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**GETTING STARTED**

Enterprise Portal: Billing is a comprehensive online bill presentment, reporting, and analysis tool designed to provide users with insight into their communications billing and usage. By viewing your invoices online and running simple reports, you can easily analyze all of your costs and usage to help you run your business more efficiently.

This portal allows you to quickly view your invoices and reports. With Enterprise Portal: Billing – Premium Access, you can also create custom reports and assign your accounts and services to your organization’s departments for quick cost allocation each month.
NAVIGATION

The main navigation bar lets you quickly access all of the tools available in the application.

Home
The home page contains important messages regarding Enterprise Portal: Billing functionality, support, and additional messages from Frontier Communications.

Statements
The Statements page allows you to easily manage all of your Frontier Communications invoices from one convenient location. You can compare invoices to previous months and group invoices by specific criteria.

Cost Allocation (Premium Access only)
Use an organizational hierarchy to allocate account and service charges by department or cost center in just seconds.

Summary
Summary reports give an overview of your telecommunications usage displayed as tables or graphs. Use standard reports or with Premium Access, create custom reports to meet your specific needs.

Detail
Detail reports contain individual data records that can include a variety of information including call usage, equipment, and other charges or credits. You can choose from a number of predefined reports or with Premium Access, create custom reports to meet your specific needs.

Setup
Setup is the control center of the application. Create hierarchies to allocate costs, manage payments, set up tools such as filters and mark-ups, and add descriptions to commonly called numbers.

Help
The Help tab includes step-by-step instructions for performing a variety of tasks within the application.
HELPFUL TIPS

Throughout Enterprise Portal: Billing, there are several features to help you quickly find the information you are looking for.

Sort Columns

While viewing the Statements page or Summary and Detail reports, you can click on any of the column headers to sort the information according to that column.

Summary to Detail Links

While viewing your invoices in the Statements tab or your Summary reports, you can click on the summarized information link to quickly access the associated detail data.

Use Levels (Premium Access only)

Use the Level drop down menu on the Statements, Summary, and Detail pages to select specific BTN or Summary Master Accounts within your monthly billing hierarchy.
STATEMENTS

The Statements page allows you to easily manage all of your Frontier Communications invoices from one convenient location. You can view consolidated invoices, compare to historical invoices, and group invoices by specific criteria.

- **Billed Date** - The date of your Billing Cycle
- **Billing Account Number**
- **Billed to SMA** - The account number of the Summary Master Account
- **Total Amount Due**
- **Days Until Due**
- **Payment Status** - Paid in Full, Payable, Partially Paid, Autopay, Denied, Scheduled, N/A
- **Paid Online** - Total paid online
- **View Monthly Invoice** – PDF version of the bill.

**View the Summary or Detailed Information for One Statement**

1. Click **Statements** Tab.
2. Select the month from the drop down menu.
3. Click **View**.
4. Check the box of the desired statement to view from the list.
5. Click **View Statement**.
6. Check Expand Statement.
7. Click **View** to see additional details.
8. Click the charge groupings to see the associated charge detail.
View a Single Statement

1. Click **Statements** Tab.
2. Select the month from the drop down menu.
3. Click **View**.
4. Check the box of the desired statement to view from the list.
5. Click **View Statement**.
6. Check **Expand Statement**.
7. Click **View** to see additional details.
8. Click the change groupings to see the associated charge details.
View a Consolidated Statement

Consolidate all or a group of statements to quickly see the total amount due.

1. While viewing a list of statements, check the boxes for the desired statements to see in a consolidated view.
2. Click **View Statement**.
3. Check **Expand Statement** and **View Account Details** to see additional details.
4. Click **View**.

View Additional Details: Basic Charges and Taxes

Once a statement has been expanded, links can be clicked on to reveal additional information such as Basic Charges or Taxes.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Basic Charges</strong></td>
<td></td>
</tr>
<tr>
<td>14 Acc Rec Chg Multi-Ln Bus</td>
<td>$42.00</td>
</tr>
<tr>
<td>14 Business Access Line</td>
<td>$420.00</td>
</tr>
<tr>
<td>14 Multi-Line Federal Subscr</td>
<td>$129.90</td>
</tr>
<tr>
<td><strong>Subtotal - Basic Charges</strong></td>
<td><strong>$690.80</strong></td>
</tr>
<tr>
<td><strong>Non Basic Charges</strong></td>
<td></td>
</tr>
<tr>
<td>1 Frontier Road Work Recove</td>
<td>$0.76</td>
</tr>
<tr>
<td>14 Federal Primary Carrier M</td>
<td>$80.34</td>
</tr>
<tr>
<td><strong>Subtotal - Non Basic Charges</strong></td>
<td><strong>$81.09</strong></td>
</tr>
<tr>
<td><strong>Taxes and Other Charges</strong></td>
<td></td>
</tr>
<tr>
<td>Dl Prv Ry Srch</td>
<td>$0.42</td>
</tr>
<tr>
<td>Federal USF Recovery</td>
<td>$29.66</td>
</tr>
<tr>
<td>FTR LD USF Surcharge</td>
<td>$19.62</td>
</tr>
<tr>
<td>IN St 911</td>
<td>$14.00</td>
</tr>
<tr>
<td>Indiana USF Surchg</td>
<td>$3.10</td>
</tr>
<tr>
<td>Indiana Util Receipt</td>
<td>$3.13</td>
</tr>
<tr>
<td><strong>Subtotal - Taxes and Other Charges</strong></td>
<td><strong>$75.55</strong></td>
</tr>
</tbody>
</table>
View Additional Details: Circuit Identifier

Circuit Identifier can be selected to reveal:
- Account Number
- WTN
- Circuit ID
- DID/PRI
- SPID 1
- SPID 2/BPR

Compare Statements

Compare your current statement to 12 months of historical statements to quickly identify unanticipated variances and analyze cost and usage trends.

1. When viewing a statement, select the period of comparison from the Compare drop-down list.
2. Click View.
Group Statements

Quickly find statements that fall into a specific category (Day of Month Due, Payment Status, etc.).

1. Select the grouping options from the Group and Subgroup drop-down lists.
2. Click View.

Export and Print Statements

Choose a PDF, CSV or XML (Excel) file format and save or print for offline use.

1. While viewing a statement, click Export.
2. Select the file type.
3. Click Ok.
View the PDF Copy of the Paper Invoice

PDF statements are now available online. The PDF is a replica of paper invoice which includes long distance detail, and the long distance summary report.

1. Click **Statements** tab.
2. Click **View Monthly Invoice**.
3. Click **Open** on the dialog box that displays, “Do you want to open or save monthly invoice from Frontier gloysonline.com?”.
Result: A PDF version of the invoice will display.

Place a Dispute Online

1. Click **View a Statement**.
2. Select **Basic, Non Basic** or **Taxes and Other Charges** to expand the detail.
3. Click on the disputed charge amount.

4. Select a Dispute Reason: Billing Inquiry, Dispute a Charge, Request a Call Back.

5. Write a detailed description of dispute and click Submit.
View Dispute Status

1. Access the Setup tab/Payment information.
2. Click **Dispute Status**. Any open disputes will display.

3. Click **View Details**. The Dispute History will display.

Dispute History

Review the history of the dispute ID listed below. To post additional comments or questions, enter them in the message box and click the submit button when finished. Please allow up to 24 hours for a posted response.
PAYMENTS

With the payments functionality, you can make online check or credit card payments and view previous or scheduled online payments. Please note that offline payments (amounts or payment status) are not reflected in the Enterprise Portal: Billing application.

Make an Online BTN Payment

Payments can be made easily online for one Billing Telephone Number (BTN). If a BTN is part of a Summary Master Account, you may not make a payment at the BTN level.

1. Select a BTN for desired payments.
2. Select Make Payment.

3. Enter the payment amount and payment date.
4. Select Credit Card of Bank Account ACH.
5. Click Ok.
6. Enter the required payment information.

Enter Payment Information
Enter your credit card information.

7. Click **Ok**.

8. Review the payment details and accept the payment terms and conditions.

9. Click **Complete**.

10. A payment confirmation page will be displayed with a transaction number that can be used for future reference.
Maximums

- Credit Card maximum per transaction is one hundred thousand ($100,000).
- Bank Draft maximum per transaction is two million ($2,000,000).

Make an Online SMA Payment

Payments can be made easily online for a Summary Master Account (SMA). A summary master Account receives its own bill that summarizes all of the Sub-BTN accounts.

1. Select a SMA for desired payments.
2. Select Make Payment.
3. Enter the payment amount and payment date.
4. Select Credit Card of Bank Account ACH.
5. Click Ok.
6. Enter the required payment information.

Enter Payment Information
Enter your credit card information.

7. Click Ok.
8. Review the payment details and accept the payment terms and conditions.
9. Click **Complete**.
10. A payment confirmation page will be displayed with a transaction number that can be used for future reference.

Maximuns
- Credit Card maximum per transaction is one hundred thousand ($100,000).
- Bank Draft maximum per transaction is two million ($2,000,000).

**Print a Remittance Slip for an Offline Payment**

Print a remittance slip with your account details and payment information to send a payment by mail.

1. Select the account to make a payment for and click **Pay by Mail**.
2. Enter the desired payment amount.
3. Click **Ok**.
4. A PDF remittance slip will be processed in a pop up window and can be printed. Enclose the remit slip with a payment in an envelope and mail to Frontier Communications.

**Store a Payment Source**

Storing payment sources allows the user to quickly make payments each month.

1. Click the **Setup** tab.
2. Within the Payment Information section, click the **Payment Sources** link.
3. Click Add Payment Source.
4. Enter the payment source information.
5. Click **Save**.
Set up Automatic Payments

Automatic payment allows the user to reduce the time and resources required to make monthly ACH or Credit Card payments.

1. Select the accounts to set up for automatic payments.
2. Click Manage Autopay.
3. Click Automatic Payment On.
4. Select the Payment Method.
5. Create New Bank or Credit Card Method.

Manage Autopay

Auto-pay will automatically authorize payment each month. Select whether auto-pay should be enabled for the account(s) and the existing or new payment option to use for auto-pay.
View Online Payments

Previous online payments can be quickly viewed. This screen will not reflect offline payments.

1. Select the accounts to view payments for or select the top box to view for all accounts.
2. Click **View Payments** to view the payments history for your online payments.
3. Click **Scheduled Payments** to view any payments that are scheduled to occur through Automatic Payment.

![View Online Payments Image]
SUMMARY REPORTS

When first logging in, there are a number of standard reports and graphs to help better understand billing data. Summary reports can be used as an overview of telecommunications usage and costs. With Premium Access, reports can be edited or create new ones that are specific to your business needs.

Table View

Table view provides a one page summary with totals and averages that you specify. Clicking a summary item will display the data associated with it.

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Total Calls</th>
<th>Total Minutes</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local 411</td>
<td>1</td>
<td>1.00</td>
<td>$1.99</td>
</tr>
<tr>
<td>Intrastate/Intralata/Home NPA</td>
<td>616</td>
<td>1,166.50</td>
<td>$31.01</td>
</tr>
<tr>
<td>Intrastate/Intralata/Foreign NPA</td>
<td>363</td>
<td>1,128.10</td>
<td>$36.98</td>
</tr>
<tr>
<td>Intrastate/Interlata/Home NPA</td>
<td>24</td>
<td>20.00</td>
<td>$0.49</td>
</tr>
<tr>
<td>Intrastate/Interlata/Foreign NPA</td>
<td>375</td>
<td>718.40</td>
<td>$27.10</td>
</tr>
<tr>
<td>Interstate/Interlata</td>
<td>1,500</td>
<td>4,544.70</td>
<td>$116.30</td>
</tr>
<tr>
<td>International</td>
<td>2</td>
<td>27.00</td>
<td>$28.08</td>
</tr>
<tr>
<td>0</td>
<td>6</td>
<td>40.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,887</strong></td>
<td><strong>7,645.70</strong></td>
<td><strong>$241.95</strong></td>
</tr>
</tbody>
</table>

Graph View

Graph view depicts data as a bar, pie, line, or graph. Clicking a bar or pie segment will display the data associated with it.
## List of Summary Reports

Here is a list of all available Summary reports:

- Asterisk (*) denotes available only with Premium access
- Report will not display if data is not available (example no circuit or long distance exists)

<table>
<thead>
<tr>
<th>Report</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Summary</td>
<td>Usage</td>
</tr>
<tr>
<td>Call Summary by Jurisdiction</td>
<td>Usage</td>
</tr>
<tr>
<td>Calling Plans by BTN</td>
<td>Usage</td>
</tr>
<tr>
<td>*Calling Plans by Local</td>
<td>Usage</td>
</tr>
<tr>
<td>*Calling Plans by Long distance</td>
<td>Usage</td>
</tr>
<tr>
<td>*Calling Plans by WTN</td>
<td>Usage</td>
</tr>
<tr>
<td>Customer Service Record Summary as of Last Bill</td>
<td>Customer Service Record by Name</td>
</tr>
<tr>
<td>Customer Service Record Summary as of Last Bill_1301</td>
<td>Customer Service Record by Number</td>
</tr>
<tr>
<td>Monthly Service Charges by BTN</td>
<td>Account Summary</td>
</tr>
<tr>
<td>Monthly Service Charges by Circuit ID</td>
<td>Account Summary</td>
</tr>
<tr>
<td>Monthly Service Charges by Service Address</td>
<td>Account Summary</td>
</tr>
<tr>
<td>*Product Code by BTN</td>
<td>Charges</td>
</tr>
<tr>
<td>*Product Summary by Product Code</td>
<td>Charges</td>
</tr>
<tr>
<td>*Summary of Charges by BTN (main Billing Telephone Number)</td>
<td>Usage</td>
</tr>
<tr>
<td>*Summary of Charges by Long Distance Provider</td>
<td>Usage</td>
</tr>
<tr>
<td>*Summary of Charges by WTN (Working Telephone Number)</td>
<td>Usage</td>
</tr>
<tr>
<td>*Summary of Products by BTN (Billing Telephone Number)</td>
<td>Account Summary</td>
</tr>
<tr>
<td>*Summary Report by Previous Charges</td>
<td>Charges</td>
</tr>
<tr>
<td>Summary Products by WTN (Working Telephone Number)</td>
<td>Charges</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Total Amount Due by Billing Telephone Number (BTN)</td>
<td>Account Summary</td>
</tr>
<tr>
<td>Total Amount Due by Payment Account Number</td>
<td>Account Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Report</th>
<th>Report Type</th>
<th>Shared</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell Summary</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Call Summary by Jurisdiction</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Calling Plans by BTN</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Calling Plans by Local</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Calling Plans by Long Distance</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Calling Plans by WTN</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Customer Service Record Summary as of Last Bill</td>
<td>Customer Service Record</td>
<td></td>
</tr>
<tr>
<td>Customer Service Record Summary as of Last Bill_1308</td>
<td>Customer Service Record</td>
<td></td>
</tr>
<tr>
<td>Monthly Service Charges by BTN</td>
<td>Account Summary</td>
<td></td>
</tr>
<tr>
<td>Monthly Service Charges by Circuit Id</td>
<td>Account Summary</td>
<td></td>
</tr>
<tr>
<td>Monthly Service Charges by Service Address</td>
<td>Account Summary</td>
<td></td>
</tr>
<tr>
<td>Product Code by BTN</td>
<td>Charges</td>
<td></td>
</tr>
<tr>
<td>Product Summary by Product Code</td>
<td>Charges</td>
<td></td>
</tr>
<tr>
<td>Summary of Charges by BTN</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Summary of Charges by LD Provider</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Summary of Charges by WTN</td>
<td>Usage</td>
<td></td>
</tr>
<tr>
<td>Summary Product by BTN</td>
<td>Account Summary</td>
<td></td>
</tr>
<tr>
<td>Summary Report by Previous Charges</td>
<td>Charges</td>
<td></td>
</tr>
<tr>
<td>Summary-Products by WTN</td>
<td>Charges</td>
<td></td>
</tr>
<tr>
<td>Total Amount Due By Billing Telephone Number (BTN)</td>
<td>Account Summary</td>
<td></td>
</tr>
<tr>
<td>Total Amount Due By Payment Account Number</td>
<td>Account Summary</td>
<td></td>
</tr>
</tbody>
</table>
View a Summary Report

The following steps are required to view a summary report.

1. Click the **Summary** tab.
2. Select the statements or desired time period to view from the Data drop-down list.
3. Select the desired report.
4. Click **View Report**.

Create a Summary Report (Premium Access only)

With unlimited, customizable reports, you can create reports that are relevant to your business model and organizational structure. For example, you may be interested to charges by PO number, usage by a certain service, or when the usage is occurring (day of week, after hours, etc.).

1. Click the **Summary** tab.
2. Click **Add Report**.
3. Select the type of report to create.
4. Click **Ok**.
5. Enter a name for your report.
6. If preferred, select a Default Filter.
7. Select Table or Graph.
8. Select the field to group by from the Group drop-down list. Group allows you to designate the primary data field by which to group and display your report data.
9. Select the field to sort by from the Sort By drop-down list.
10. Select Ascending or Descending to designate the sort order.
11. To exclude data that falls below a minimum, select an item from the Minimum Value drop-down list and enter an amount.
12. Select the field to subgroup by from the Subgroup drop-down list. If you do not want to subgroup your data, select None. Subgroups provide the option to designate a secondary data field by which to subgroup and display your report data.
13. Select the field to sort by from the Sort By drop-down list.
14. Select Ascending or Descending to designate the sort order.
15. To exclude data that falls below a minimum, select an item from the Minimum Value drop-down list and enter an amount.

16. The Table View section allows you to designate which totals and averages will appear in the columns of your report. Select the field of the column to add from the Exclude list.
17. Click the > button to move a single field or click the >> button to move all fields.
18. To remove columns from your report: Select the field of the column to remove from the Include list.
19. Click the < button to move a single field or click the << button to move all fields.

20. The Graph View section allows you to select whether the graph will be a bar, line, or pie graph and what calculation will be used to display the graph. Select Bar, Line, or Pie graph and specify display preferences.
21. Select the calculation method.
22. To include the data that was not a part of the group or subgroup as its own increment in the graph, select the ‘None’ Group and Subgroup check box.
23. To include the data that did not meet the minimum as its own increment in the graph, select the 'Below Minimum' Group and Subgroup check box.
24. Markup allows you to add markups to reports you make for clients and customers. To select an existing markup, select from the Markup drop-down list. To define a new markup or edit an existing markup, click the Markup link and you will be directed to the Markup page, which is located on the Setup page. Select if you would like to share this report or only have it visible to you. If you select ‘Share this report,’ all users in your organization will have the ability to view this report upon log-in.
Edit a Summary or Detail Report (Premium Access only)

Quickly edit existing reports to change the sorting, calculations, and details included.

1. Select the report to edit.
2. Click **Edit Report**.
3. Specify the parameters of report (see ‘Create a Summary or Detail Report’ for details).
4. Click **Ok**.

Remove a Report (Premium Access only)

If a report is removed, you will not be able to retrieve this report again without creating a new report.

1. Select the report you would like to remove.
2. Click **Remove Report**.
Order and Share a Report

With automated reporting, you can schedule recurring reports to be emailed directly to your inbox, or to additional recipients. If the report is over 2 MB, you will receive a link to download the report. This feature reduces the time and resources required to run reports on a recurring basis.

1. Click the Summary or Detail tab.
2. Select the desired report.
3. Click Order Report.
4. On the Order Report page, select a date range and filter to narrow the scope of the report.
5. Select the frequency for the report.
6. Select the format for the report.
7. Select Compress report into Zip file to reduce the file size of the order. You will need an operating system that supports Zip files or a utility to unzip them, all files over 2MB will be automatically compressed.
8. Select the notification method. You can choose whether to be notified by e-mail when your report is complete and include additional recipients for the report to be delivered to (note that access to Enterprise Portal: Billing is not required to receive or download the report).
9. Click Submit Order.
View Status

The following steps are required to view the status of an ordered report. Quickly see if any ordered reports are Completed or Pending.

1. Click on Summary or Detail tab.
2. Click View Order Status.

Export and Print a Report

Table reports can be exported and printed as a PDF, CSV, or XML file. Graph reports can be exported or printed as a PNG or JPG file.

1. While viewing a report, click Export.
2. Select the preferred format.
3. Click Ok.
Use Filters (Premium Access Only)

With unlimited, customizable filters, you can quickly extract specific information from your reports.

1. From a summary or detail report, select a filter from the Filter drop-down list.
2. **Click View.** In addition to the filters provided, you can create custom filters in the Setup section.
View a Customer Service Report (CSR) Summary Report

1. Click on the Summary report tab.
2. Click on as Customer Service Report Summary of Last Bill.
3. Click **View Report**.
4. Click **View**.
DETAIL REPORTS

When first logging in, a number of standard reports will display to help better understand the billing data. Detail reports can be used to view individual data records. Edit the reports that are provided, or create new ones that are specific to your business needs.

List of Detail Reports

- Asterisk (*) denotes available only with Premium access
- Report will not display if data is not available (example no circuit or long distance exists)

<table>
<thead>
<tr>
<th>Report</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>All 800 Call Detail</td>
<td>Usage</td>
</tr>
<tr>
<td>All Long Distance Call Detail</td>
<td>Usage</td>
</tr>
<tr>
<td>*Calling Data Local Usage</td>
<td>Usage</td>
</tr>
<tr>
<td>*Carrier PIC Report</td>
<td>Usage</td>
</tr>
<tr>
<td>Customer Service Record Detail as of Last Bill</td>
<td>Customer Service Record</td>
</tr>
<tr>
<td>Detailed Report by Previous Charges</td>
<td>Charges</td>
</tr>
<tr>
<td>Report-Charge by Line No Tax</td>
<td>Charges</td>
</tr>
<tr>
<td>Report-Charges by line with Tax</td>
<td>Charges</td>
</tr>
<tr>
<td>*Report-Circuit Detail</td>
<td>Circuit</td>
</tr>
<tr>
<td>Sort- All Calls Over $2</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort-All Calls Over $5</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort-All Calls Over 10 Minutes</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort-All Calls Over 5 Minutes</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort-by 800 Highest Minutes</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort by Day of the Week</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort by from City for 800 calls</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort by from Number for 800 calls</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort by Highest Minutes</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort by Most Expensive Call</td>
<td>Usage</td>
</tr>
<tr>
<td>Sort by Time of Day</td>
<td>Usage</td>
</tr>
</tbody>
</table>
View a Detailed Report

1. Click the **Detail** tab.
2. Select the statements or time period to view from the Data drop-down list.
3. Select the desired report.
4. Click **View Report**.
Create a Detail Report

With unlimited, customizable reports, you can create reports that are relevant to your business model and organizational structure.

1. Click the **Detail** tab.
2. Click **Add Report**.
3. Select the type of report to create.
4. Click **Ok**.
5. Enter a name for your report.
6. If preferred, select a Default Filter.
7. Group allows you to designate the primary data field by which to group and display your report data. Columns allow you to designate which fields will be displayed as the columns of your report. Use the SHIFT and CTRL keys to select multiple fields at one time. To add columns to your report: Select the field of the column to add from the Exclude list.

8. Click the > button to move a single field or click the >> button to move all fields.

9. To remove columns from your report: Select the field of the column to remove from the Include list.

10. Click the < button to move a single field or click the << button to move all fields.

11. Sorting allows you to designate the order in which your data will appear. In detail reports that have a group designated, the report will be sorted primarily by group and then further sorted within that group by up to three additional sorting fields that you specify. If no group has been selected, the detail report will be sorted by the sorting options specified. Select the field to sort by from the Sorting drop-down list.

12. Click Ascending or Descending to designate the sort order.

13. To select secondary and tertiary sorting options, repeat Steps 11 and 12.

14. Select the number of records you want returned.
15. Markup allows you to add markups to reports you make for clients and customers. To select an existing markup, select from the Markup drop-down list. To define a new markup or edit an existing markup, click the Markup link.

16. Select if you would like to share the report will all users or only have it visible to you.

17. Click **Ok**.

**View a Customer Service Record (CSR) Detail Report**

1. Click on **Detail Report** tab.
2. Click **View Report**.
3. Click **View**.
SETUP

Hierarchies (Premium Access only)

You can allocate costs by division, department, or cost center by using Tree Builder to create an organizational hierarchy of your company. After your organizational tree is built, you can assign accounts and services to the departments of your choosing. This hierarchy can be used every month to allocate costs across your organization in just seconds.

**Set Hierarchy**

The default hierarchy is the Master Hierarchy. Users can be granted access to a branch or the entire hierarchy by the administrative user. Multiple hierarchies can be created to experiment with different scenarios without affecting the Master Hierarchy. You can use an existing hierarchy as the starting point or create one from scratch.

**The Active Hierarchy**

When you create a new hierarchy, it becomes the Active Hierarchy and any changes to nodes, account assignments, and service assignments will only affect that hierarchy. When more than one hierarchy has been created, the Active Hierarchy is displayed on pages in the hierarchy section and in the reporting bar of summary and detail reports. As an Administrative user or user assigned to the top node, you can easily change which hierarchy is the Active Hierarchy at any time.

**Public and Private Hierarchies**

A hierarchy can be designated as Public or Private. Public Hierarchies can be accessed by any users which have access to the root node of the Master Hierarchy. Private Hierarchies can be seen only by you. They can be changed to Public Hierarchies at any time, but once a hierarchy is made Public it cannot be changed back to Private.

**The Master Hierarchy**

Any Public Hierarchy can be set to be the Master Hierarchy. Since users are assigned access rights to branches of the Master Hierarchy, selecting a hierarchy to be the new Master Hierarchy will un-assign all users not assigned to the top node. These users will have to be reassigned to the nodes of the new Master Hierarchy.
The Billing Feed Hierarchy is the Hierarchy which is systematically established from the Frontier Billing System. If a Summary Account is set up for paper invoice, that information will display under the Billing Feed Hierarchy (Select Setup/Hierarchies/Set Hierarchy/Billing Feed Hierarchy).

Hierarchy Example:

Create a New Hierarchy (Premium Access only)

1. Click the Setup tab.
2. Click Set Hierarchy.
3. Click Add Hierarchy.
4. Enter a name for the hierarchy.
5. Select whether the hierarchy will be a Public Hierarchy or Private Hierarchy.
6. Select whether to begin with a blank hierarchy or to use an existing hierarchy as a starting point.
7. Click Save.
Set the Active Hierarchy (Premium Access only)

1. Select the Hierarchy.
2. Click **Set Active Hierarchy**.

Rename Hierarchy (Premium Access only)

1. Select the hierarchy to rename.
2. Click **Edit Hierarchy Properties**.
3. Enter the new hierarchy name.
4. Click **Save**.
Convert from Private to Public Hierarchy (Premium Access only)

1. Select the hierarchy to convert.
2. Click **Edit Hierarchy Properties**.
3. Select the **Convert from Private to Public Hierarchy** check box.
4. Click **Save**.

Set the Master Hierarchy (Premium Access only)

1. Select the hierarchy to convert.
2. Click **Edit Hierarchy Properties**.
3. Select the **Set as Master Hierarchy** check box.
4. Click **Save**.
Tree Builder (Premium Access only)

The Tree Builder page is where the basic structure of your hierarchy takes shape. This page allows you to add nodes and GL codes that represent divisions and departments. Depending on the permissions granted to you, you also have the ability to move nodes, edit node descriptions, and remove nodes.

Add nodes and GL Codes

When you begin your hierarchy, it will consist of the default corporate node. You can build your hierarchy by adding the divisions or departments that will be the children of the top-most node.
1. Click the **Setup** tab.
2. Click the **Tree Builder** link in the Hierarchies section.
3. Add your top level departments and their GL codes in the crib and click **Add Nodes**.
4. Continue building your organizational tree by selecting a parent node for additional departments that you want to add.
5. Click **Add Nodes**.

**Move Nodes**

You can move a parent node and its children; the topmost node that a user has access to cannot be moved, but its description and GL code can be changed.

1. Select the parent node of the nodes you wish to move and click **Move Nodes** in the top menu or click for menu options.
2. Select the destination of the nodes.
3. Click **Ok**.
Edit Node Descriptions

The names of nodes and their respective GL codes can be edited at any time.

1. Select the nodes you wish to change and click **Edit Descriptions** in the top menu or click for menu options.
2. Edit the Descriptions and GL codes.
3. Click **Save**.

Remove a Branch

You can permanently remove a branch of the hierarchy by selecting its topmost parent node and clicking **Remove Branch**.

Edit Levels

Once you have added nodes to your hierarchy, you can assign accounts to them. Accounts are initially assigned to the unassigned node. You can view the accounts assigned to any node in the hierarchy by selecting the node from the drop-down list and clicking View. The account number, two descriptions, and the assignment date will be displayed. You can click the sort button on any of these columns to sort the accounts by that column.

Assign Accounts

1. After your hierarchy structure is built, click the Edit Levels ta in the navigation bar.
2. In the Level drop-down list, select the location of the accounts you want to move. Leave this set to the top node when you first set up your hierarchy as your accounts have not yet been assigned.
3. Click the **Accounts** buttons.
4. Click **View**.
5. Select the accounts that you want to assign to a cost center.
6. Click **Move Accounts**.
7. On the Move Accounts page, select the Destination for the accounts.
8. Click **Ok**.
Edit Account Descriptions

Account numbers can have two descriptions to make them easier to identify.

1. Select the accounts you wish to edit.
2. Click **Edit Descriptions**.
3. Type in desired descriptions. Note: Description 1 defaults to Business name and cannot be changed. Only Description 2 can be changed.
4. Click **Save**.
Assign Services

When you initially assign an account to a node in the hierarchy, all of the services belonging to that account such as account codes and subscriber numbers are assigned to that node as well. You can move these services further down the hierarchy to any nodes beneath the node where their account is assigned.

Move Services (Hierarchy)

1. In the Level drop-down list, select the location of the services you want to move.
2. Click the Services button.
3. Click View.
4. Select the services you wish to move.
5. Click Move Services.
6. Select the destination.
7. Click Ok.
Edit Service Description

Services can have two descriptions to make them easier to identify.

1. Select the service you wish to edit.
2. Click **Edit Descriptions**.
3. Edit Description 1 and Description 2.
4. Click **Save**.

Split Services

You can allocate a service between nodes in the hierarchy that are at or below where the parent account is assigned. This makes it easy to share resources among different offices or departments.

1. Select the services you wish to split.
2. Click **Split Services**.
3. Enter a percentage for each node you wish to allocate and click Ok. Your total allocation must total 100%.
4. Confirm and click **OK**.
Export a Hierarchy Report

1. Click on Setup tab.
2. Select Set Hierarchy.
3. Click Export Hierarchy.
4. Edit report preferences and click Ok.

View Change History

1. Click View Change History from the Hierarchies section in the Setup tab.
2. Click one of the hierarchy actions to view.

Link Accounts

From the Enterprise Portal – choose MyAccount/My Profile to link accounts. For instructions on how to link accounts refer to MyProfile user guide in Help Center.

TOOLS

Filters (Premium Access only)

Filters allow you to quickly find specific information in your reports and graphs. (e.g., calls to clients, after hour calls, calls made by branch offices, specific service types, calls over a certain value or duration). Multiple lines of filter criteria are joined with the logical operators And/Or. Filters defined in Profiles can be selected from the Filter drop-down list on report pages. By selecting ‘And’, the data must match both criteria. By selecting ‘Or’, the data must match only one of the criteria.

Add or Edit a Filter
1. Click the **Setup** tab.
2. Under Tools, click **Filters**.
3. Click **Add Filter** or **Edit Filter**.
4. Select the type of filter to create.
5. Click **Ok**.
6. Enter an appropriate name in the Name text box.
7. Select the criteria to filter by from the Criteria drop-down list.
8. Enter a value (e.g. 1000, Day, Denver) in the Comparison Value text field.
9. If additional fields are required, select And/Or from the beginning of each new line of filter criteria and repeat steps 3, 4, and 5.
10. Click **Save**.

Markups (Premium Access only)

Markups allow you to designate a specific percentage (%) or dollar ($) value markup that is typically added to reports made for your clients for re-billing purposes or to determine future budgeting needs. Markups are calculated on a per call basis, not per minute. After a markup has been added, it will appear in the Markup drop-down list on the Edit Report Parameters pages.
Add a New Markup

1. Click the **Setup** tab.
2. Under Tools, click **Markup**.
3. Click **Add Markup**.
4. Enter the Markup name (e.g. 20% Markup) in the Description text box.
5. Enter the percent and/or fixed dollar amount to adjust the cost of your data (e.g., 20% and $0.00).
6. Click **Save**.
USER PROFILES

My Profile

My Profile allows you to edit Account information, create and manage Frontier ID s and too link/unlink accounts.

1. At the Enterprise Portal, click My Account at the top of the page. A drop-down menu appears.
2. Click My Profile. The My Profile screen appears.

For more help please refer to the MyProfile user guide at the Help Center.

Descriptions

The Description section allows you to assign custom descriptions to phone numbers.

Phone Numbers

Phone Numbers allow you to designate descriptions for phone numbers. This makes reports easier to read and eliminates the hassle of having to remember or look up numbers on your bill. Two Phone Number Descriptions are available for each number which can be used together or independent of each other when selecting the Group and Subgroups of your reports. Phone Number descriptions are shared among all the users of your organization.

Add Phone Numbers

1. Click the Setup tab.
2. Within the Descriptions section, click the Phone Numbers link.
3. Click Add Phone Number.
4. Enter the phone number (e.g., 123-456-7890) in the Phone Number column. Phone numbers may be a maximum of 25 characters, and must contain at least one numeric character.
5. Enter the primary description (e.g., Davidson Associates) in the Description 1 column.
6. Enter the secondary description (e.g., Supplier) in the Description 2 column.
7. Click Save.
Run a Report with Descriptions

A report can be run once descriptions are created.

1. Click on the Details tab.
2. Click Add a Report.
3. Select a new report type.

4. Click Ok.
5. Select Account Descriptions 1 and/or Account Descriptions 2 other selections in the left column over to the right using the > arrows.
6. Click Ok.
NOTE: for additional information see Creating a Detail or Summary Report section of this document.

COST ALLOCATIONS

Once your hierarchy is built and accounts have been assigned, you can perform your monthly cost allocation (Premium access only) process in just seconds.

Run a Cost Allocation Report

1. Click the Cost Allocation tab.
2. Select the month of statements you want to view.
3. Click View Report.
4. To export, click Export and select PDF or CSV.
EMAIL NOTIFICATION

Enterprise Portal: Billing uses email notifications to communicate important messages, including the following:

| Statements         | • First invoice ready (for new customers)  
|                   | • New invoice ready  
|                   | • New account added  
| Payments          | • ACH payment accepted/ACH payment rejected  
|                   | • ACH notice of change  
| Reports           | • Ordered reports available  
| Disputes          | • Status Updates  

GLOSSARY

Account
Lines and services grouped together for billing. Accounts are usually billed on a monthly basis with a statement or invoice which details fixed costs and usage based charges.

Active Hierarchy
When you create more than one hierarchy, the Active Hierarchy is the hierarchy that is currently selected for cost allocation and reporting. You can switch between hierarchies on the Set Hierarchy page in Setup.

Branch
A part of a hierarchy that includes a node, its children nodes, and all the accounts and services assigned to those nodes.

Detail Report
Detail reports contain individual data records that can include usage, equipment, and other charges or credits. View detail reports by clicking the Detail tab in the main navigation bar.

Favorites
You can add hierarchy nodes, accounts, or services to your Favorites so that it's easy to run reports at those levels each time you log in. Add Favorites on the Edit Levels page in Setup.

Filter
Filters allow you to designate certain criteria by which to narrow the results of your reports. They are especially useful for locating a specific group of calls such as calls to clients, after-hour calls, or calls made by branch offices. You define filters in Setup which can be used when running Summary and Detail reports.

GL Code
A number used by accountants to identify expenses associated with a particular department. You can add a GL Code to each of the nodes of your hierarchy and use them for allocating costs and other reporting.

Hierarchy
A tree structure describing the relationship of your accounts and services to your divisions, departments, or cost centers. Hierarchies consists of individual nodes connected together in parent-child relationships.
Level

A hierarchy gives you the ability to view reports at the node, account, or service level.
- Viewing at the node level returns all the data from that branch of the hierarchy. The data from accounts or services assigned to that department and any departments under it will be returned.
- Viewing at the account level returns the data from all the services that belong to the account.
- Viewing at the service levels returns just the data from the selected service.

Master Hierarchy

A special hierarchy used to grant users specific access privileges to view only the accounts that belong to the branches of the hierarchy that you specify. If you have created only one hierarchy, it is by default the Master Hierarchy.

Node

A structural element of the hierarchy which represents a division, department, or cost center. Accounts and services are assigned to nodes so that you can allocate costs. Nodes are connected to each other in parent-child relationships which form a tree structure of your organization.

Service

A voice line, account code, fax line, pager, data circuit, or other recurring transmission of information. Services are grouped together and billed by accounts.

Splitting Services

A service can be split between two or more nodes to allocate a shared resource between different departments. You can split services from the Edit Levels page in Setup.

Summary Report

Summary reports give an overview of your telecommunication usage with totals and averages. View summary reports by clicking the Summary tab in the main navigation bar.

Unassigned Node

Before accounts and services have been assigned to a node of hierarchy, they are assigned to the unassigned node.