Verizon Enterprise Center CALNET 3 Invoices User Guide

Version 1.17

Last Updated: March 2017

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Getting Started

Sign In

If you are already a registered user, you can sign in with your user ID and password. Refer to the Verizon Enterprise Center Overview User Guide for instructions on how to register.

1. Go to http://calnet3.verizon.com. The *Welcome to the CALNET 3 Web Portal* screen appears.
2. Click **Account Login** on the menu on the left. The Account *Login* screen appears.

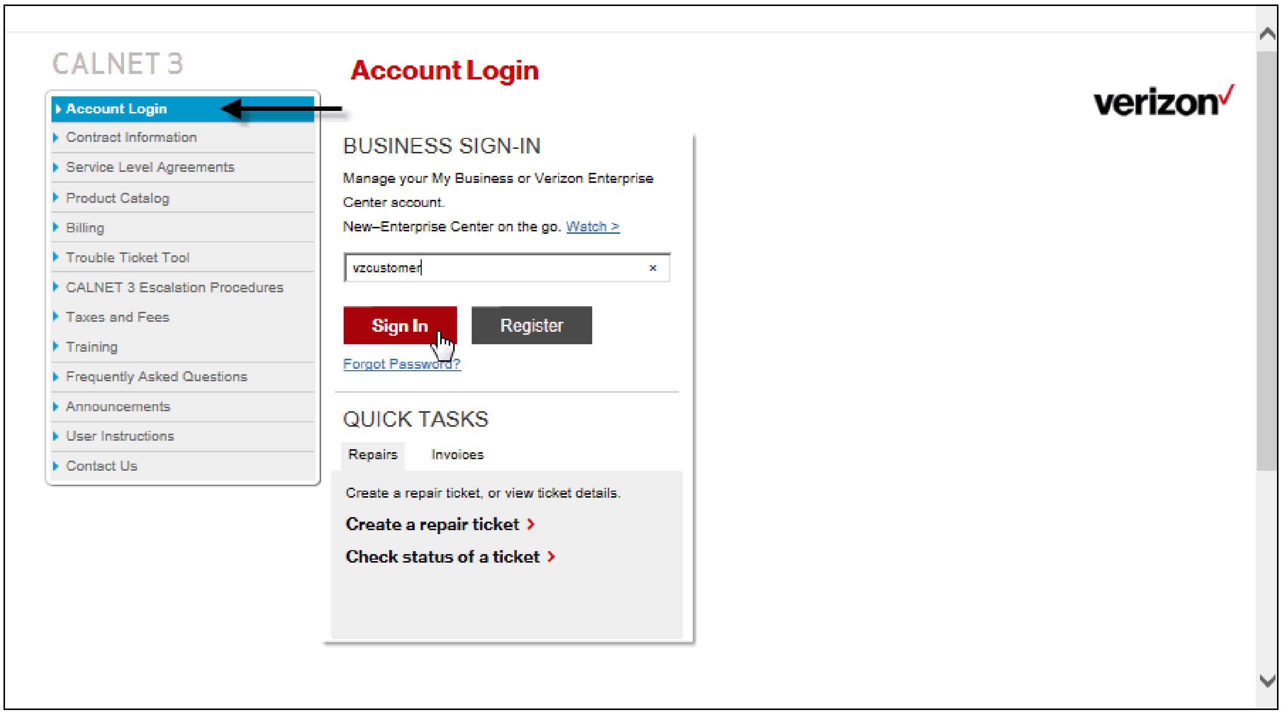

Figure 1 Welcome Screen

3. Enter your user name.
4. Click **Sign In**. The *Sign In* screen appears.

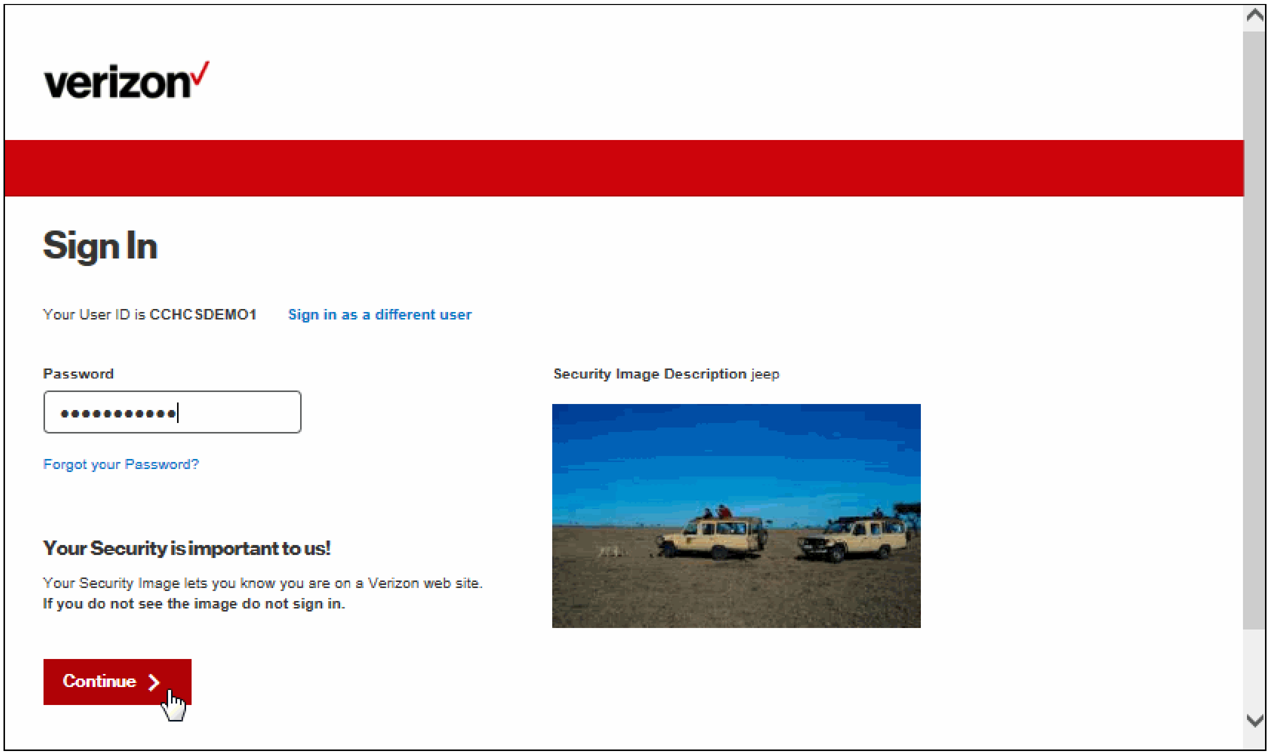

Figure 2 Enter Password

1. Enter your password.
2. Click **Continue**. The Verizon Enterprise Center Home page appears.

Verizon Enterprise Center Home

The Verizon Enterprise Center enables you to order, manage, and pay for your voice and data services through one portal. You can access multiple tools 24 X 7 with a single user ID and password. You can also review and pay invoices online, monitor and configure your inbound and outbound network, report on network performance, create trouble tickets, and order Verizon products and services.

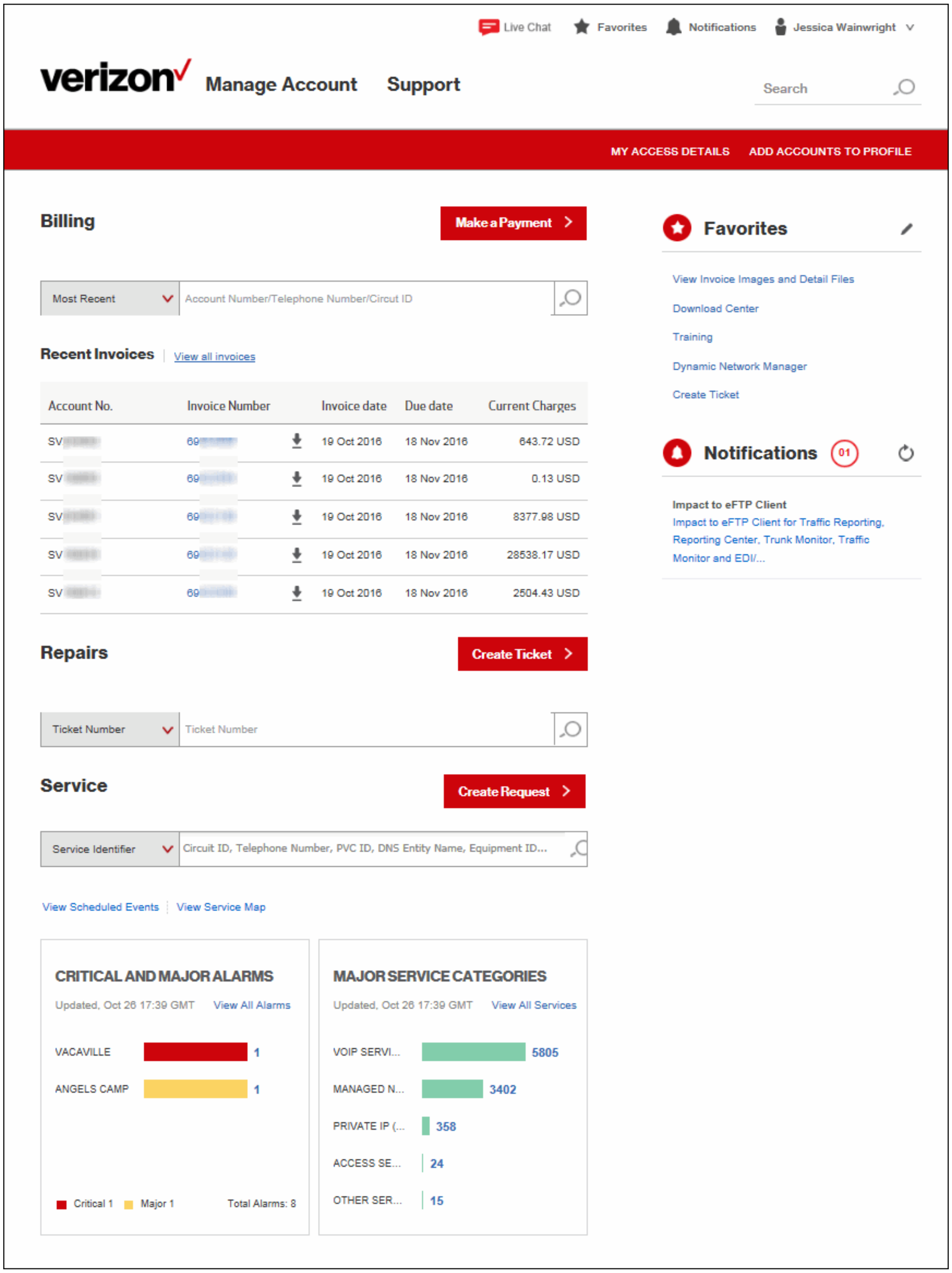

Figure 3 Verizon Enterprise Center Home

Access Invoices

The Invoices tool is entitlement based. When your account is created, your account team must entitle you to see invoices. Contact your account team if you do not see the invoices you need.

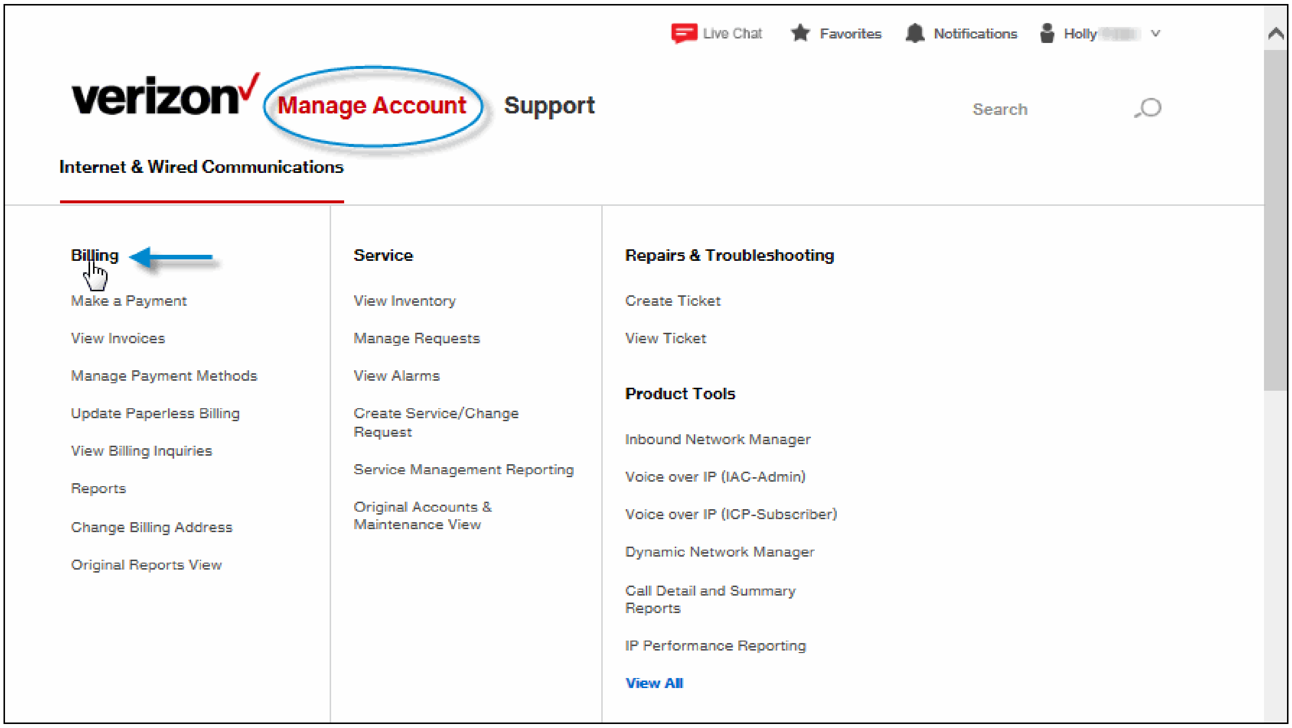

Figure 4 Manage Account

Select **Manage Account | Billing**.

Invoices Overview

The Verizon Enterprise Center Invoices tool enables you to view invoices, generate reports, and pay your bills online. You can view current charges, previous charges and adjustments, providers, legacy invoices, a summary of charges by account, and other billing related information. Other features include:

- **Pay Online** - pay your accounts via online payment by credit card (American Express, Discover, MasterCard, or Visa), or Electronic Funds Transfer (EFT) from your checking account. A Pay by Mail option also exists, allowing you to print a remittance slip and mail your check to the appropriate payment center.
- **Reporting and Analysis** - analyze invoice reports for specific corporate, location, and service level details, identify exceptions through call record sorting, and make invoice inquiries online.
- **Billing Inquiry** - get the status on open tickets for billing discrepancies, questions, and concerns.
- **Notifications** - control whether or not to receive an e-mail and/or pager notification from eligible billing systems when your online invoice is available.
- **View Historical Invoices** - view invoices from up to seven years ago depending on the billing system. You are provided with an online image of your historical invoice.
- **Manage e-Media** - access any of your billing data downloads.
- **Paperless Billing** - manage your paperless subscriptions.

View Invoices

The Invoices tool is entitlement based. When your account is created, your account team must entitle you to see invoices. Contact your account team if you do not see the invoices you need.

The Invoices page lists all of your invoices. You can sort by recently viewed, search by account number, choose the columns you want displayed, and access additional actions.

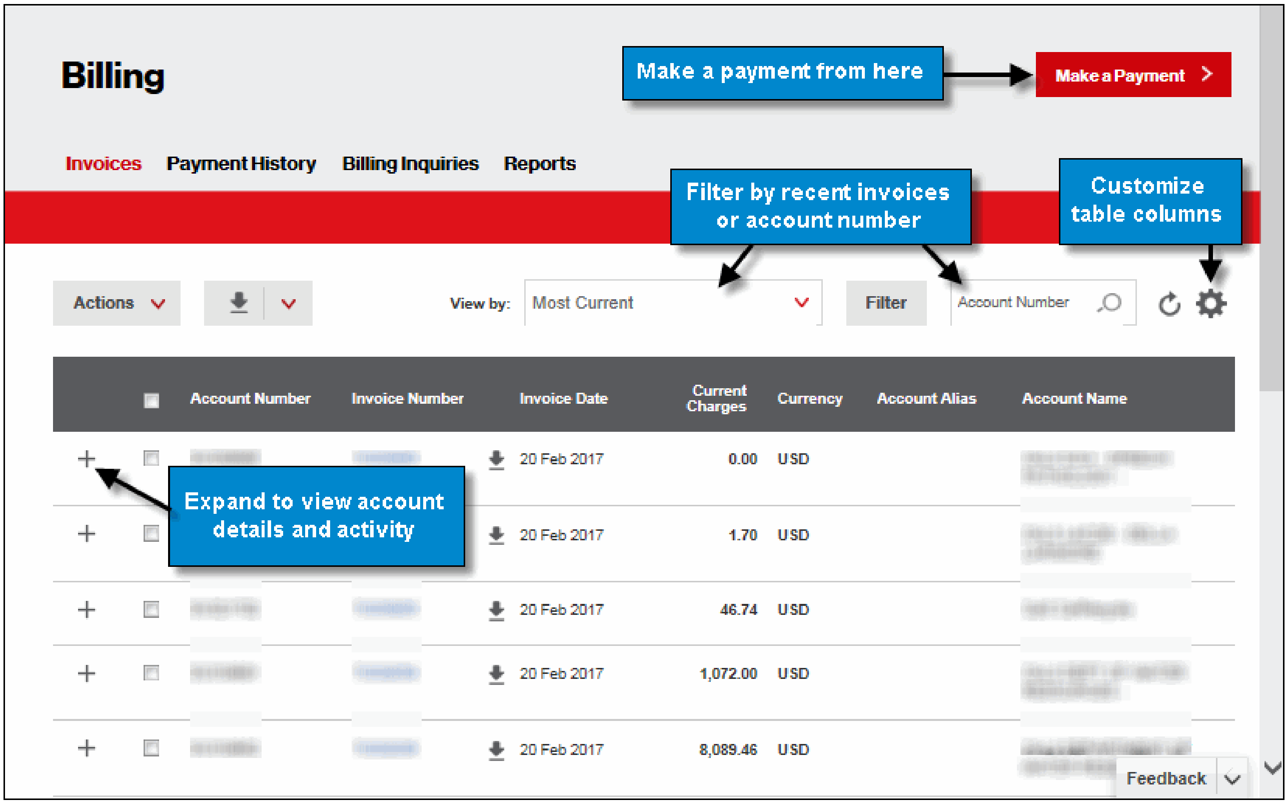

Figure 5 Invoices Home

View By

You can view the most recent invoices, historical invoices, or search by account number.

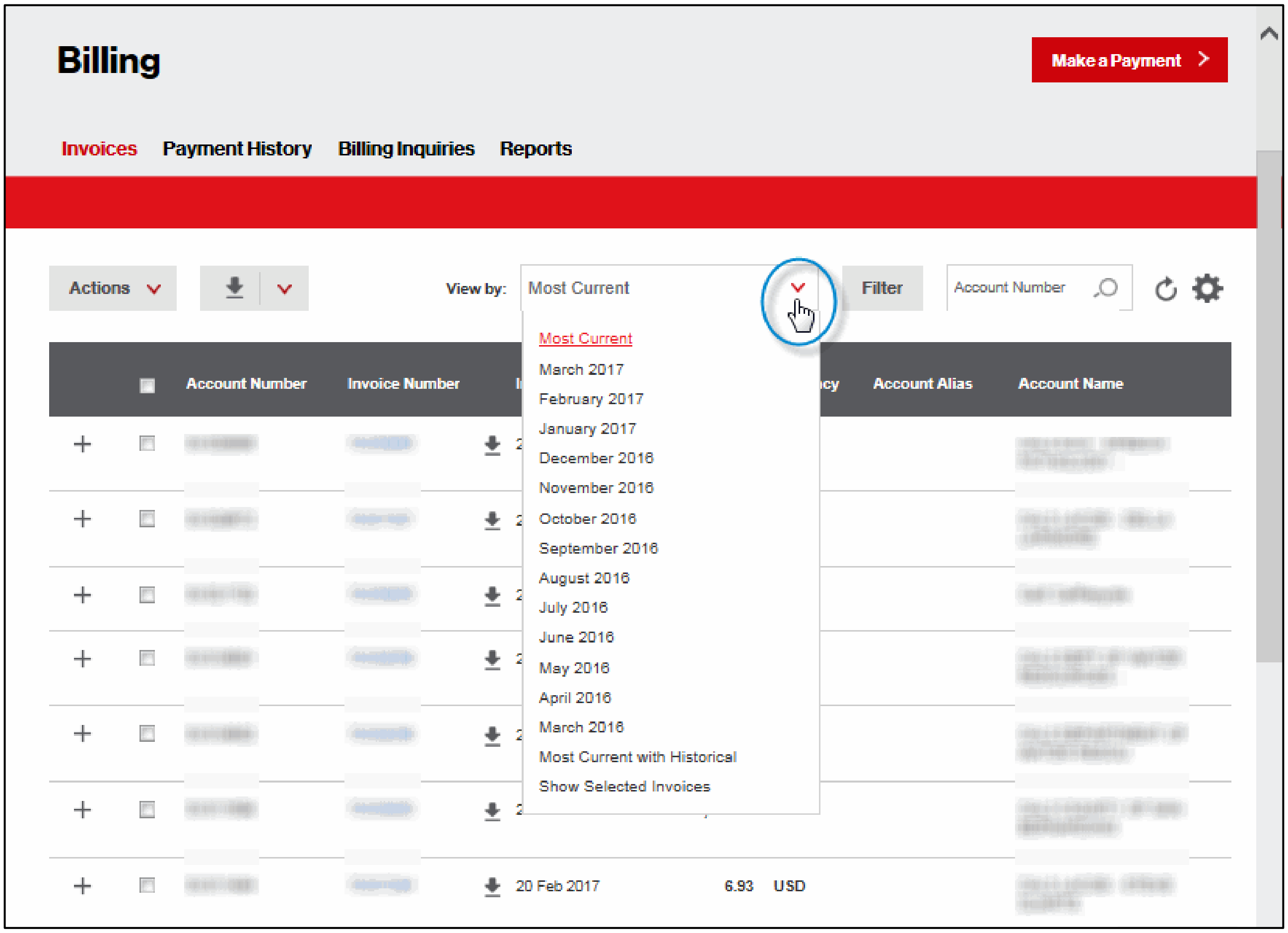

Figure 6 Filter Invoices

Select a recently viewed invoice from the *View by* drop-down list.

-OR-

Enter a full or partial account number in the search field.

Click **Filter**. Additional filter options appear where you can provide more specific information on the type of invoices you want to view.

Filter Invoices

You can filter invoices by different account variables.

1. Click **Filter** at the top of the screen. A drop-down menu appears with different filter options.

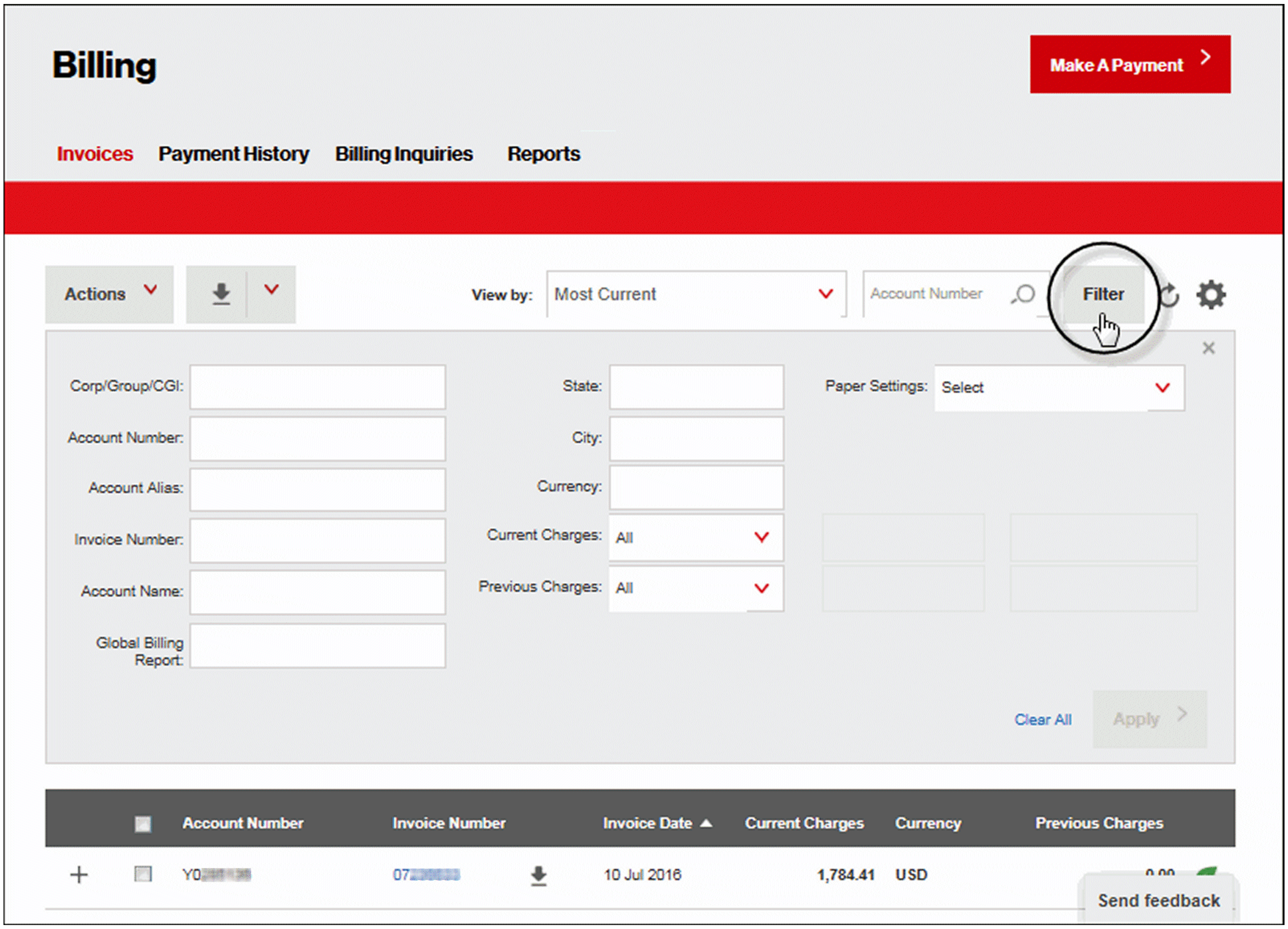

Figure 7 Filter

2. Enter the filter criteria you want.
3. Click **Apply**. Invoices matching your criteria are displayed.

Download

You can export the invoice table, selected rows, invoices, and the remittance slip.

1. Click . A drop-down list appears with different options to download.

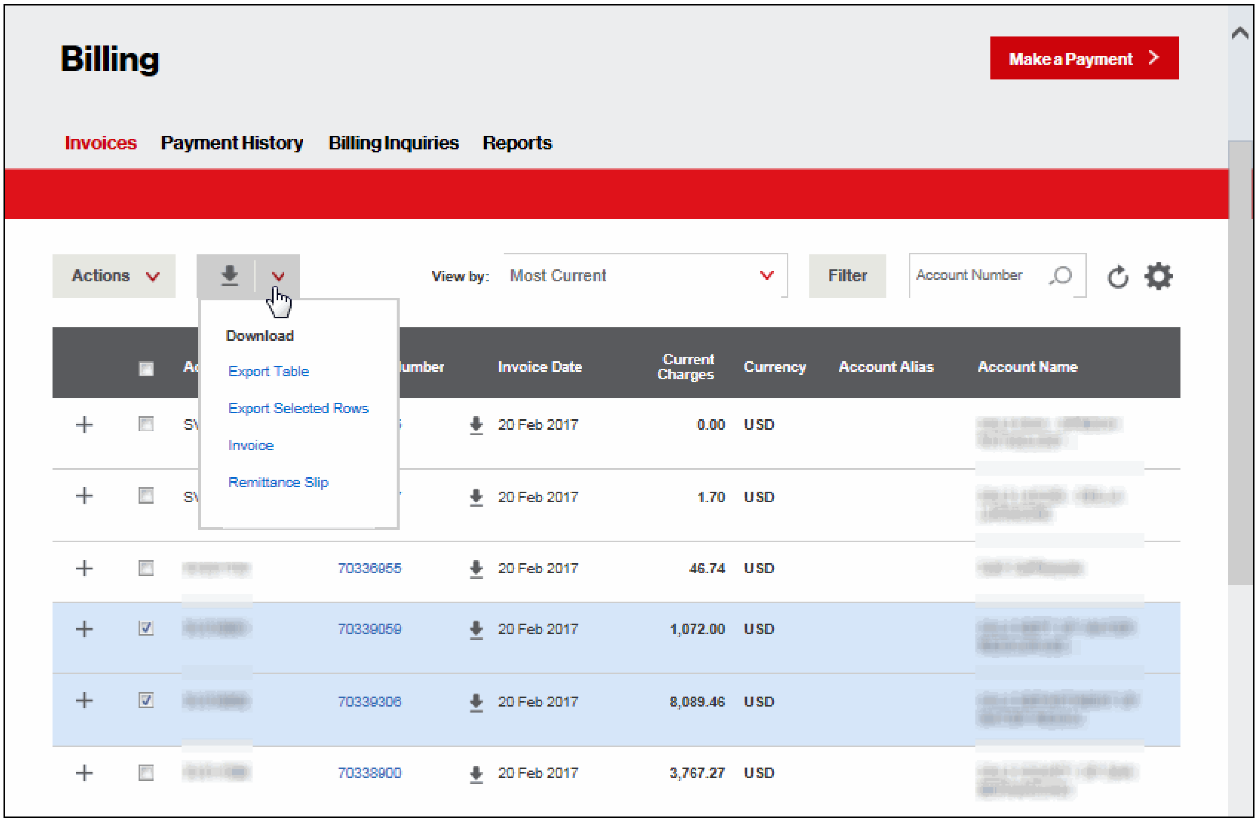

Figure 8 Download

2. Select one of the following options:
   - **Export Table** - save the list of invoices to a spreadsheet.
   - **Export Selected Rows** - check the boxes next to specific invoices to save to a spreadsheet.
   - **Invoice** - save the selected invoice.
   - **Remittance Slip** - save the remittance slip of the selected invoice.

   A pop-up appears at the bottom of the screen allowing you to save.
3. Click **Save**. The spreadsheet is downloaded and you can open it.
4. Click **Open** to open the spreadsheet and edit or save it.

Customize Table Columns

1. Click ⚙. The *Customize Table* pop-up appears.

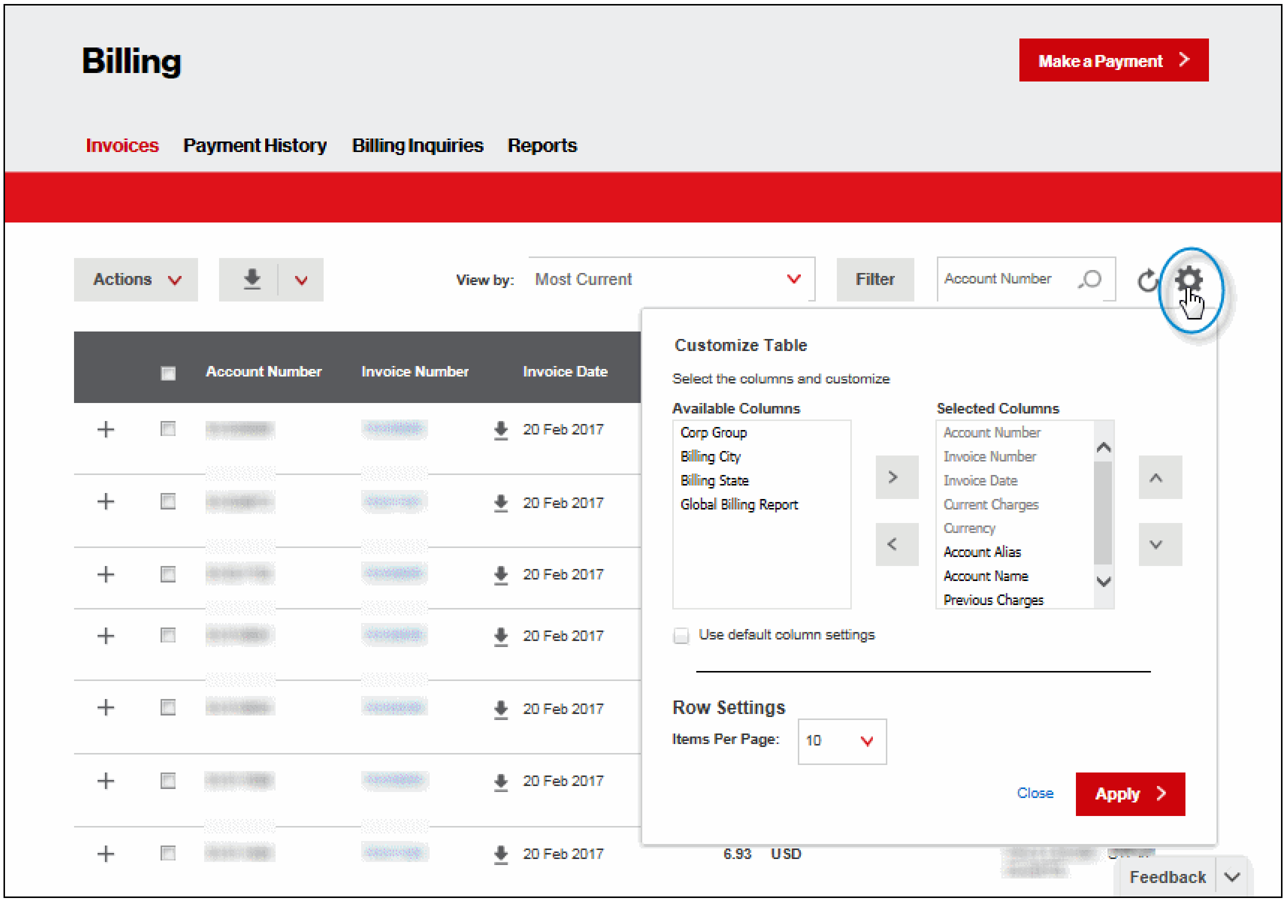

Figure 9 Customize Table Columns

2. Add/remove the columns you want to display in the order list.

   -OR-

   Check **Use default column settings**.

3. Click **Apply**.

View Invoice Details

You can view the details of any invoice, including current balance, last payment amount, and a link to view account details and activity.

1. Click **+** next to an order to expand the details.

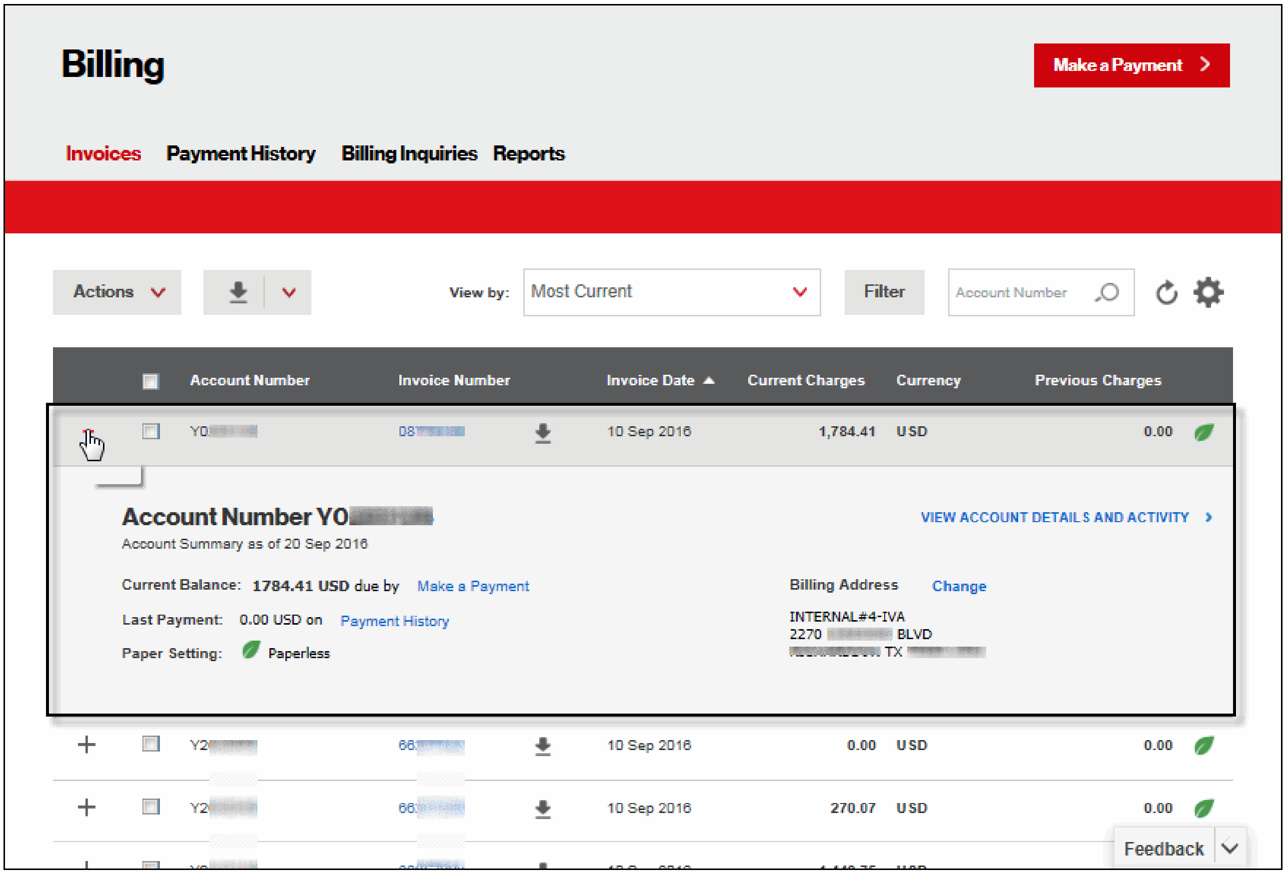

Figure 10 Invoice Details

2. Click to open or save the order details in PDF or TXT format.
3. Click **Make a Payment** to pay this invoice.
4. Click **Payment History** to see the payment history on this account number.
5. Click **Update Paperless Billing** to choose to receive an electronic invoice instead of a paper invoice.
6. Click **VIEW ACCOUNT DETAILS AND ACTIVITY** to view the details and activity for the account number (Figure 9).

Details and Activity

You can view the current balance and the last payment applied for this account number, as well as view invoices. You can also make a payment, access additional actions, edit the billing address, set up recurring payments, or update your paperless billing preferences.

There is an additional download option on this page. You can download the payment receipt for an invoice.

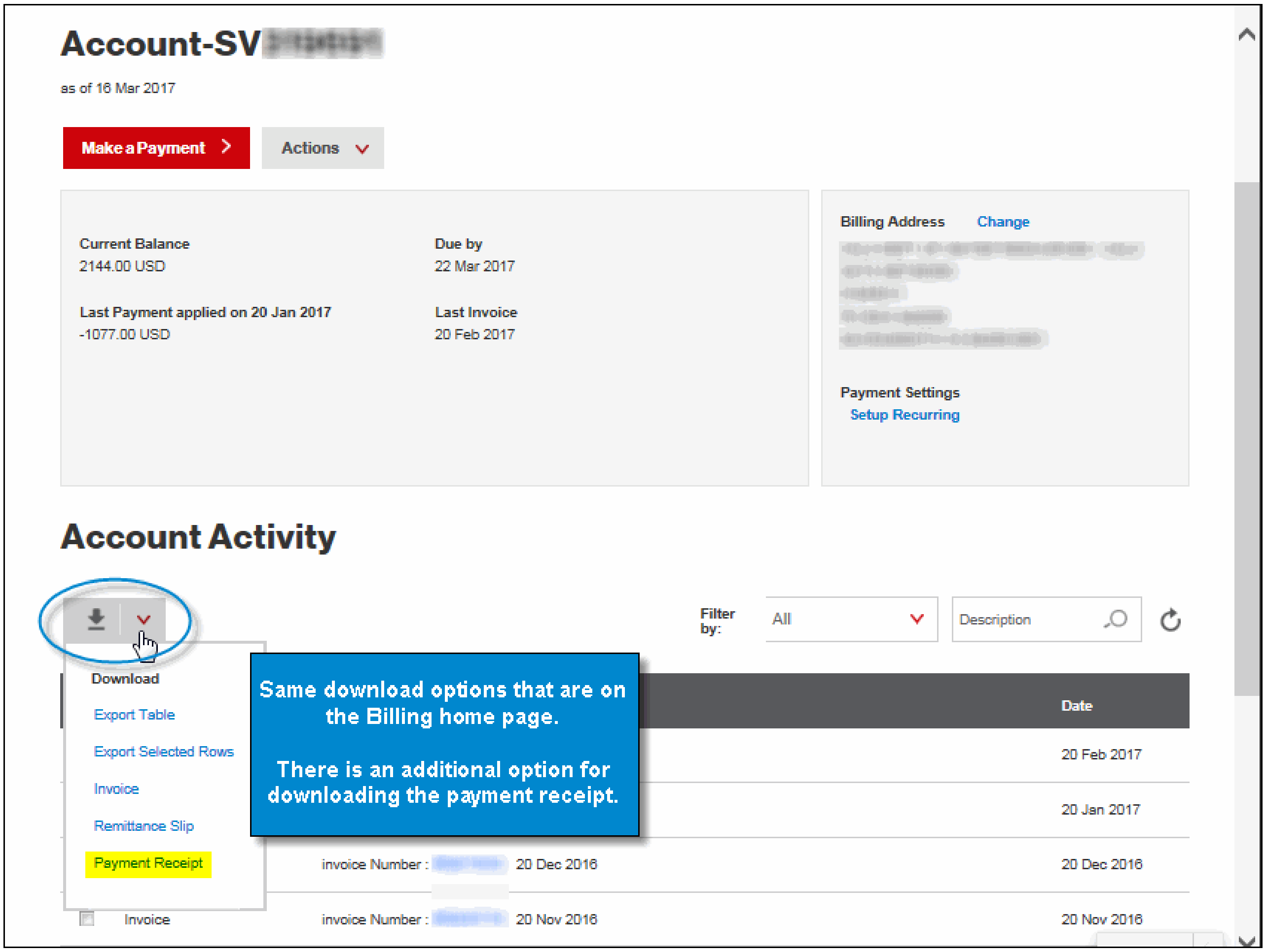

Figure 11 Details and Activity

Actions

There are several actions available on the Invoices Home page and *the Account Details and Activity* screen.

Click **Actions** to access links to manage payments, historical invoices, disputes, accounts, inquiries, and e-rate. **Note: Instructions on using these functions are included in the other sections in this user guide.**

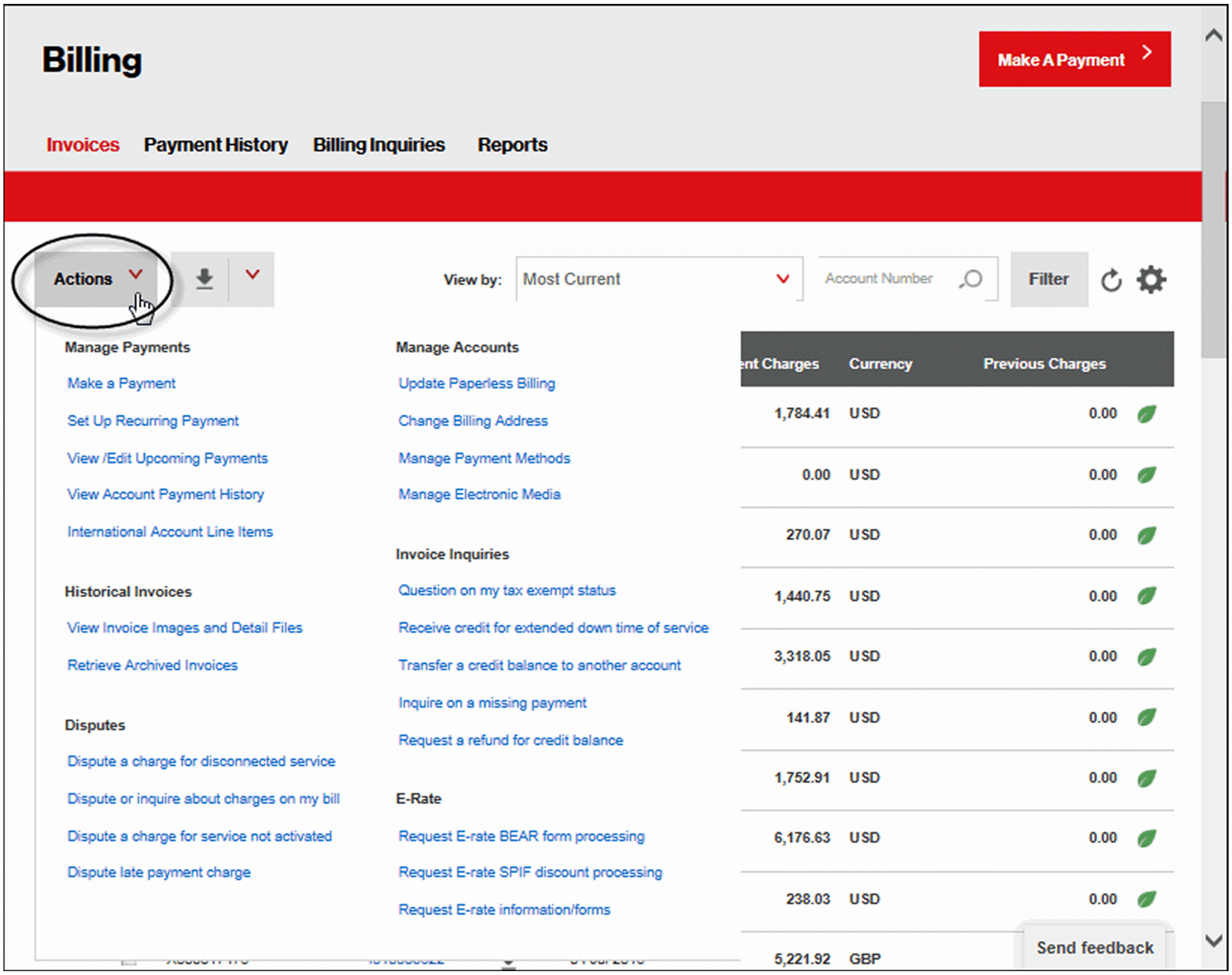

Figure 12 Actions

View an Invoice

You can download and view available invoices. The *Summary Bill* provides access to previous invoices, payments, actions, reports, and inquiries. You can also change the billing address, set up recurring payments, and update your paperless billing preferences.

1. Click next to an invoice number. The *Download* pop-up appears.

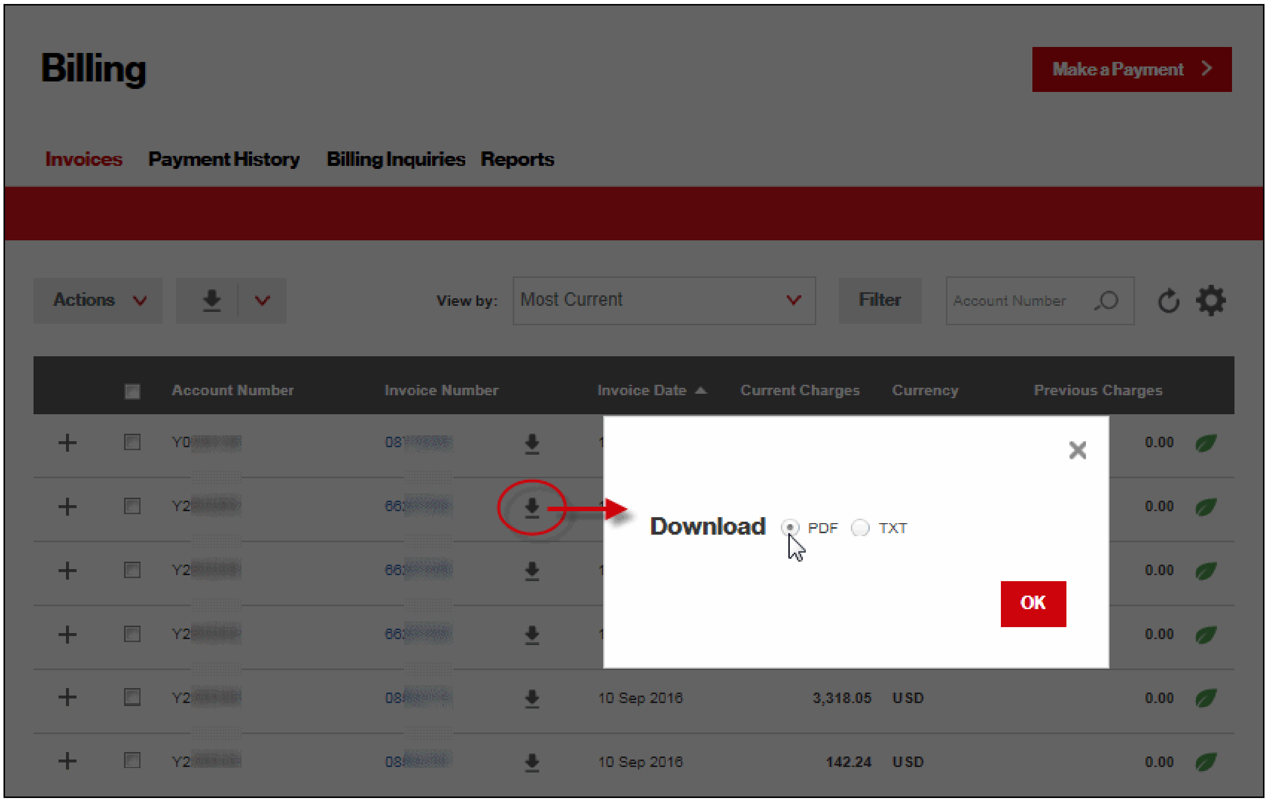

Figure 13 Download Invoice

2. Select **PDF** or **TXT**.
3. Click **OK**.
4. Click **Open** or **Save**.

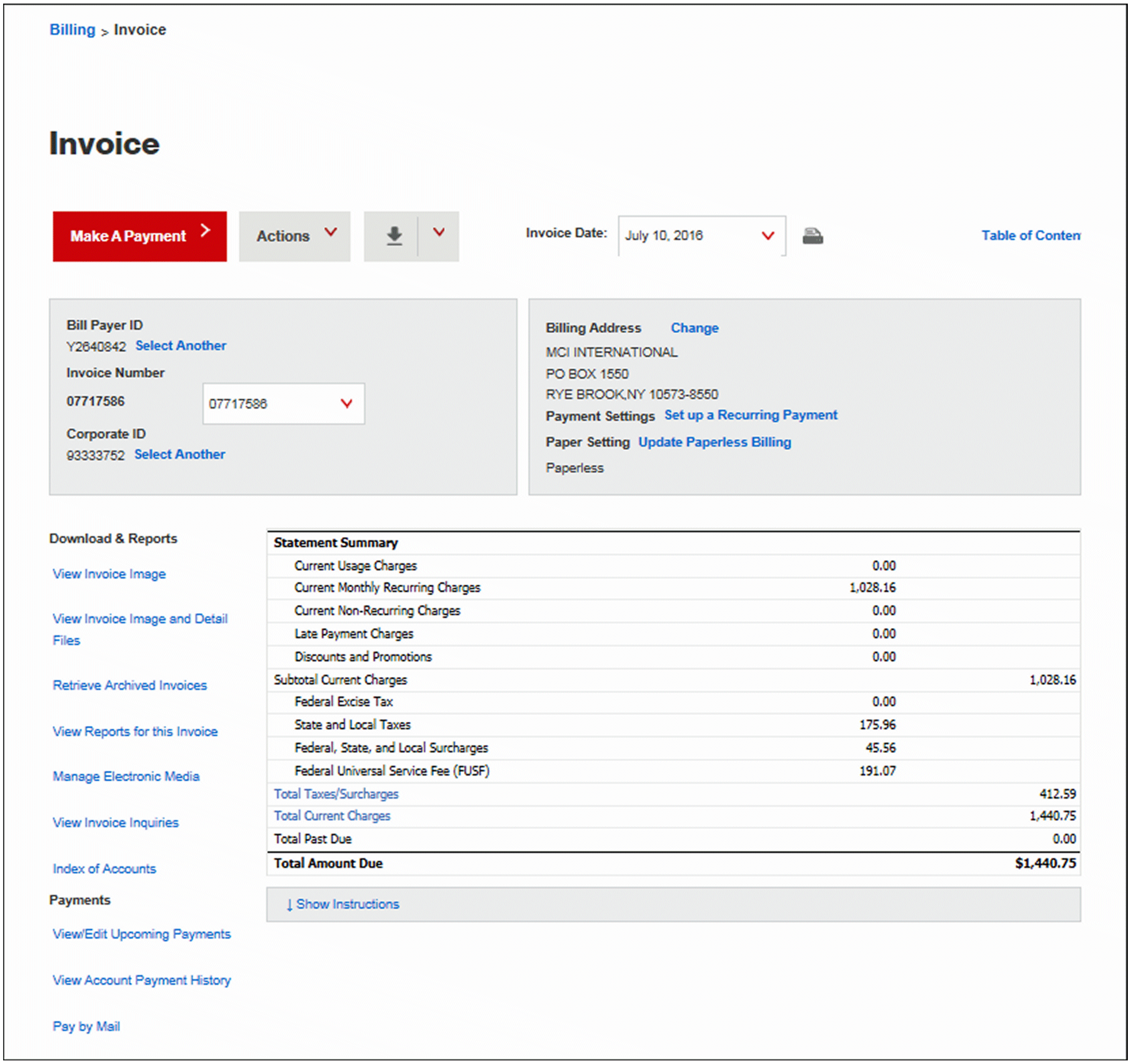

Figure 14 Summary Bill

5. Click **Make a Payment** to pay this invoice.
6. Click **Actions** to access links to manage payments, historical invoices, disputes, accounts, inquiries, and e-rate. **Note: Instructions on using these functions are included in the other sections in this user guide.**
7. Click to download the invoice or remittance slip.
8. Select a previous invoice from the *Invoice Date* drop-down list, if applicable.
9. Click **Select Another** to return to the Invoices home page to select another invoice to view, if applicable.

Charges

You can view a breakdown of payments, charges by account, and charges by provider.

Previous Charges and Adjustments		
Previous Amount		1,069.94
Payments		1,027.61 CR
Adjustments		0.00
Adjustments transferred from sub-accounts		0.00
Amount past due		42.33
Current Charges		
Current Charges - Summary Account		5.87 CR
For your information Your late payment charge this month is	0.00	
Current Charges - Subordinate Accounts		1,758.12 CR
Total Current Charges		1,763.99 CR
Summary Of Charges by Account		
Accounts		1,758.12 CR
Summary of Charges by Provider		
Verizon		1,763.99 CR
Total Amount Due by October 28 ,2015		**$1,721.66 CR**

Figure 15 Charges

- **Payments** - view payments made on this account, including the date and amount.
- **Summary of Charges by Account**- view a summary of charges by account, including the bill date, previous charge, and current charge.
- **Summary of Charged by Provider** - view a summary of itemized charges, including calls and taxes.

Download & Reports

The *Download & Reports* section within an invoice provides access to various functions you can perform on the invoice.

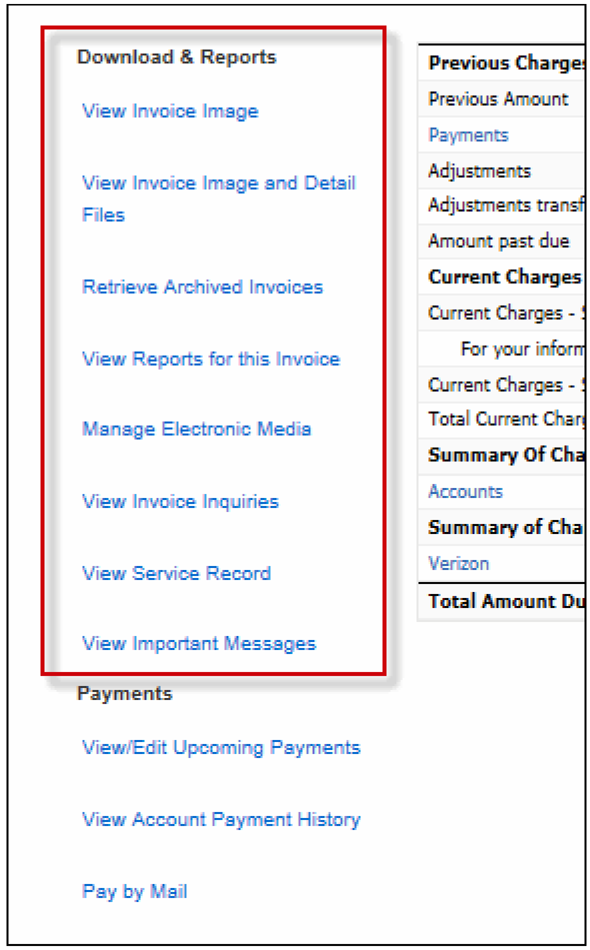

Figure 16 Download & Reports

- **View Invoice Image** - open or save the invoice as a PDF. It is an image of your paper bill.
- **View Invoice Image and Detail Files** - see invoices older than 13 months for an account.
- **Retrieve Archived Invoices** - invoices older than 13 months are archived. You can request to retrieve those invoices for viewing. Once requested, archived invoices are available within 24 hours and accessible for 30 days.
- **View Reports for this invoice** - view bill reports for a single account or multiple accounts. Refer to Section 5 for more information.
- **Manage Electronic Media** - request your invoices in three different eMedia formats: BillManager, Electronic Data Interface (EDI), and VZ450 Direct. You can own multiple profiles to which accounts can be added or deleted. Each profile is associated with a unique media distribution method. Refer to Section 7 for more information.
- **View Invoice Inquiries** - you can initiate a bill inquiry if you find a discrepancy on your bill or if you have a question about an invoice. You can them view those inquiries you submitted and track the progress. Refer to Section 4 for more information.
- **View Service Record** - view the billing account number and name, service and equipment, service ID, and a summary of products and rates.
- **View Important Messages** - view any messages regarding the Verizon Enterprise Center.

Payments

You can view/edit upcoming payments, payment history, or make a payment by mail. Refer to the Payments section for more information.

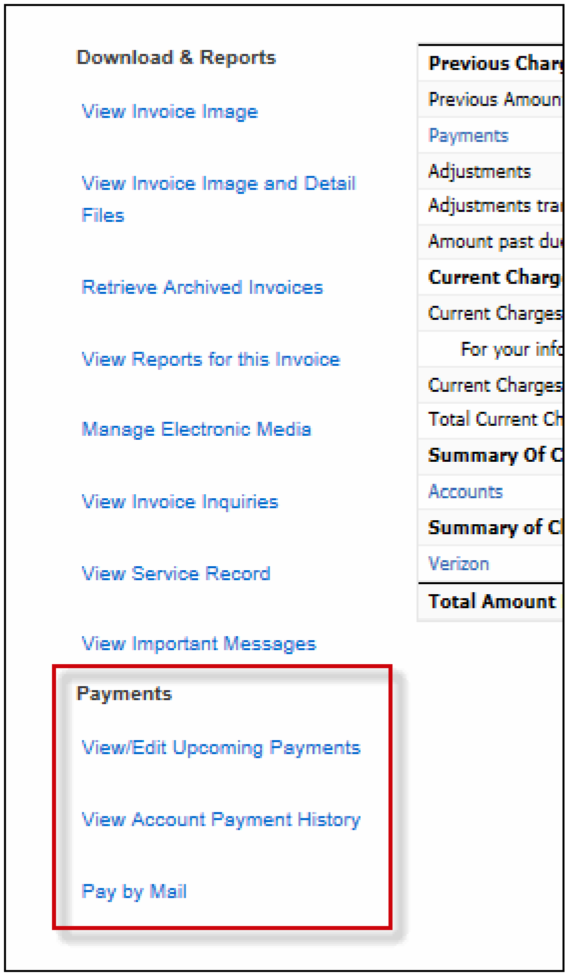

Figure 17 Payments

- **View/Edit Upcoming Payments** - view all accounts that are set up for a recurring payment or a scheduled payment.
- **View Account Payment History** - view previous payments made on this account.
- **Pay by Mail** - open or save the remittance slip in PDF format to mail a payment.

Historical Invoices

You can view invoice images (image of your paper invoice) and detail files, as well as retrieve archived invoices.

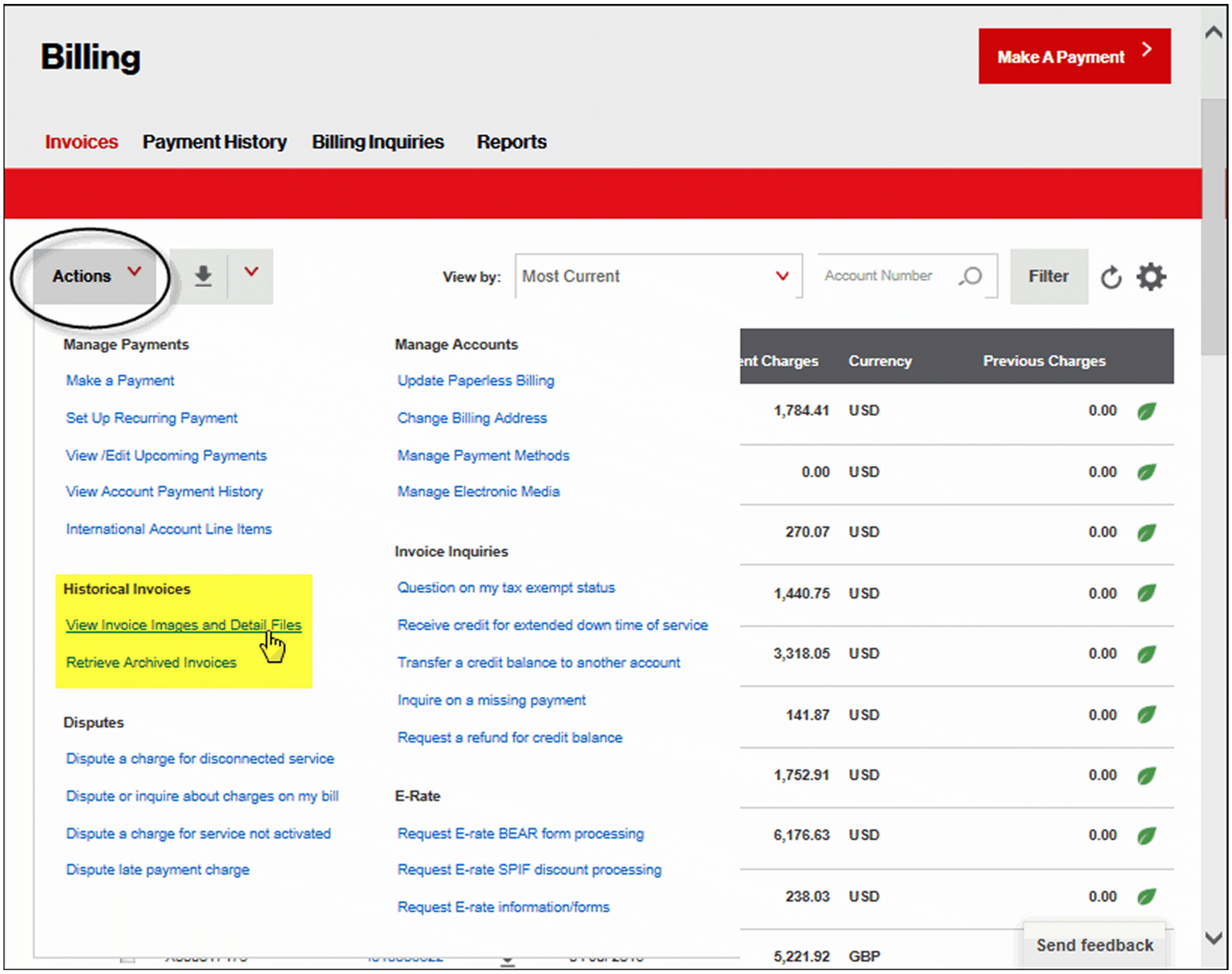

Figure 18 Historical Invoices

1. Click **Actions** on the Billing home page.
2. Click **View Invoice Images and Detail Files** under *Historical Invoices* (Figure 19).

   -OR-

   Click **Retrieve Archived Invoices** under *Historical Invoices* (Figure 24).

View Invoice Images and Detail Files

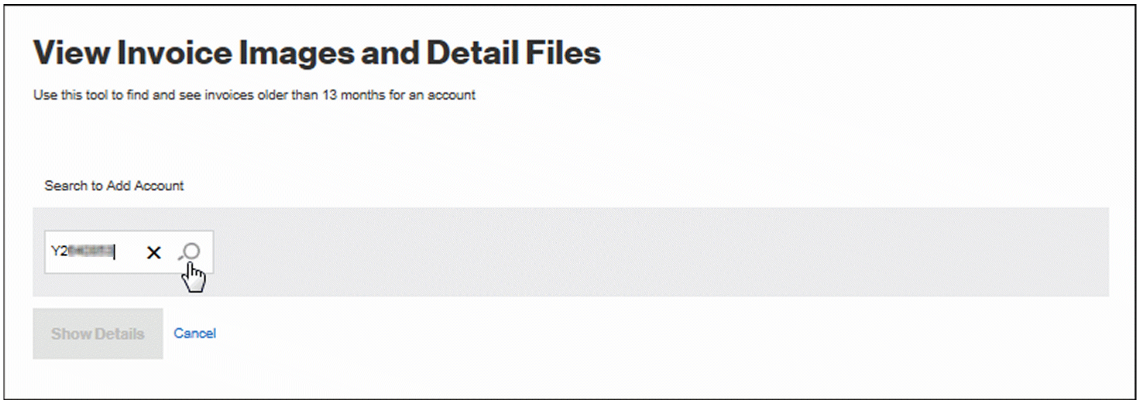

Figure 19 View Invoice Images and Detail Files

1. Enter an account number.
2. Click ⚲. A list of invoices for that account number is listed.

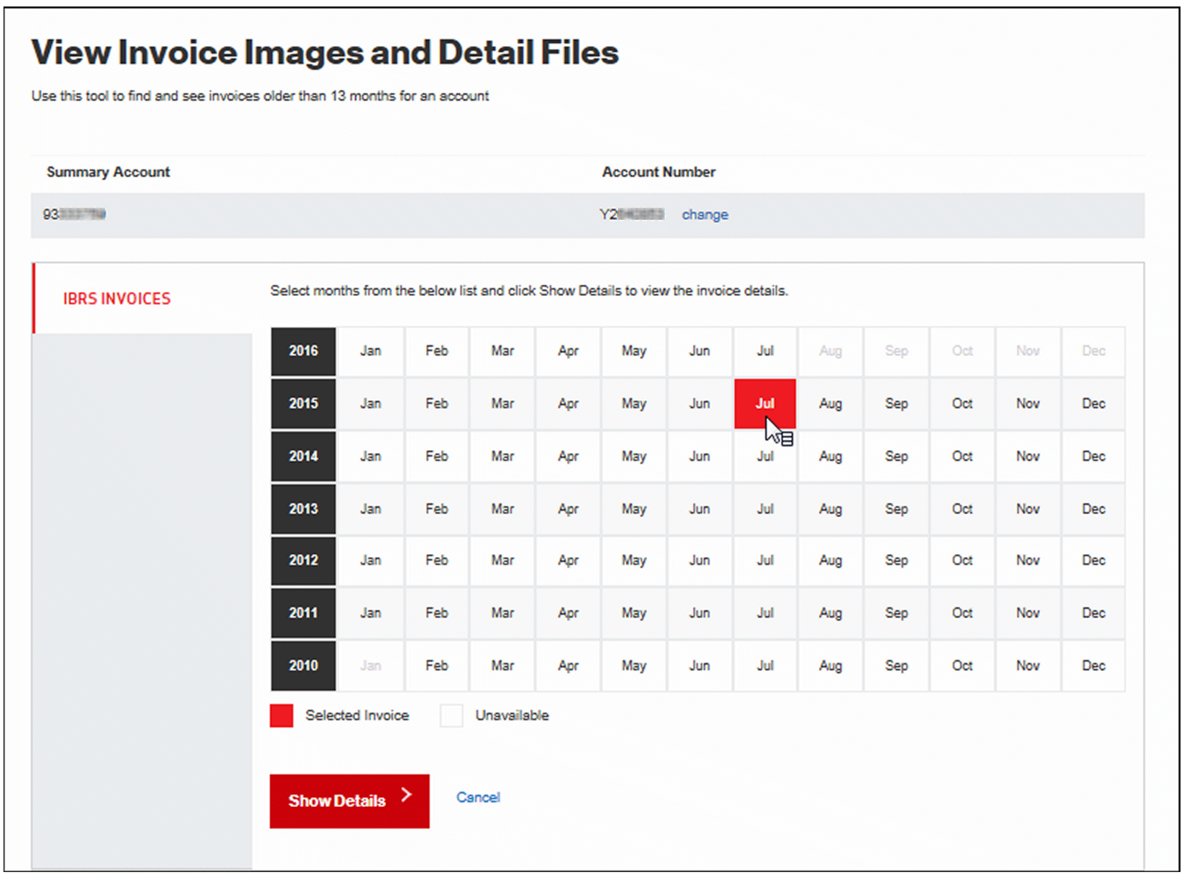

Figure 20 View Invoice Image and Detail Files

3. Click on the months for which you want view details. They become highlighted in red.
4. Click on a month again to unselect it, if applicable.
5. Click **Show Details**. A table displays at the bottom of the screen listing the invoices for the months you selected.

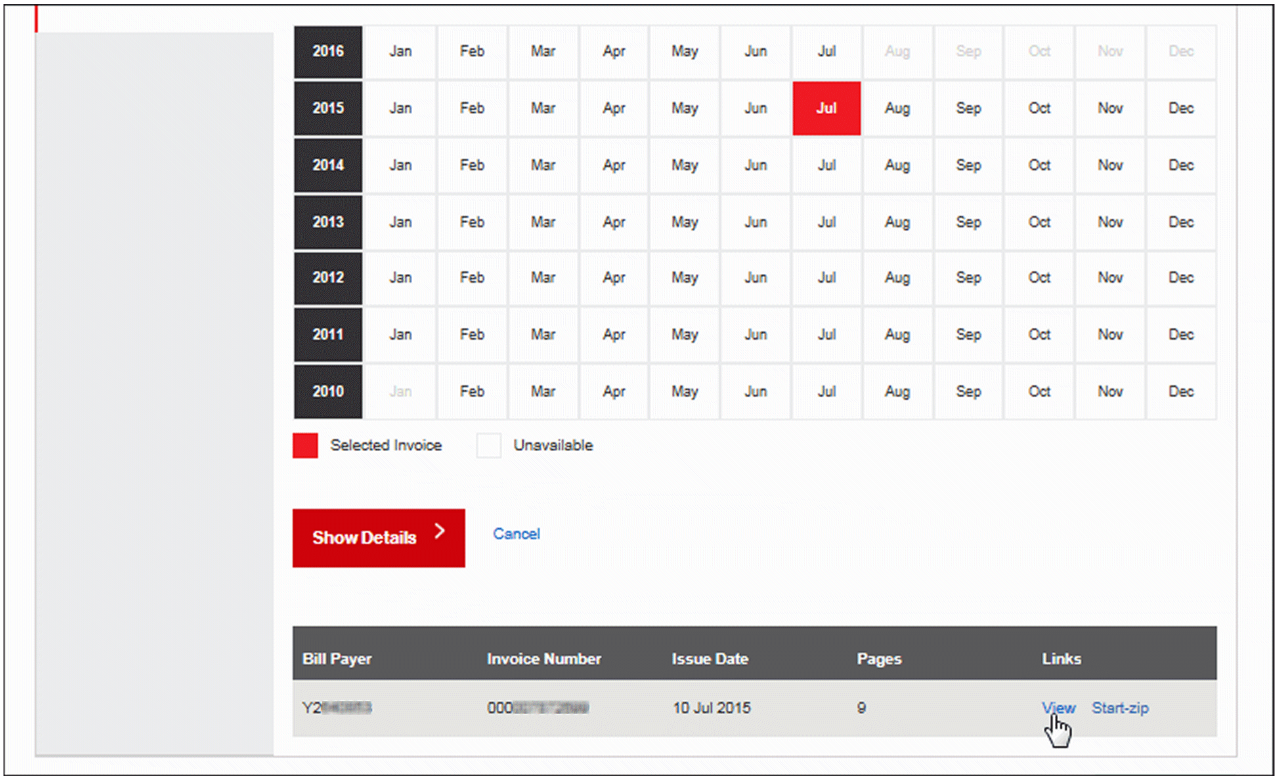

Figure 21 View Invoice Image and Detail Files

6. Click **view start-zip** to submit a request to have the invoice zipped and available for download. The *Zip Request* pop-up appears.

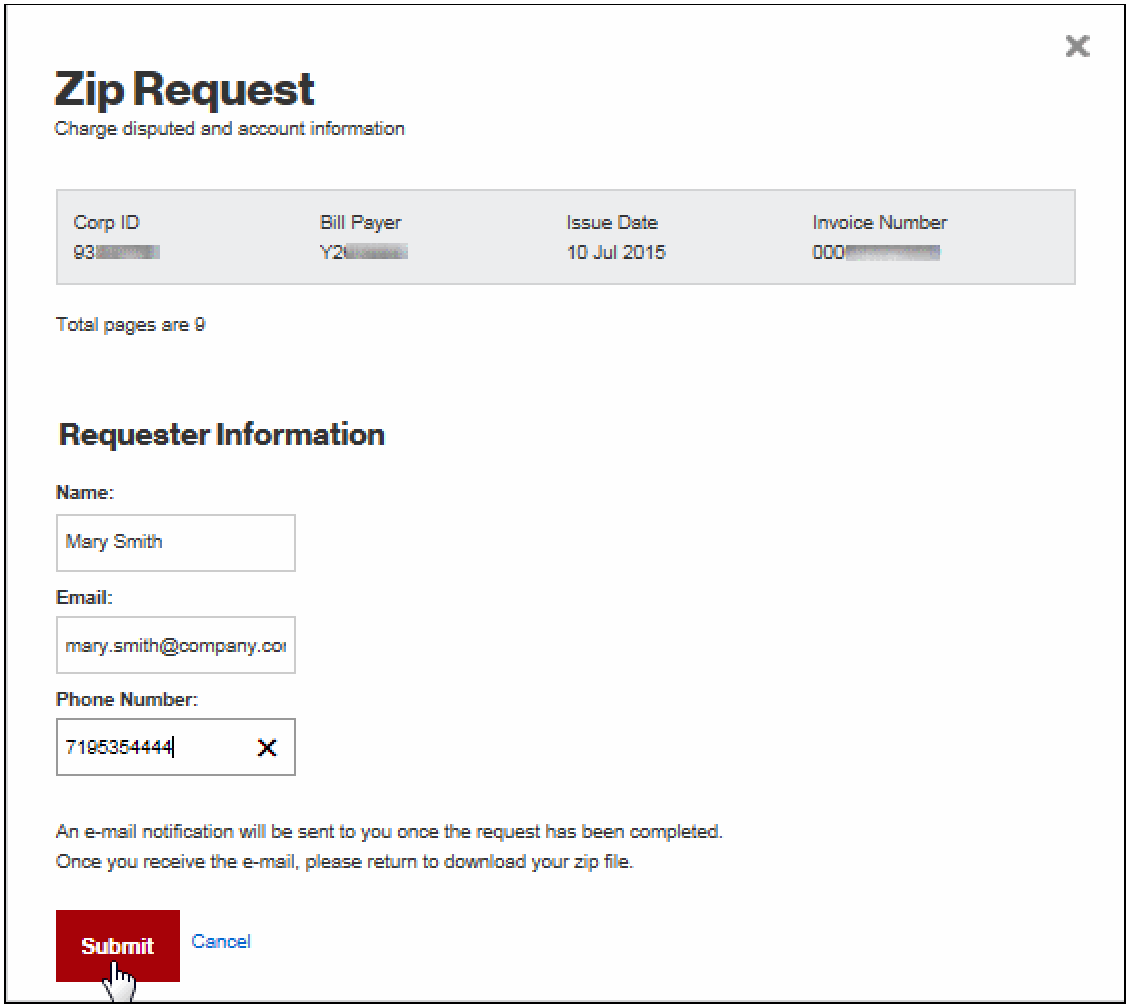

Figure 22 Zip Request

7. Enter your Name, Email, and Phone Number.
8. Click **Submit**. An email notification is sent to you when the request is complete and you can return and download the file. The invoice is available to download for 30 days.
9. Click **view** next to the invoice on the View Invoice Image and Detail Files screen. The invoice image opens in another browser window.

You can view the invoice image in PDF or TXT. The default is PDF. You can also view different pages of the invoice by selecting the page you want from the Table of Contents on the left.

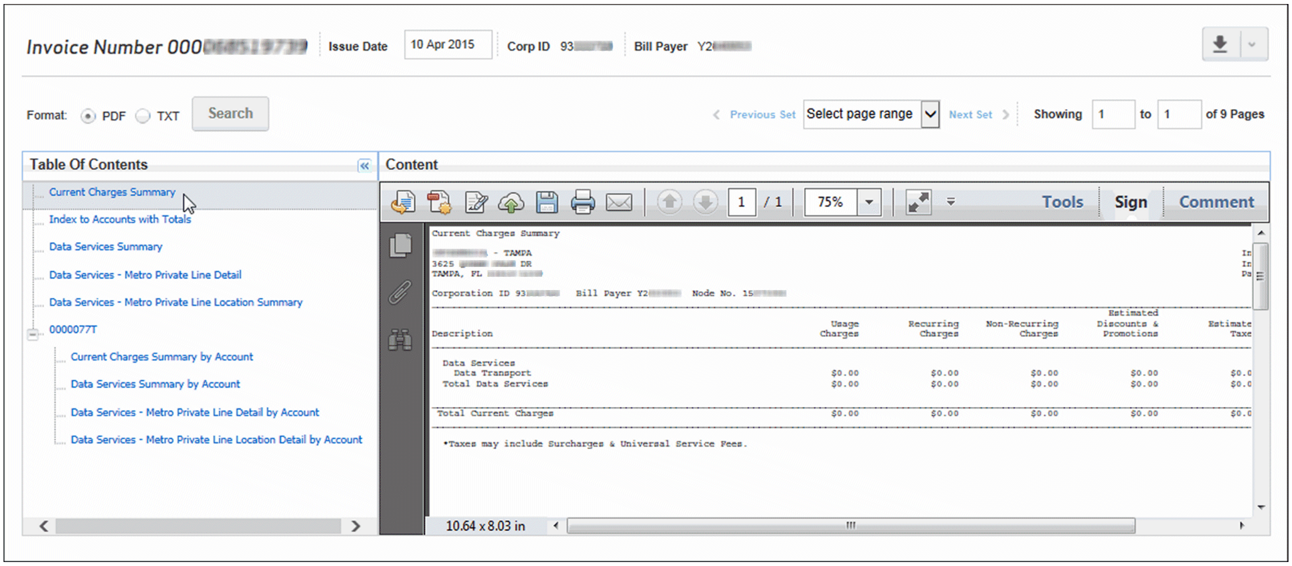

Figure 23 Invoice Image

Retrieve Archived Invoices

You can access your invoices for the past seven years.

1. Click **Actions** on the Billing home page.
2. Select **Retrieve Archived Invoices**. The *Retrieve Archived Invoices* screen appears.
3. Enter an account number.
4. Click 🔍. A list of archived invoices for that account number is listed.

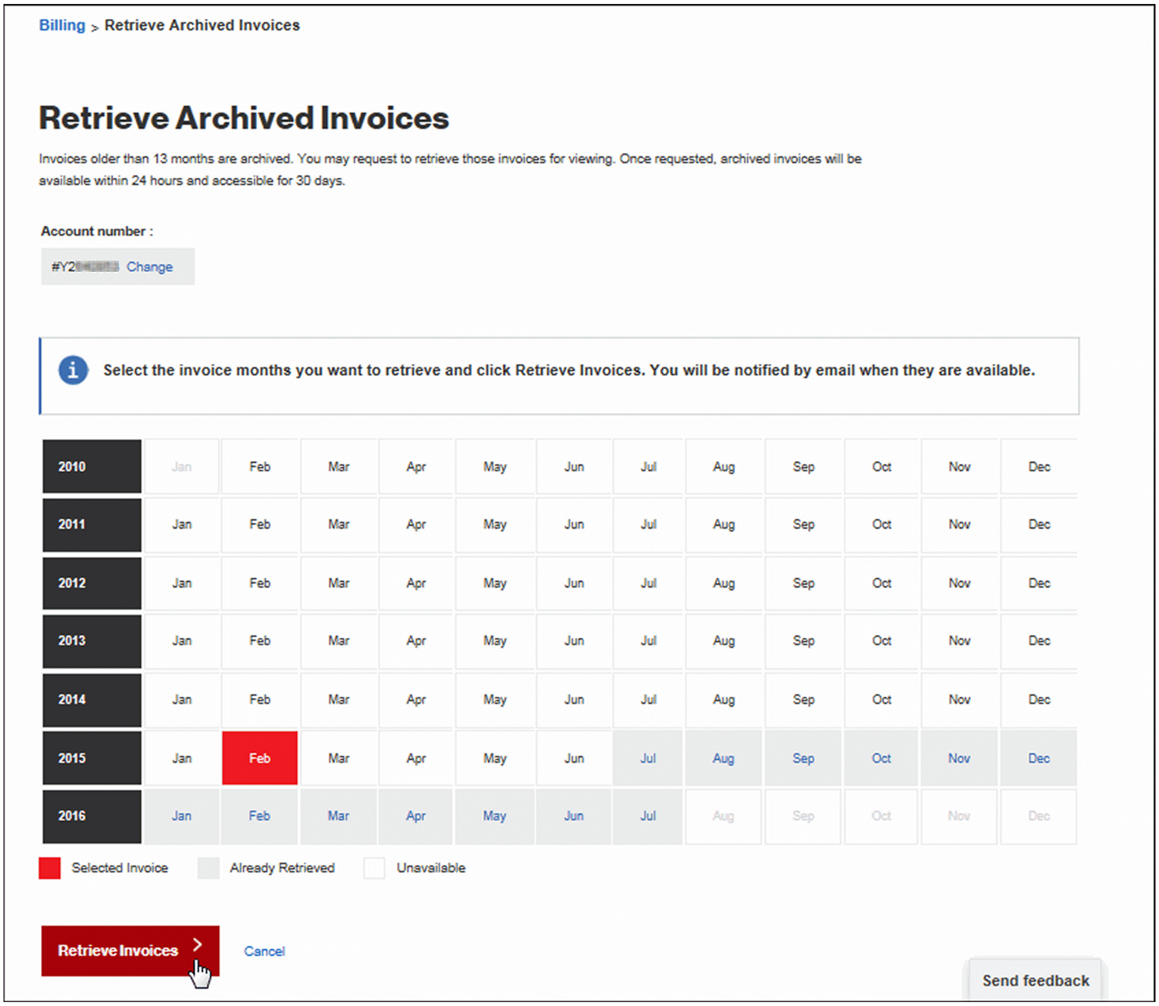

Figure 24 Retrieve Archived Invoices

5. Click on the month for which you want retrieve invoices. It becomes highlighted in red.
6. Click on the month again to unselect it, if applicable.
7. Click **Retrieve Invoices**. A pop-up confirmation appears informing you that invoices will be retrieved in 24 hours.
8. After 24 hours, come back to the *Retrieve Archived Invoices* screen. A list of archived invoices is displayed at the bottom of the screen.
9. Click **view** next to the invoice you want to view. The invoice image opens in another browser window.

Paperless Billing

You can set up paperless billing so that you no longer receive a paper invoice in the mail. You can set up paperless after you receive your first invoice.

1. Select **Manage Account | Update Paperless Billing** (under Billing). The *Update Paperless Billing* screen appears.

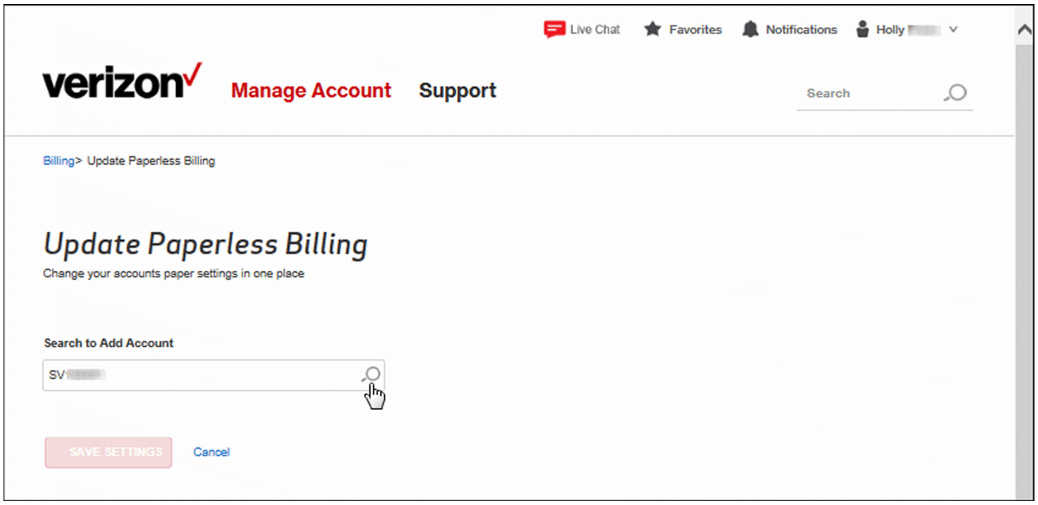

Figure 25 Update Paperless Billing

2. Enter the account number.
3. Click . The paperless settings display.

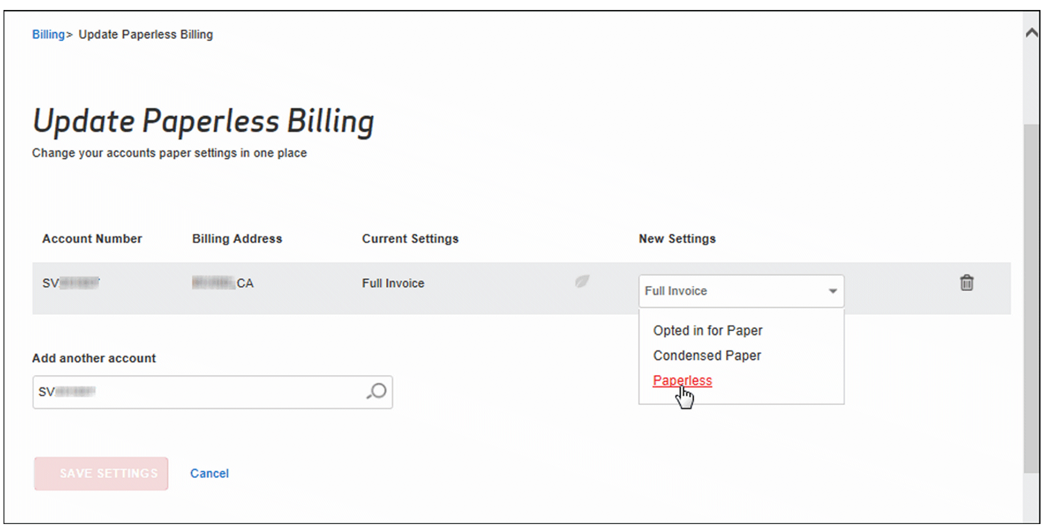

Figure 26 Update Paperless Billing

4. Select **Paperless** from *the New Settings* drop-down list.
5. Accept the terms and conditions.
6. Click **Save Settings**.
7. Repeat steps 1 - 6 to set additional accounts as paperless.

8. Check the accounts you want to set as paperless.

Payments

The Payments tool provides easy account and invoice availability, accurate balance information, a clear indication of scheduled vs. recurring payments, bank card options for invoices that cannot be paid using a credit card, and intuitive search options. There are several different ways to access payment options.

Click **Manage Account | Make a Payment** at the top of the screen.

-OR-

Click **Manage Account | Manage Payment Methods** at the top of the screen.

-OR-

Click **Make a Payment** on the Billing home page or the *Summary Bill* screen.

-OR-

Click a payment option under *Payments* on the *Summary Bill* screen.

-OR-

Click **Actions** on the Billing home page and select an option under *Manage Payments*.

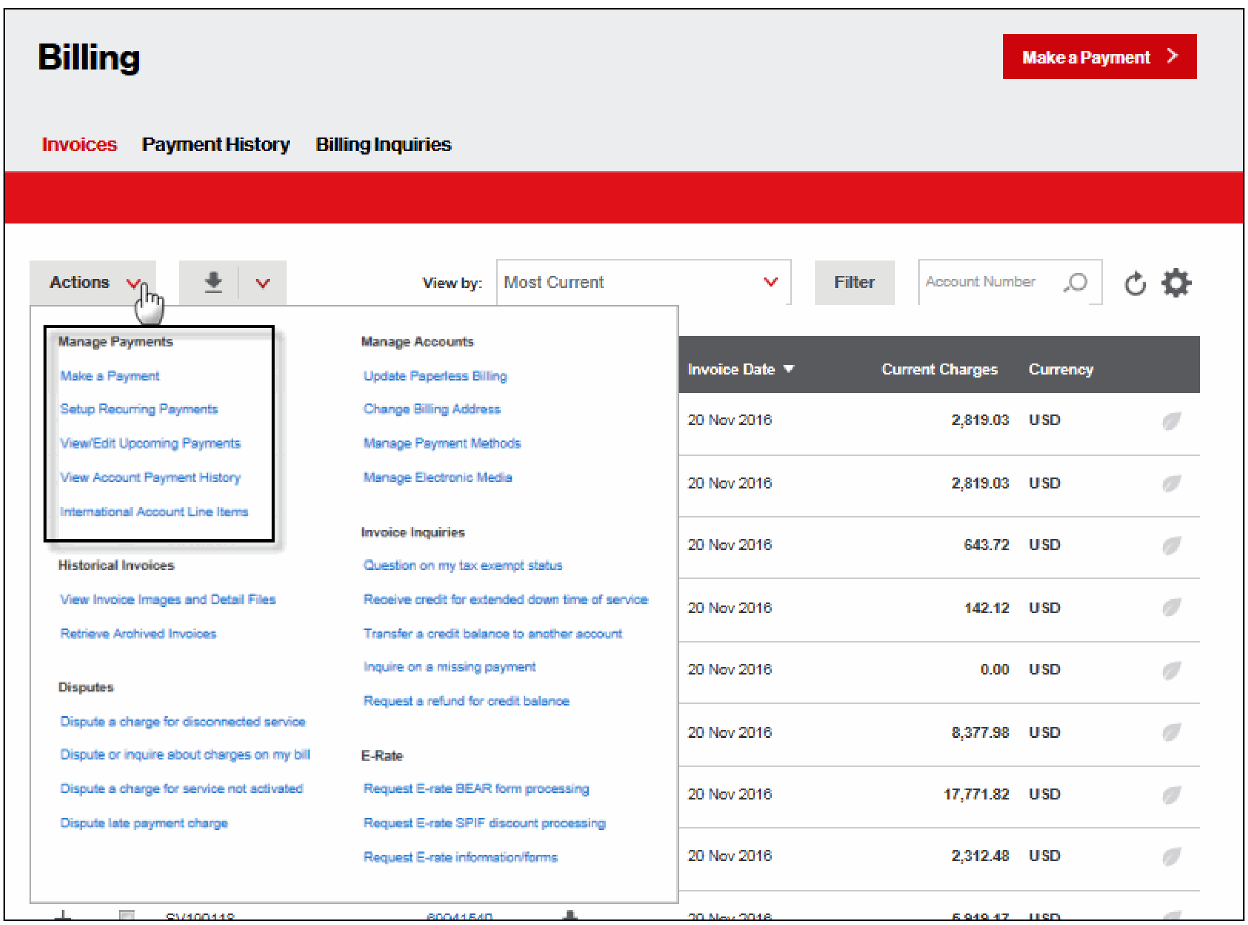

Figure 27 Access Payments

Manage Payment Methods

You can add bank accounts as well as credit/debit cards for making payments.

Click **Manage Account | Manage Payment Methods** at the top of the screen. The *Manage Payment Method(s)* screen appears listing any saved bank accounts or credit cards that were previously added.

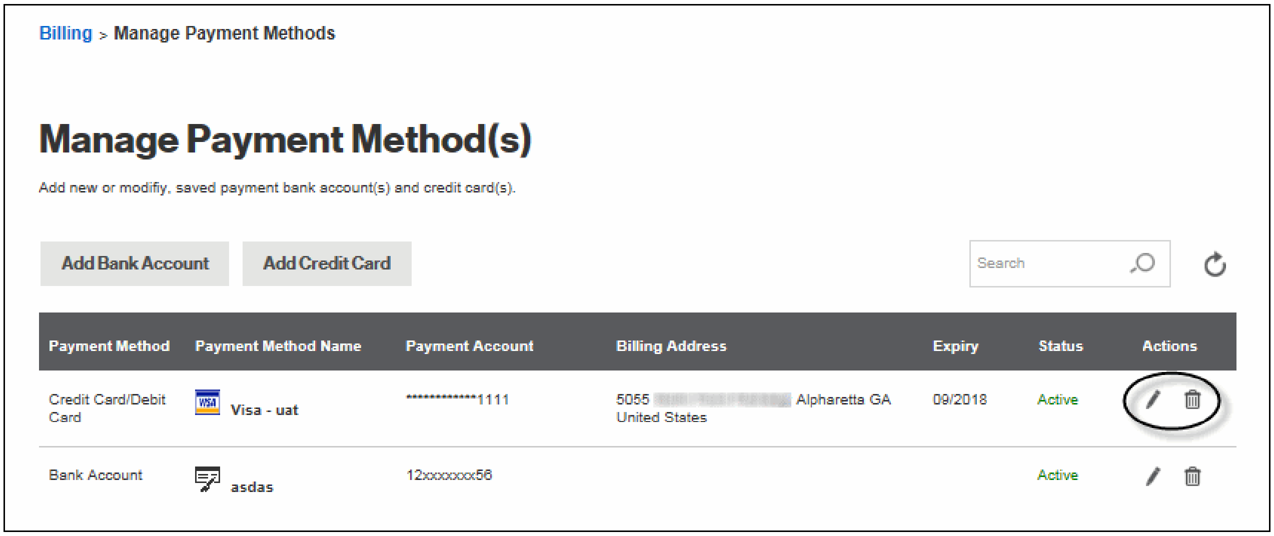

Figure 28 Manage Payment Method(s)

Add Bank Account

1. Click **Add Bank Account** on the *Manage Payment Method(s)* screen. The *Create a New Bank Account* screen appears.

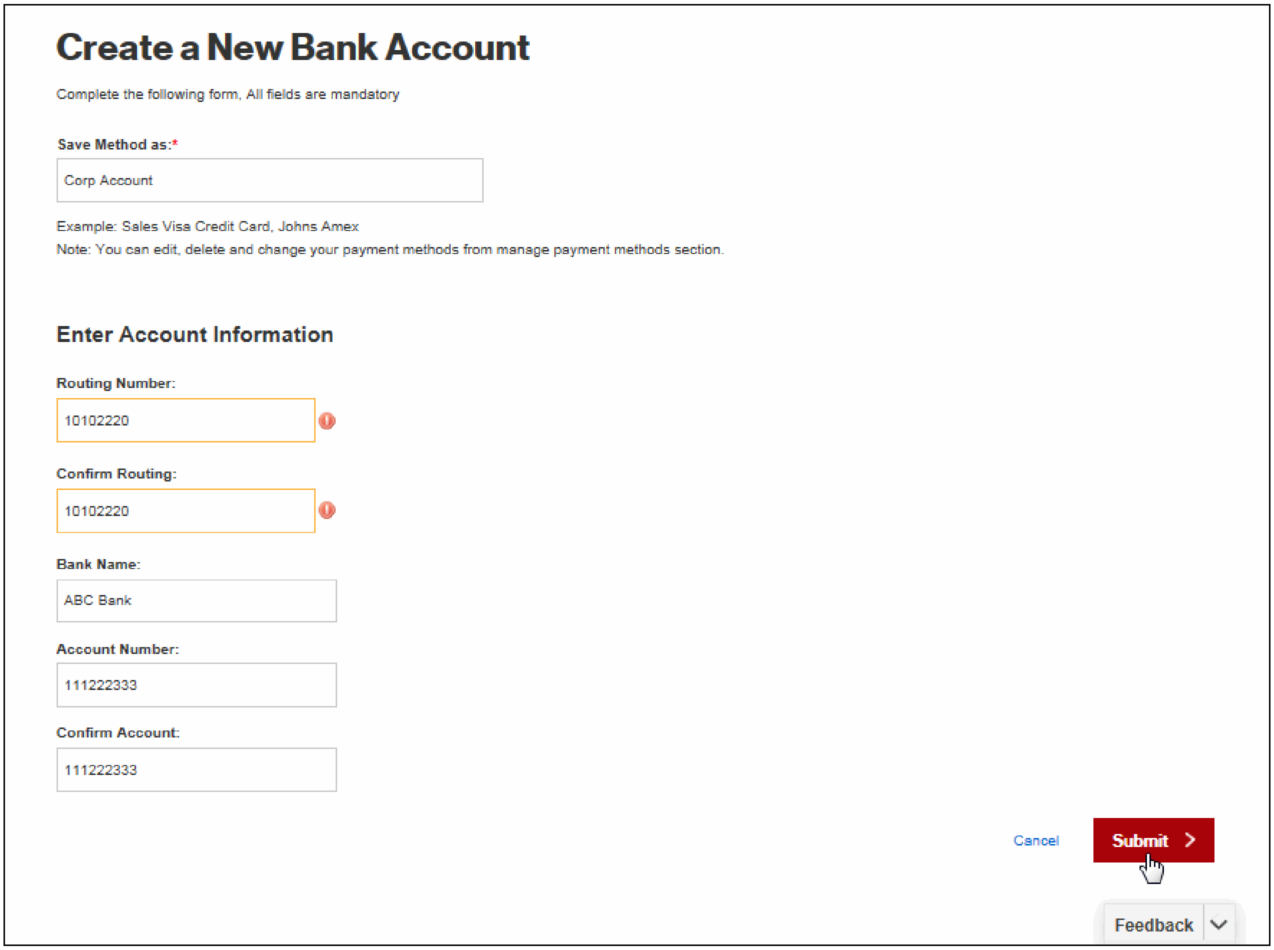

Figure 29 Create a New Bank Account

1. Enter a name that identifies the bank account in the *Save Method as* field.
2. Enter the *Routing Number*.
3. Confirm the routing number.
4. Enter the *Bank Name*.
5. Enter the *Account Number*.
6. Confirm the account number.
7. Click **Submit**. The system verifies that the routing number is accurate and the bank account is listed as a payment method.

Add Credit Card

1. Click **Add Credit Card** on the *Manage Payment Method(s)* screen. A form appears for you to enter credit card information.

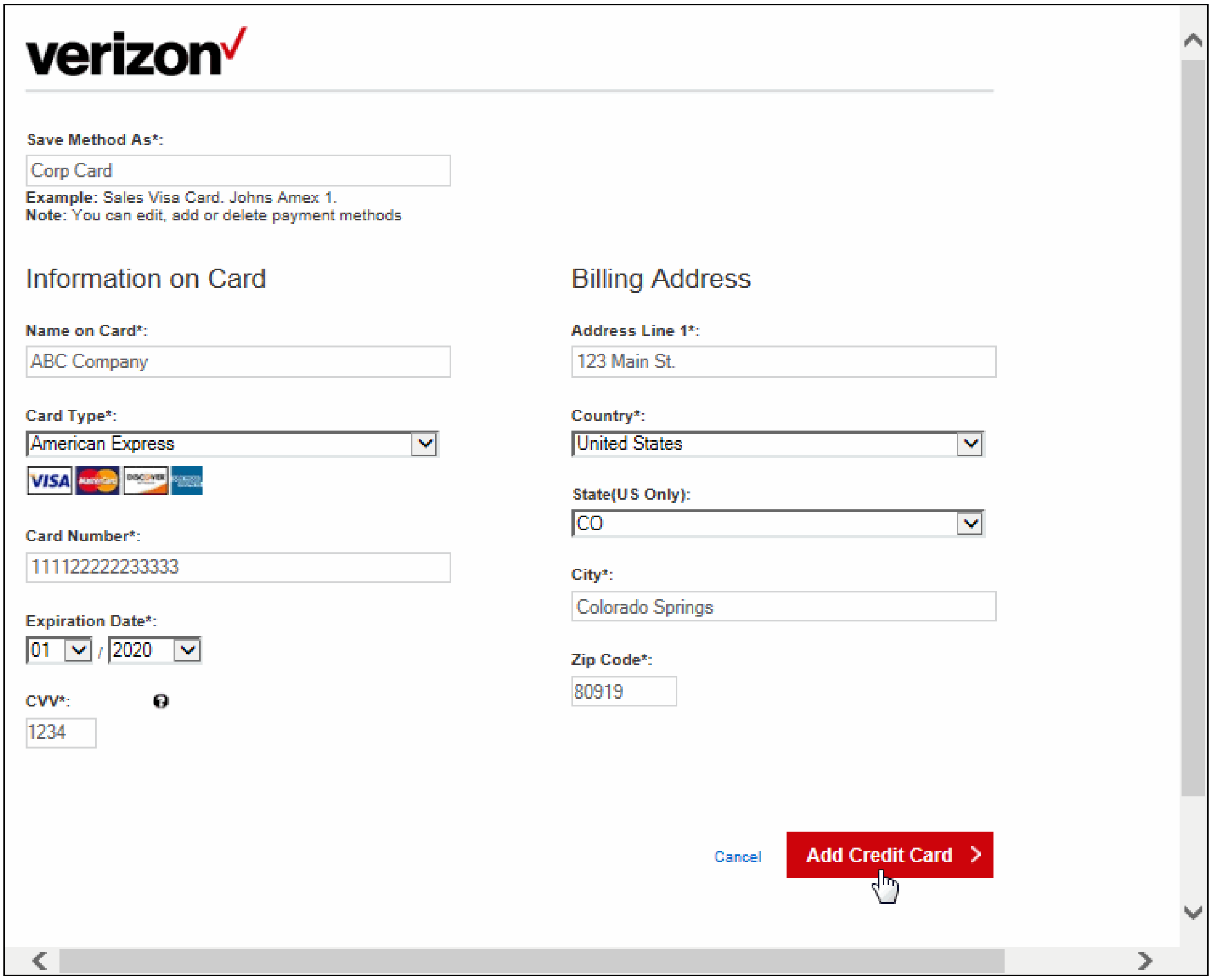

Figure 30 Add Credit Card

2. Complete all the fields to add a credit card.
3. Click **Add Credit Card**. The credit card is listed as a payment method.

Edit/Delete Payment Methods

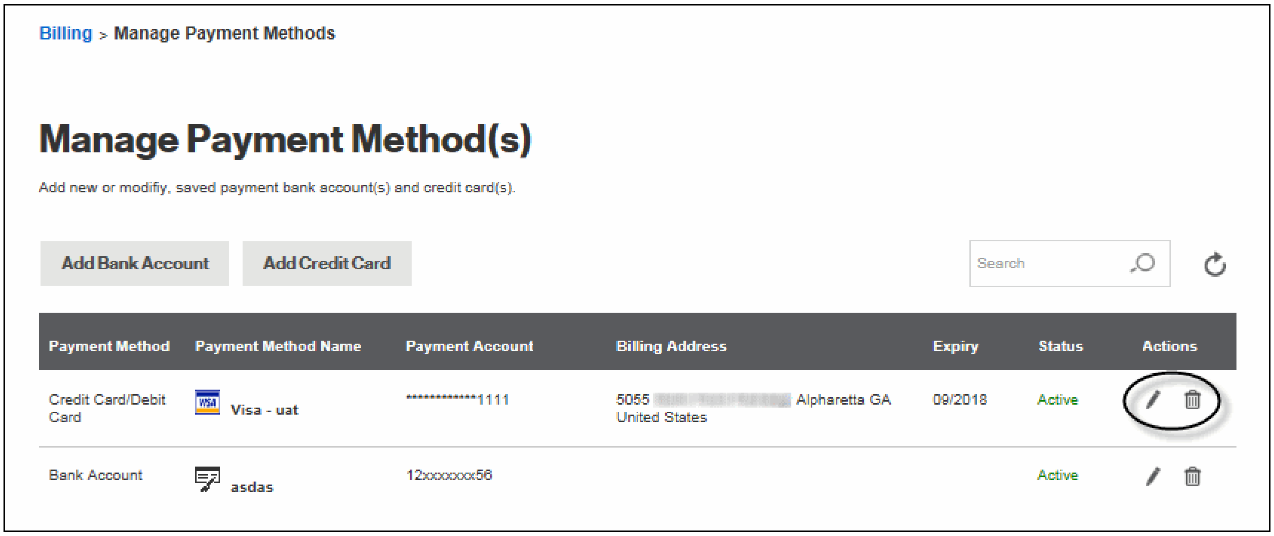

Figure 31 Manage Payment Method(s)

Click next to a bank account or credit card to edit the information.

-OR-

Click next to a bank account or credit card to delete it.

Make a Payment

You must first add an account in order to make payments (refer to Manage Payment Methods).

There are several different ways to be able to make a payment.

Select **Manage Account | Make a Payment** at the top of the screen.

-OR-

Click **Make a Payment** on the Billing home page or the *Summary Bill* screen.

-OR-

Click a payment option under *Payments* on the *Summary Bill* screen.

-OR-

Click **Actions** on the Billing home page and select an option under *Manage Payments*.

The *Make a Payment* screen appears.

Entitled to Less Than 10 Accounts

The following screens are an example of the payment process if you are entitled to less than 10 accounts.

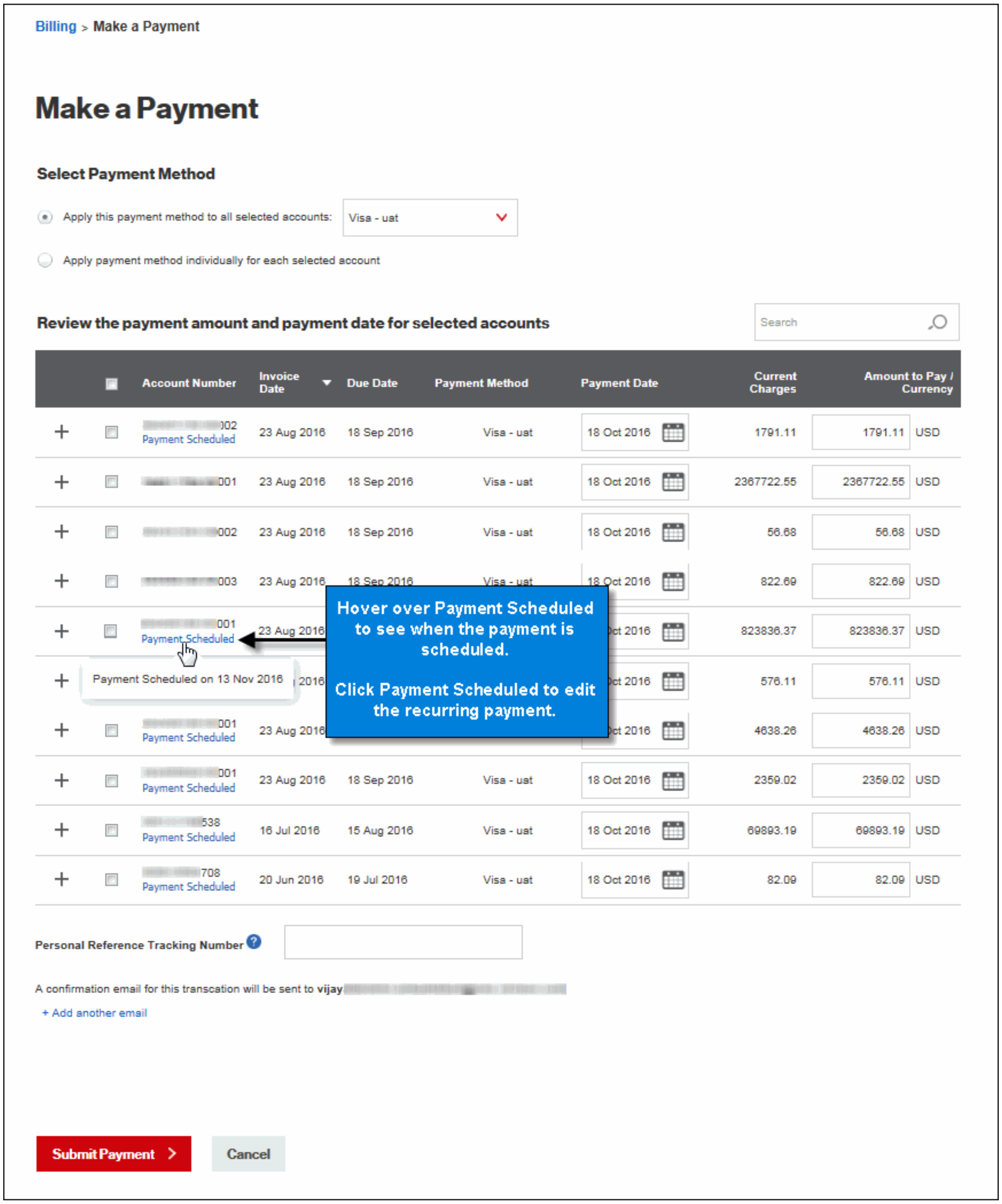

Figure 32 Make a Payment

1. Check **Apply this payment method to all selected accounts** and select a payment method from the drop-down list. Your selection is listed in the *Payment Method* column.

   -OR-

   Check **Apply this payment method individually for each selected account**, if applicable. You can select an option in the *Payment Method* column for each account number.

2. Start typing an account number you want to search for in the search field, if applicable. As you type, a list of matching account numbers display.

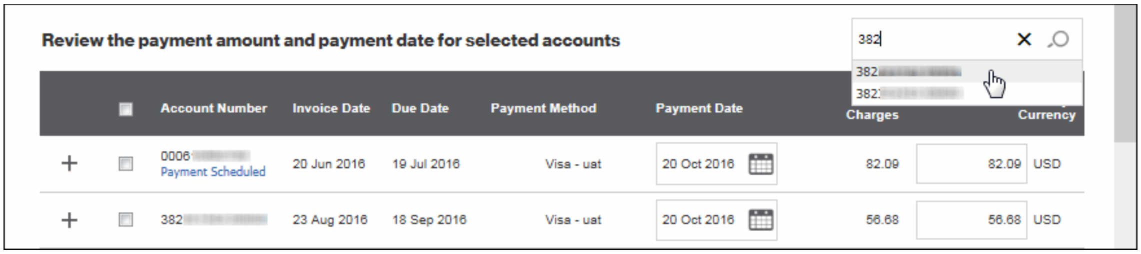

Figure 33 Make a Payment – Search

3. Select the account number you want.
4. Click . The current bill due for that account number is listed.
5. Click **+** next to an account to expand the details and review the payment amount and date.

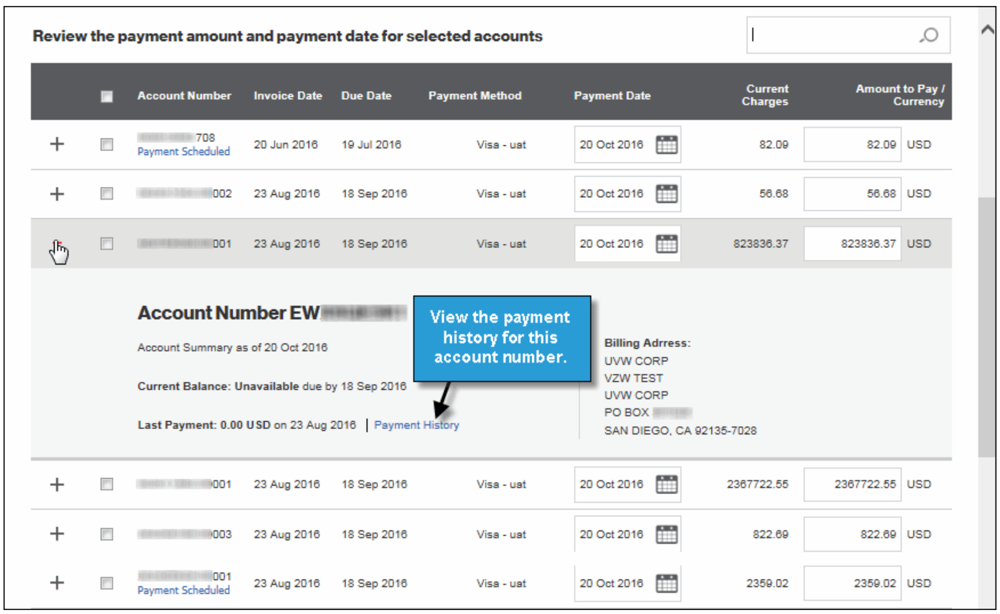

Figure 34 Make a Payment – Details

6. Click **Payment History** to view all the payments made for the selected account.
7. Select the date you want to make a payment in the *Payment Date* column. Note: There is a note to let you know if a payment has already been scheduled.
8. Enter the amount you want to pay for each account. The amount in the current charges field is the current balance. If your payment amount cannot be paid by credit card, it will not be eligible for a one-time payment. You will receive a pop-up message that you can either use a bank card, which will allow you to pay more than the limit, or you could set up a recurring payment that does not have that limitation.
9. Scroll to the bottom of the page when you are done and enter a *Personal Reference Tracking Number*, if applicable. The reference tracking number is displayed in the payment history.
10. Click **Add another email** if you want to add others to receive an email notification of the transaction.
11. Click **Submit Payment** to make your payment.

Entitled to More Than 10 Accounts

If you are entitled to more than 10 accounts you will see steps at the top of the *Make a Payment* screen. The first step shows the billed amount, and the second step retrieves the real time balances for the selected accounts.

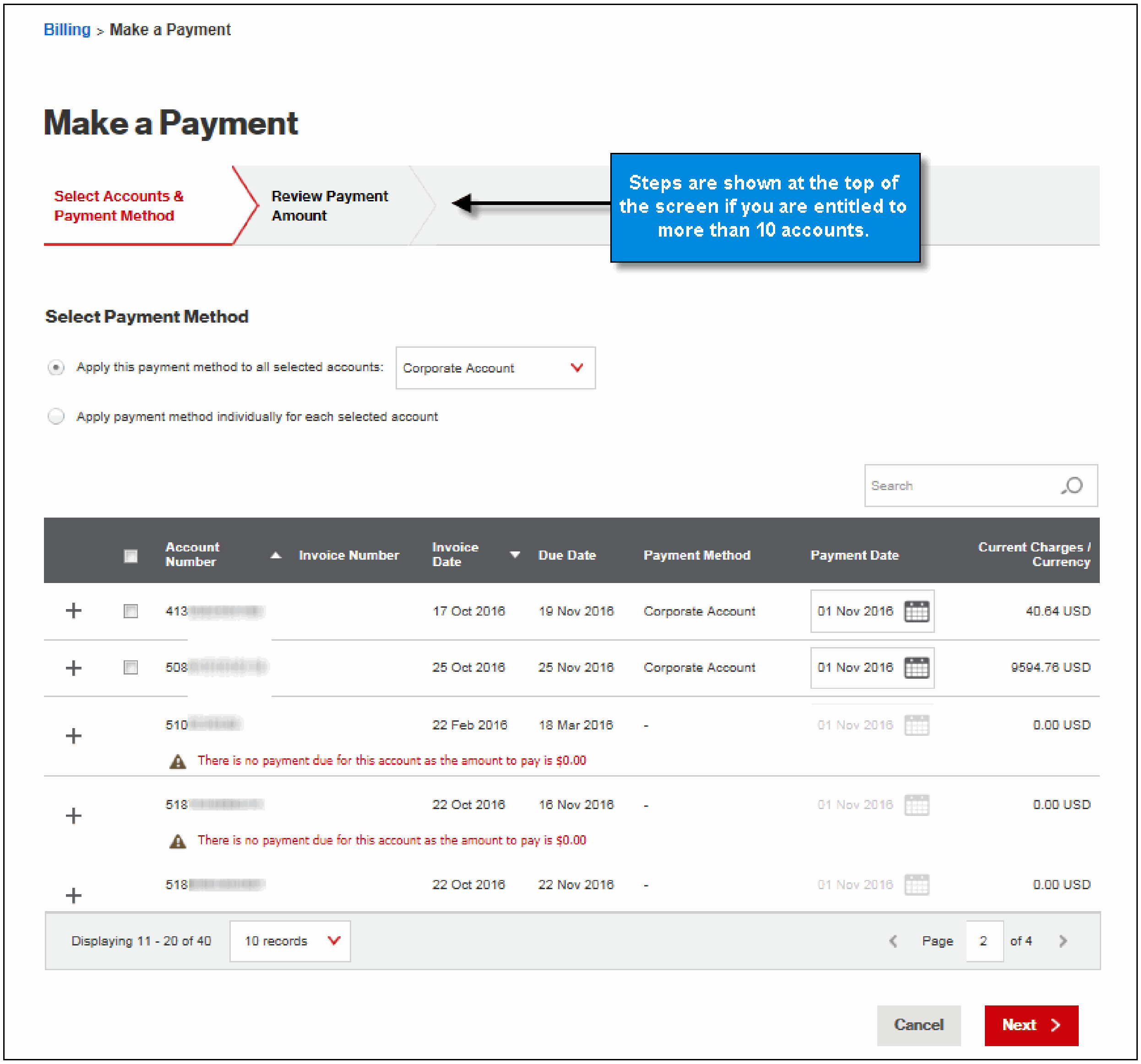

Figure 35 Make a Payment

1. Check **Apply this payment method to all selected accounts** and select a payment method from the drop-down list. Your selection is listed in the *Payment Method* column.

   -OR-

   Check **Apply this payment method individually for each selected account**, if applicable. You can select an option in the *Payment Method* column for each account number.

2. Start typing an account number you want to search for in the search field, if applicable. As you type, a list of matching account numbers display.

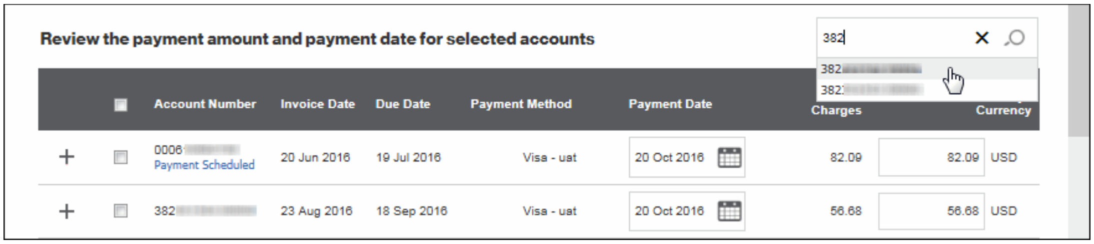

Figure 36 Make a Payment – Search

3. Select the account number you want.
4. Click 🔍. The current bill due for that account number is listed.
5. Click **+** next to an account to expand the details and review the payment amount and date.

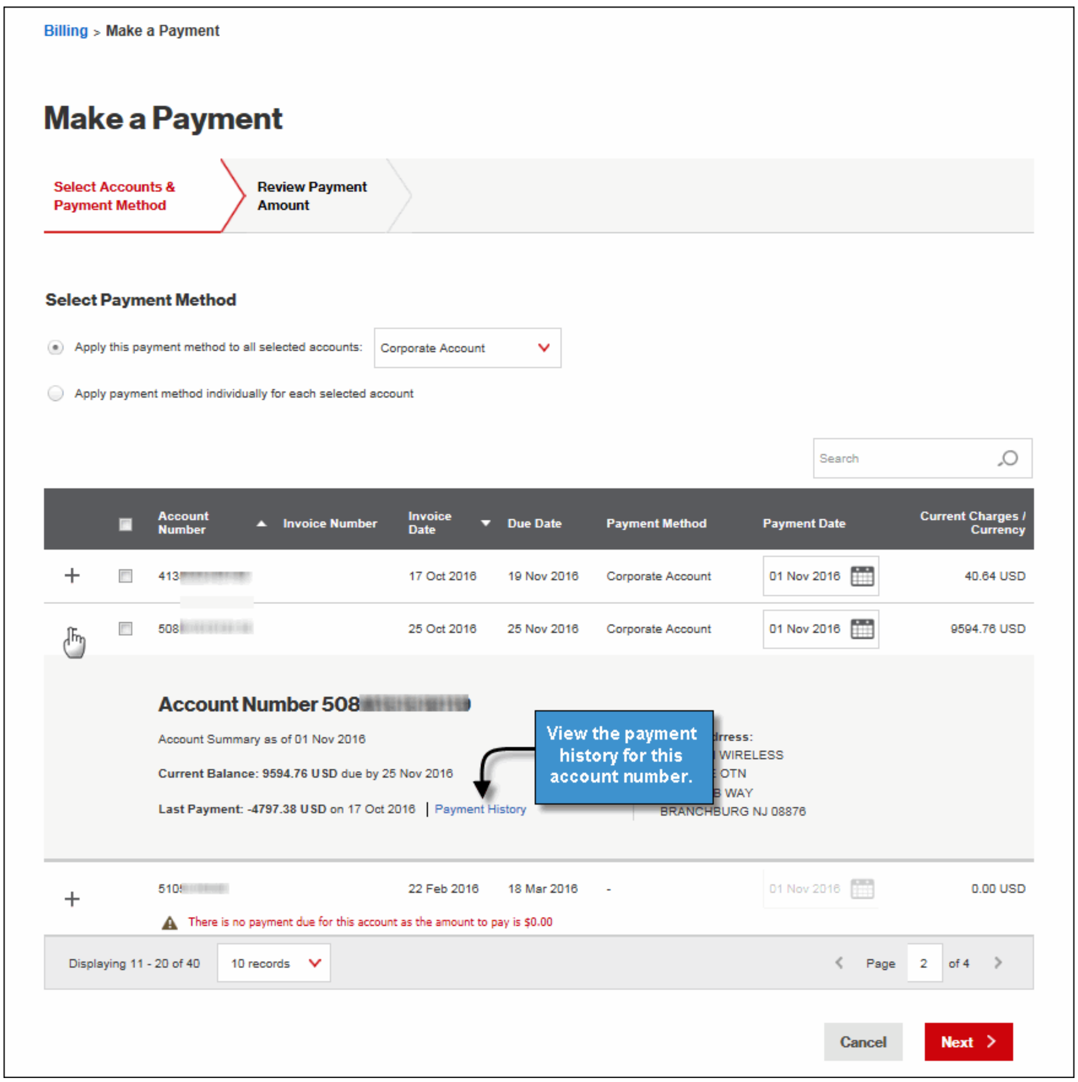

Figure 37 Make a Payment – Details

6. Click **Payment History** to view all the payments made for the selected account.

7. Select the date you want to make a payment in the *Payment Date* column. Note: There is a note to let you know if a payment has already been scheduled.
8. Enter the amount you want to pay for each account. The amount in the current charges field is the current balance. If your payment amount cannot be paid by credit card, it will not be eligible for a one-time payment. You will receive a pop-up message that you can either use a bank card, which will allow you to pay more than the limit, or you could set up a recurring payment that does not have that limitation.
9. Scroll to the bottom of the page when you are done and enter a *Personal Reference Tracking Number*, if applicable. The reference tracking number is displayed in the payment history.
10. Click **Add another email** if you want to add others to receive an email notification of the transaction.
11. Click **Next**. The *Review Payment Amount* screen appears.

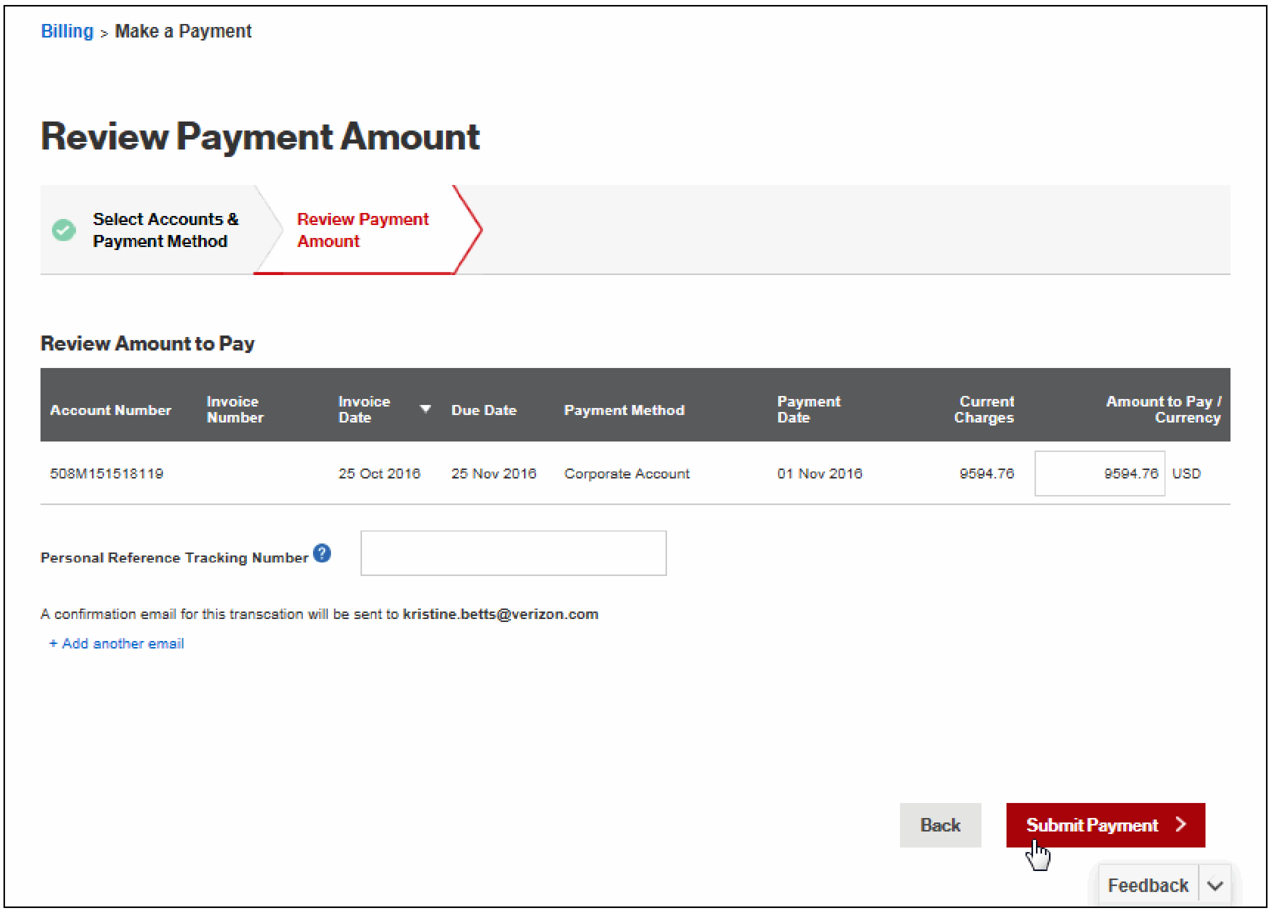

Figure 38 Review Payment Amount

12. Review the payment amount for the accounts you selected.
13. Click **Add another email** if you want someone else to be notified of the transaction, if applicable.
14. Click **Submit Payment** to make your payment.

Payment History

You can view previous payments from any page in the Billing tool. You have the same functions that you have when viewing invoices. You can download, select the columns you want to view, and filter.

Click **Payment History** on the Billing home page.

-OR-

Click **Payment History** on the *Billing Inqu*iries screen.

-OR-

Click **Actions** on the Billing home page and select **View Account Payment History**.

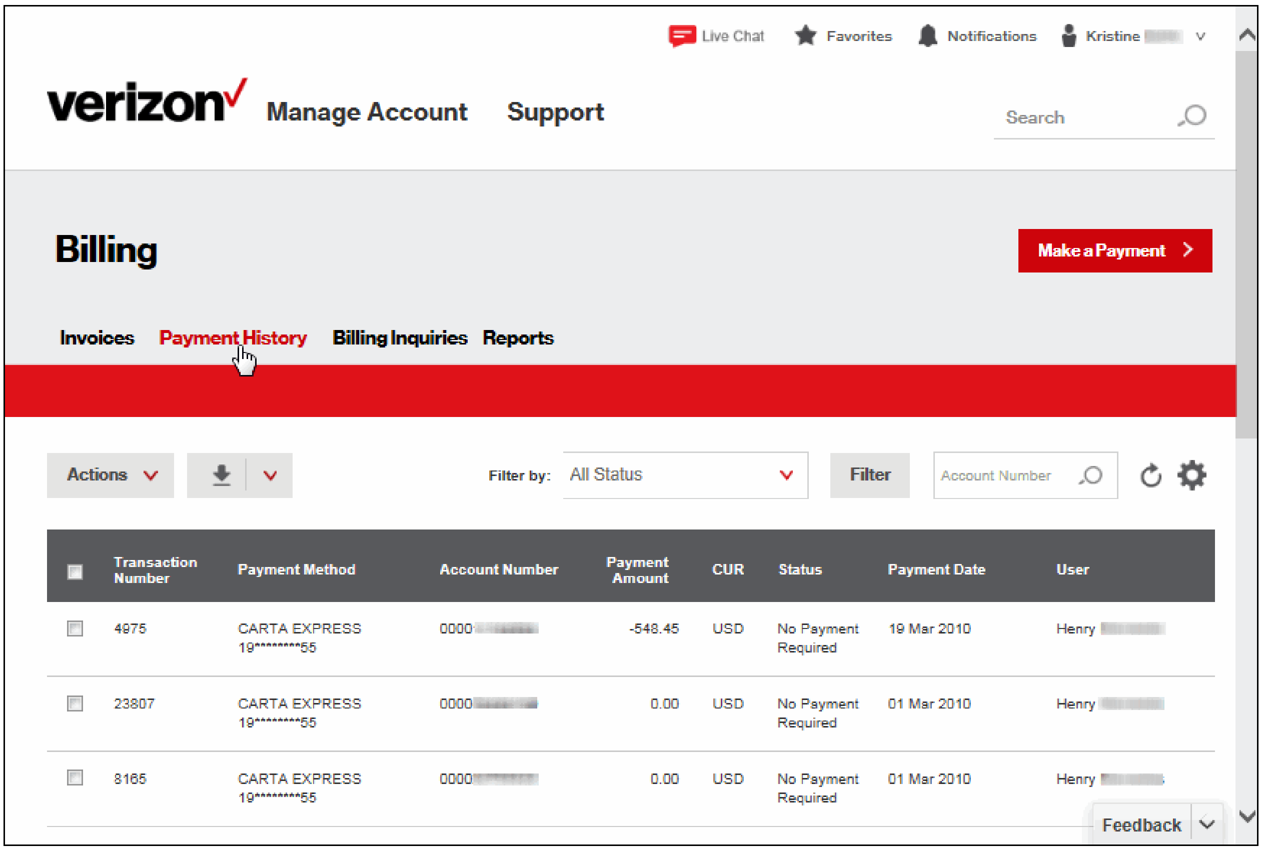

Figure 39 Payment History

Billing Inquiries

You can initiate a bill inquiry or dispute if you find a discrepancy on your bill or if you have a question about an invoice. You can then view those inquiries you submitted and track the progress.

Click **Manage Account | View Billing Inquiries** at the top of the screen.

-OR-

Click **Actions** on the Billing home page to access *Invoice Inquiries* and *Disputes*.

-OR-

Click **Billing Inquiries** on the toolbar on the *Billing* screen.

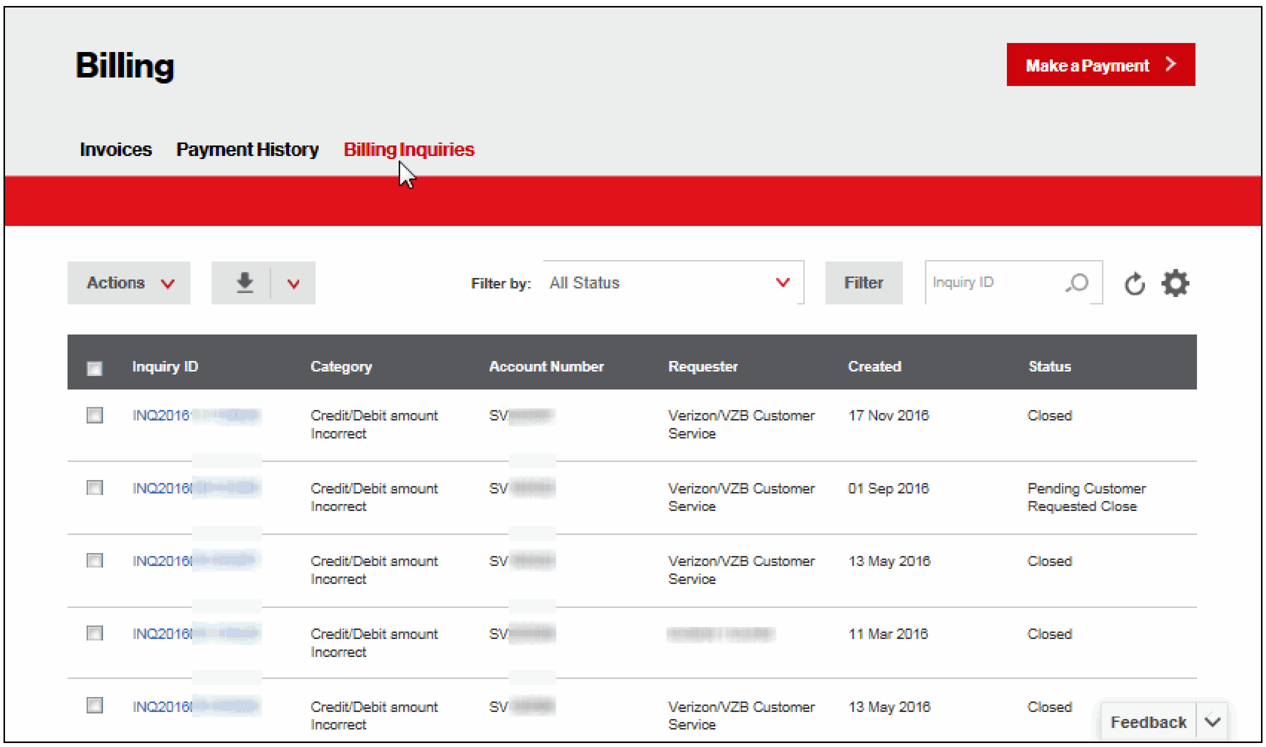

Figure 40 Access Inquiries & Disputes

Reasons for Creating an Inquiry

The following table lists the reasons for creating an invoice inquiry:

Request an Action	Disagree with a Charge or Payment
Receive a copy of an invoice	Charge for inactivated service
Change the billing address	Charge for service still being installed
Change the point of contact or authorized user for an account	Charge for unusable service due to inactivated hub location
Go paperless	Charge from an unauthorized carrier
Receive credit for extended down time of service	Charge for disconnected service
Receive refund for credit balance	Tax charge but company is tax exempt
Transfer a credit balance to another account	Charged twice for same service
Cancel a contract or service agreement	Late payment charge
Payment not reflected on invoice	Unrecognized charge
Payment applied to incorrect account	Service rate does not match expectation
	Service rate does not match contracted rate
	Promotional price, rate or credit not reflected on invoice
	Incorrect credit or debit adjustment

Submit an Inquiry

1. Click **Actions** on the Billing home page. A pop-up appears with actions you can perform.

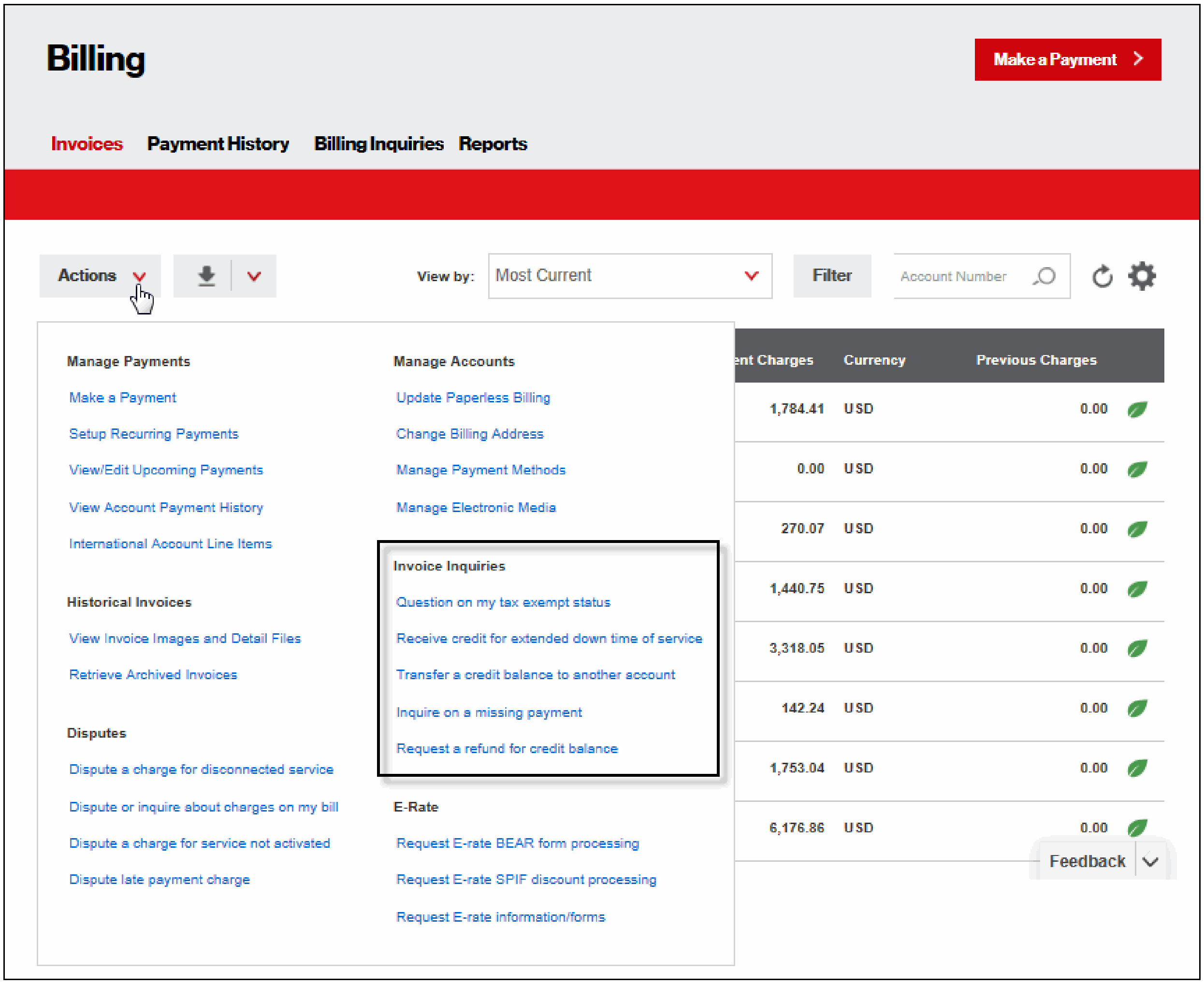

Figure 41 Invoice Inquiries

2. Select the inquiry you want to submit.
3. Enter the account number.
4. Click . The details you need to provide to submit an inquiry depends on the option you choose.

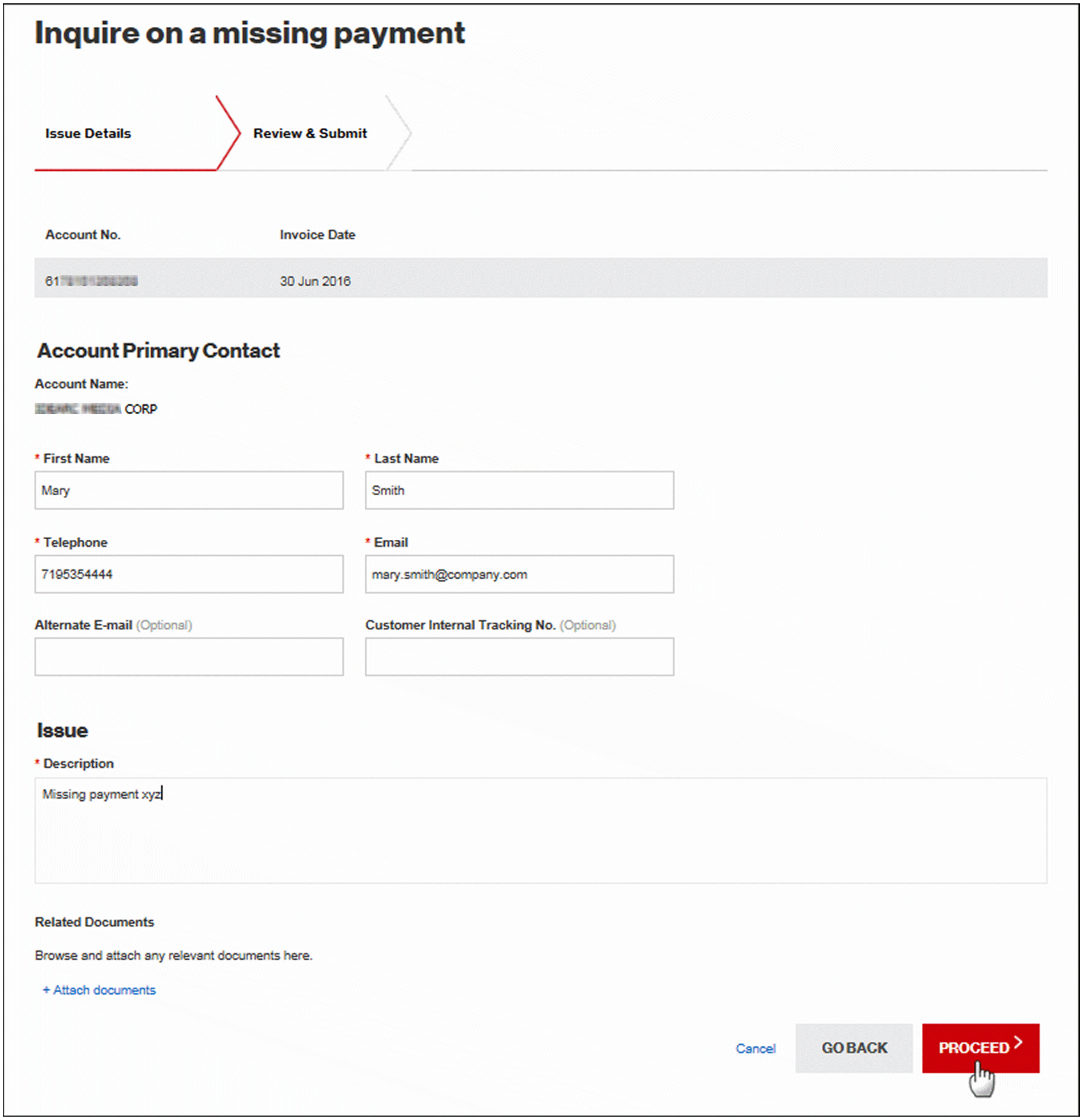

Figure 42 Create an Inquiry

5. Enter the relevant information pertaining to your inquiry.
6. Click **PROCEED**. The *Review & Submit* screen appears.
7. Click **SUBMIT**.

View Billing Inquiries

You can view your inquiries and track the progress. You have the same functions that you have when viewing invoices. You can download, select the columns you want to view, and filter.

1. Click **Manage Account | View Billing Inquiries** at the top of the screen.

   -OR-

   Click **Actions** on the Billing home page to access *Invoice Inquiries and Disputes*.

   -OR-

   Click **Billing Inquiries** at the top of the screen.

2. Click on an **Inquiry ID** to view the details of the inquiry. The inquiry detail screen appears.

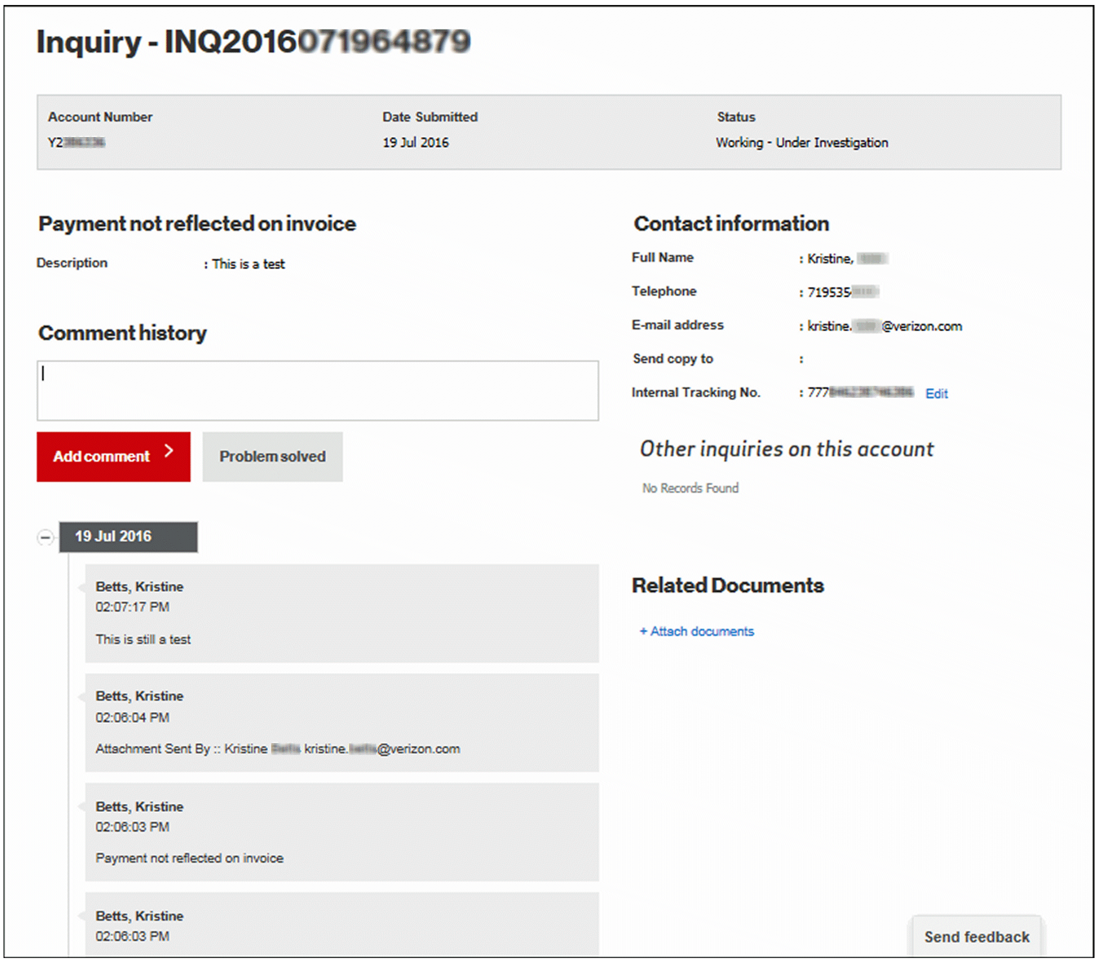

Figure 43 Inquiry Detail

3. Click an inquiry number to view other inquiries on this account.

   -OR-

   For *Working* inquiries, click **Add Comment** to add comments to the inquiry, if applicable.

   -OR-

   Click **Problem solved** if the issue was resolved and you want to cancel the inquiry.

Submit a Dispute

You can view pending disputes for the bill you are viewing or from the Invoice Inquiries screen if there is a tracking number. Disputes are created by a Verizon account representative based on a billing inquiry submitted by a customer. Approved claims typically appear on the invoice as a credit adjustment between two and three billing cycles from the date the issue is received by bill inquiry. This depends on complexity of the issue and calculating the correct claim amount. Some claims can take up to 10 -12 months; however most are resolved within 60 days.

1. Click **Actions** on the Billing home page. A pop-up appears with actions you can perform.

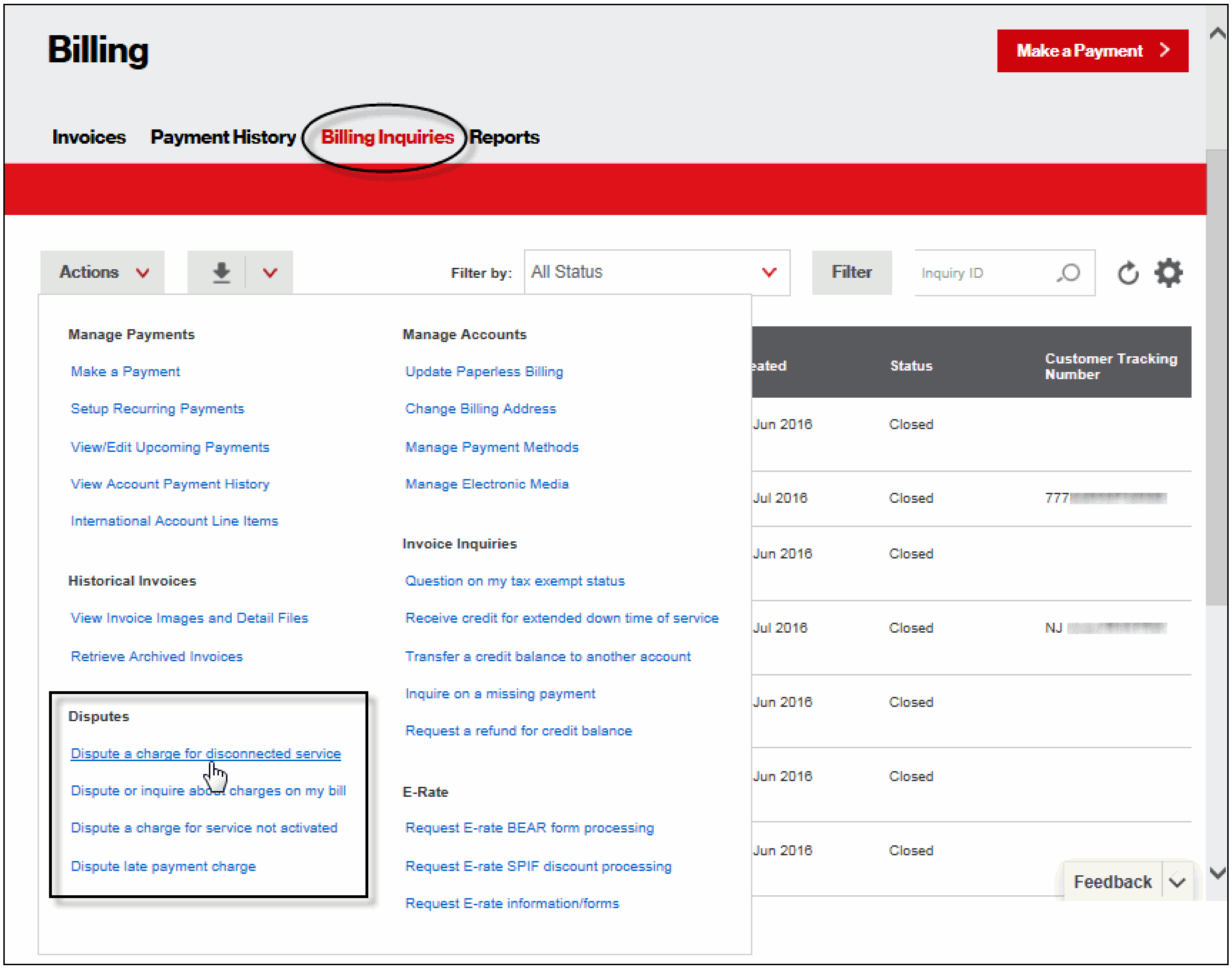

Figure 44 Submit a Dispute

2. Select the type of dispute you want to submit.
3. Enter the account number.
4. Click 🔍. The *Dispute Details* screen appears.

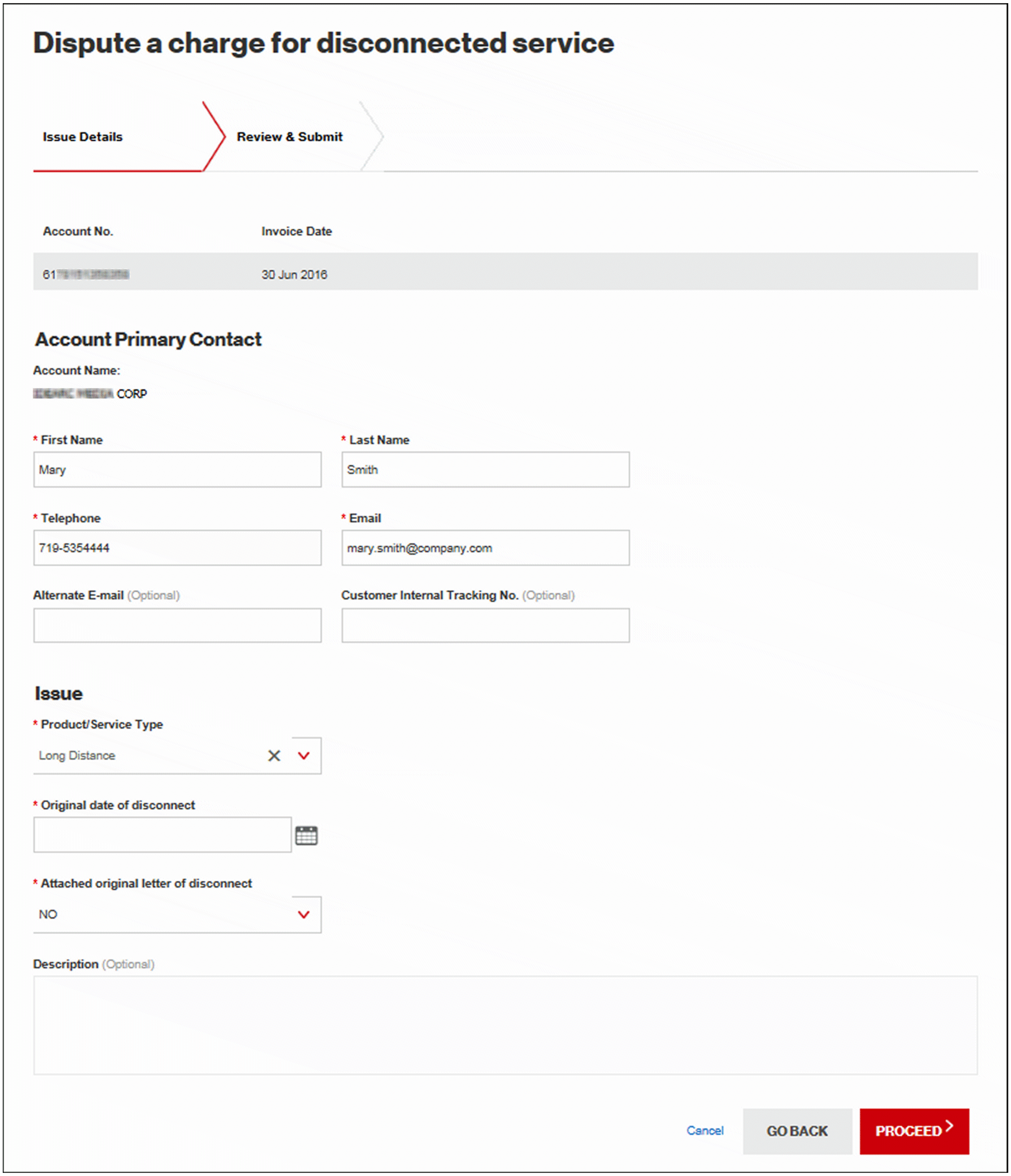

Figure 45 Dispute Details

5. Enter the details of your dispute.
6. Click **Proceed** to review and submit.

Quick Tasks

You can create an inquiry using *Quick Tasks* on the *Account Login* screen without having to sign in.

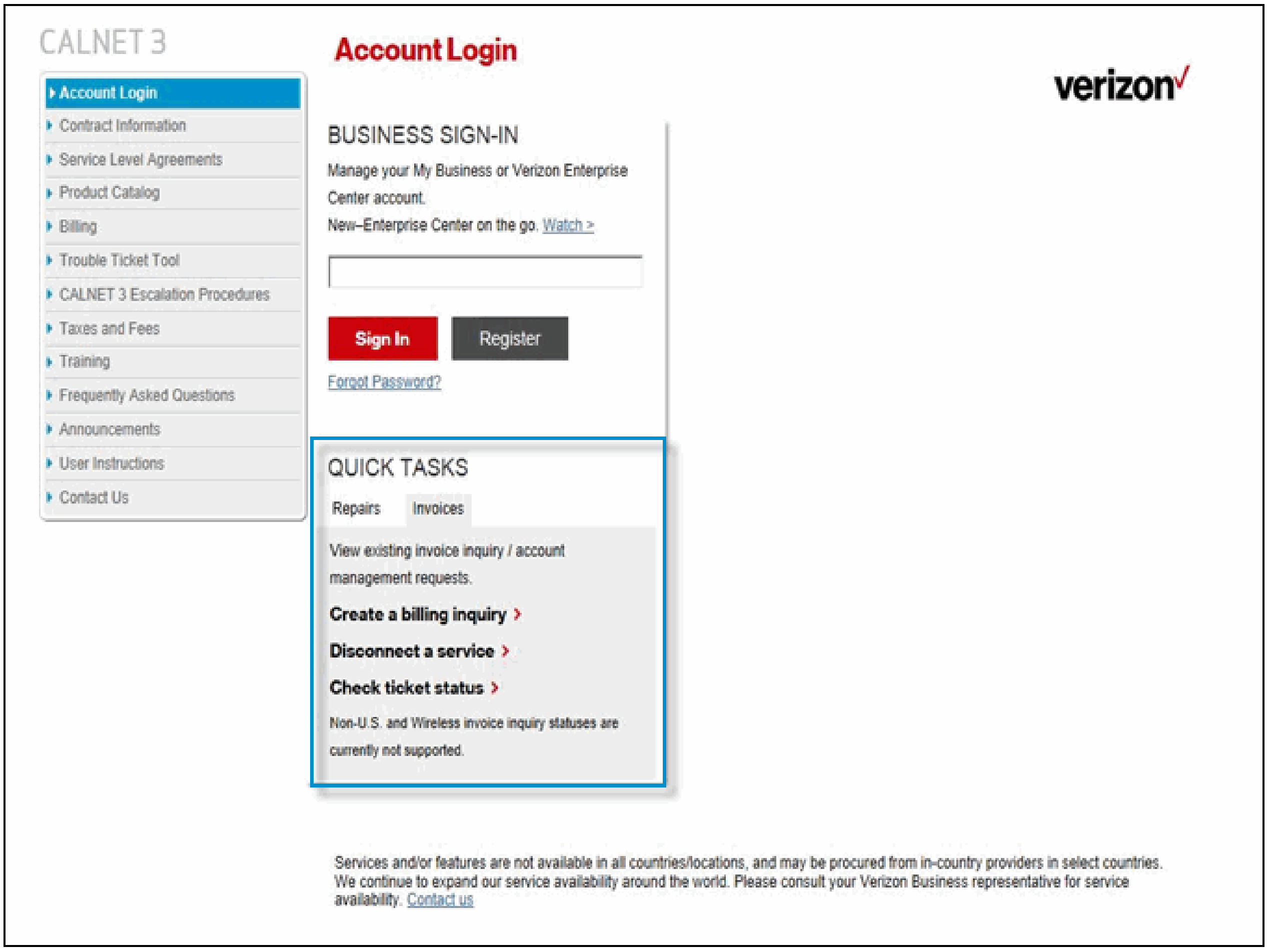

Figure 46 Account Login

Select one of the following options:

- **Create a billing inquiry** - a billing inquiry is a request for information, clarification, or correction on an invoice. Submitting a billing inquiry online eliminates the need to call the help desk and saves time. You can create an inquiry without logging in.
- **Disconnect a service** - you can submit a request to disconnect service without logging in. Refer to the Disconnect Services User Guide for more information.
- **Check ticket status** - view the status, who opened the inquiry, comments about the issue, and any other inquiries on this account.

  Note: A billing inquiry is used in the following example.

Create a Billing Inquiry

A billing inquiry is a request for information, clarification, or correction on an invoice.

1. Click **Create a billing inquiry** under *Quick Tasks* on the *Account Login* screen. The *Invoice Inquiry/Account Management* pop-up appears.

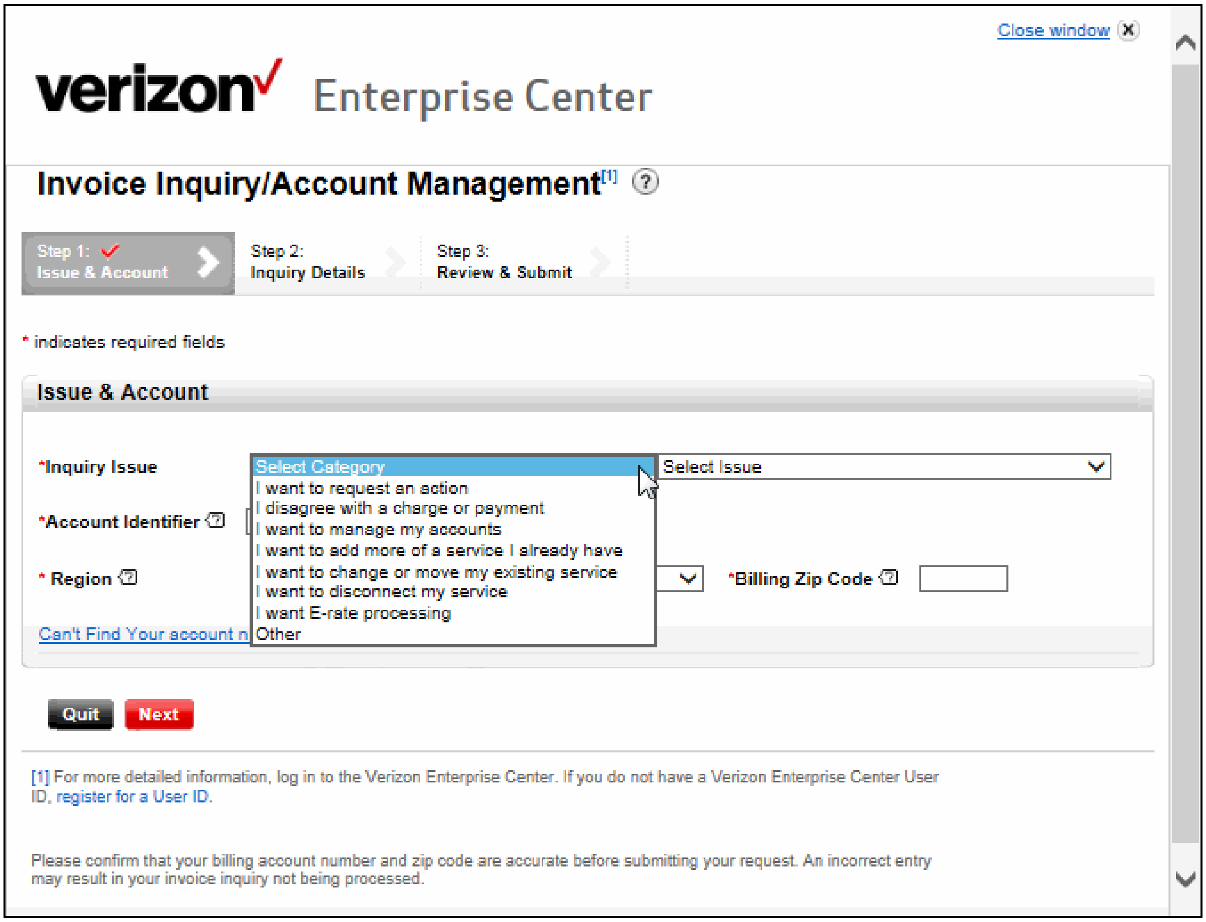

Figure 47 Issue & Account

2. Select the *Inquiry Issue* category and issue from the drop-down lists.
3. Enter the *Account Identifier*. It can be a billing account number, telephone number, circuit ID, group account number, bill payer ID, summary account number, or corporate ID.
4. Select the *Region* in where the services are billed: **In the U.S.**, **Outside the U.S.**
5. Enter the *Billing Zip Code*. You can find the billing zip code on your invoice.
6. Click **Next**. The *Inquiry Details* screen appears.

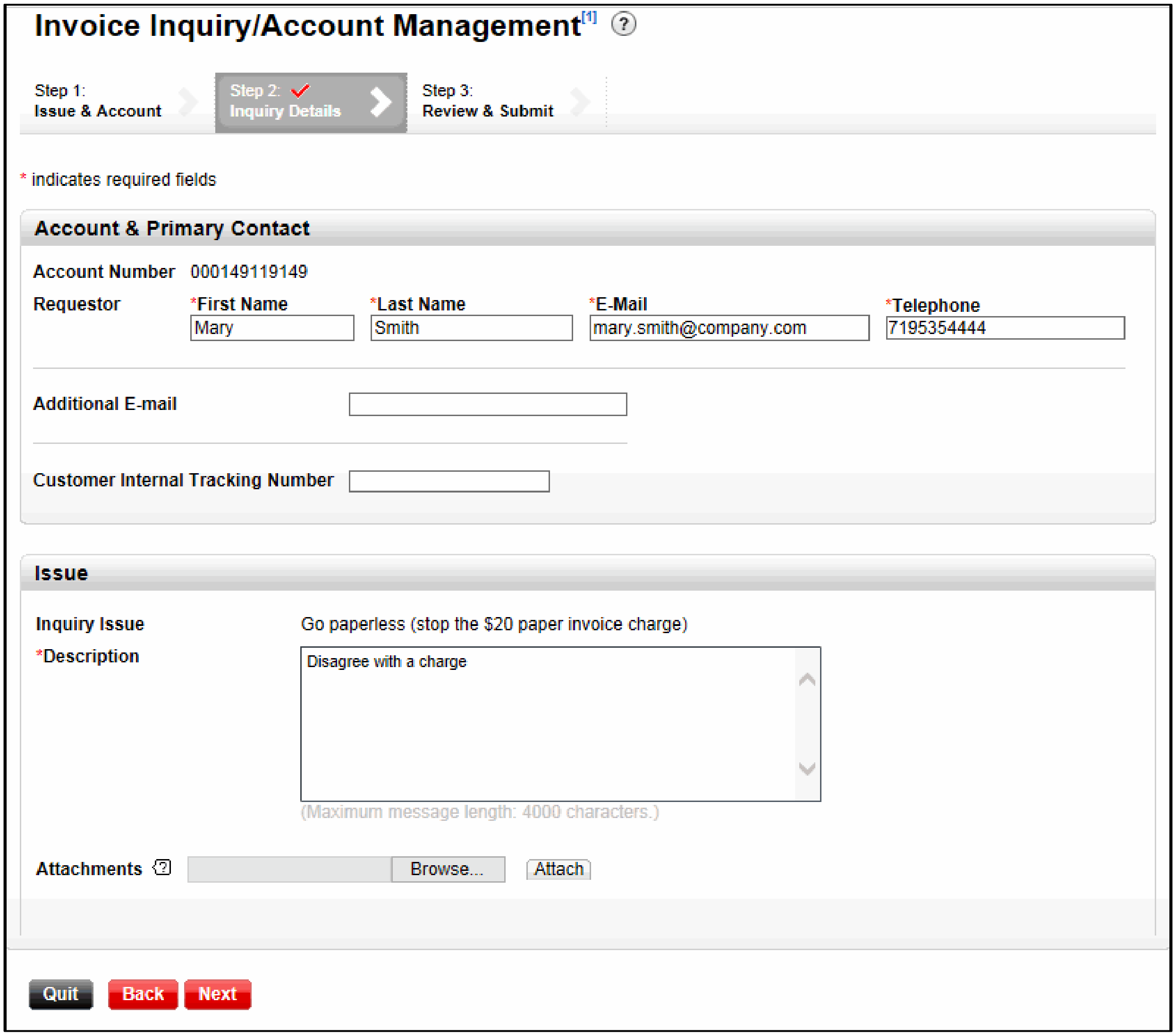

Figure 48 Inquiry Details

7. Enter the *Requestor information*: **First Name**, **Last Name**, **E-Mail**, **Telephone**.
8. Enter an *Additional E-mail*, if applicable.
9. Enter an internal tracking number, if applicable.
10. Enter a brief description of the inquiry.
11. Add an attachment, if applicable.
12. Click **Next**. The *Review & Submit* screen appears.

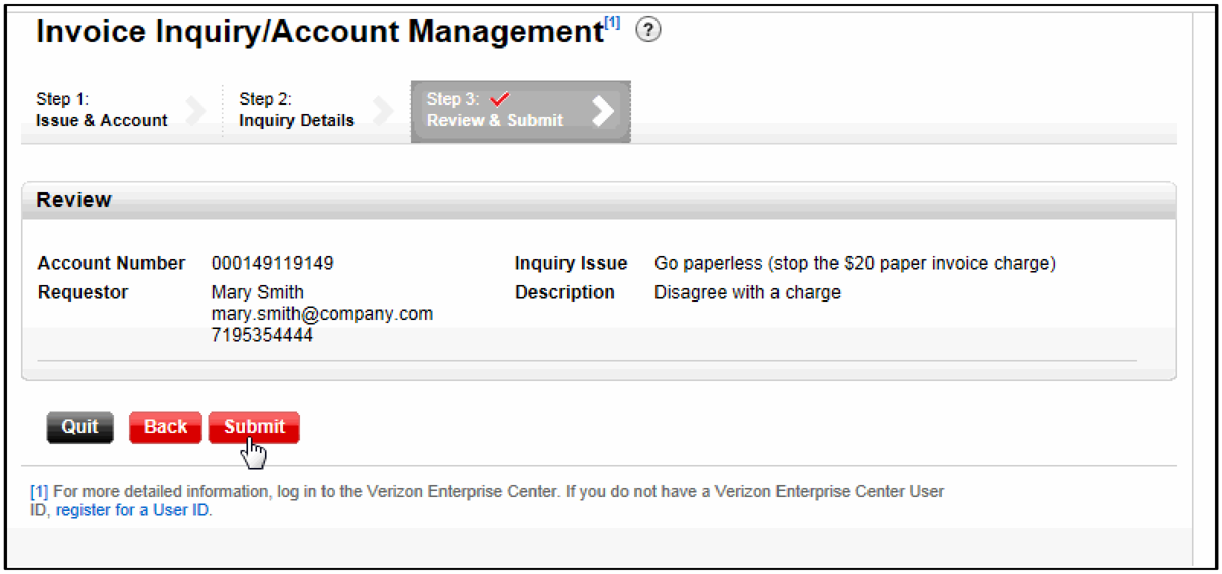

Figure 49 Review & Submit

13. Review the information.
14. Click **Submit**. A confirmation appears.

If you need to register your account, click **Have an Invitation Code** or **Don't Have an Invitation Code** at the bottom of the screen. Refer to the Registration and Log In Process in the Calnet 3 Verizon Enterprise Center Overview User Guide for more information on registering for the Verizon Enterprise Center.

Click **Create Another Inquiry** at the bottom of the screen if you need to submit another inquiry.

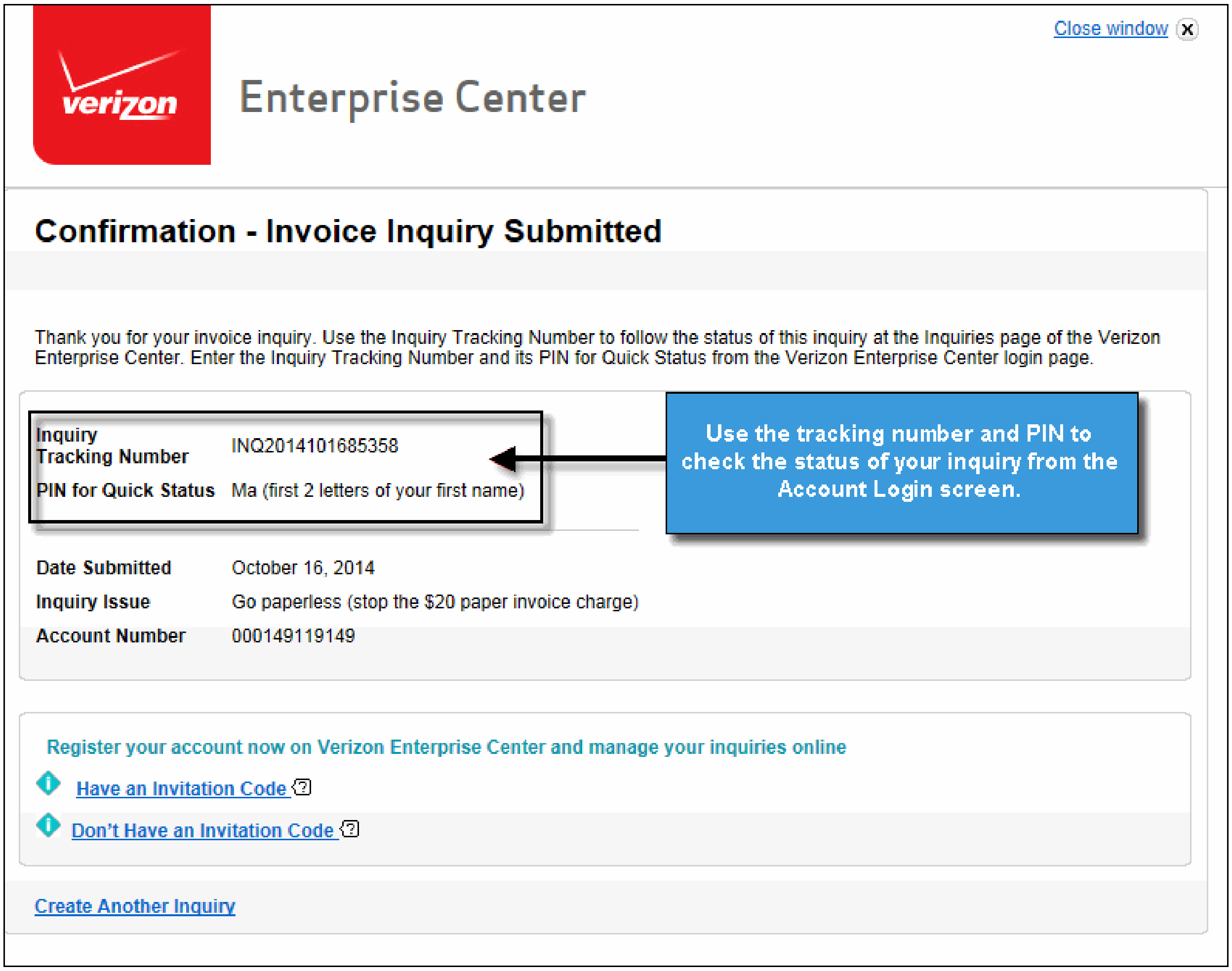

Figure 50 Confirmation - Invoice Inquiry Submitted

Reports

You can view bill reports for a single account or multiple accounts. You can also schedule to view a report at a later date, as well as schedule recurring monthly reports. Create a Reporting Structure if you want to view reports for a certain account or group of accounts.

Not all reports are available for all invoices. Some reports give you the option to filter for certain types of information, such as the Summary of Current Charges report that enables you to sort by Provider, Summary Account/Provider, Type of Charge, or type of Charge and Provider.

Select **Manage Account | Reports** at the top of the screen.

-OR-

Click **Reports** on the Billing toolbar at the top of the screen.

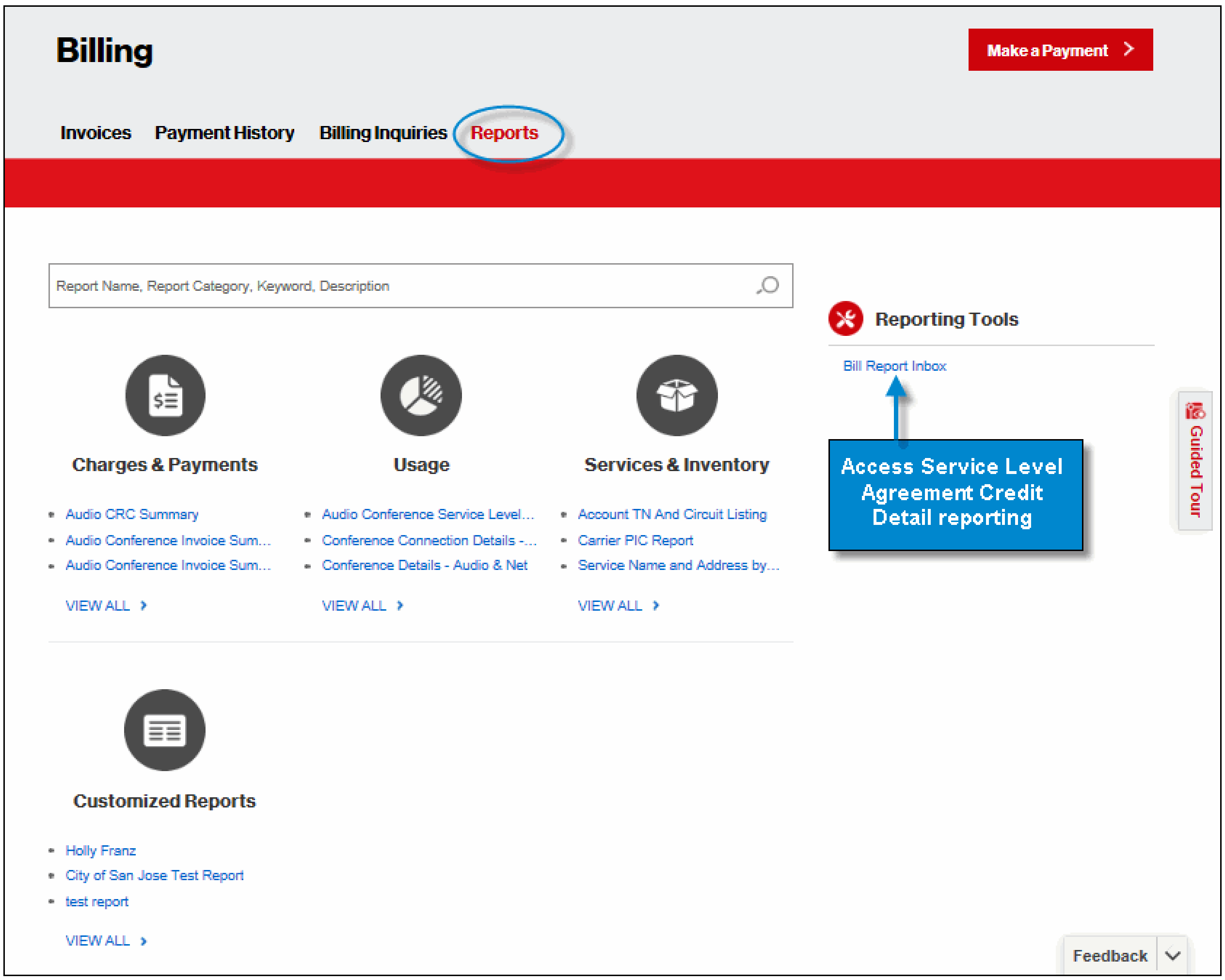

Figure 51 Reports

Standard Reports

You can run standard reports by category.

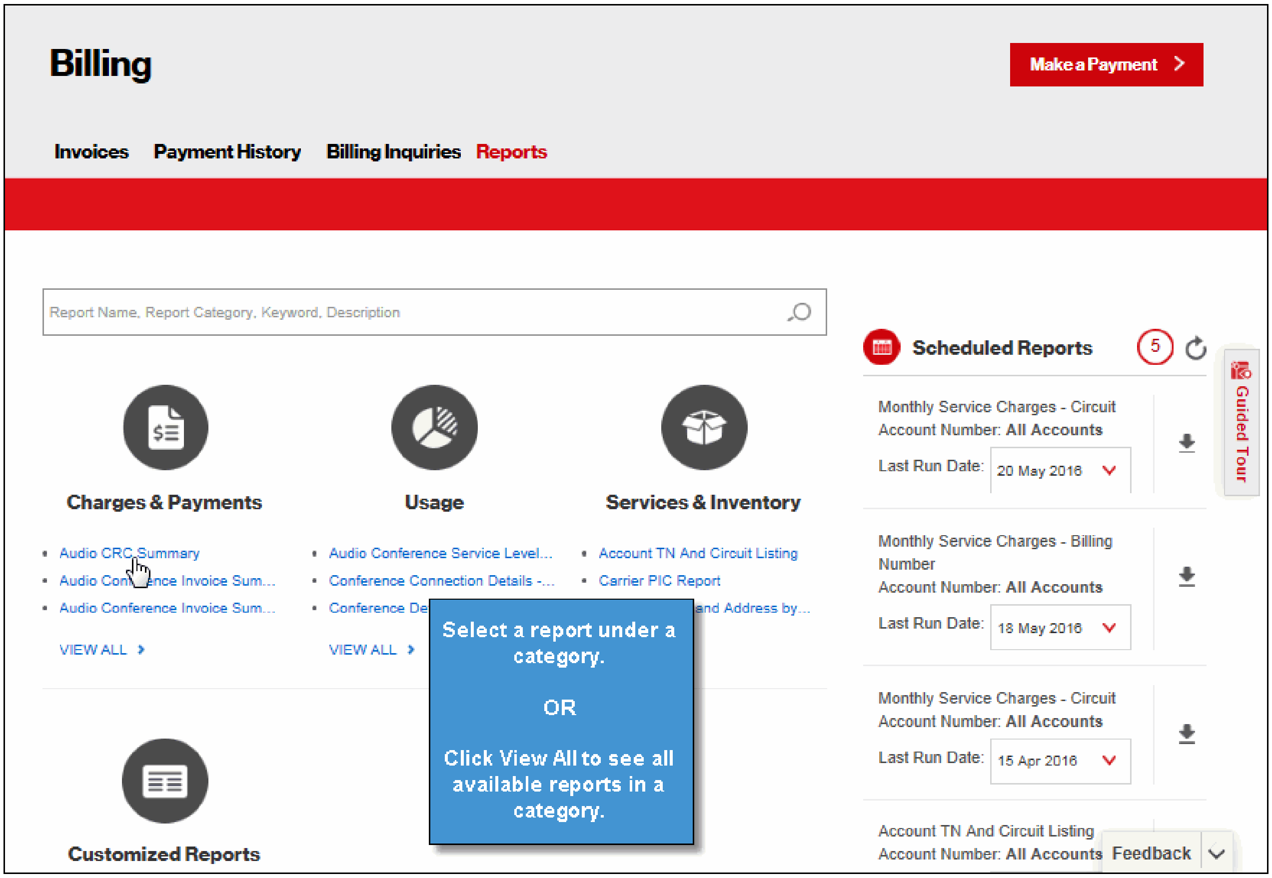

Figure 52 Standard Reports

1. Click a report name under a category to run the report (see example in Figure 40).

   -OR-

   Click **VIEW ALL** to a list of all standard reports under a category. Figure 39 shows a list of standard reports available in the *Charges & Payments* category.

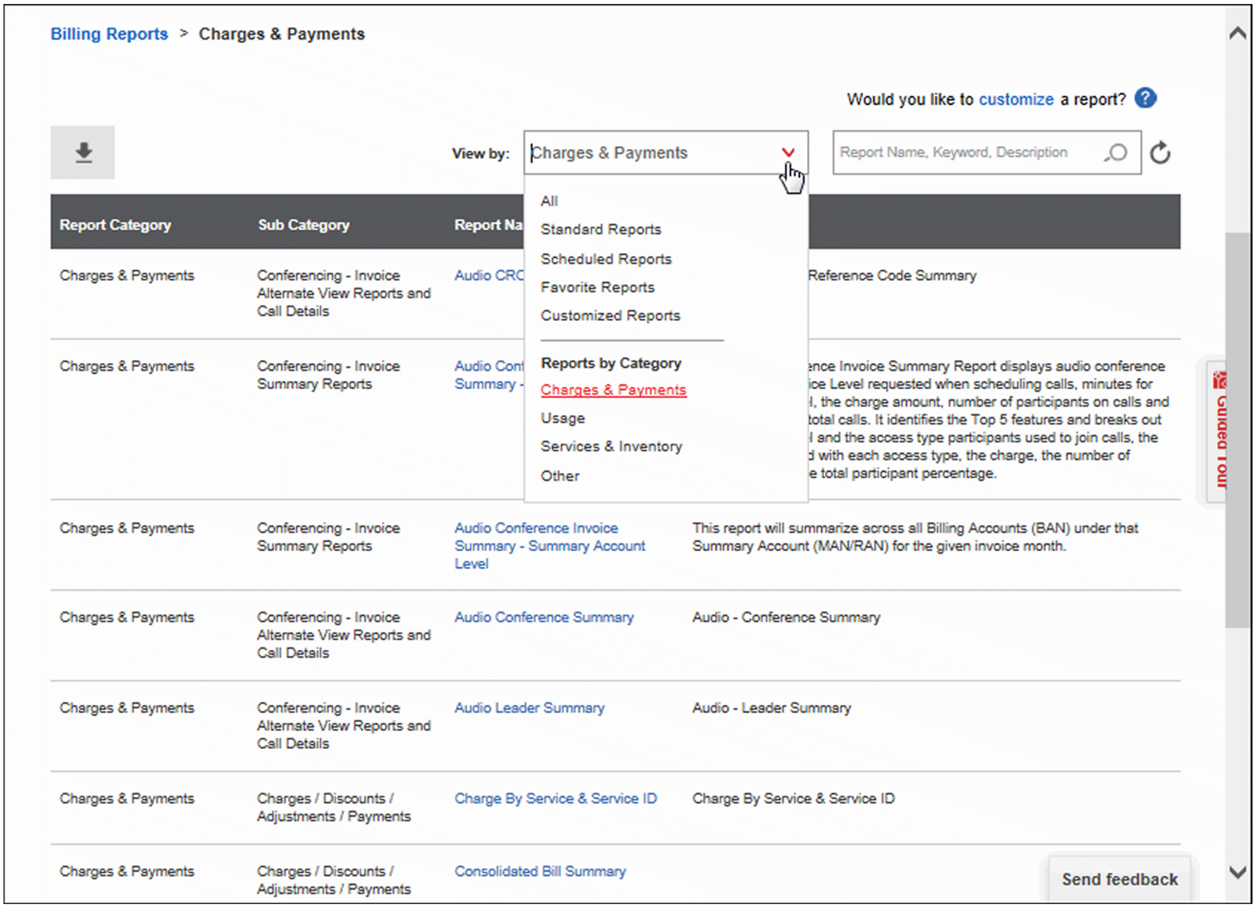

Figure 53 Charges & Payments Reports

2. Select a *View By* option, if applicable:
   - **All**
   - **Standard Reports**
   - **Scheduled Reports**
   - **Customized Reports**
   - **Reports by Category**: Charges & Payments, Usage, Services & Inventory, Other
3. Search by a report name, key word, or description.
4. Click on a **Report Name** to run the report. Figure 40 shows the *Audio Conference Invoice Summary - Account Level* report.

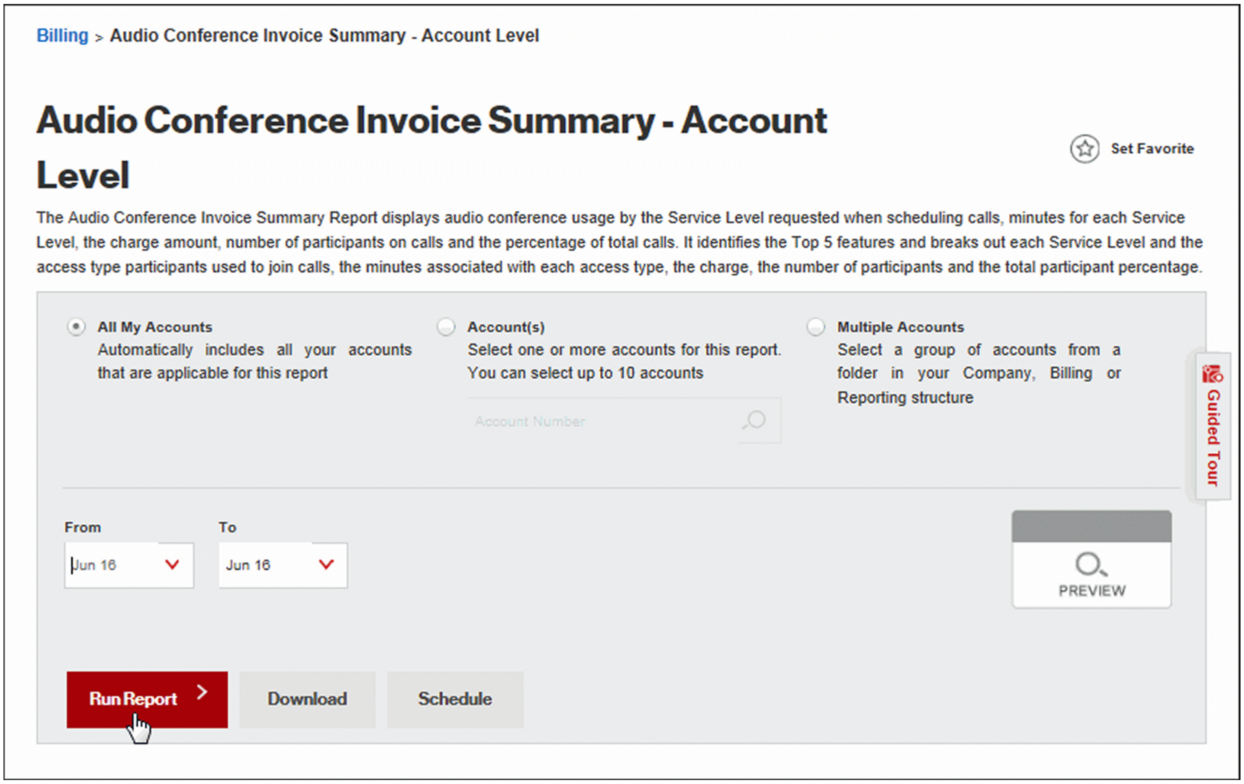

Figure 54 Run Report

5. Select **All My Accounts** to include all of your accounts applicable to this report.

   -OR-

   Select **Account(s)** to select up to 10 accounts for this report.

   -OR-

   Select **Multiple Accounts** to select a group of accounts from your Company, Billing, or Reporting Structure.

   Select the date range.

6. Click **Run Report** to run the report immediately.

   -OR-

   Click **Download** to receive an email when your report is ready and accessible from the Download Center (next page).

   -OR-

   Click **Schedule** to schedule it for a date in the future or schedule it has a recurring report.

Download

You are notified via email when your request is complete. You can then retrieve your invoice by clicking the link in your email or going directly to the Download Center.

1. Click **Download**. Your request is submitted and the Invoices home page appears.
2. Click on your name in the top right corner of the screen.
3. Click **Download Center**. The *Download Center* screen appears.

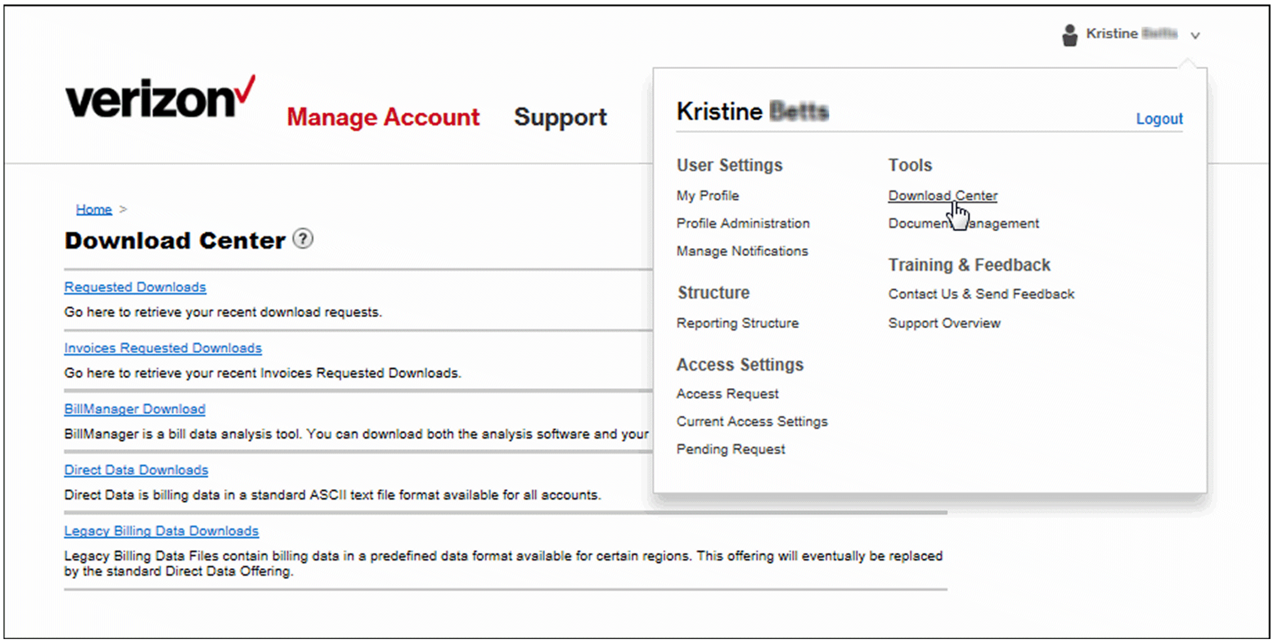

Figure 55 Download Center

4. Click **Requested Downloads** to retrieve your recent download requests.

   Note: If the number of items in a drop-down menu exceeds 50, a Select Another link to a selection page appears instead of a drop-down menu.

5. Select a *Summary Account Number* from the drop-down list.
6. Select a *Summary Bill Date* from the drop-down list.
7. Select an *Account Number* from the drop-down list.
8. Select the *Bill Date* from the drop-down list.
9. Click **Download** to download the report.

Customized Reports

You can customize any of the standard reports.

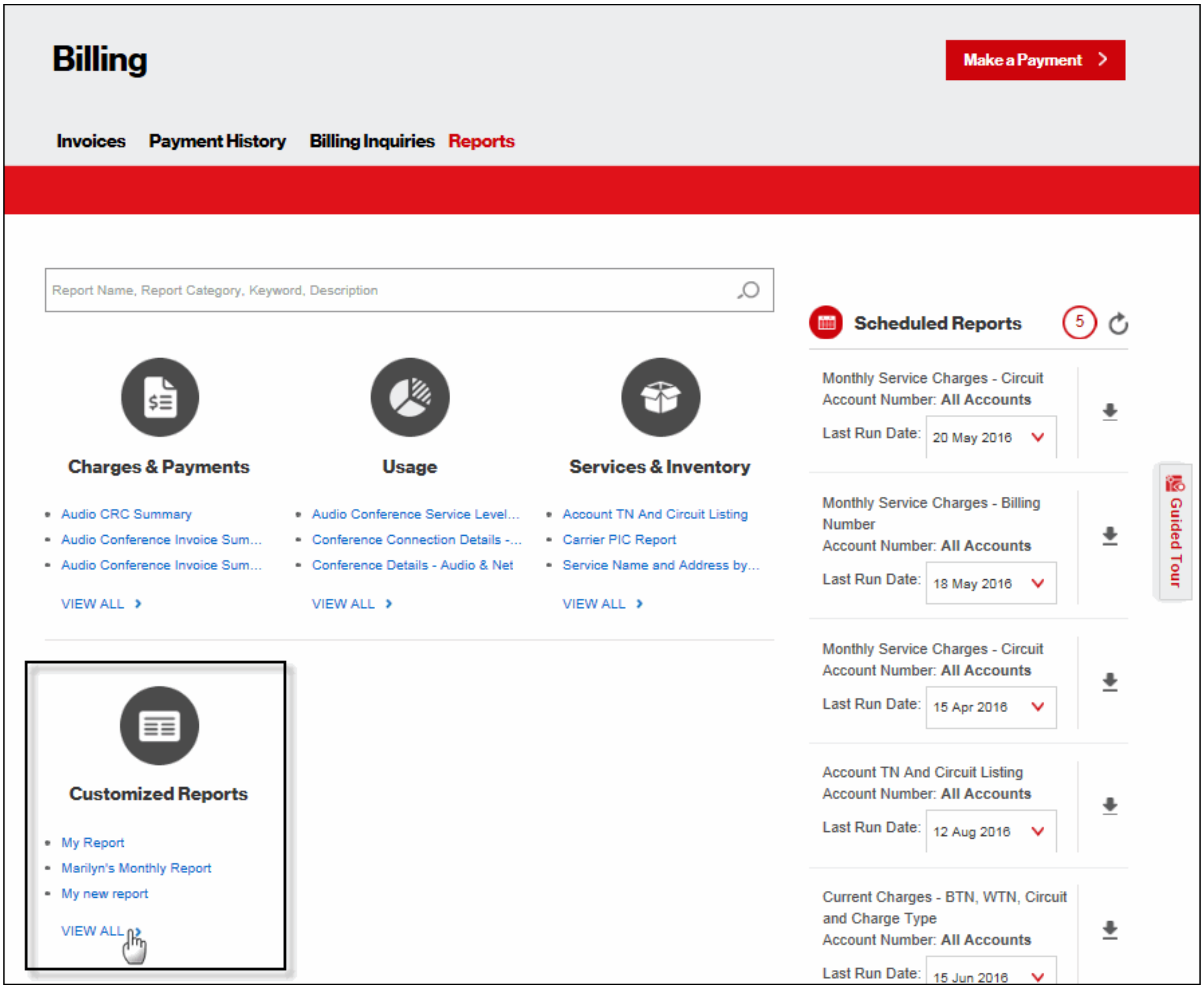

Figure 56 Customized Reports

1. Select the custom report you want to view from the *Customized Reports* category on the *Reports* screen. Report options appear allowing you to select accounts/dates.

   -OR-

   Click **VIEW ALL** to view a list of all custom reports. The *Customized Reports* screen appears allowing you to filter, sort, and download.

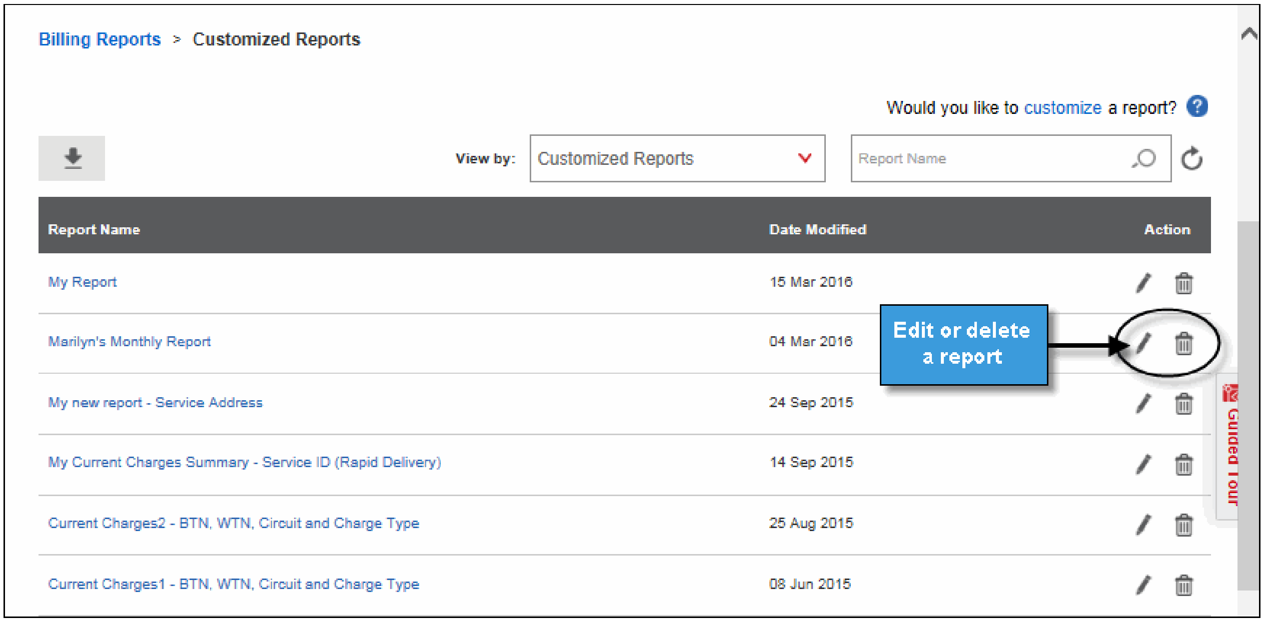

Figure 57 Customized Reports

2. Select a *View By* option, if applicable:
   - **All**
   - **Standard Reports**
   - **Scheduled Reports**
   - **Customized Reports**
   - **Reports by Category**: Charges & Payments, Usage, Services & Inventory, Other
3. Search by a report name, key word, or description.
4. Click  to edit a report.
5. Click  to delete a report.
6. Click on a **Report Name** to run the report.

Scheduled Reports

The *Scheduled Reports* section lists the five most recently executed reports by the user via a schedule. The list of reports is generated dynamically each time the page is rendered based on the standard or customized reports you executed most recently via the scheduling function. The ranking is based on real time activity. A message appears stating that no reports are available if no scheduled reports were run.

The *Scheduled Reports* screen has the same **Filter**, **Sort**, and **Download** options as *Standard Reports*.

Click a scheduled report in the *Scheduled Reports* section to open and view it.

-OR-

Select a *Last Run Date* for a scheduled report to open and view it.

-OR-

Click **View All** in the *Scheduled Reports* section on the *Reports* page. The *Scheduled Reports* screen appears on the *Voice Data & IP* tab.

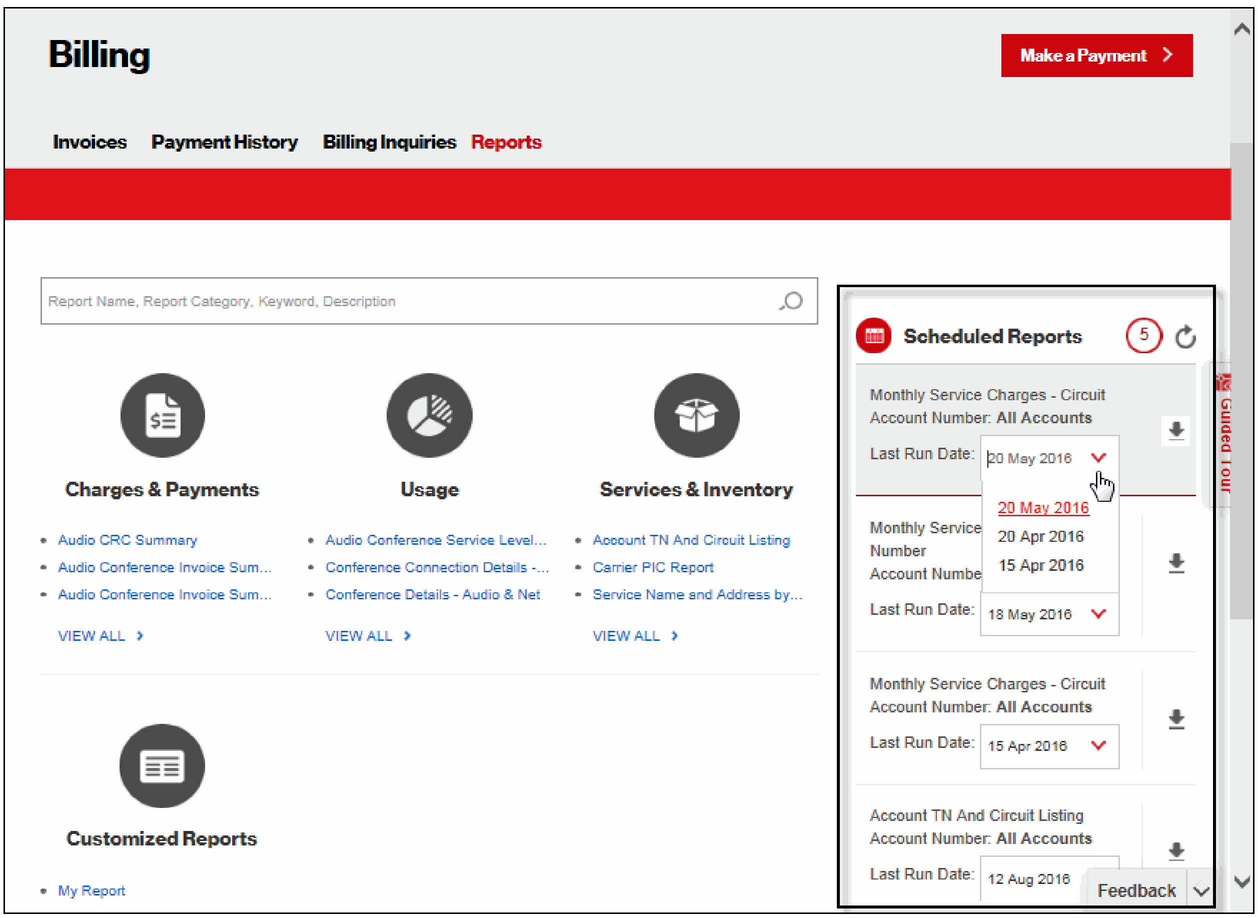

Figure 58 Scheduled Reports

Reporting Structures

A structure is a collection of accounts. You can create your own customized structure of accounts and sub folders, as well as edit, delete, import, and download structures you created. A structure that was created by one user can be shared with other users. The users with whom it is shared can view the accounts added in the structure if they have the entitlements to view them.

A *Reporting Position* must be defined when a Reporting Structure is created. Set the *Reporting Position* at the level of a structure, a folder within a structure, or an account to filter accounts that appear on the Reports screen.

Note: Both Verizon Wireline and Verizon Wireless accounts can be used in Billing Structures by users that have both types of accounts.

1. Click on your name in the top right corner of the screen.
2. Click **Reporting Structure**. The *Structures* screen appears.

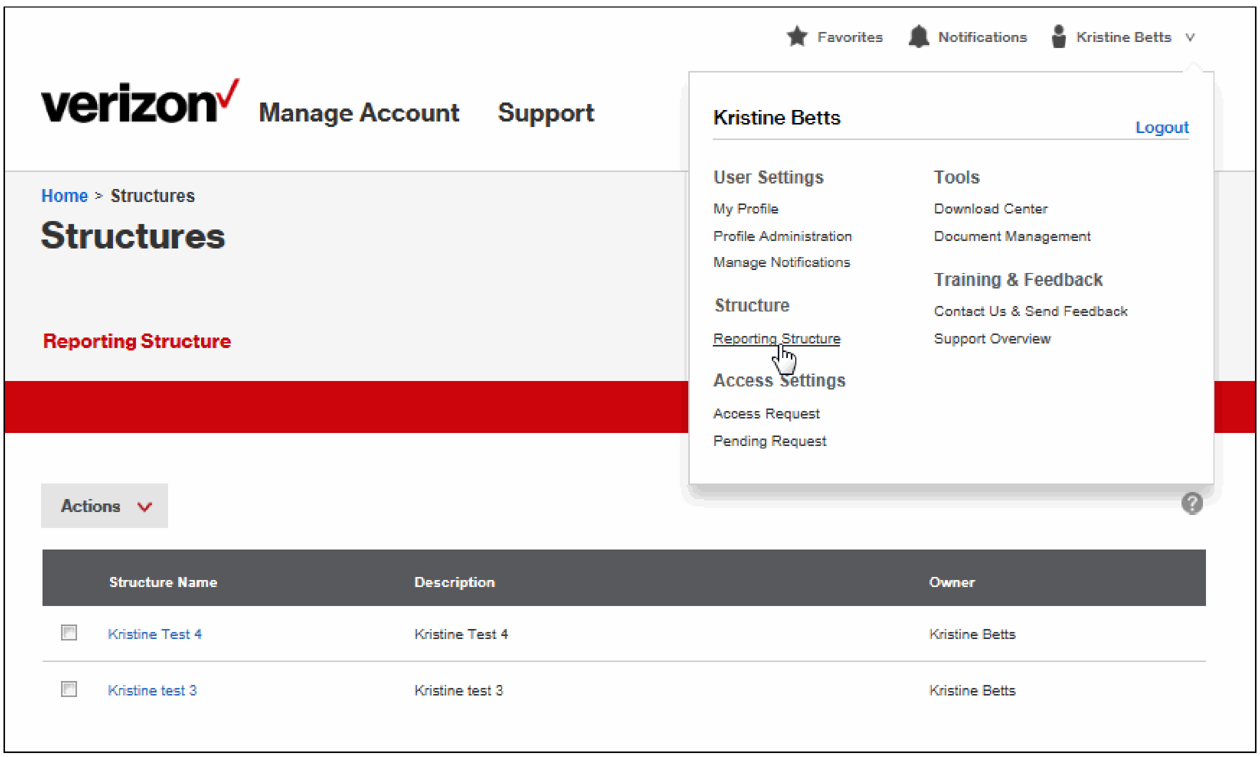

Figure 59 Structures

Create Reporting Structure

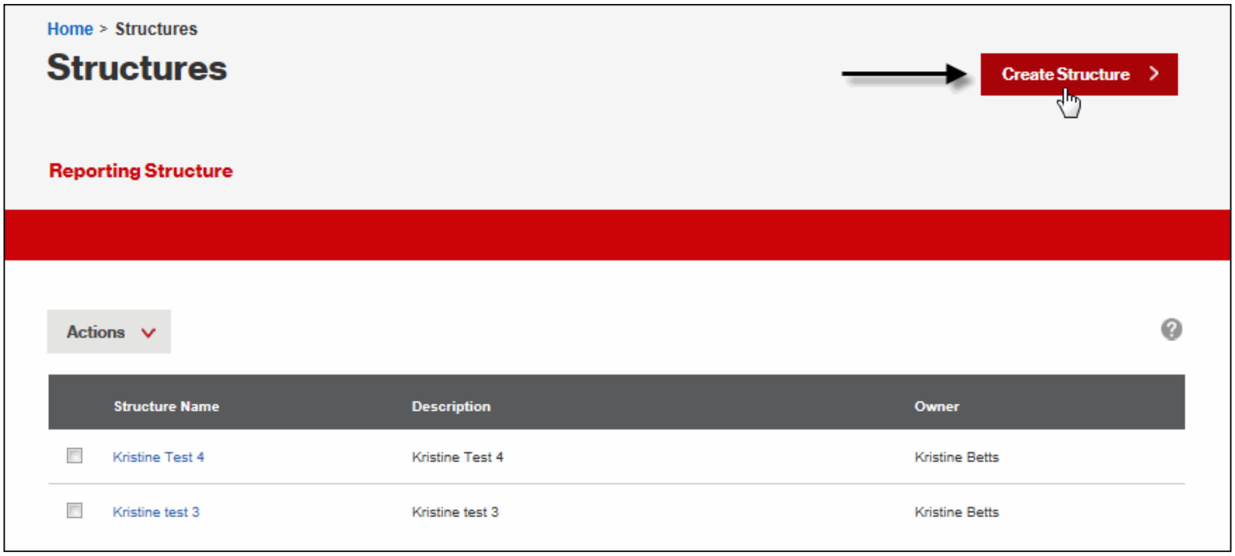

Figure 60 Structures

1. Click **Create Structure**. The *Create Reporting Structure* screen appears.

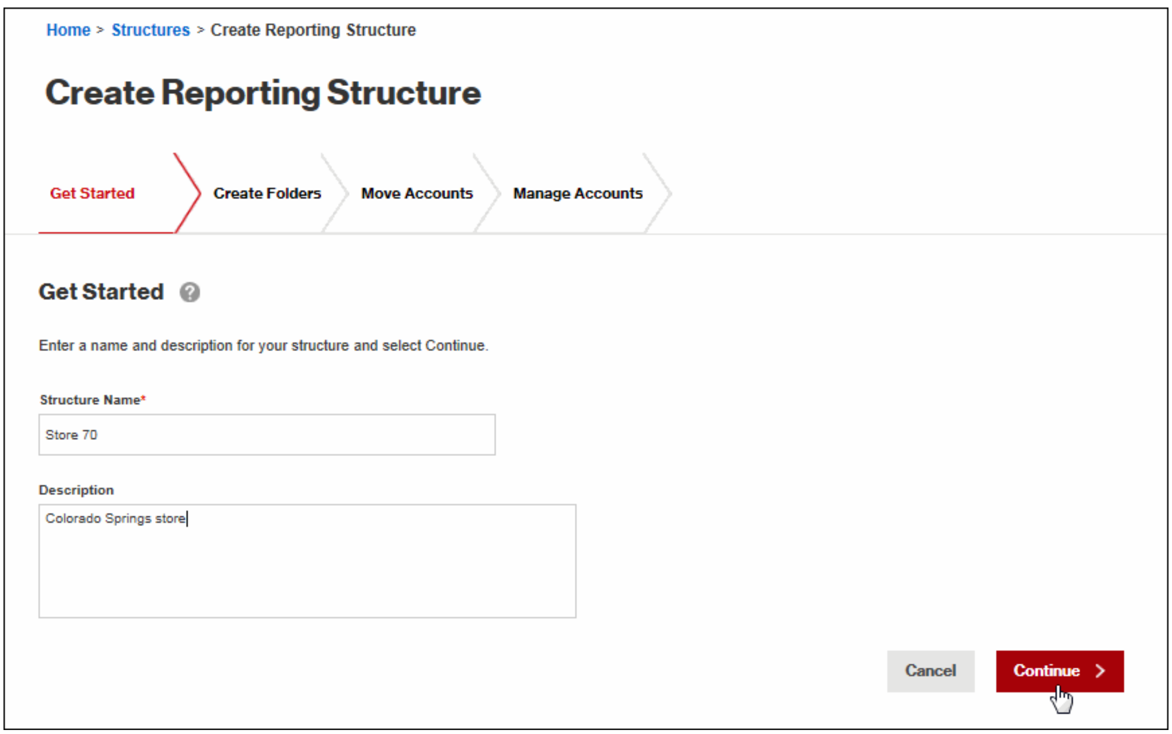

Figure 61 Create Reporting Structure

2. Enter a name in the *Structure Name* field (required). Names cannot contain characters other than 0-9, a-z, A-Z, hyphen, space, and single quote. Any other special characters are not allowed.
3. Enter a description in the *Description* field, if applicable.
4. Click **Continue** to create folders.

Folders created within a Reporting Structure are used to organize accounts for reporting purposes. Once accounts are added to folders, you can pick any folder to run the report you want.

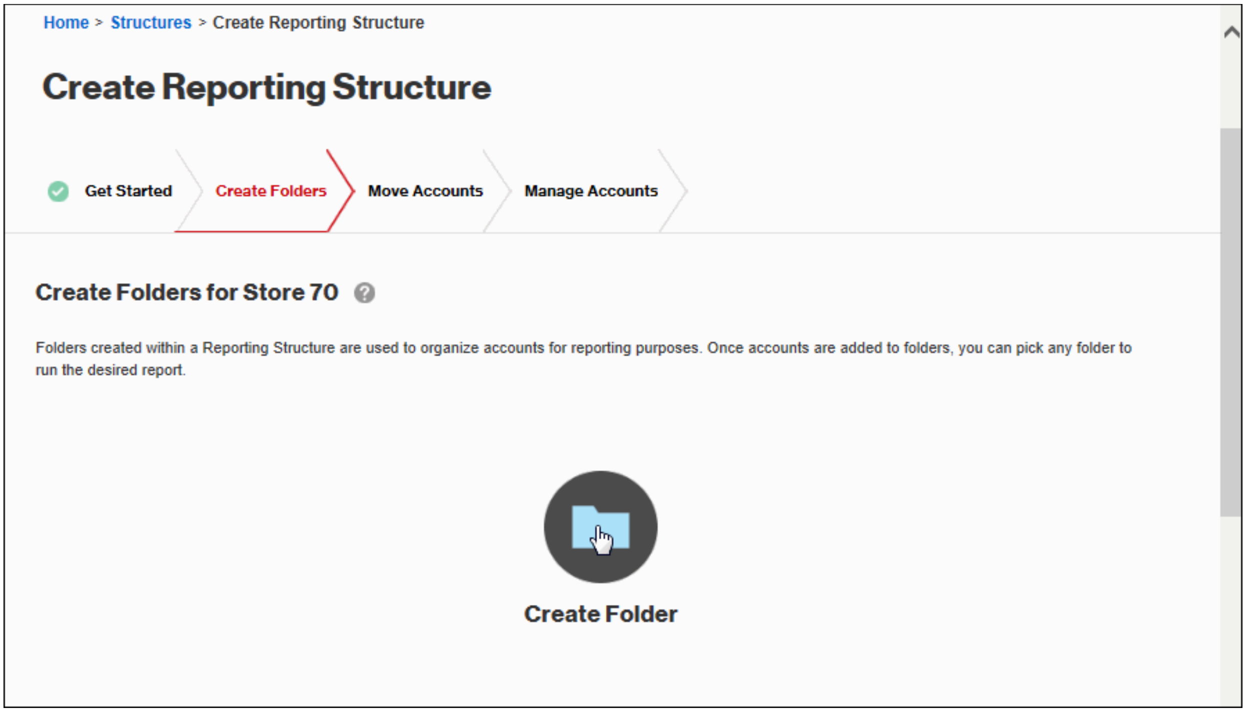

Figure 62 Create Reporting Structure

5. Click **Create Folder**. The *Create Folder* pop-up appears.

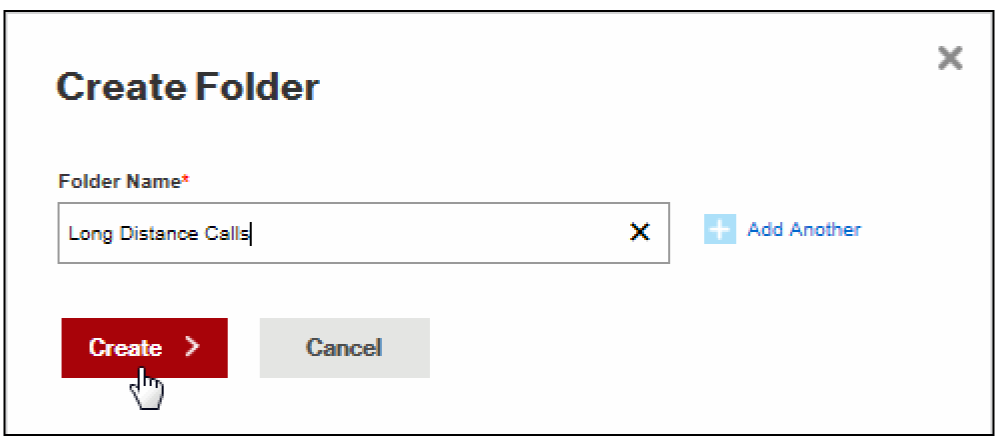

Figure 63 Create Folder

6. Enter a name in the *Folder Name* field.
7. Click **Add Another** to add another folder, if applicable.
8. Click **Create**. Your folder(s) is created and you can assign accounts.

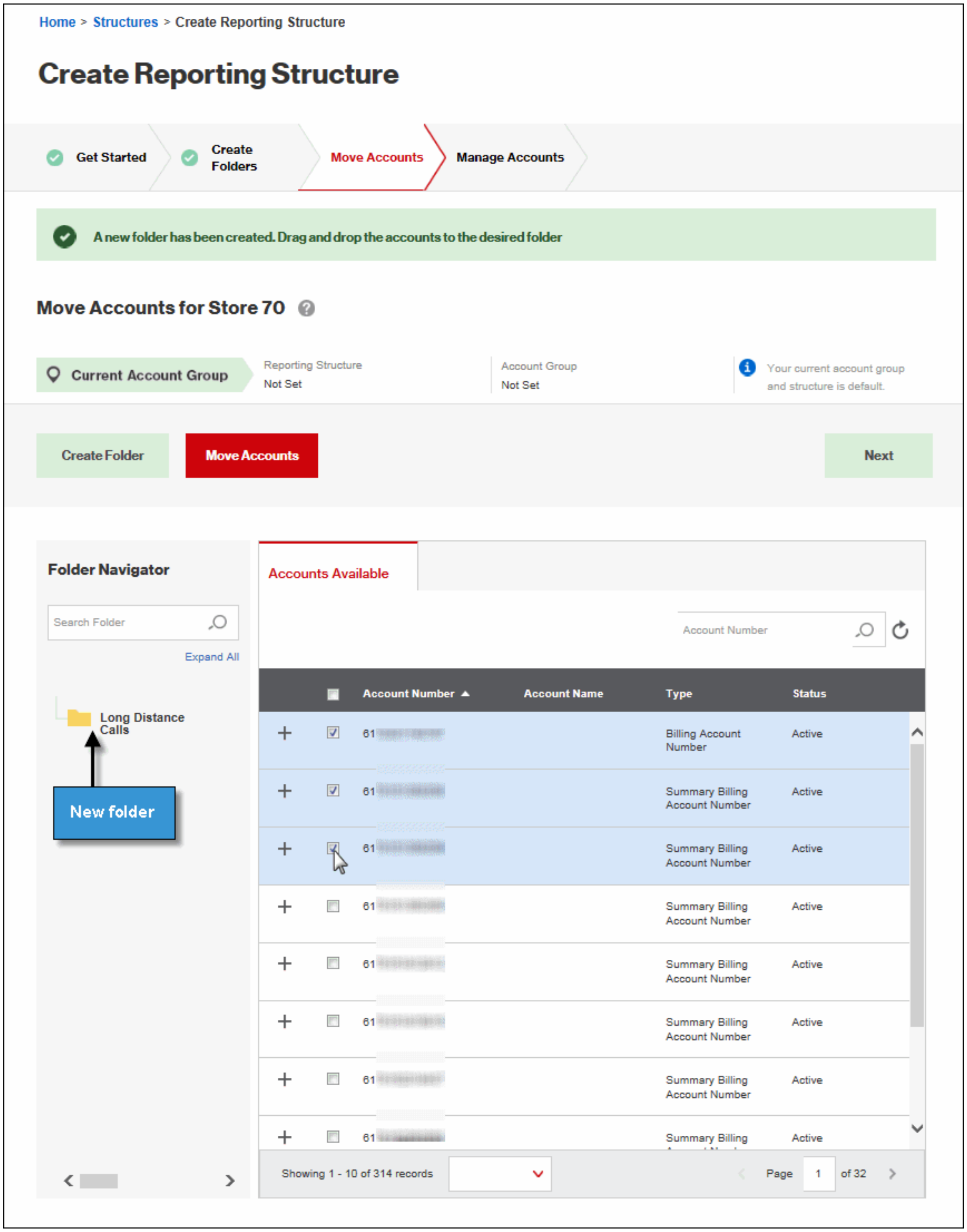

Figure 64 Move Accounts

9. Check the accounts you want to add to the folder. An account cannot be added to more than one structure.
10. Drag and drop the accounts to the folder. The *Move Records* pop-up appears.
11. Click **Yes** to confirm.

    -OR-

    Click **Move Accounts**.

12. Click to see additional actions you can perform for the folder.

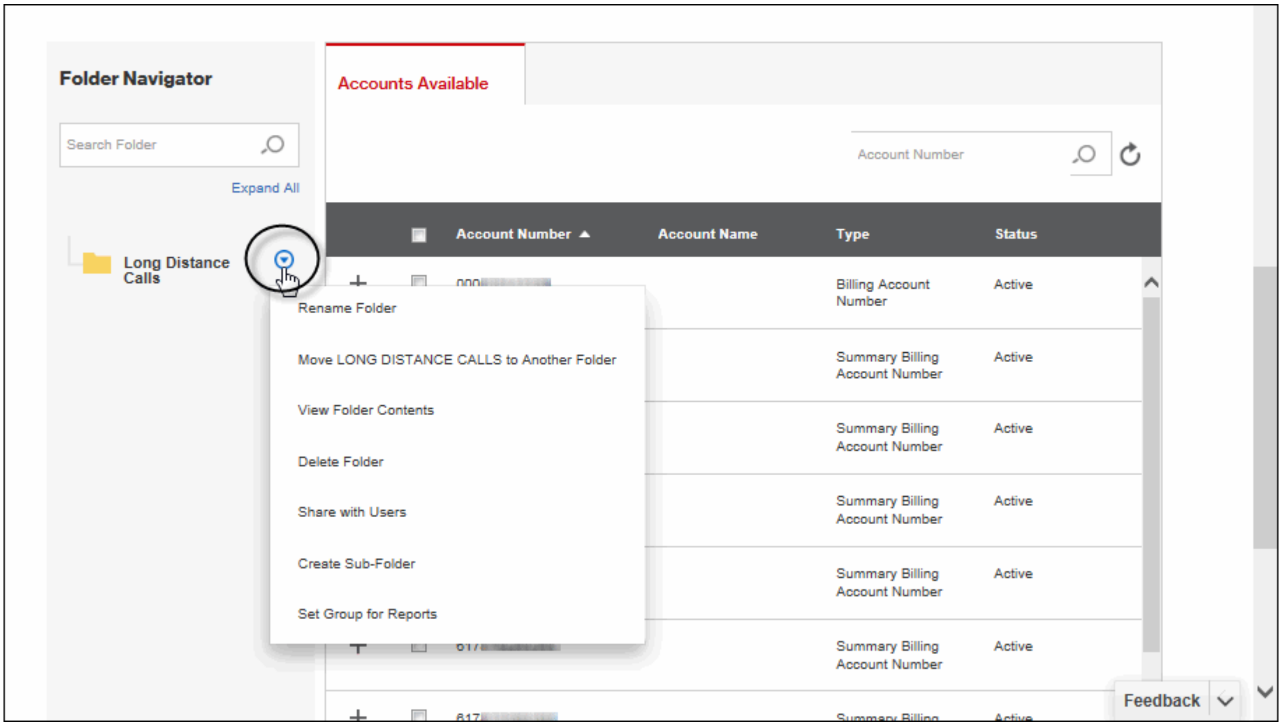

Figure 65 Move Accounts

- **Rename** – change the folder name.
- **View Folder Contents** – view the accounts you added to the folder.
- **Delete Folder** – delete the folder.
- **Share with Users** - share your structures with users to provide them access to specific accounts.
- **Create Sub-Folder** - create sub-folders for your reporting structure. For example, you could create a sub-folder to track and categorize accounts or numbers.
- **Set Group for Reports** – make this folder/accounts the default for running reports.

13. Click **Next** when you are done.

You can configure your reporting structure to keep the information organized.

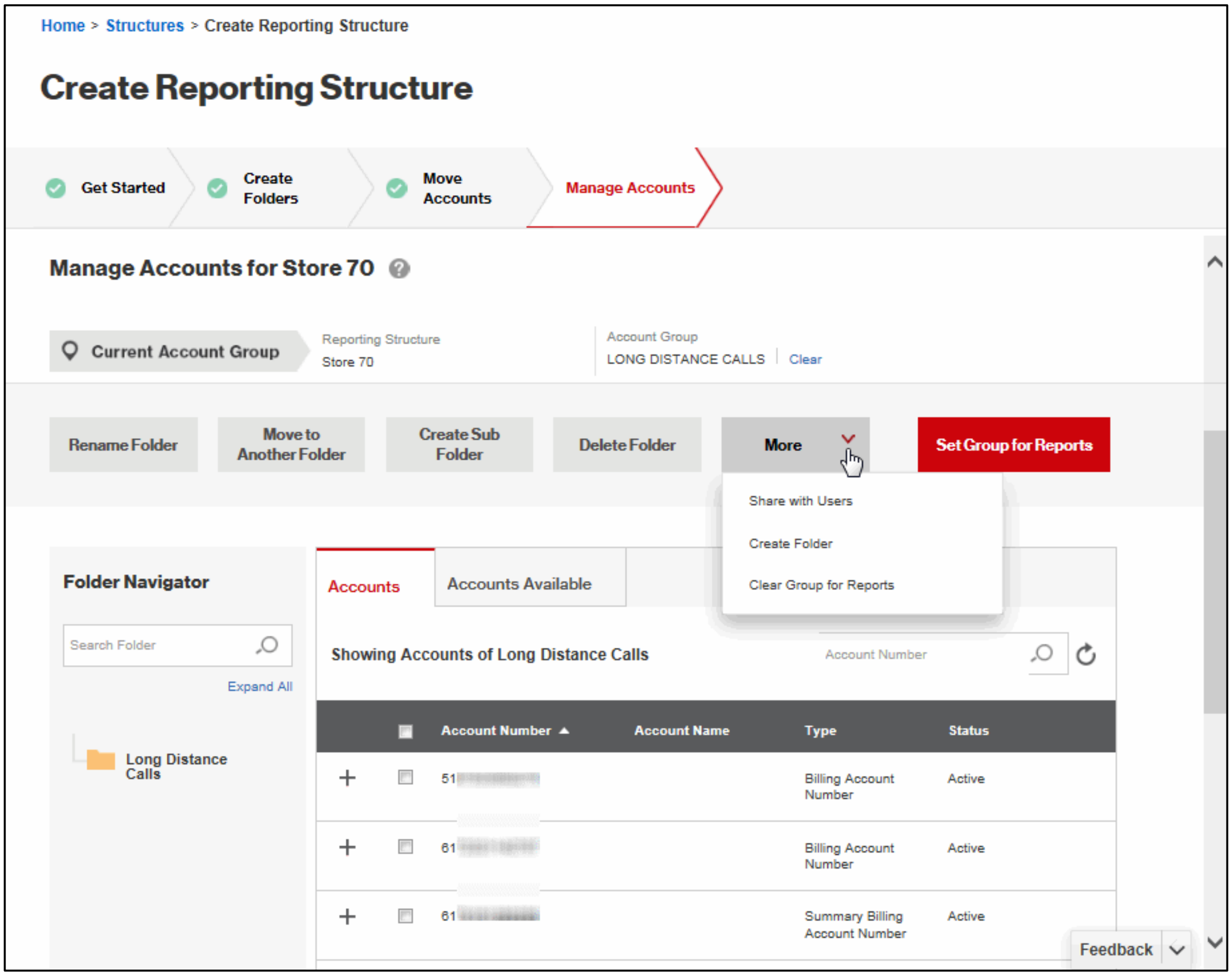

Figure 66 Manage Accounts

Rename a Folder

1. Select a folder if you have more than one.
2. Click **Rename Folder** to change the name. The *Rename Folder* pop-up appears.

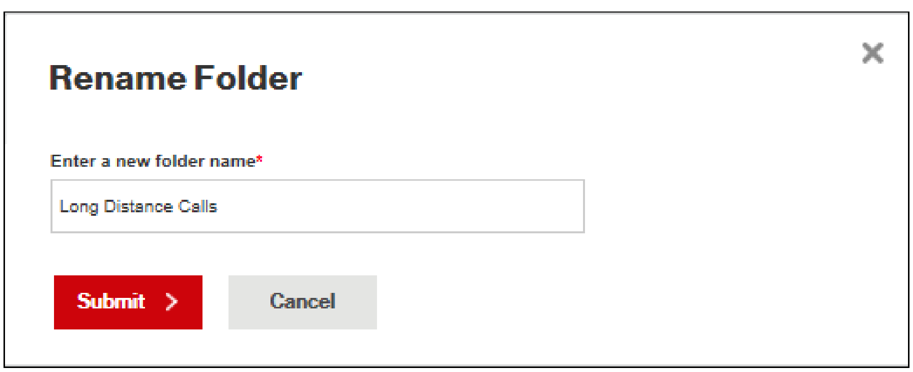

Figure 67 Rename a Folder

3. Enter a new folder name and click **Submit**.

Move to Another Folder

1. Select a folder if you have more than one.
2. Click **Move to Another Folder**. The *Move to Another Folder* pop-up appears.

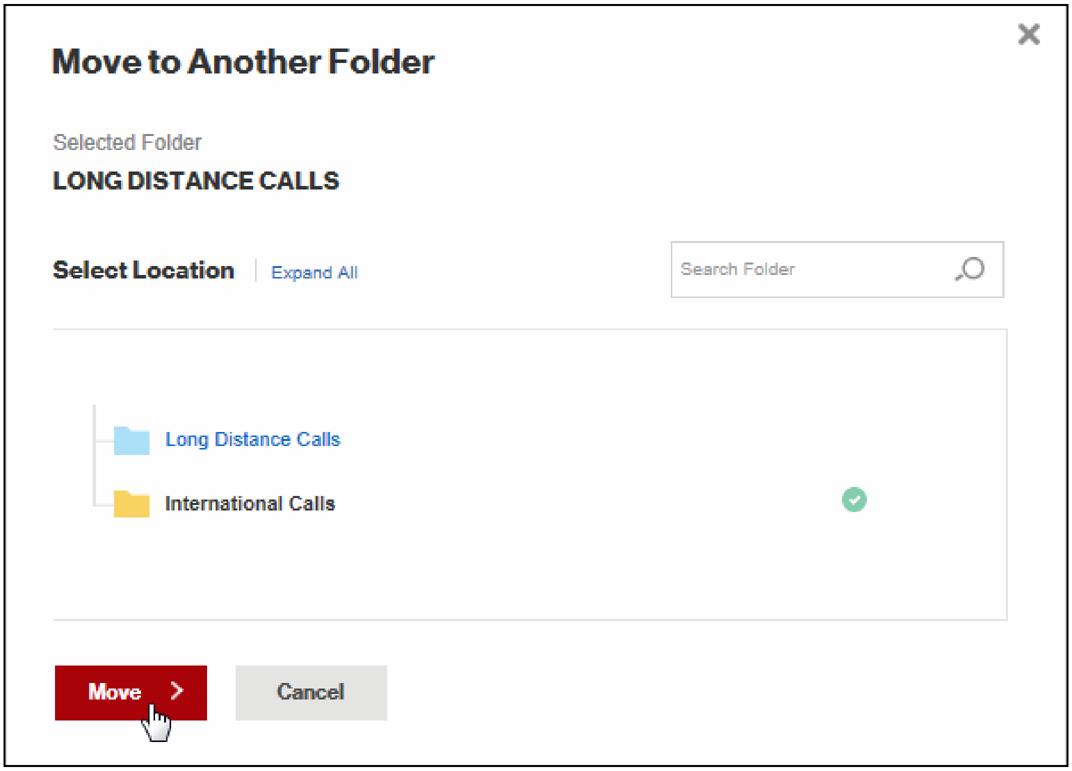

Figure 68 Move to Another Folder

3. Select the folder to which you want to move the selected folder.
4. Click **Move**.

Create a Sub Folder

1. Select a folder if you have more than one.
2. Click **Create Sub Folder**. The *Create Sub-Folder* pop-up appears.

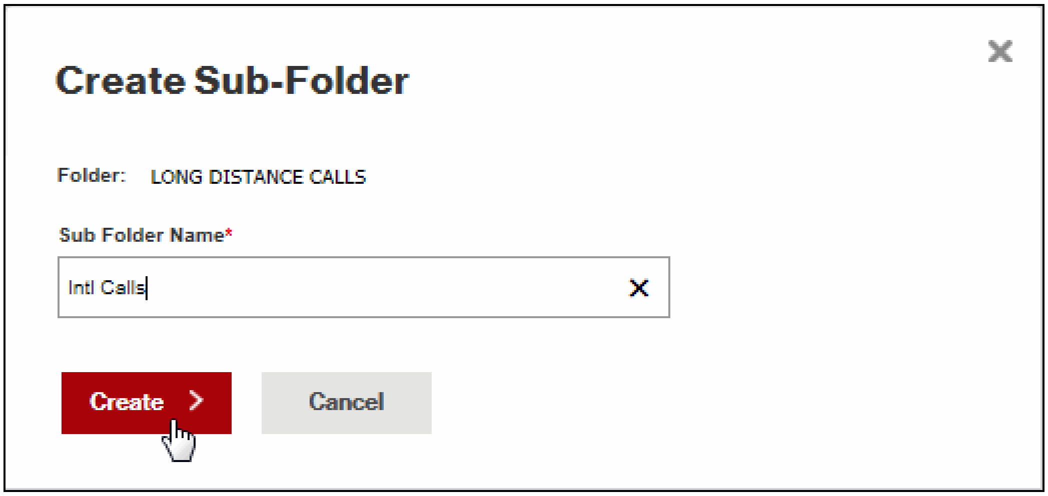

Figure 69 Create Sub-Folder

3. Enter the *Sub Folder Name*.
4. Click **Create**.

Delete Folder

1. Select a folder if you have more than one.
2. Click **Delete Folder**. The *Delete Folder* pop-up appears.

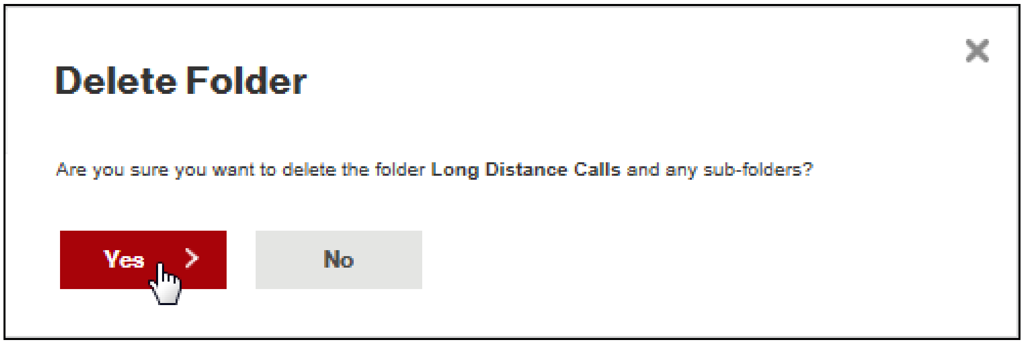

Figure 70 Delete Folder

3. Click **Yes** to confirm.

Share with Users

You can share your structures with users to provide them access to specific accounts.

1. Click **More | Share with Users**. The *Share/Unshare with Users* pop-up appears.

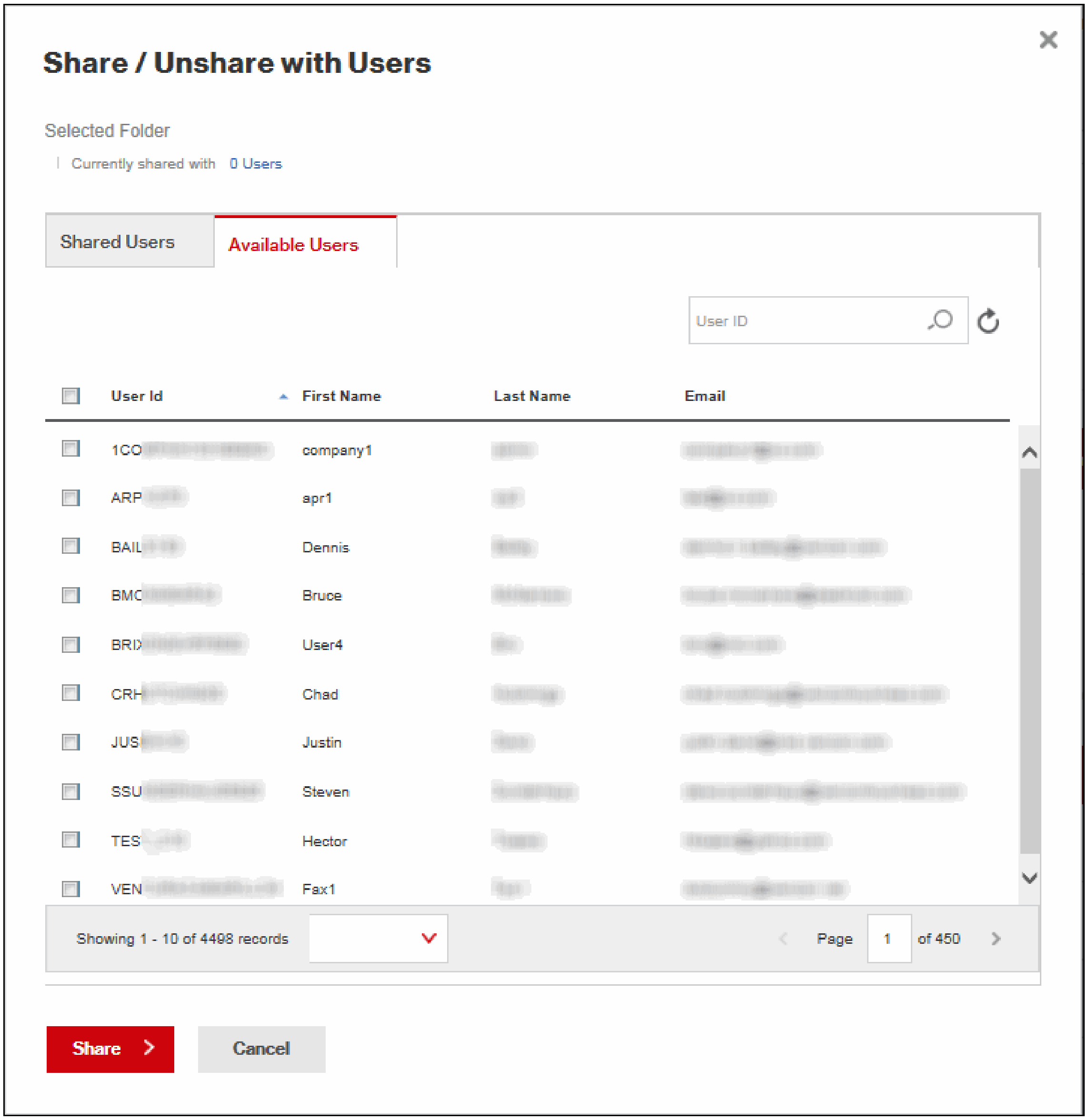

Figure 71 Share/Unshare with Users

2. Click **Available Users** to see a list of users you can share with.
3. Check the users you want.
4. Click **Share**. The structure is now available to the user you selected.

Create Folder

1. Select a folder if you have more than one.
2. Click **More | Create Folder**. The *Create Folder* pop-up appears.

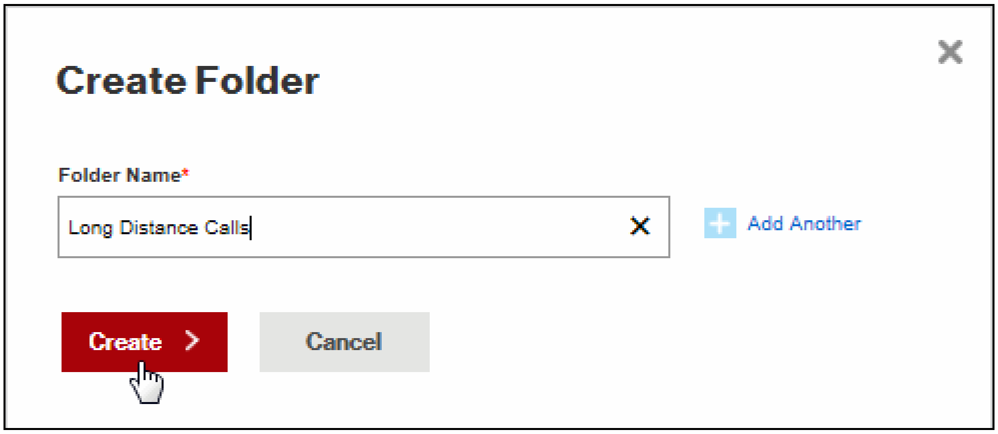

Figure 72 Create Folder

3. Enter a name in the *Folder Name* field.
4. Click **Add Another** to add another folder, if applicable.
5. Click **Create**. Your folder(s) is created and you can assign accounts.

Set/Clear Group for Reports

You can make folder/accounts the default for running reports, or clear it.

1. Select a folder.

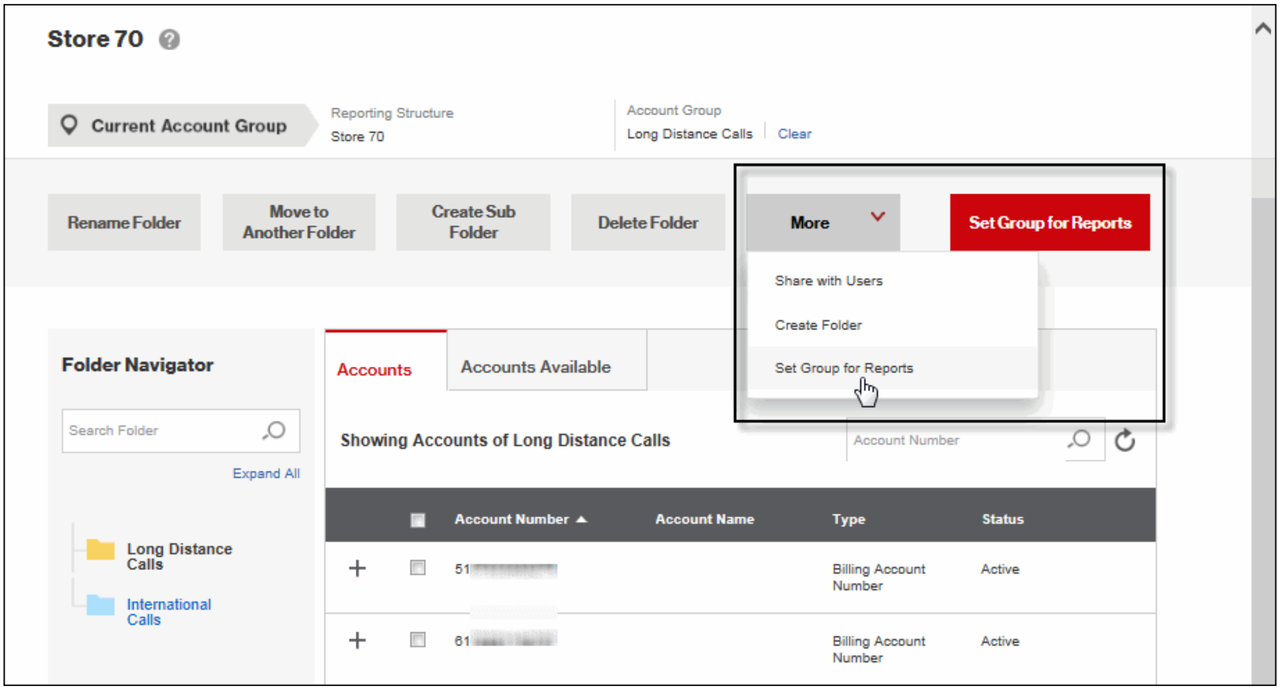

Figure 73 Manage Accounts

2. Click **More | Set Group for Reports** to make it the default when running reports.

   -OR-

   Click **Set Group for Reports** (button next to *More* button).

3. Click **More | Clear Group for Reports** to clear it as default.

Manage Reporting Structures

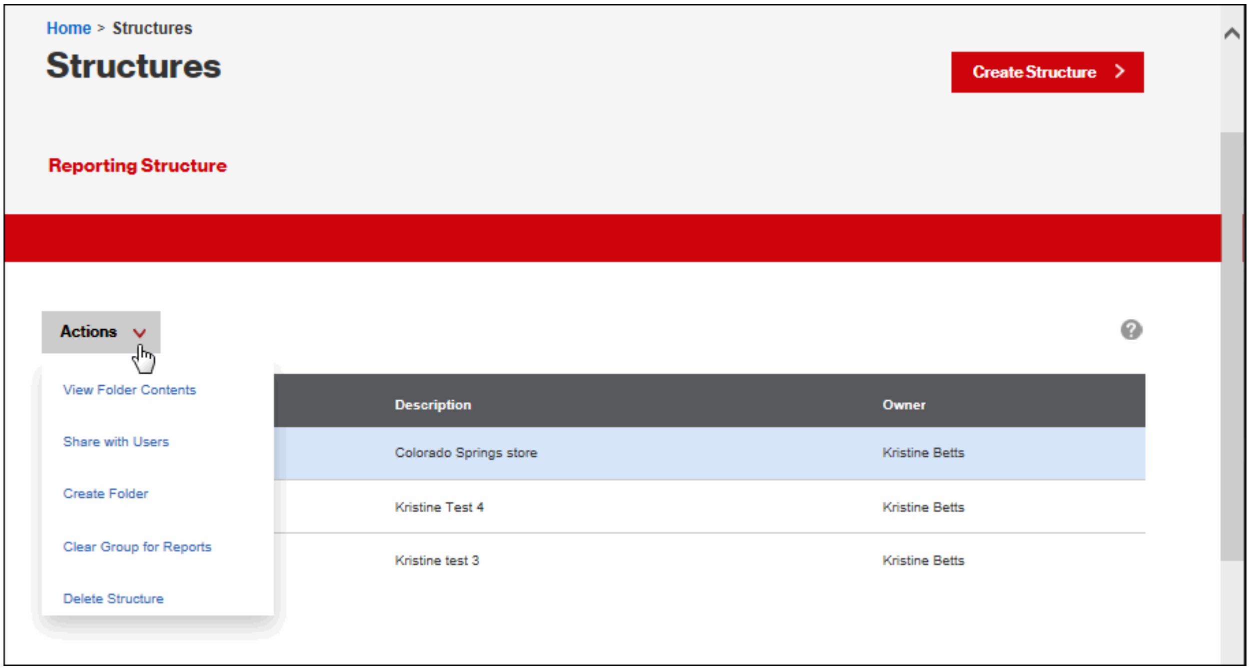

Figure 74 Structures

1. Click on a reporting structure to edit it. See Create a Reporting Structure for instructions on organizing a reporting structure.
2. Select a reporting structure and click **Actions** to see a list of actions you can perform to manage your structures.
    - **View Folder Contents** – update and organize your reporting structure, e.g., add accounts, rename folders, delete folders, move to another folder, etc. See Create a Reporting Structure.
    - **Share with Users** - share your structures with users to provide them access to specific accounts.
    - **Create Folder** – add another folder to your structure.
    - **Clear Group for Reports** – clear the default account for running reports.
    - **Delete Structure** – delete the selected structure.

Customer Support & Training

Customer Support – Verizon Enterprise Center

Contact customer support for any Verizon Enterprise Center issues.

Contact your account team with any account specific questions on equipment or service, pricing information, or adding additional users to the Verizon Enterprise Center.

- Select on your name in the top right corner of the screen. Click Contact Us & Send Feedback.
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- LiveChat if you have questions or need help
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