# Customer Billing Portal

## User Help Guide

tech advance

# Customer Portal - User Help Guide

**An overview of the home page and main sections**

The main home page displays a dashboard view of useful information and has links and tabs to other sections as detailed below:

**On screen help/tips**

Where you see the following icon ? you can get extra help or details on screen

## Home

The home page provides instant access to information relating to the selected billing month. Our Customer Billing Platform opens showing the latest invoice (Billing Period) and if you want to review other months, you can select them from here.

**Sections on this page**

The home page will show various sections as defined below. Depending on the type of invoice selected (Monthly or One-off ) different controls will show in this section. If a selected Billing Period has a Monthly type all sections will show, however if the Billing Period only contains One-off types, then all sections other than the 'Invoice Summary for Billing Period' sections will be hidden.

• Welcome Message

• Shown at the top of the screen under the tab strip

• Customer and Invoice Selection

• The Billing Period field allows you to define what month the data on this page relates to

• Invoice Summary for Billing Period

• Provides high level details of the invoices for the selected billing period

• The Invoice Type field shows either Monthly or One-off. Monthly types may have calls and or usage in them but One-off types only have charges.

• Observations for Billing Period

• Only relates to Monthly Invoice Types

• Provides high level observations based on this month's invoice details compared to last month's.

• Usage Summary for Billing Period

• Only relates to Monthly Invoice Types

• Shows basic details of the usage of this month's invoice compared to the last two months (if data exists)

• Invoice Charges for Billing Period

• Only relates to Monthly Invoice Types

• Shows the invoice charges broken down by types of spend

• Call Charges for Billing Period

• Only relates to Monthly Invoice Types

• Shows the invoice call usage broken down by types

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## Invoices

This section allows you to view the detail of any uploaded invoices onscreen.

• Both Monthly recurring invoices and One-off sales invoices (or credit invoices) will be available depending on what has been uploaded.
• Depending on the Invoice Type you can view all relevant sections.
• Monthly Invoices allow full details to be viewed including CLIs and all charges on the bill (including calls and other charges like rentals). Full call itemisation can be accessed, and filters applied to either the whole invoice, service centre or CLI.
• One-off Invoices do not have calls and so the Call Itemisation option is disabled.

### Sections on this page

• Customer and Billing Period Selection
• Select the customer (if you have more than one customer setup) and billing period required or just click on relevant details, itemisation or download buttons of the required invoice line. As default all invoices will show for the selected customer.
• Invoice Details - Buttons on these pages:
• Details
• Shows the details of the selected invoice and selected section within that invoice

• Monthly Invoice Type
• When you click the 'Details' button it will take you into the next level of the invoice and so on, down to individual CLI/Number level information

• One-off Invoice Type
• Shows the details of the invoice

• Itemisation
• Monthly Invoice types shows usage for the selected invoice and selected section within that invoice. The itemisation page allows the user to filter usage items based on a wide selection of filter options. The user can then download that filtered section.
• One-off invoice type disables this option

• Downloads
• Takes the user to the Downloads page

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## Reports

The Reports section allows you to preview pre-defined reports that relate to the billing month selected. Click the relevant report link to view the report. Once a report has been selected our Customer Billing Platform displays the information on screen (table, line graph, pie chart) and allows you to download the report in either CSV or Excel formats using the buttons on this page.

### Sections on this page

• Customer Bill Period
• Use this to select the required customer and invoice combination
• All reports run in the other sections on this page will be based on the customer and billing period selected here
• Overview Reports
• Provides three high level reports to allow you to see the details of the selected invoice.
• Invoice Breakdown
• This gives you the ability to drill through the core cost groups of an invoice and then to see the detail of the selected charge type. Selecting a charge type link opens a new section that provides the breakdown by CLI for the selected charge type.
• CLI Summary
• This allows you to see all CLIs (numbers) that had a charge of any type on the chosen billing period.
• It lists the following items for each CLI.
• Call Spend, number of calls and total duration

• Usage Profile Summary - Combined
• This shows all usage for the chosen billing period / invoice grouped by call type

• When calls were made Reports
• Groups of reports that show calls based on times and dates

• High Usage Reports
• Two groups of reports detailing information based on either the originating number or the dialled number details.

• Call Profile Reports
• Two groups of reports based around usage summary and usage detailed information

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## Downloads

This section allows you to download Monthly invoice sections (or the whole invoice) as well as One-off invoices in either PDF, CSV or Excel formats. You must select which Customer and Billing Period you want to download data for, and for which sections of the bill. The PDF downloads are held within the 'Your PDF Downloads For Period…' section for up to 7 days. Whilst large downloads are created, you can use the rest of the site. Completed reports appear in the 'Your PDF downloads For…' section when ready to download. When selecting a One-off invoice type the itemisation section is disabled.

**Sections on this page**

• Customer and Invoice Selection

• Use this to select the required Customer and Billing Period combination together with the required invoice

• Set Your Preference for Billing Period This section has three sub-sections

• PDF Selection and Download

• Using the on screen section fields choose what you want to download and press the 'Download PDF' button

• The chosen selection will present themselves in the 'Your PDF Downloads' section ready for you to download.

• For One-off invoice types only the Include Invoice Page check box is available for selection

• Itemisation (CSV or Excel)

• Using the on screen selection boxes, choose what itemisation usage you would like to download and then select the required format.

• This section is disabled for One-off invoices

• Your PDF Downloads For Billing Period

This section lists the PDF downloads as selected in the PDF download section and allows you to download the PDF information.

• Status Columns

• A Download Ready link will show when the PDF is ready for downloading

• The link will change to Downloaded when you have downloaded the PDF

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## Services

This section lists all numbers within your account(s). You can search and filter on numbers (plus other key values) within the selected account. Clicking a number link will show the following details but it should be noted that options may have been set by us, where some of the following do not show:

• Update details

• Shows you basic details of the number and if the option is switched on the ability to update these field values into both our Customer Billing Platform within our billing platform.

• Bar Settings – Mobile Number Type Only

• If enabled by us, the section will allow certain bars to be added to remove from the mobile number. These requests are sent directly to us as well as on to the number network. Status updates are provided on screen to confirm requested changes have been made.

• SIM Swap – Mobile Number Type Only

• If enabled by us, this section allows the you to update a SIM number used by that mobile device.

## Unbilled Usage

If enabled, this section provides you with unbilled usage information as processed overnight for the previous day's usage. The graphs sum the unbilled usage until that usage has been billed on an invoice. At that point, the unbilled usage graphs are updated to remove what was unbilled and has now been billed. The values shown are not cost related, but rather as an indication of the volume of usage for data, voice and SMS where those usage items have occurred. If no usage has occurred for a given usage type, the unbilled usage so far column will be blank.

• High Level Summary

• This shows the three groups of usage information for unbilled usage so far for the month compared with last month's actual billed usage.

• CLI Summary

• Provides a list of all CLIs that have unbilled usage linked to them. You can search and filter on the grid values. Clicking on the itemisation button against a selected number will opens the CLI itemisation section.

• You can download a .csv file of the selected data

• CLI Itemisation

• Provides a full itemisation of all usage for the selected number with the ability to search and filter

• You can download a .csv file of the selected number

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## Administration

This page allows you to access the following sections:
Note that some of these sections may have limits placed on them by us. If this is the case and you think you need access to these sections, please contact us.

**Sections on this page**

• Manage/ view company details
• Review the basic details of your account/s If this section has been enabled for update, then you can make changes to the listed fields and save these charges.

• Manage Billing Groups
• Review the basic details of your account
• See the numbers / CLIs listed within the selected billing group
• Review basic details of the numbers

• Manage Login Profile
• View login profile details and change login password

## Help and Support

This section provides help and support information relating to our Customer Billing Platform and this guide.

## Log out

Note that as a security feature, if you have not used our Customer Billing Platform for a period of 10 minutes our Customer Billing Platform will automatically log you off. At this point you will need to log in again with your username and password.

## Summary

We hope this simple user guide has helped you to understand the core features and functionality within our Customer Billing Platform. If you have any questions or comments or need help gaining access to our Customer Billing Platform, please contact us using the information in the help and support section of our Customer Billing Platform, the contact details on our main website or the details located on any supplied invoice.

Thank you for your custom and we hope you enjoy using our Customer Billing Platform.