Telarus Undertaker indicating that your customer has canceled their service along with providing the detail of the order. This will automatically change the order status to Cancel. You can also update your backoffice by simply changing the status of the order to “cancel”. If your order canceled prior to provisioning completion, set the status to “delete – not provisioned” rather than canceled.

Who changes the “status” within the order?

- ❖ Some Carrier Channel Managers will update the status of the order as the provisioning process moves forward however agents can change this status on their own as they are provided updates on the provisioning. If the status is not changed by the time commissions begin, Commissions will adjust the status to read “turned up and billing”.

Task Management Tool

The Telarus back office has a task management tool that allows you to create, assign and complete tasks based around your customer records.

1. You can set a task while in your customer record. You will need to go to “**Tasks for Customer**” and then select “**Add**”.

The screenshot shows the 'View Test Company' page. On the left, there's a 'Customer Information' panel with details like address, contact info, and record history. On the right, there are several tabs: 'Solution', 'Location', 'Inventory', 'Proposals', 'VAR Leads', and 'Custom'. Below these tabs, there's a section for 'Tasks for Customer' which says 'No tasks found in the database.' An 'ADD' button is located at the bottom of this section, circled in red.

2. You can select the **Priority**, **Due Date** and **Task Description** for the task, and also assign the task to an Agency Contact if you would like.

The screenshot shows the 'Add a New Task for Test Company' form. At the top, there's a header with a checkmark icon and the title. Below it is a table with columns: Type, Customer Name, Primary Contact, BTN, Address, and Task ID. The table row shows 'TEST COMPANY', 'MARY SMITH', '(801) 523-2100', '45 W SEGO LILY DR SUITE 220 SANDY, UT 84070', and 'NEW'. Below the table is a grid for task details. The first row has columns for Priority (set to Low), Due Date (set to 10/12/2012 02:01 PM Mountain), and Task Description (a large yellowed-out area). A note below the grid says: '*NOTE: You can now enter in the TIME of the task in addition to the DATE. Any time zone you select will be auto-adjusted to match the time zone where you live. (Customer Zone: Eastern)'.

You can have an email task reminder sent either to yourself and/or other Agency Contacts on a specific date. Select “**Add a New Task**” when done.

The screenshot shows the 'Task Email Reminder' form. It has a 'Send To' section on the left with a list of contacts and a 'Delivery Date' section on the right with a date field set to '10/12/2012'. The contacts listed are: Telarus Admin <amorgan@yahoo.com>, Keith T. <keith@telarus.com>, Johnny B. Goode <john@smith.com>, Bobby Jay <bob@masters.com>, Daniel Vest <dvest@telarus.com>, Mindy Johnson <keith@telarus.com>, Andrew Morgan <amorgan@telarus.com>, and Joe Quentes <joe@telarus.com>. At the bottom is a 'Add a New Task' button.

You can view a full Task report by going to “Task Manager” under “Customer Management”

The screenshot shows a vertical navigation menu for 'Customer Management'. The 'Task Manager' option is highlighted in yellow. Other menu items include VAR Program, GeoQuote, Training, Marketing, Reports, Agent Bulletin Board, Agent Support, Vendor Contacts, and a promotional message 'Got a deal and need help? easy click here'. At the bottom right, there is a logo for 'TEST COMPANY' with the time '2:15 PM MDT'.

The “Task Manager Report” will give you a full report of all tasks. It shows past due, done and future tasks.

The screenshot shows the 'Task Manager' report interface. It displays a list of tasks with columns for Type, Cust Name/Time, Due Date, Priority, Status, Task Summary, Edit, and Done. The tasks are categorized at the top: 'Past Due Tasks (13)', 'Today's Tasks (0)', and 'Future Tasks (0)'. Buttons for 'Display Completed Tasks', 'View All Priority Tasks', and 'Show All Tasks' are also present.

Type	Cust Name/Time	Due Date	Priority	Status	Task Summary	Edit	Done
TEST TRAINING	CUSTOMER 2:20 PM MDT	10/11/2012 11:12 AM	HIGH	PAST DUE	Call this customer.	EDIT	DONE
TEST TRAINING	CUSTOMER 2:20 PM MDT	08/03/2012 02:42 PM	HIGH	PAST DUE	Call customer on order.	EDIT	DONE
TRAINING CALL	CUSTOMER 2:20 PM MDT	07/25/2012 02:05 PM	HIGH	PAST DUE	Call customer on order.	EDIT	DONE
TEST TRAINING	CUSTOMER 2:20 PM MDT	07/18/2012 09:29 AM	HIGH	PAST DUE	Check with carrier on order.	EDIT	DONE
TEST TRAINING	CUSTOMER 2:20 PM MDT	07/16/2012 01:59 PM	HIGH	PAST DUE	Call this customer to find out about order.	EDIT	DONE
TEST TRAINING	COMPANY 2:20 PM MDT	07/09/2012 01:43 PM	HIGH	PAST DUE	Call customer for paperwork.	EDIT	DONE
TEST TRAINING	CUSTOMER 2:20 PM MDT	07/05/2012 09:34 AM	HIGH	PAST DUE	Call customer on order.	EDIT	DONE
TEST TRAINING	CALL 2:20 PM MDT	06/13/2012 10:34 AM	HIGH	PAST DUE	Please call customer on the order.	EDIT	DONE
TEST COMPANY	FOR TRAINING 2:20 PM MDT	06/11/2012 02:45 PM	HIGH	PAST DUE	Call this customer for paperwork.	EDIT	DONE
PIZZA SCHITZTA	06/23/2012 1:20 PM PDT	10/14 AM	HIGH	PAST DUE	Please call this customer on his order.	EDIT	DONE
TEST COMPANY	TRAINING 2:20 PM MDT	06/17/2012 10:06 AM	HIGH	PAST DUE	Call customer about proposal.	EDIT	DONE

A view of upcoming and past due tasks can also be found on your home page when you login.

The screenshot shows the home page with a lead list and a sidebar. The lead list has a total of 3,374 leads. The sidebar includes a 'Graveyard Update' message, a 'Friday's Tasks' section, and a 'View Complete List' link.

Graveyard Update: Congratulations, the Telarus undertaker has not found any accounts that you lost in Jul or Aug.

Friday's Tasks:

- TEST TRAINING CUSTOMER** (CLOSER) - Task date: 10/11/12, Status: Past Due (High), Task: Call this customer.
- TEST COMPANY** (CLOSER) - Task date: 10/08/12, Status: Past Due (Low), Task: Test task.
- TEST CUSTOMER TRAINING** (CLOSER) - Task date: 10/04/12, Status: Past Due (Low), Task: Test task.

View Complete List is a direct link to your “Task Manager Report”.

COMMISSIONS

Telarus pays commissions out on the 28th of each month via direct deposit. (If the 28th is a holiday or weekend, then you receive payment the following business day.) There are two ways you can access your commission report through your back office.

1. The first link to your commission report can be found on your home page under the “**Financial Dashboard**” section. You will need to click on the “**Info**” next to the amount.

The screenshot shows the Telarus Financial Dashboard. On the left, there's a sidebar with links like 'GeoQuote', 'Training', 'Marketing', 'Reports' (which is highlighted in yellow), 'Agent Bulletin Board', 'Agent Support', and 'Vendor Contacts'. Below these are two promotional banners: 'Got a deal and need help?' with a 'click here' button, and 'Where are the SPIFs?' with a 'CLICK HERE' button. The main area displays commission information:

- Your October Sales: \$0.00 [INFO](#)
- Your September Check: \$0.00 [INFO](#)
- EARN BENEFITS THROUGH THE AGENT REWARDS PROGRAM
- A photo of three people: a man and two women.
- Manual Quote Requests**: A table with columns 'Last Update' and 'Customer Name/Location'. It says 'THERE ARE NO MA...'.
- Orders Pending Approval**: A table with columns 'Aff' and 'Customer Name'. It says 'THERE ARE NO A...'.
- Quick Reference**: A section with a graduation cap icon and the text 'One-on-One Training'. It says 'Need help learning the back office? Sign up for live training from our dedicated train...'.

The second way to access your commission report is through the “**Reports**” section and then selecting “**Commission Report**”.

The screenshot shows the 'Reports' section of the Telarus back office. On the left is a sidebar with 'GeoQuote', 'Training', 'Marketing', 'Reports' (selected and highlighted in yellow), 'Agent Bulletin Board', 'Agent Support', and 'Vendor Contacts'. Below the sidebar are two banners: 'Got a deal and need help?' and 'Where are the SPIFs?'. The main area shows a list of reports:

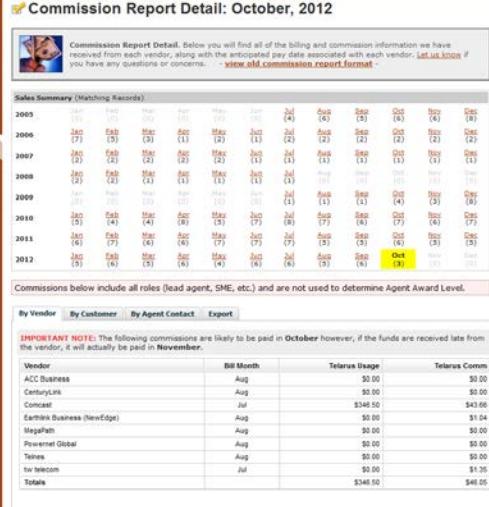
Co	Type	Customer Name	BTN/S
	MEGAPATH TEST QUOTE	(925) INTERI MPOW	
	Customer Graveyard	NING	(801) INTERI QWES*
	Customer Fallout Report		
	Agent Recruitment Report		(801) BUSINI LEVEL
	Customer TEST QUOTE 11:53 AM EDT (RPL Free)		
	AIRBAND TEST QUOTE 11:53 AM EDT (RPL Free)	(214)	FIXED NEW C
	AIRBAND TEST 10:53 AM CDT (RPL Free)	(214)	ETHER SOUT+

2. Find the month that you would like to review and click on the amount in red.

The screenshot shows a monthly commission report table:

Month	Amount	Amount	Amount	Amount	Amount
Feb 2012	\$0.00	\$0.00	\$0.00	\$0.00	\$798.55
Mar 2012	\$0.00	\$6.12	\$0.00	\$0.00	\$804.67
Apr 2012	\$0.00	\$6.56	\$0.00	\$0.00	\$811.23
May 2012	\$0.00	\$4.69	\$0.00	\$0.00	\$815.92
Jun 2012	\$40.51	\$8.09	\$0.00	\$0.00	\$864.52
Jul 2012	\$40.51	\$6.08	\$0.00	\$0.00	\$911.11
Aug 2012	\$43.09	\$4.32	\$0.00	\$0.00	\$958.52
Sep 2012	\$43.03	\$7.82	\$0.00	\$0.00	\$1,009.37
Oct 2012	\$43.66	\$2.39	\$0.00	\$0.00	\$1,055.42
Total:	\$360.81	\$661.56	\$33.05	\$0.00	\$1,055.42

3. Your Commission Report Detail can be viewed a few different ways. The first way is by Vendor. You can see the billing month you were paid for, the usage and the amount Telarus will be paying you.



Commission Report Detail: October, 2012

Commission Report Detail. Below you will find all of the billing and commission information we have received from each vendor, along with the anticipated pay date associated with each vendor. [Let us know if you have any questions or concerns.](#) [View old commission report format.](#)

Sales Summary (Matching Records)

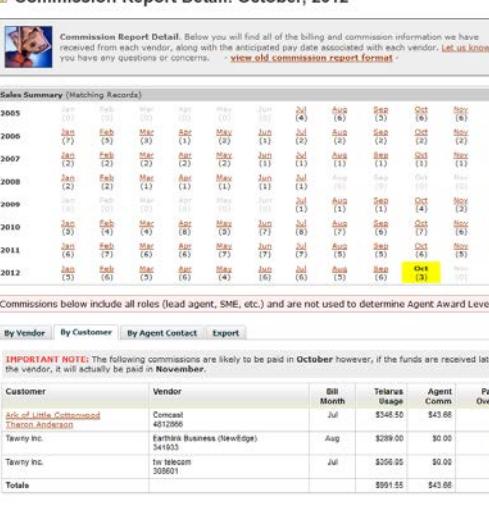
Vendor	Bill Month	Telarus Usage	Telarus Comm
ACC Business	Aug	\$0.00	\$0.00
CenturyLink	Aug	\$0.00	\$0.00
Comcast	Jul	\$346.50	\$43.66
Earthlink Business (NewEdge)	Aug	\$0.00	\$1.04
MegaPath	Aug	\$0.00	\$0.00
Powernet Global	Aug	\$0.00	\$0.00
Telnes	Aug	\$0.00	\$0.00
tw telecom	Jul	\$0.00	\$1.35
Totals		\$346.50	\$46.05

Commissions below include all roles (lead agent, SME, etc.) and are not used to determine Agent Award Level.

By Vendor | By Customer | By Agent Contact | Export

IMPORTANT NOTE: The following commissions are likely to be paid in **October** however, if the funds are received late from the vendor, it will actually be paid in **November**.

You can also view your report by customer.



Commission Report Detail: October, 2012

Commission Report Detail. Below you will find all of the billing and commission information we have received from each vendor, along with the anticipated pay date associated with each vendor. [Let us know if you have any questions or concerns.](#) [View old commission report format.](#)

Sales Summary (Matching Records)

Customer	Vendor	Bill Month	Telarus Usage	Agent Comm	Partner Override
Ad of Little Cottonwood Theron Anderson	Comcast	Jul	\$346.50	\$43.66	\$0.00
Tawny Inc.	Earthlink Business (NewEdge)	Aug	\$289.00	\$0.00	\$1.04
Tawny Inc.	tw telecom	Jul	\$256.00	\$0.00	\$1.35
Totals			\$901.55	\$43.66	\$2.39

Commissions below include all roles (lead agent, SME, etc.) and are not used to determine Agent Award Level.

By Vendor | By Customer | By Agent Contact | Export

IMPORTANT NOTE: The following commissions are likely to be paid in **October** however, if the funds are received late from the vendor, it will actually be paid in **November**.

If you have added Agency Contacts, and given them a percentage of your Telarus commission, you can view a report that will show you how much they are to be paid under the “**By Agent Contact**” tab. You can also export your report into Excel for downloading by selecting the “**Export**” tab.



By Vendor | By Customer | **By Agent Contact** | Export

IMPORTANT NOTE: The following commissions are likely to be paid in **October** however, if the funds are received late from the vendor, it will actually be paid in **November**.

Vendor	Bill Month	Telarus Usage	Telarus Comm
ACC Business	Aug	\$0.00	\$0.00
CenturyLink	Aug	\$0.00	\$0.00
Comcast	Jul	\$346.50	\$43.66
Earthlink Business (NewEdge)	Aug	\$0.00	\$1.04
MegaPath	Aug	\$0.00	\$0.00
Powernet Global	Aug	\$0.00	\$0.00
Telnes	Aug	\$0.00	\$0.00
tw telecom	Jul	\$0.00	\$1.35
Totals		\$346.50	\$46.05

Commission FAQ'S

When do I get paid?

- ❖ Telarus agent payments are made via Direct Deposit on the 28th of the month. If the 28th is a holiday or weekend, payments will be made the next business day. Payments are initiated on the 28th with most banks making the funds available on the following business day.

What is needed to get paid?

- ❖ A current W-9 and Direct Deposit Form must be on file in order to receive your payment. If not on file, commissions will continue to accumulate until you submit your W-9 at which time they will pay out in full.

How do I change my address?

- ❖ You can change your mailing address by updating your address within your profile. You can access your profile along the top bar of your back office on the far left side.

How do I change my bank account number?

- ❖ Contact Cindy Cokl at ccokl@telarus.com for documentation necessary for changing your bank account detail.

Where is the commission statement posted?

- ❖ From the home page of your back office you can access your report by 2 methods. You can either select from the list in the top left box "Reports", "Commission Reports". This will provide you a "Composite Commission Report" which gives you a summary of your commissions by month. By selecting the commission amount it will bring you into a detailed report of your commissions broken down to carrier and customer levels. You can also get to this report by selecting the "view commissions" link on the financial dashboard also located on the left side of the home page.

When are commissions posted for my view?

- ❖ Commissions are posted as they arrive to Telarus. Commissions cannot begin to post until the 1st of the month and will continue to be added until the 24th of the month at which time they are finalized and the payment process begins. After the 24th of the month you will see no changes to your commissions.

Why do some of my customers commissions skip months?

- ❖ Most Telarus Carriers pay commissions based on billing revenue however some pay on cash payments received by the customers. If a customer is running behind on their payment no commissions will pay during that given month. Rest assured that we have tools in place to monitor this and ensure that all payments will eventually be paid in full as the customer makes payments to the Carrier.

Why am I seeing a Chargeback?

- ❖ Chargebacks occur when a customer becomes delinquent with the Carrier and service is shut off and/or customer is sent to Collections. As most Carriers pay commissions based on billing, they need to recoup commissions paid to you on invoices not paid to them. The carrier will chargeback commissions to Telarus (and Telarus passes this through to you) only after all efforts to recoup the money have been exhausted. If a One Time Spiff is paid and the customer cancels within the first few months the spiff will also be charged back.

If my customer receives a credit by the Carrier, why am I not paid my commissions?

- ❖ Carriers pay commissions either on billed amount or received amount. If a customer receives a credit from the carrier that credit is applied to the customer bill thus reducing the amount owed and paid.

How do I know what % of commission I get paid?

- ❖ From the commission report you can access a link in the lower right corner titled “Commission Payment Table”. You can then view all commission % available on this table.

How do I know what carriers offer spiffs?

- ❖ The easiest way to access spiff detail is from the home page of your back office. In the lower right corner you will see a list of vendors currently offering spiffs and can select the carrier to read the detail. You can also see the available spiffs at Telarus.com under Promotions.

Do I need to pay my VAR partners?

- ❖ No, Telarus pays your VAR partner and/or Lead Gen commissions on the 28th of the month. VAR partners also need to have a current W-9 and Direct Deposit form on file.

Do I need to pay my Sub-Agents?

- ❖ Yes, Master Agents are responsible for paying their sub-agents. You can view the amount owed to your sub-agent as an overall amount on your Commission report or by logging into your Master Agent back office and selecting “pay commissions” for a breakdown of each sub agent who has earned commissions on a particular month. Telarus will include the subagent commissions in the Master Agent’s monthly check.

What if there is a commission error?

- ❖ If there is an error in your commissions, please notify Lori O’Rourke either by e-mail at lorio@telarus.com or by completing a commission discrepancy entry by selecting the link titled “report a commission Discrepancy” located at the bottom of your commission report. Be sure to include the name of the customer in this request.

How long does it take to get paid a spiff?

- ❖ Each Carrier pays a different time for spiffs. Some can be as early as the week after the sale while others are paid after 3 months of billing. Contact Lori O’Rourke at lorio@telarus.com for specific Carrier questions.

How long does it take for residuals to begin?

- ❖ Each Carrier begins paying residuals either 2 or 3 months after billing begins. Most carriers are 2 months although we do have a few that are a 3 month delay. Billing will not begin until customer service is installed and many times will begin the month after installation with the first bill being larger as it is a full month in addition to a prorated month of service.

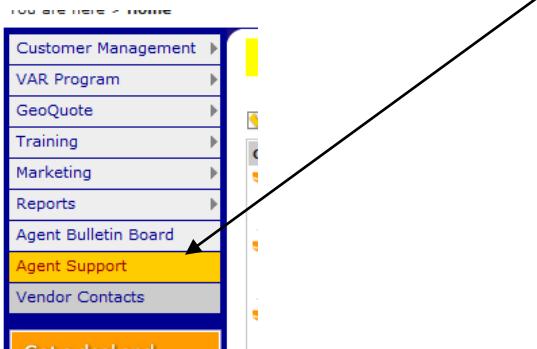
What if I want to share my commissions with a Lead/VAR outside of the standard split?

- ❖ If you want to make a onetime change to the amount of commission split with your VAR and/or Lead Gen contact your Telarus Channel Manager and they will ensure that the adjustment is completed.

Agent Support (Telarus Trouble Ticket Tool)

Telaurs has a trouble ticket tool that allows you to send trouble tickets through the back office for Telarus tools issues and also for commission inquires.

1. To access this tool, you will need to select “Agent Support” on the right side of your page.



2. On the Agent Support page, you will need to select from the dropdown box which subject or category your trouble ticket falls under.

A screenshot of the Agent Support page. The left sidebar shows 'Customer Management' and 'Agent Support' selected. The main area displays a table of 'Review Trouble Tickets' with one entry: Open Date: 10/26/2011, Subject: Software Bug or Error, Description: testing on production, Status: Closed, Action: VIEW | DEL. Below this is a 'Submit a New Trouble Ticket' section. A dropdown menu is open, listing categories: Software Bug or Error, GeoQuote Pricing Error, Commission Tools: Premium Website, Commission Issue, Other / Misc., and System Improvement Suggestion. A black arrow points from the text above to this dropdown menu.

3. Please type up the issue or help information you need in the empty space provided. When done, please select “Submit” to send your ticket to the appropriate department and Telarus Team member. You will be notified via email when your trouble ticket is being worked on, and also when the issue has been resolved.

A screenshot of the Agent Support page. The left sidebar shows 'Customer Management' and 'Agent Support' selected. The main area displays a table of 'Review Trouble Tickets' with one entry: Open Date: 10/26/2011, Subject: Software Bug or Error, Description: testing on production, Status: Closed, Action: VIEW | DEL. Below this is a 'Submit a New Trouble Ticket' section. A dropdown menu is open, listing categories: Software Bug or Error, GeoQuote Pricing Error, Commission Tools: Premium Website, Commission Issue, Other / Misc., and System Improvement Suggestion. A yellow star is placed over the 'Submit' button at the bottom of the form. A red oval highlights the 'Submit' button.

Training

Telarus has a dedicated section in the back office on training. You can access this section by going to the “Training” section from the left side of your home page.

The screenshot shows the Telarus Back Office homepage. At the top, there's a banner with two people and the text "Telarus Back Office". Below the banner, a navigation menu on the left includes "Customer Management", "VAR Program", "GeoQuote", "Training" (which is highlighted in yellow), "Marketing", "Reports", "Agent Bulletin Board", "Agent Support", and "Vendor Contacts". To the right of the menu, a yellow box displays "You have 1 solution request". Below this, a section titled "Inbox" shows several items: "Recorded Training Calls" (801), "Conference Call Schedule" (BUSI), "Telarus Document Library" (LEVEL), "Vendor Product Matrix" (214), "Patrick's Corner" (FIXEC), and "Agent Bulletin Board" (NEW). A yellow box on the left says "Got a deal and need help? easy click here". Below the inbox, another yellow box says "Where are the".

To watch one a training video on a particular function or section of the back office, select “Training Videos”. These videos are each average about ten minutes in length.

This screenshot shows a list of 9 training lessons under the "Training Videos" section. Each lesson includes a number, a title, a brief description, and a thumbnail image of the video player. The lessons are:

No.	Lesson Description	Watch Video
1	Lesson 1 - Agent Support Introduction to the Telarus Agent Back Office, locating channel manager information, creating customer records, solution requests, and trouble tickets.	
2	Lesson 2 - GeoQuote How to create a customer record, a brief introduction to the customer record, GeoQuote (real-time vs. manual solution requests), interpreting the GeoQuote results page, quote details, commission percentages, requesting paperwork, and adding an order.	
3	Lesson 3 - GeoScan/Fiber Maps How to use Telarus tools to research complex opportunities; Fiber maps (high capacity circuits), GeoScan, multi-location GeoScan, and a review of Solution Requests.	
4	Lesson 4 - Commissions Commission - how to see how much you earn from each carrier, on each product, on each customer, where to find promotions and splits, and where to go for help if something doesn't look right.	
5	Lesson 5 - CRM Meaning of various icons, Inbox, sales funnel statuses, notes, tasks, task reminders, customer contacts, SME access.	
6	Lesson 6 - Proposals Creating, modifying, and sending detailed proposals for your clients.	
7	Lesson 7 - Marketing Learn what the Online Marketing tool Telarus has created to help your business grow both online and in the real world. In this lesson we discuss the Online Marketing Menu, LinkedIn and other social networking sites, the monthly marketing call, and a brief overview of the GeoQuote XML plug-in.	
8	Lesson 8 - MARS Learn what the Master Agent Reporting System is, how to private label it to your business, how to add sub-agents, import your non-Telarus commissions, and how to administer your own master agency using the software.	
9	Lesson 9 - Comcast All about Comcast; quoting, interpreting the results in GeoQuote, creating paperwork, manual availability checks, processes, order status.	

Recorded Training Calls is where you can find our Tuesday morning Partner call that we record each week, training calls held by our Suppliers and Marketing help calls that were held by Patrick Oborn.

This screenshot shows the "Recorded Training Calls" section. It includes a list of recordings and contact information for Patrick Chandler. The recordings listed are "Recorded Training Calls", "Partner Call Recordings", "Conference Call Schedule", "Vendor Training Call Recordings", "Telarus Document Library", "Marketing Call Recordings", "Vendor Product Matrix", "Patrick's Corner", and "Agent Bulletin Board". Below this, a "Primary Instructor" section lists "Phil Chandler" with the title "Telarus Channel Manager" and the phone number "(801) 938-3680" and email "pchandler@telarus.com". At the bottom, there are "Training Links" and a "TRAINING HOME" button.

Conference Call Schedule shows a current list of trainings being offered by Suppliers and Telarus.

You have 1 solution request fr

Inbox

Training	Training Videos
Marketing	Recorded Training Calls
Reports	Conference Call Schedule
Agent Bulletin Board	Telarus Document Library
Agent Support	Vendor Product Matrix
Vendor Contacts	Patrick's Corner
	Agent Bulletin Board

Got a deal and need help? **easy**

11:15 AM CDT (RPL Free)

TEST COMPANY (801) 5

Check this page often since we are always adding training sessions. Also be sure to register in advance for a training call if it requires you to do so.

> **Training** > Conference Call Schedule Telarus Admin Logged In

Conference Call Schedule

Below is a complete conference call training schedule. Please mark your calendar and be sure to attend so that you can bring any questions you may have for the presenter of the conference. All calls are recorded and published to the Audio Library for future reference.

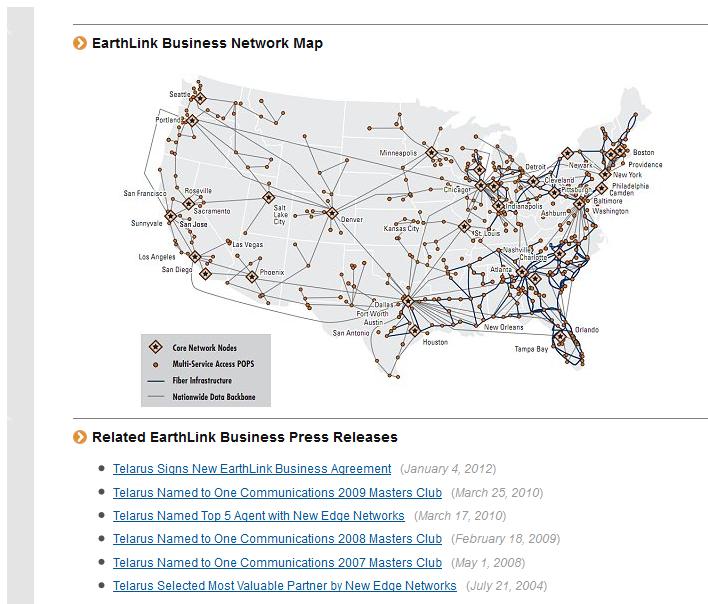
Company	Description	Date/Time/Call-In
Telarus	Weekly Agent Training Join Lance Akins, VP of Sales for Telarus, as he reviews rate changes, promotions, bonuses, contests, best practices, and new carrier additions. LiveMeeting	Every Tuesday October 16, 2012 9:00 AM MDT (404) 920-6484 PIN: 332326
Telnes™ BROADBAND	15 Minute Webi - The 5 Things You Need to Know Join us for this new Express training on the 5 things you need to know to sell Telnes TODAY!	October 16, 2012 9:00 AM MDT 3099449515 PIN: 7750507
	High-Speed Internet & Wideband Product Training <ul style="list-style-type: none"> Business Needs for Speed & Productivity Target Market High-Speed Internet and Wideband Internet offerings Competitive review Value-added products Selling resources Click here to register for the event	October 16, 2012 12:00 PM MDT PIN:
	Charter Training <ul style="list-style-type: none"> Charter overview Network footprint Products and services Pricing Pre sales and order entry support process Rules of engagement Current spiffs Click here to join the webinar	October 17, 2012 10:00 AM MDT 1-303-927-3055 PIN: 594 693 666
	Creative Selling Learn how to creatively position your client's needs and desires for Hosted Voice and MPLS. Click here to Register	October 17, 2012 11:30 AM MDT 682 461 955 PIN: Welcome1

Vendor Product Matrix will show you all the services and Suppliers that we work with that sell those services. It will also show you if that particular service can be quoted in Geoquote™ (Real-Time), and what will need to be submitted for pricing via Manual Quote through the back office.

Telarus Product Matrix

The Right Products at the Right Price		
Do you have access to the products that you need to be successful in telecom sales? Do you have access to cloud, fiber, wireless, mobility, and other game-changing solutions that you'll need to compete? Below is our comprehensive product matrix, where we have compiled a list of both the products that Telarus is able to offer through our many service providers, but we've also included the time in which it takes to get a quote for that solution. Having the right products, from the right providers, at the right price, it's what Telarus is all about.		
PRODUCT MATRIX UPDATED ON OCTOBER 15, 2012		
Mobility	Service Providers	Quote Time
Expense Management	Advantix Solutions Group	Manual Quote
3G Fixed Wireless	Accel Networks , Broad Sky Networks , EarthLink Business , Level 3 (Spring 3G) , MegaPath , NetWolves , XO Communications	Real-Time
3G Mobile Wireless	AT&T , Cbyeyond , EarthLink Business , TelePacific , Verizon Wireless	Manual Quote
4G WiMax	AT&T , Accel Networks , Broad Sky Networks , NetWolves , Verizon Wireless	Manual Quote
Internet Access	Carriers	Quote Time
Business DSL	AT&T , Broadview Networks , Cbyeyond , CenturyLink , EarthLink Business , Ernest Communications , MegaPath , NetWolves , PAETEC , RealLink , Telles Broadband	Real-Time
Cable Internet	Comcast Business , Time Warner Cable Business Class	Real-Time
Data T1	Alpheus , AT&T , ACC Business , AireSpring , Broadview Networks , Cbyeyond , CenturionLink , EarthLink Business , Ernest Communications , Integra Telecom , Level 3 , MegaPath , Mosaic Network , NetWolves , Nitel , PAETEC , PowerNet Global , RealLink , TelePacific , Telles Broadband , USA Digital Communications , Vocal IP Network , Windstream Communications , XO Communications	Real-Time
Satellite Fixed Wireless	Broad Sky Networks , NetWolves	Real-Time
High BW Fixed Wireless (Microwave)	Airband , Broadview Networks , NetWolves , PAETEC , TelePacific , XO Communications	Manual Quote
Bonded T1	Alpheus , AT&T , ACC Business , AireSpring , Broadview Networks , Cbyeyond , CenturionLink , EarthLink Business , Integra Telecom , Level 3 , MegaPath , NetWolves , Nitel , PAETEC , PowerNet Global , RealLink , TelePacific , Telles Broadband	Real-Time

By selecting any of the Carrier names in **blue**, you will be taken to a profile page that will give you more information about that Carrier. You can see the types of products they offer, strategic advantages, awards and recognition they have received, case studies, network maps and press releases.



How to Add an Agency Contact

- Click on “Update Profile” in upper right hand corner of home page.

The screenshot shows the Telarus Back Office homepage. At the top right, there is a link labeled "Update Profile" which is circled in red. The main content area displays an "Inbox" section with several pending approval requests. To the right of the inbox, there are sections for "Graveyard Update", "Thursday's Tasks", and "Upcoming Training". A sidebar on the left contains promotional banners for deals, financial dashboard, and agent rewards.

- Select “Agency Contacts” tab and then “Add Contact” at bottom of page.

The screenshot shows the "Update Your Profile" page under the "Agent Profile Management" tab. On the left, there is a sidebar with various links like Customer Management, VAR Program, GeoQuote, etc. The main content area has tabs for "Agency Contacts" (which is circled in red) and "IME Prof...". Below these tabs is a list of contacts with columns for Contact Name, Phone/Email, and Action. At the bottom right of the contact list, there is a blue button labeled "ADD CONTACT" which is also circled in red.

3. Complete requested information and select “**Submit Changes**”. (If the Agency Contact will be logging in under own agent id and password, the “**Contact Can Login**” must be selected as “yes”.) Once selected for login access, the Primary Contact entering all information will need to select an agent id and password for the Agency Contact. The “**Permissions**” section will appear, and this is where the settings can be customized to the best fit for the employee they are adding. Select “**Submit Changes**” once the profile is complete.

The screenshot shows the 'Agency Contact' profile page. The 'Contact Can Login?' field is checked ('Yes'). The 'Submit Changes' button at the bottom right is circled in red.

4. To edit the email permissions of the Agency Contact, select “**Edit**” next to the Agency Contact that needs email permissions set. You will back in the Agency Contact profile page. Go to the “**Subscriptions**” section of the page and add or remove emails permissions by selection either the circle with the dash (to remove) or the green add button to add additional emails. *Note- if the Agency Contact will be submitting manual quotes or orders, you will want to make sure “**Order Status Updates**” and “**Manual Quote Updates**” are both added. Select “**Submit Changes**” for changes to be finalized.

The screenshot shows the 'Agency Contact' profile page with the 'Subscriptions' section open. The 'Order Status Updates' and 'Manual Quote Updates' checkboxes are checked. The 'Submit Changes' button at the bottom right is circled in red.

The VAR Program in Your Telarus Back Office

- Want to learn more about the VAR Program? Select the "**VAR Introduction**" section.

You are here > Home

Customer Management > You have 1 solution request from your sub-agents

VAR Program	VAR Introduction
GeoQuote	VAR Administration
Training	VAR Search Engine
Marketing	VAR Marketing Tools
Reports	Lead Generator Admin
Agent Bulletin Board	Agent Recruitment Report
Agent Support	VAR Equipment Commissions
Vendor Contacts	VAR Lead Tracker
	VAR Bulletin Board
	VAR Statistics

Got a deal and need help? **easy** click here

change to vertical view

BTN/Service/LEC

MAN	(682) 628-1234 ETHERNET (FI.. SOUTHWESTERN..)
	(425) 488-7171 BONDED T1 FRONTIER COM..)
QUOTE	(214) 383-1000 ETHERNET (CO.. SOUTHWESTERN..)
	(801) 879-2238

ANGELA TEST

- Want to add a VAR to your back office? Select the "**VAR Administration**" button and then "**Add a VAR**". (For further instructions on adding a VAR, please see the "Add a VAR" section in this manual.)

You are here > Home

Customer Management > You have 1 solution request from your sub-agents

VAR Program	VAR Introduction
GeoQuote	VAR Administration
Training	VAR Search Engine
Marketing	VAR Marketing Tools
Reports	Lead Generator Admin
Agent Bulletin Board	Agent Recruitment Report
Agent Support	VAR Equipment Commissions
Vendor Contacts	VAR Lead Tracker
	VAR Bulletin Board
	VAR Statistics

Got a deal and need help? **easy** click here

change to vertical view

Contact/PI

JAMES KNICKERBOCKER	(877) 257-1234
	(801) 879-2238
ANGELA TEST	INTERNET T1 CELLCO PARTN..)
	(703) 386-2421
MATT RABALA	ETHERNET (FI.. TW TELECOM O..)
	(703) 386-2421
MATT RABALA	ETHERNET (FI.. TW TELECOM O..)

TW TELECOM TEST

4:43 PM CDT (RPL Free)

QUOTE

4:43 PM CDT (RPL Free)

- VAR Email Tool allows you to send out a bulk email to all of your VAR's at once. You can specify a future date and time for the emails to go out.

Customer Management > **VAR Email Tool**

VAR Program	VAR Introduction
GeoQuote	VAR Administration
Training	VAR Search Engine
Marketing	VAR Marketing Tools

VAR Email Tool

VAR Administration

Add a VAR

VAR Search Engine

VAR Marketing Tools

VAR Email Archive

Complete the Bulk Email Tool fields and select "[Send Message](#)" to send your bulk emails out to your VAR Partners.

Welcome to the VAR Email Tool. Use the form below to send out bulk announcements to your VAR agents on the date you specify below.

VAR Admin [Add a VAR](#) [Bulk Email Tool](#) [Email Outbox](#)

Time to Send: 10/10/12 9:30 AM **Mountain** [\[Send in 10-20 min\]](#) [\[Send Now\]](#)

From: amorgan@yahoo.com

To: * Gotta Get Cash <aedwards@telarus.com>
 * Test VAR For Me <jmartin@telarus.com>

BCC: amorgan@yahoo.com

Subject: Telarus Update from Telarus Admin

Message:

You may use the following special fields which will be replaced in the subject and message:

%BusinessName% = Business' Name
%RecordID% = Account Number (AgentsID)
%ContactName% = Contact name
%Email% = Contact Email
%Address%, %City%, %State%, %Zip% = Agent's Address

Send Message

4. [VAR Email Archive](#) will give you a list of all VAR emails you have sent.

You are here > Home > [VAR Resources](#) > [VAR Administration](#) > [VAR Emails](#)

Telarus Admin Logge

Customer Management > **VAR Program** [VAR Introduction](#)

GeoQuote	VAR Administration	Add a VAR	VAR Search Engine	VAR Email Tool	Use the form below to send out bulk announcements to your VAR agents on the date you specify below.			
Training	VAR Marketing Tools	VAR Email Archive	Lead Generator Admin	Agent Recruitment Report	VAR Equipment Commissions	Add a VAR	Bulk Email Tool	Email Outbox
Marketing								
Reports								
Agent Bulletin Board								
Agent Support								
Vendor Contacts								
VAR Links								
VAR HOME								
VAR INTRODUCTION								
VAR ADMINISTRATION								
VAR SEARCH								
VAR MARKETING TOOLS								
LEAD GEN ADMIN								
AGENT RECRUITMENT								
VAR LEAD TRACKER								

Recipient / Subject

Date	Subject	Status	Del
04/21/2006 4:15 PM	dwest@shopfort1.com Shopfort1 VAR Program Survey	Sent	DEL
05/09/2006 4:58 PM	poborn@cheaprates.com Shopfort1 VAR Program Survey	Sent	DEL
04/22/2010 4:24 AM	"Patrick VAR Oborn" <poborn@cheaplates.com> Patrick VAR Oborn - Welcome to the Telarus VAR Program!	Sent	DEL
04/22/2010 4:12 PM	"Patrick Min" <poborn@telarus.com> Patrick Min - Welcome to the Telarus VAR Program!	Sent	DEL
08/16/2012 1:10 PM	dwest@shopfort1.com Telarus Update from Telarus Admin	Sent	DEL

5. VARSearch Tool allows you to search through our database of VAR's and find a VAR who will be a good fit for your customer. Complete all the fields on page 1 and continue.

Customer Management > VAR Program > VARSearch™ Search Tool

Survey :

- What type of VARNetwork partner are you looking for?
 Information Technology Service or Equipment Provider
 Telecom Service and Equipment
- How can a VARNetwork partner help you?
 I am interested in buying equipment and having it installed.
 I am interested in buying equipment and installing it myself.
 I have a service request of a VARNetwork partner.
- What is the estimated budget for this purchase?
 \$0.00 - \$5,000.00
 \$5,001.00 - \$15,000.00
 \$15,001.00 - \$25,000.00
 \$25,001.00 - \$50,000.00
 \$50,001.00+
- What is the estimated time frame for this decision?
 As soon as possible
 Less than 30 days
 31 - 60 days
 60+ days
- How would you classify your business?
 Small Business (1 - 100 employees)
 Medium Business (101 - 500 employees)
 Enterprise (501+ employees)
 Government

Continue >>

Be sure to select the green arrow to see a drop down box with the available brands that you are interested in.

Customer Management > VAR Program > VARSearch Tool - Step 2

Please select the equipment and services you are interested in below.

- PBX Equipment**
- VoIP Equipment**
- Peripheral Equipment**
- Other Telecom Services**

Continue >>

A drop down list will appear with all services in the category you selected. To see the brands, select **Show Brands** on the right side for a list of brands.

VAR Search Tool - Step 2

Please select the equipment and services you are interested in below.

- PBX Equipment**
 - Hosted PBX Hardware
 - IP PBX Hardware
 - PBX Hardware
 - Telephone Key Systems
- VoIP Equipment**
- Peripheral Equipment**
- Other Telecom Services**

Continue >>

- a. After you select **Continue** a full list of VAR's available will appear on the next page.

6. VAR Marketing Tools will give you ways that VAR Network can help you as a Telarus Partner.

VARSearch(tm) Marketing Tools

Marketing Tools

to "plug" VARSearch(tm) real-time VAR location search into your web sites so that you can begin generating telecom equipment and installation leads today!

VARSearch(tm) to Your Site

Technology that allows users to search for telecom equipment in their local area. When a customer goes through the site, we capture their information and send it to the VARs that are the best matches for one customer. We also tag the equipment customer's records with your AgentID, assuring you get paid whenever a VAR successfully makes a sale.

Below you will find detailed instructions on how to add VARSearch(tm) to your site(s) and to ensure that the tracking is working properly.

VAR Network Banners

One very easy way to drive traffic to your VARNetwork.com site is to place banners on the top (or bottom) of your existing web site. We have created several banners for you to use along with the source code you need to ensure proper tracking.

VAR Network Banners

VARSearch(tm) Post

In addition to banners, the "post code" is by far the quickest and easiest way to add VARSearch(tm) to your web site. The only drawback is that the user will be sent away from your website, to VARNetwork.com (that is tracking your Agent ID in a user cookie). Here is the code that you need to add to make this work:

```
<!-- Begin VARSearch Form -->
<form action="http://varnetwork.com/var_step2.cfm?telid=closer"
      method="POST" name="TheForm">
<table>
  <tr>
    <td nowrap align=right>Your Zip Code:</td>
    <td><input type="text" name="CustomerZip"
               size="20" value=""></td>
  </tr>
  <tr>
    <td></td>
    <td><input type="submit" value="Proceed to Step 2 "></td>
  </tr>
</table>
</form>
```

7. Lead Generator Admin is where you can view the partners who have selected you as their preferred closer and submitted at least one lead. You can also view the leads they've sent you and send them emails and newsletter blasts.

Lead Generator Admin

8. VAR Equipment Commissions will show you the billing and commission information we have received from each VAR.

You have 1 solution

VAR Equipment Commissions

VAR Commission Report for Oct 2012



VAR Commission Report. Welcome to the commission and usage reports section. Below you will find all of the billing and commission information we have received from each VAR. [Let us know](#) if you have any questions or concerns.

VAR Commissions Summary

There are no matching records

Commission Date	VAR	Customer	Commission Role	Commission Amount
			Total	\$0.00

[Return to Commission Report](#)

9. **VAR Lead Tracker** will give you a view of all the phone system and network equipment leads you've submitted to VAR's in our Network. This page is a valuable resource to you if your customer wants to know the status of their equipment orders and/or installations.

The screenshot shows a vertical navigation menu titled "Customer Management". The "VAR Lead Tracker" option is highlighted in yellow. Other menu items include VAR Program, GeoQuote, Training, Marketing, Reports, Agent Bulletin Board, Agent Support, Vendor Contacts, VAR Statistics, and a promotional message "Got a deal and need help? EASY".

VAR Lead Tracker

Welcome to the VAR Lead Tracker. On this page you can view all of the phone system and network equipment leads you've submitted to VARs in our Network. This page is a valuable resource to you if your customer wants to know the status of their equipment orders and/or installations.

Type	VAR / Date	Customer Contact	Services	Status
	HTBSUPERSTORE HTB INTERNET SUPERSTORE, LLC 05/18/2012 06:46 PM	INTEGRA ETHERNET / CROSS PRODUCT DANNY STEER (503) 649-4641 dsteer@stellarus.com	CRM Internet/Intranet/Web Software	Inbox ● commission confirmed ● submit feedback
	PATRICKOBORNVAR2 OBIE ONE COMMUNICATIONS 02/25/2011 06:26 PM	TELARUS DANIEL VEST (801) 897-8921 dvest@shopfort1.com	Point of Sale Software Netopia	Transaction Complete ● commission confirmed ● submit feedback
	PACKETFUSION PACKET FUSION, INC. 10/19/2010 07:52 PM	MEGAPATH TEST QUOTE JOSH BYRD (925) 416-0494 jbyrd@megapath.net	Access Points	Inbox ● commission confirmed ● submit feedback

Reassign lead to new VAR: TestVAR12345 - Test VAR For Me

Reassign lead to new VAR: TestVAR12345 - Test VAR For Me

Reassign lead to new VAR: TestVAR12345 - Test VAR For Me

10. **VAR Statistics** will give you a view the activity of all of your VARs in the system, including the number of equipment leads they've received as well as the number of T1 leads they've provided.

The screenshot shows a vertical navigation menu titled "Customer Management". The "VAR Statistics" option is highlighted in yellow. Other menu items include VAR Program, GeoQuote, Training, Marketing, Reports, Agent Bulletin Board, Agent Support, Vendor Contacts, VAR Lead Tracker, VAR Bulletin Board, and a promotional message "Got a deal and need help? EASY".

VAR Statistics

Welcome to the home of VAR Statistics. In this section you can view the activity of all of your VARs in our system, including the number of equipment leads they've received as well as the number of T1 leads they've provided.

Your VARs						
AgentID	Business/Contact Name	Survey	T1 Leads	T1 Deals	VAR Leads	
SMITHTELECOMVARTEST	SMITH TELECOM JOHN SMITH	No	0	0	0	
TESTVAR12345	TEST VAR FOR ME JESSICA MARTIN	No	2	0	1	

**Note: All agents highlighted in yellow have generated at least one T1 lead for you.

How to Add a VAR Partner

1. Select VAR Program, VAR Administration and click on “Add a VAR”.

 Telarus Back Office

You are here > Home [change to vertical view ▾](#)

Customer Management		You have 1 solution request from your sub-agent		
VAR Program	VAR Introduction			
GeoQuote	VAR Administration	Add a VAR		
Training	VAR Search Engine	VAR Email Tool		
Marketing	VAR Marketing Tools	VAR Email Archive		
Reports	Lead Generator Admin	INTERNET T1 CELLCO PARTN..		
Agent Bulletin Board	Agent Recruitment Report			
Agent Support	VAR Equipment Commissions	EST	(703) 386-2421	MATT RABA (913) 780-
Vendor Contacts	VAR Lead Tracker	ETHERNET (FI.. TW TELECOM O..		
	VAR Bulletin Board			
	VAR Statistics	EST	(703) 386-2421	MATT RABA (913) 780-
Got a deal and need help? 	QUOTE 1:26 PM CDT (RPL Free)	ETHERNET (FI.. TW TELECOM O..		
Where are the	ALPHUS TEST QUOTE 2:26 PM EDT (RPL Free)	(512) 219-5408 ETHERNET (CO., SOUTHWESTERN..		

2. Complete all highlighted boxes to add the contact information for your VAR. Click “**Add VAR Record**” when completed.

Add an Agent to Your VAR Program

Welcome to the VAR Agent Addition Area. Use the form below to add a new VAR to your program. After you successfully enter the data below, make sure you remember to send the VAR a Welcome Letter that contains all of the login information and URLs that they'll need.	
 VAR Admin	▼ Add a VAR
	Bulk Email Tool
	Email Outbox
Agent ID:	(<input type="text"/>)
Business Name:	(<input type="text"/>)
First Name:	(<input type="text"/>)
Last Name:	(<input type="text"/>)
Password:	(<input type="text"/>)
Email Address:	(<input type="text"/>)
Phone Number:	(<input type="text"/>) - <input type="text"/> x <input type="text"/>
Toll Free Phone Number:	(<input type="text"/>) - <input type="text"/> x <input type="text"/>
Cell Phone Number:	(<input type="text"/>) <input type="text"/>
Mailing Address:	(<input type="text"/>)
City State Zip:	(<input type="text"/>) AL <input type="button" value="▼"/>
Commission Split:	75% for you / 25% for the VAR <input type="button" value="▼"/>
Receives VAR Newsletter:	<input checked="" type="radio"/> Yes <input type="radio"/> No
VAR Recruiter*:	<input type="text"/> closer <input type="text"/> Telarus <input type="button" value="▼"/>

* Enter your Telarus Agent ID if you recruited this VAR personally or the Agent ID of the Lead Generator who originally submitted this VAR record.

3. To see and edit the added VAR profile, select the “**VAR Admin**” tab.

VAR Administration



Welcome to the VAR Administration Area, arguably the most important area of the VAR program is the VAR Administrator. Here you can add VARs, edit VAR records, and send them one-time scheduled emails and newsletter blasts.

VAR Admin Add a VAR Bulk Email Tool Email Outbox

Your Value Added Resellers (VARs)											
Type	AgentID (status) / Status Info	Sort ▲▼	Business / Contact Name	Sort ▲▼	Tasks	Split	VARSearch Profile	Login	Welcome Letter	Edit	Del
 TESTVAR12345	Agent Status: active VARSearch ID(m) Status: active <input checked="" type="checkbox"/> 2 active T1 leads <input type="checkbox"/> 0 active T1 leads 0 total equipment lead 0 active equipment leads		TEST VAR FOR ME JESSICA MARTIN		1 Task	25%	No	Login	Send	Edit	Delete

**Note: All agents highlighted in yellow have generated at least one T1 sale for you.
All agents highlighted in pink are in inactive status. Click "Edit" to change their status.

4. To edit the VAR profile and set up permissions, select “Edit”. Edit the fields that need to be changed as listed below.

Edit VAR - Test VAR For Me

General		VARSearch*	Services Offered*	Locations*	Contacts*
User ID:	TestVAR12345	LOGIN			
Agent Since:	July, 26 2012 12:54 PM				
Record Last Updated:	July, 26 2012 01:02 PM				
VAR Agent Status:	<input checked="" type="radio"/> Active → <input type="radio"/> Deleted <input checked="" type="radio"/> Active ← <input type="radio"/> Inactive <input type="radio"/> Deleted				
VARSearch(tm) Status:	<input checked="" type="radio"/> Active ← <input type="radio"/> Inactive <input type="radio"/> Deleted				
Business Name:	Test VAR For Me				
Password:	telarus!				
Residual Commission Split:	75% for you / 25% for TestVAR12345				
Re-assign to another closer:	Select an agent to re-assign <small>(dropdown menu)</small>				
Receives Newsletter:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Master VAR:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Sub Var Label:	<input checked="" type="radio"/> Employees (The Master Var is one agency with employees) <input type="radio"/> Partners (The Master Var is an equipment vendor or similar that will assign leads to several independent sub-var agencies)				
VAR Recruiter:	jessicatestid	Telarus	<small>(dropdown menu)</small>		

[Update VAR Record](#)

Custom Profile for Test VAR For Me		EDIT THIS RECORD
Split for SPIFFs:	25%	To edit the spiff split and ability to view the commission, training and marketing sections, you will need to select “Edit This Record” and select “yes” or “no”.
View Commission Section:	No	
View Training Section:	No	
View Marketing Section:	No	

* required profiles for VARSearch(tm) consideration

 [Return to VAR Admin](#)

MARS (Master Agent Reporting System) and Managing Sub Agents

The MARS software allows you to manage subagents and give them access to real-time quoting, proposal generation and tracking their orders.

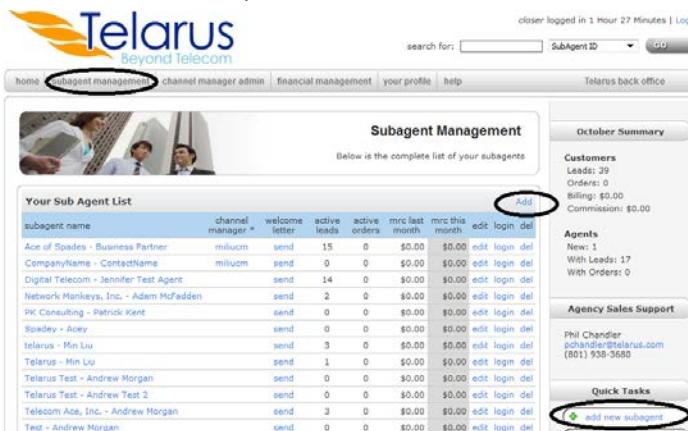
1. To login to the MARS tool, you will need to go to Partnerbackoffice.com and use your agent id and password. You will also need to sign an addendum to your agreement. This addendum can be requested by contacting your Telarus Channel Manager.



2. This will bring you to your home page in Mars.

This will be YOUR company logo when you and your sub agents login.

3. To begin adding subagents, you can either go to the “**Subagent Management**” tab, or select “**Add**” locate on the top right corner of Sub Agent list. You can also select the “**Add Subagent**” button under the “**Quick Tasks**” section.



Complete the required information in each box, and then select “Continue”.



search for:

closer

home | subagent management | channel manager admin | financial management | your profile | help

Add Subagent
Use the form below to add a new subagent to your master agency.

add a new sub agent - step 1 of 2

contact name	██████████*
business or company name	██████████*
agent id (do not use spaces)	██████████*
password	██████████*
mailing address	██████████*
city state zip	██████████* ██████████*
phone number	██████████*
toll free phone number	██████████
fax number	██████████
email address	██████████*
time zone	- Select Here -
Associate Admin	- Select Here -

* required fields

[Continue >](#)

The second step is where you can set your commission split levels and also set the visibility levels for your subagent.



Add Subagent
Step 2 - Set up Smithsubagent's financial settings and web site settings.

financial settings

residual commission*	<input checked="" type="radio"/> Percentage: 75 %	Input a percentage value here to pay this sub agent a percentage of the Master Agent commission. This will cause the actual commission level to vary from vendor to vendor.
	<input type="radio"/> Fixed Rate: <input type="text"/>	Input a percentage here for a fixed rate to pay this sub agent. This will cause the actual commission level to vary from vendor to vendor. This may leave little or no margin on some vendors.
	<input type="radio"/> Open Rate: <input type="text"/>	Input a percentage here to collect a fixed percentage over-rate of the total compensation amount. This will cause the actual commission to the sub agent to vary from vendor to vendor.

commission split on SPiffs: 75 %

configuration settings

full access to GeoQuote real-time pricing?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to commission reports?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to var program?	<input checked="" type="radio"/> yes <input type="radio"/> no
show SPIFF information?	<input checked="" type="radio"/> yes <input type="radio"/> no
show PROMO information?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to GeoQuote news?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to GeoQuote xml plugin?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to GeoQuote plus?	<input checked="" type="radio"/> yes <input type="radio"/> no
ability to upload Custom Logo?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to vendor contact information?	<input checked="" type="radio"/> yes <input type="radio"/> no
copy on all leads assigned?	<input checked="" type="radio"/> yes <input type="radio"/> no
access to all customers assigned to the master agency?	<input checked="" type="radio"/> yes <input type="radio"/> no

[Finalize Set Up >](#)

Subagent has been successfully added when you see the following screen:

home | subagent management | channel manager admin | financial management | your profile | help

Subagent Management
Below is the complete list of your subagents.

Sub Agent Successfully Added

Your Sub Agent List

subagent name	channel manager *	welcome letter	active leads	active orders	mrc last month	mrc this month	edit	login	del
Ace of Spades - Business Partner	milum	send	15	0	\$0.00	\$0.00	edit	login	del
CompanyName - ContactName	milum	send	0	0	\$0.00	\$0.00	edit	login	del
Digital Telecom - Jennifer Test Agent	send	14	0	\$0.00	\$0.00	edit	login	del	
Network Monkeys, Inc. - Adam HoFadden	send	2	0	\$0.00	\$0.00	edit	login	del	
PK Consulting - Patrick Kart	send	0	0	\$0.00	\$0.00	edit	login	del	
Smith Sub Agent - David Smith	send	0	0	\$0.00	\$0.00	edit	login	del	
Spadey - Accey	send	0	0	\$0.00	\$0.00	edit	login	del	
Telarus - Min Lu	send	3	0	\$0.00	\$0.00	edit	login	del	
Telarus - Min Lu	send	1	0	\$0.00	\$0.00	edit	login	del	
Telarus Test - Andrew Morgan	send	0	0	\$0.00	\$0.00	edit	login	del	
Telarus Test - Andrew Teal 2	send	0	0	\$0.00	\$0.00	edit	login	del	
Telecom Aze, Inc. - Andrew Morgan	send	3	0	\$0.00	\$0.00	edit	login	del	
Test - Andrew Morgan	send	0	0	\$0.00	\$0.00	edit	login	del	
Test - Test	send	1	0	\$0.00	\$0.00	edit	login	del	
Test - Test	send	0	0	\$0.00	\$0.00	edit	login	del	
Test - Test	send	0	0	\$0.00	\$0.00	edit	login	del	
Test - Jim Smith	send	0	0	\$0.00	\$0.00	edit	login	del	
Test - Test	send	0	0	\$0.00	\$0.00	edit	login	del	
Test Company - Test Sub Agent	send	0	0	\$0.00	\$0.00	edit	login	del	

* Show only one channel manager, if there are more than one channel managers.

If the permissions or contact information need to be changed for a sub \agent, you can select “edit”.

Smith Sub Agent - David Smith	send 0 0 \$0.00	\$0.00	edit	login	del
Shadow - Area	send 0 0 \$0.00	\$0.00	edit	login	del

You can send your new subagent a welcome letter by selecting “send”. A new page will appear allowing you to customize and set the time, date, to, from, subject and message that will be sent to your sub agent.

The screenshot shows the "Subagent Email Tool" section of the software. It includes fields for "time to send" (set to 10/17/12 12:00 PM), "to:" (Ace of Spades - Business Partner), "subject" (Welcome to Business Broadband Inc), and "message" (a welcome message). Below the message is a note about using special fields like %ContactName%. You can click "Continue >" to proceed.

4. The Channel Manager Admin tab allows you to add your internal staff as Associate Administrator's of your MARS portal. You can set them up to manage all of your subagents or select subagents of your choice. To do this, you will need to add them as a new Associate Administrator.

The screenshot shows the "Channel Manager Admin" tab selected in the top navigation bar. Below it, a sub-navigation bar shows "channel manager admin" highlighted. The main content area displays a "CM Management" section with a subagent image and the text "Use this page to set up Channel Managers and other administrators who work for you." A red info box at the bottom states "Info: These people will have access to your back office with the permissions you set." A yellow arrow points to the "add" button in the "Your Associate Administrator List" table header. The table lists eight administrators with their names, titles, and permission buttons (edit, login, del).

associate admin name	Title	edit	login	del
Andrew Morgan	Tester	edit	login	del
Bobby Jay	Master	edit	login	del
Joe Quentes	El Senor	edit	login	del
Johnny B. Goode	Great	edit	login	del
Keith T.	best tester	edit	login	del
Daniel Vest	Programmer	edit	login	del
Mindy Johnson	Supreme Being	edit	login	del

Complete the required boxes and “add associate administrator”.

The screenshot shows a form titled "Associate Administrator Management". It includes fields for "associate admin login id", "password", "name", "Title", "email", "phone", "time zone", "allowed to view ALL commissions?", and "subagent access". The "subagent access" section contains two radio button options: "Manage all agents" (selected) and "Manage selected agents". A note at the bottom right indicates "* required fields".

5. The Financial Management tab is where you can find a complete commission report for all of your subagents. This can also be accessed by going to the “Pay Commission” button. Your commission report will let you know which subagents to pay and how much they are owed.

The screenshot displays a commission report for October 2012. It includes a calendar for the month, a summary table, and a detailed table of subagent activity. The summary table shows totals for orders, billing, and commissions. The detailed table lists subagents with their respective contract and billing information. A sidebar on the right provides quick tasks and contact information for Phil Chandler.

Subagent Name	New Contracts	Billing	T1 Commissions Payable to Subagent	VAR Commissions Payable to Subagent
Business Broadband Inc	\$0.00	\$248.10	\$0.00	
Business Services	\$0.00	\$46,405.08	\$7,299.38	\$0.00
Comcast Home	\$0.00	\$8.78	\$0.00	
Digital Telecom	\$0.00	\$8.38	\$0.00	
National Networks, Inc	\$0.00	\$8.38	\$0.05	
PC Consulting	\$0.00	\$8.38	\$0.00	
Smith Sub Agent	\$0.00	\$8.38	\$0.00	
Socorro	\$0.00	\$8.38	\$0.00	
Telarus	\$0.00	\$8.38	\$0.00	
Telarus	\$0.00	\$8.38	\$0.00	
Telarus Test	\$0.00	\$8.38	\$0.00	
Telarus Test	\$0.00	\$8.38	\$0.00	
Telecom Ave, Inc.	\$0.00	\$8.38	\$0.00	
Test	\$0.00	\$8.38	\$0.00	
Test	\$0.00	\$8.38	\$0.00	
Test	\$0.00	\$8.38	\$0.00	
Test	\$0.00	\$8.38	\$0.00	
Test Company	\$0.00	\$8.38	\$0.00	

6. The “your profile” tab is where you can change your contact information as the Master Agent. It is also where you can go to update your company logo.

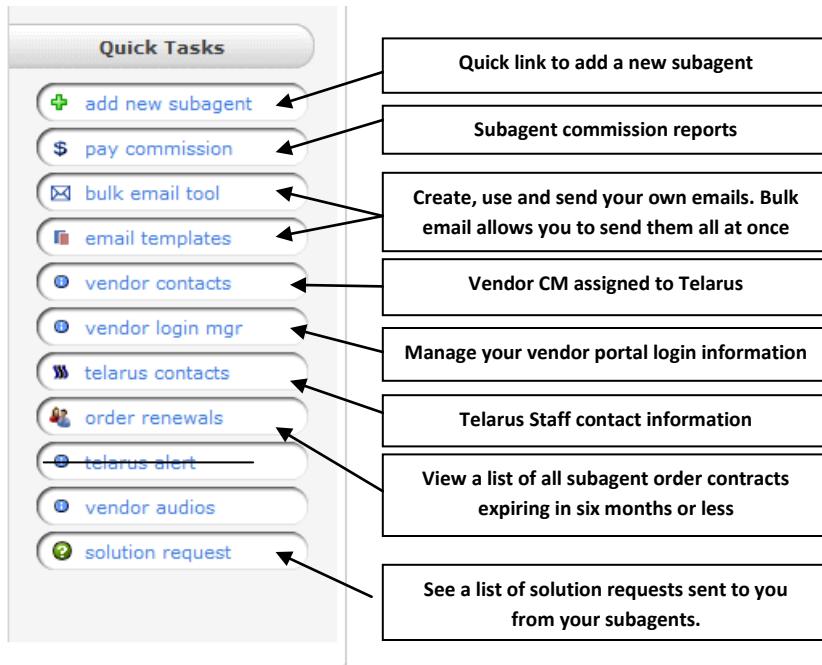
The screenshot shows the "Your Profile" page. It features a "Master Agent Profile" section with fields for contact name, business or company name, agent ID, password, mailing address, sub agents number, contact number, fax number, master agent email address, closer email address, contact email address, and time zone. Below this is a "Logo Customization Profile" section with a note about logo visibility and a placeholder for the Telarus logo.

7. The MARS back office has a trouble ticket system similar to your Telarus back office. The “**help**” tab will take you to the trouble ticket system where you can submit tickets based on issues with your MARS back office should any arise.

The screenshot shows a web-based trouble ticket submission interface. At the top, there's a navigation bar with links for 'home', 'subagent management', 'channel manager admin', 'financial management', 'your profile', and 'help'. Below the navigation is a search bar. The main content area is titled 'Help - Agent Support' and contains a sub-section titled 'Master Agent Support Form'. This section includes a table for 'Review Trouble Tickets' showing one entry: 'Open Date' 10/26/2011, 'Subject' Software Bug or Error, 'Description' testing on production, 'Status' Closed, and 'Action' VIEW | DEL. Below this is a form for 'Submit a New Trouble Ticket' with fields for 'How can we help you?' (with a dropdown menu), 'from:' (set to 'Telarus Admin'), and a large text area for the ticket description. A 'Submit >' button is at the bottom. To the left of the main content is a sidebar with a title 'Quick Tasks' and a list of items:

- + add new subagent
- \$ pay commission
- ✉ bulk email tool
- ✉ email templates
- 🌐 vendor contacts
- 🌐 vendor login mgr
- 📞 telarus contacts
- 📅 order renewals
- 📅 telarus alert
- 🔊 vendor audios
- ❓ solution request

8. The “**Quick Tasks**” are quick links to various places in your MARS back office.



Your Subagent back office in MARS

1. You can login to a subagent back office by selecting “login” from your sub agent list.

The screenshot shows the Telarus Subagent Management interface. At the top, there's a logo for 'Telarus Beyond Telecom' and a search bar labeled 'search for: []'. Below the search bar is a horizontal menu with links: 'home', 'subagent management', 'channel manager admin', 'financial management', 'your profile', and 'help'. A large arrow points down to the 'subagent management' link. The main content area is titled 'Subagent Management' with a sub-header 'Below is the complete list of your subagents'. It features a grid table titled 'Your Sub Agent List' with columns: subagent name, channel manager *, welcome letter, active leads, active orders, mrc last month, mrc this month, edit, login, and del. The table lists several subagents, each with a row of buttons for editing, logging in, or deleting.

subagent name	channel manager *	welcome letter	active leads	active orders	mrc last month	mrc this month	edit	login	del
Ace of Spades - Business Partner	milliumc	send	15	0	\$0.00	\$0.00	edit	login	del
CompanyName - ContactName	milliumc	send	0	0	\$0.00	\$0.00	edit	login	del
Digital Telecom - Jennifer Test Agent	send		14	0	\$0.00	\$0.00	edit	login	del
Network Monkeys, Inc. - Adam McFadden	send		2	0	\$0.00	\$0.00	edit	login	del
PK Consulting - Patrick Kent	send		0	0	\$0.00	\$0.00	edit	login	del
Smith Sub Agent - David Smith	send		0	0	\$0.00	\$0.00	edit	login	del
Spadey - Acey	send		0	0	\$0.00	\$0.00	edit	login	del

Your subagent back office view:

The screenshot shows the subagent back office view. At the top, there's a 'flickr' logo and a search bar. Below the search bar is a horizontal menu with links: 'home', 'leads', 'geoquote', 'var', 'commission', 'marketing', 'tasks', 'help', and 'profile'. A large arrow points down to the 'leads' link. The main content area is divided into several sections:

- Lead Inbox (4 out of 4):** Shows a list of leads with columns: customer name, btn/service/lec, contact/phone, lead id/date, and action. Each lead entry has a 'View All' link at the top right.
- Manual Quote Request Updates:** A section with a checked checkbox labeled 'Manual Quote Request Updates'. It includes a table with columns: Last Update, Customer Name/Location, Contact/BTN/Service, and Carriers. A message below the table states 'THERE ARE NO MANUAL QUOTE REQUESTS IN THIS CATEGORY' and a 'View Complete List' link.
- Orders Pending Activation:** A section with a table showing columns: Customer Name, Service, Carrier, and Last Update. A message below the table states 'THERE ARE NO ACCOUNTS IN YOUR ACTIVATION FUNNEL'.
- October Summary:** A summary box showing Leads: 0, Orders: 0, Billing: \$0.00, and Commission: \$0.00.
- Agent Support:** A box listing Daniel Vest as a Programmer with email dvest@telarus.com and phone (801) 523-2100.
- Business Broadband...** A box listing Telarus Admin with address 2613 W Village Ln, Salt Lake City, UT 84119, email amorgan@telarus.com, and phone (888) 606-2505.
- Today's Tasks:** A box showing a task for 'UCN Test Quote' with status 'Done' and 'Snooze' options. It also lists Task Date: 09/20/09, Status: Past Due (Low), and Task: Test.
- Test Biz.:** A box showing a task for 'Test Biz.' with status 'Done' and 'Snooze' options. It also lists Task Date: 12/06/07, Status: Past Due (Low), and Task: This is a test.
- Quick Tasks:** A list of quick tasks with icons and labels: create new customer, lead management, geoquote, and your profile.

A subagent back office looks and functions very closely to the Telarus back office. The subagent does not see their back office tied to Telarus. They see it as tied to you, their Master Agent.