

WINDSTREAM

LEARNING AND DEVELOPMENT

WE Connect Partners Portal

Version 2.4
October 2023

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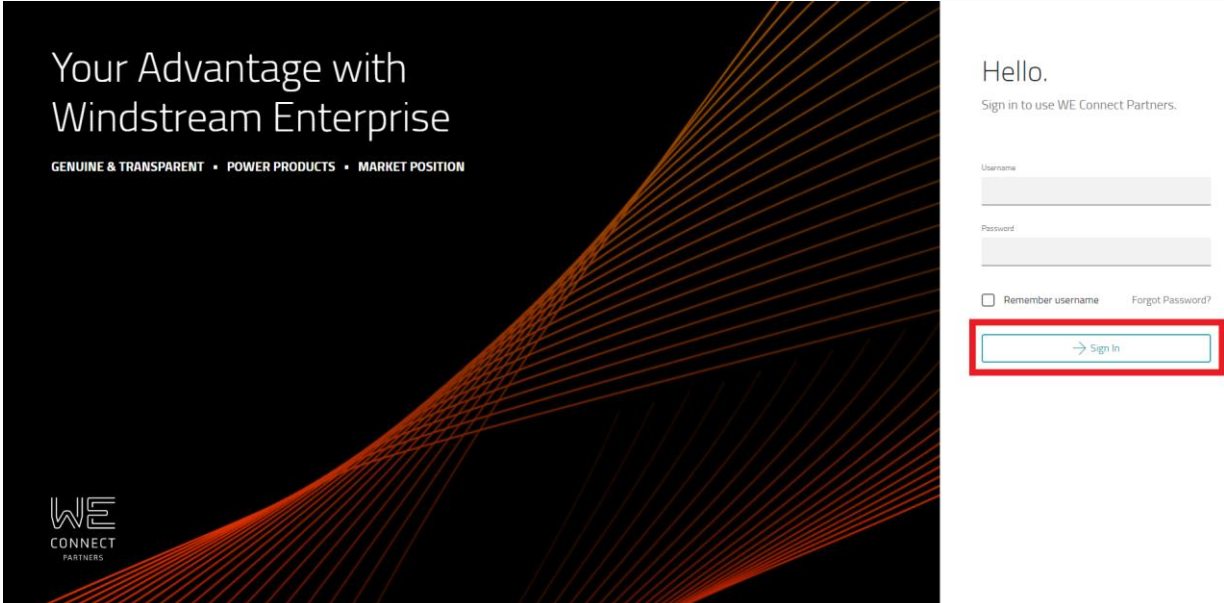
HOW TO USE THIS GUIDE

This document is designed for use as a reference guide. Every effort has been made to ensure that the information contained is accurate and up-to-date.

This guide covers the basics of the WE Connect Partner Portal, including the Home page and Navigation.

LOGGING IN

1. Access the portal by going to <http://partner.windstream.com>
2. Enter Username and Password.
3. Click **Sign In**.



Your Advantage with
Windstream Enterprise

GENUINE & TRANSPARENT • POWER PRODUCTS • MARKET POSITION

WE
CONNECT
PARTNERS

Hello.
Sign in to use WE Connect Partners.

Username
Password

☐ Remember username [Forgot Password?](#)

[→ Sign In](#)

4. CPNI Agreement box displays. Click **I accept and agree**.

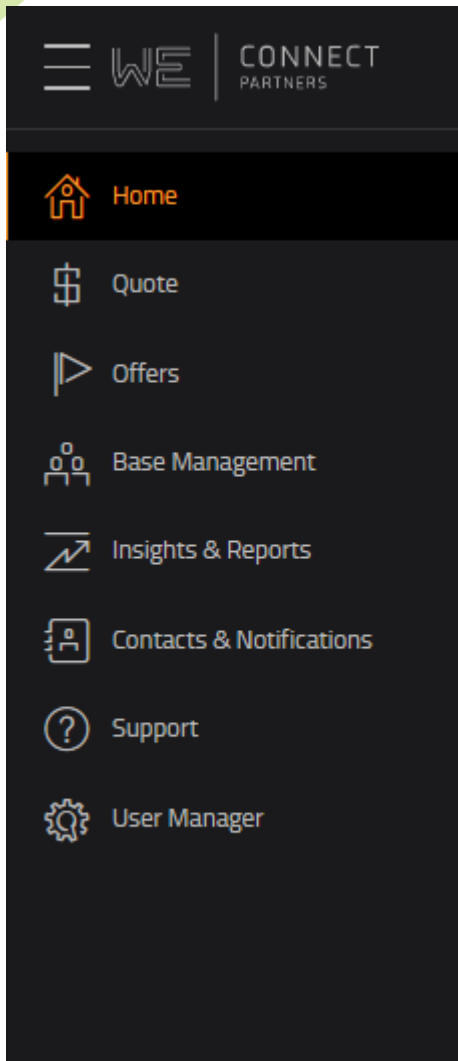
CPNI Agreement

[Letter](#)[FAQ](#)

Windstream's systems, including this site, are strictly for the business use of Windstream's authorized sales partners, for the purpose of selling products and services. Use of this site for any other purpose or by any unauthorized person is strictly prohibited. By accessing this site I am affirming that I am an authorized sales partner and that I understand, and will strictly comply, with all Customer Proprietary Network Information or "CPNI" rules. I understand I may be accessing **CONFIDENTIAL CUSTOMER INFORMATION**. Failure to safeguard this information can result in terminating your partner agreement for cause and subjecting you to financial penalties.

NAVIGATION

The main Navigation Menu located on the left side of the screen includes: Home, Quote, Offers, Base Management, Insights & Reports, Contacts & Notifications, Support and User Manager. The options and information displayed in each section changes based on the user logged in.



Home : overview & latest Windstream news

Quote : new logo quotes & contracts, quote requests, rack rate prices & access availability

Offers : current offers available to Customers in the user's base

Base Management : account dashboard, order status, trouble tickets

Insights & Reporting : insights into user's book of business

Contacts & Notifications : contacts related to the partner company & notification settings

Support : support/help direction, marketing materials, report portal issues, request portal training

User Manager : portal user administration

MY PROFILE

Heather Collins

My Profile Hierarchy

User Info

Add Avatar

First Name: Heather

Last Name: Collins

Email: heather.collins@windstream.com

Phone (optional): 456.778.9797

Mobile (optional): 704.814.2901

To receive portal notifications to a mobile number, one must be provided here.

Password Preferences

Reset My Password Now

How often should we prompt you to reset your password?

☐ Once every 90 days

☐ Once every 180 days

☐ Once every year

☒ Never

It is more secure to change your password often.

Identities

Choose an Identity (a Master Seller account) to view customers sold under that relationship.

☐ Intelisys 2 - Comtel Group-MASTER
Intelisys 2 - MERGED - Comtel Group-MASTER

☐ Partner Pros - Unified Master

☐ Nickname Goes Here
Intelisys 2 "MERGED" Connectel Inc - Master

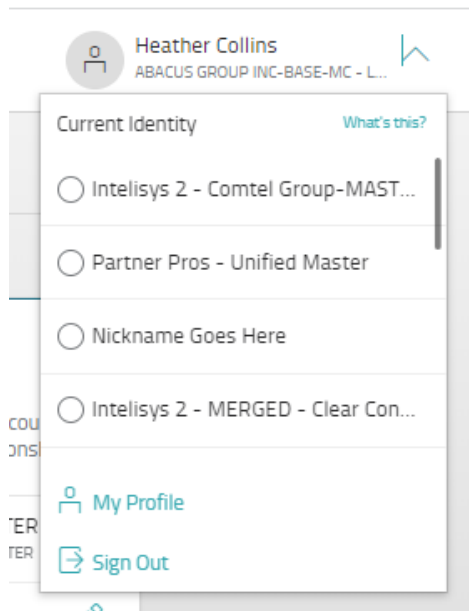
Make Selected Default

You can nickname your identities to make them more readable in the user menu.

Save Changes

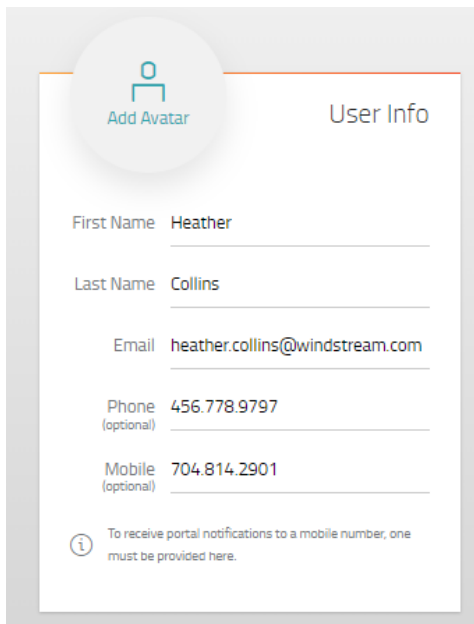
OVERVIEW

My Profile enables a user to manage their user information, password preferences and identities. The page can be accessed from the dropdown at the top right of the screen.



USER INFO

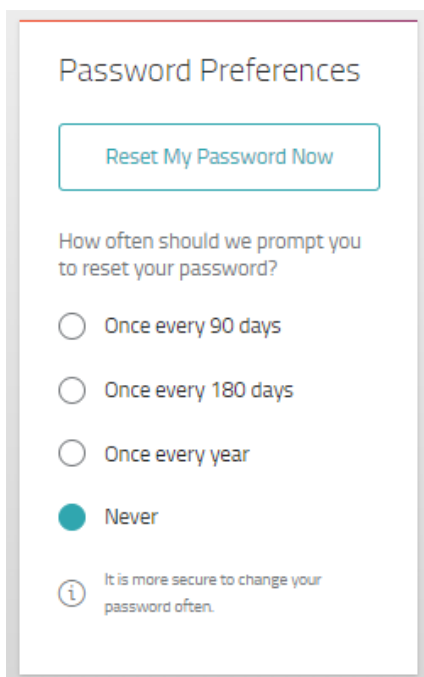
User Info allows the user to manage their user information such as name, email, phone number & avatar. Users can update any of the information in this widget, add and remove an avatar photo.



The User Info widget is a light gray rectangular box. At the top left is a circular placeholder for an avatar with a person icon and the text "Add Avatar". To the right of this is the title "User Info". Below the title are several input fields: "First Name" with the value "Heather", "Last Name" with the value "Collins", "Email" with the value "heather.collins@windstream.com", "Phone (optional)" with the value "456.778.9797", and "Mobile (optional)" with the value "704.814.2901". At the bottom left is an information icon (i) followed by the text: "To receive portal notifications to a mobile number, one must be provided here."

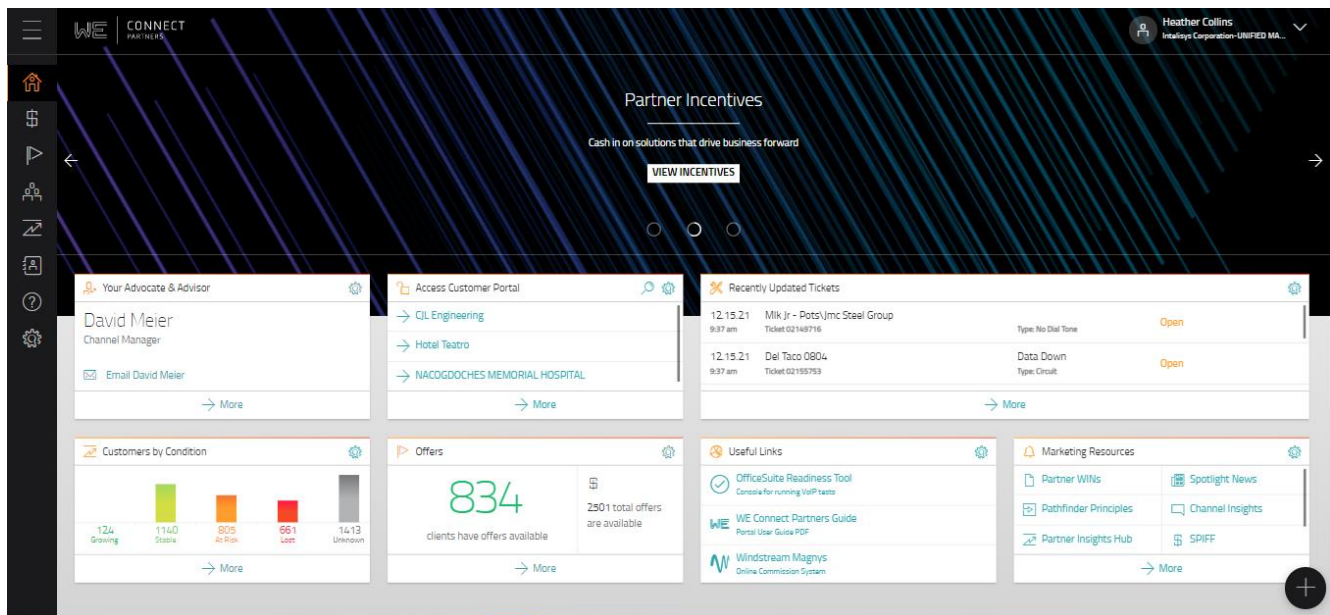
PASSWORD PREFERENCES

The Password Preferences widget allows the user to manage their own password settings. Users can reset their password and set the desired cadence of systematic password reset prompts. By default, the portal will request that users change their passwords every 90 days.

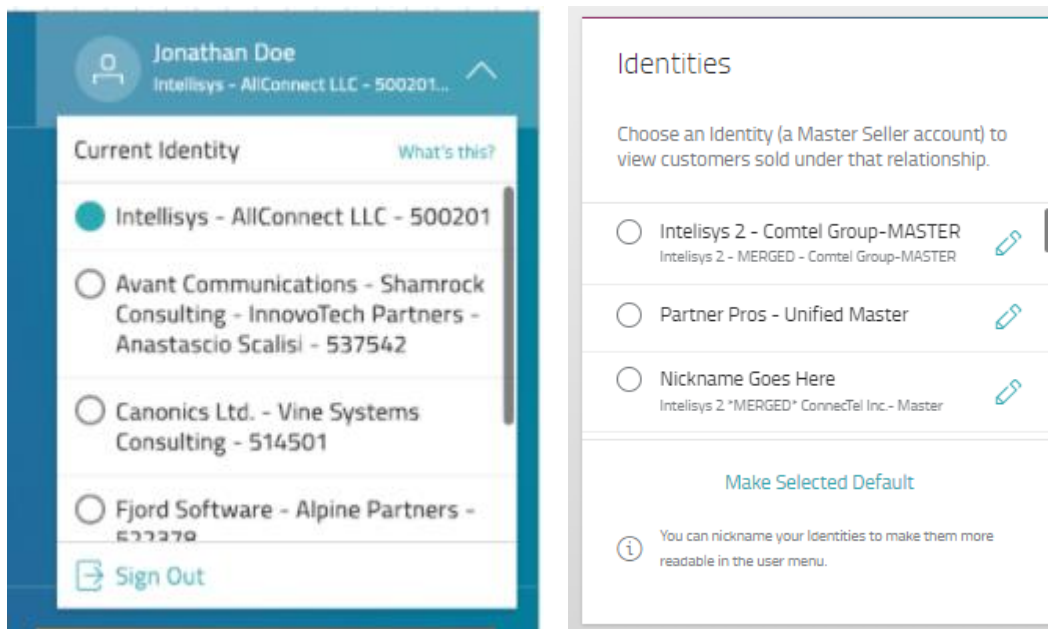


The Password Preferences widget is a light gray rectangular box. At the top is the title "Password Preferences". Below the title is a button labeled "Reset My Password Now". Underneath is the question "How often should we prompt you to reset your password?". There are four radio button options: "Once every 90 days", "Once every 180 days", "Once every year", and "Never". The "Never" option is selected, indicated by a teal dot. At the bottom left is an information icon (i) followed by the text: "It is more secure to change your password often."

USER IDENTITY



User Identity management is handled in one of two places – the My Profile page or the dropdown at the top right corner of the portal. When associated to multiple Masters or Sales IDs, the user may choose an Identity to view the customers sold under that relationship.

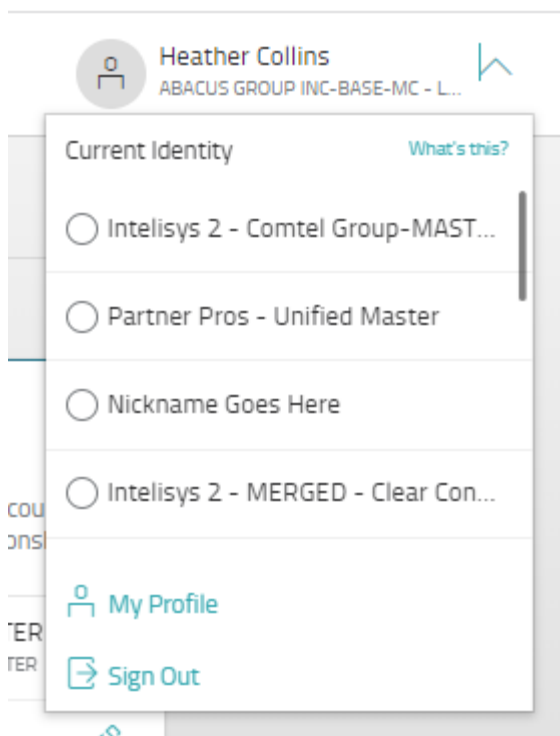


CHANGING IDENTITIES

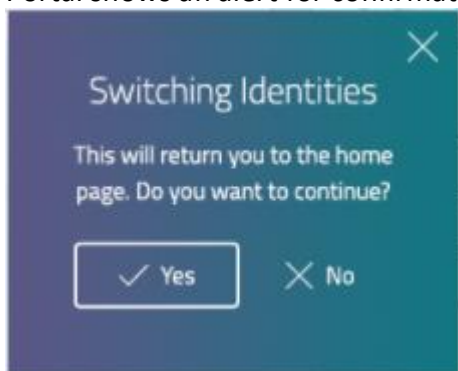
Users can change identities two ways: via the corner dropdown or the My Profile page.

To toggle between Identities using the **corner dropdown**:

1. Click the dropdown and choose the Identity you want to view.



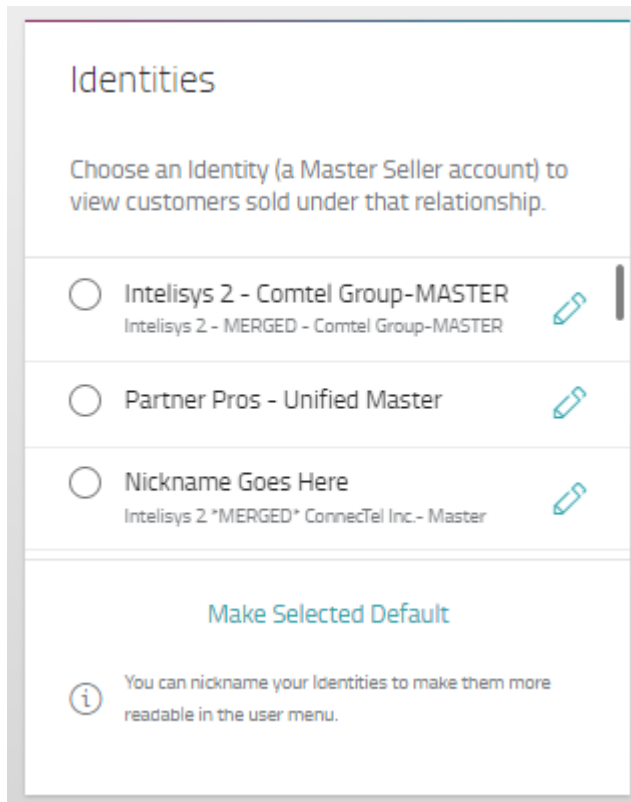
2. Portal shows an alert for confirmation.



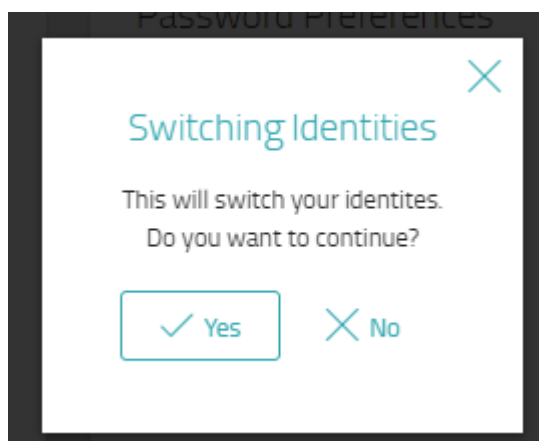
3. Click Yes. The portal resets to the home screen with new Identity loaded.

To toggle between Identities using the **My Profile** page:

1. Select the Identity you want to view from the Identities list



2. Portal shows an alert for confirmation



3. Click Yes. The portal resets to the homes screen with new Identity loaded

NICKNAMING IDENTITIES

Users can nickname their Identities for easier recognition using the Identities widget on the My Profile page.

1. In the Identities widget, click the pencil icon next the Identity
2. Type in the desire name

Identities

Choose an Identity (a Master Seller account) to view customers sold under that relationship.

<input checked="" type="radio"/> Intelisys - Comtel Group	✓ ✕
<input type="radio"/> Partner Pros - Unified Master	✎
<input type="radio"/> Nickname Goes Here Intelisys 2 "MERGED" ConnectTel Inc.- Master	✎

3. Click the checkmark

SETTING DEFAULT IDENTITY

The default identity is the one that is automatically shown each time a user logs in. The first default is set by Windstream employees when the user is linked to multiple sales IDs. The current default is noted in the Identities widget by a purple "Default" bubble.

Identities

Choose an Identity (a Master Seller account) to view customers sold under that relationship.

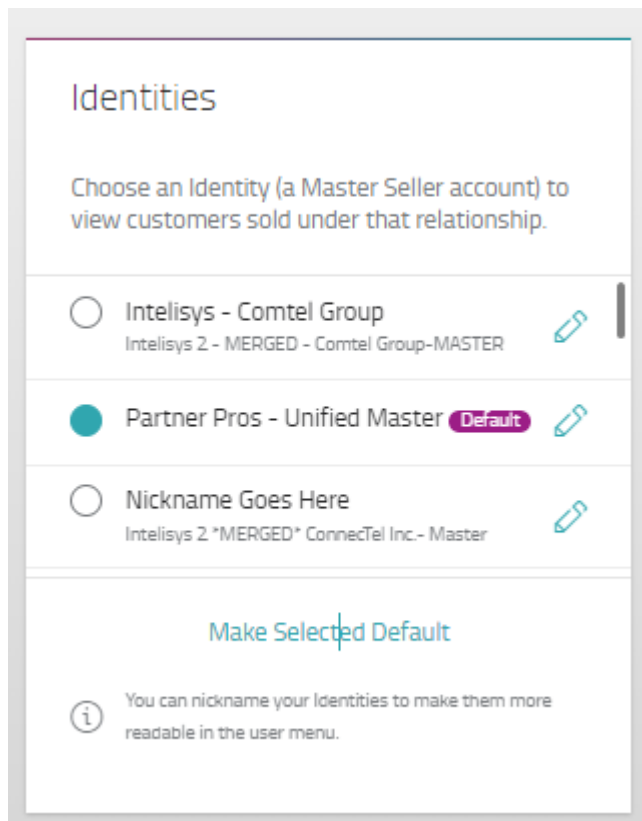
<input checked="" type="radio"/> ABACUS GROUP INC-BASE-MC - Legacy	✎
<input type="radio"/> Avant - Merged - PlanetOne Merger-ITD Solutions FL-sub	✎
<input type="radio"/> Telechoice Consulting-UNIFIED MASTER	✎

[Make Selected Default](#)

You can nickname your Identities to make them more readable in the user menu.

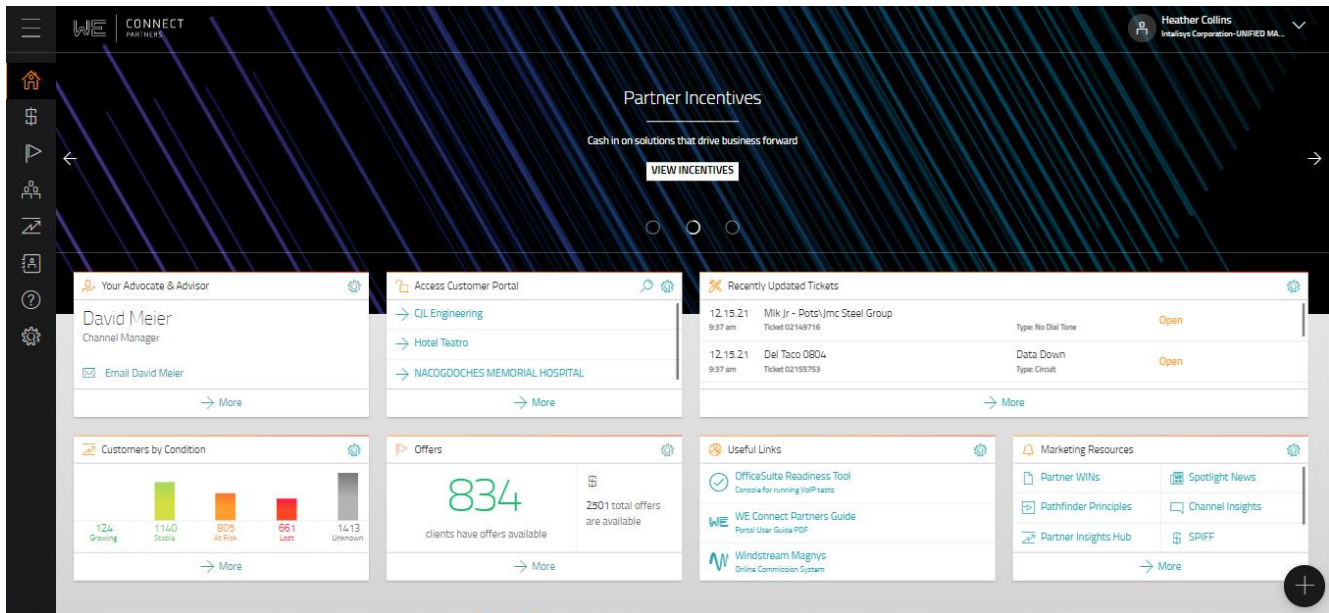
To change the selected default

1. Log in to the portal and toggle to the desired Identity
2. Navigate to the My Profile page
3. In the Identities widget, click **Make Selected Default**. The Default bubble will appear next to the current Identity



4. Upon the next login, the new default Identity will be shown

HOME



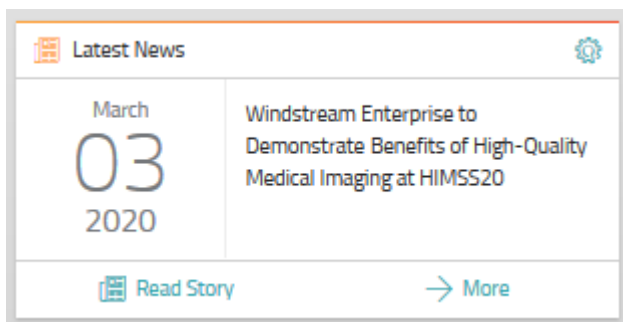
OVERVIEW

[Click here for a demo of the Home Screen](#)

The Home screen shows a rotating banner with links to SPIFF information and the Partner Webinar.

Top 5 widgets are presented automatically upon first login. Users can choose which widgets to show here by clicking “+” in the bottom right corner. Widgets can be moved around to the preferred arrangements.

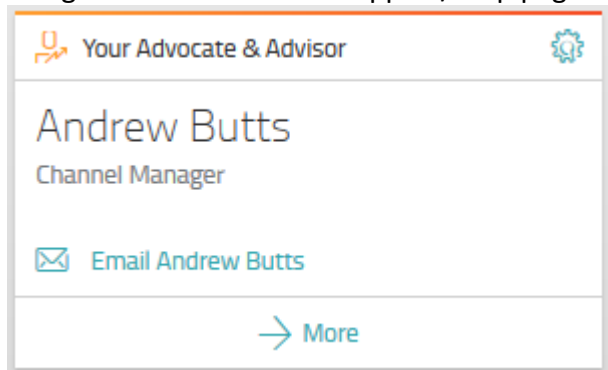
The Latest News link is now a widget showing the latest news article. Users can click “Read Story” to open the news link or click “More” to show a feed of recent Windstream news.



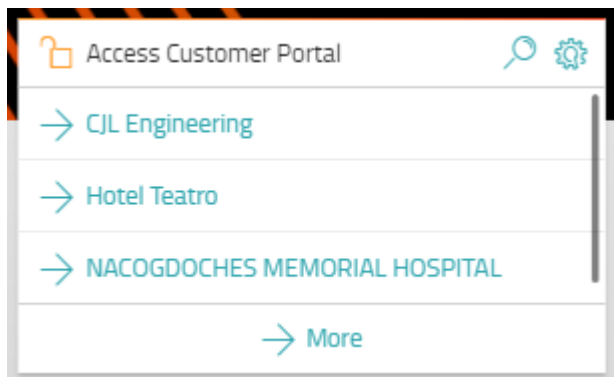
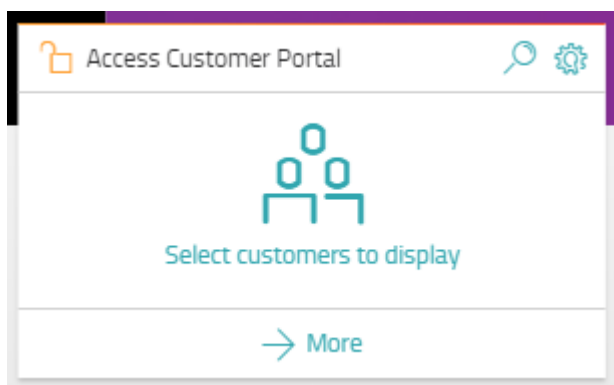
WIDGETS

The current widgets available are:

Your Advocate & Advisor – the user's Channel Manager & a link to email them. Clicking **More** navigates the user to the Support/Help page









Access Customer Portal – users can choose up to 5 customers to show in the widget for click through access to WE Connect. Access must already be approved. Clicking **More** navigates the user to the Accounts dashboard




Recently Updated Tickets – last 5 updated trouble tickets associated to the user's base of accounts. Clicking **More** navigates the user to the Trouble Tickets page

Recently Updated Tickets			
01.10.20 6:18 pm	322720 , AGENT - AGENT DEMO Ticket INCO00042806084	Static/Noise Type: Voice	Closed
12.15.19 11:22 pm	322720 , AGENT - AGENT DEMO Ticket INCO00042598036	Connection Up - Can't Bro... Type: Circuit	Closed
→ More			

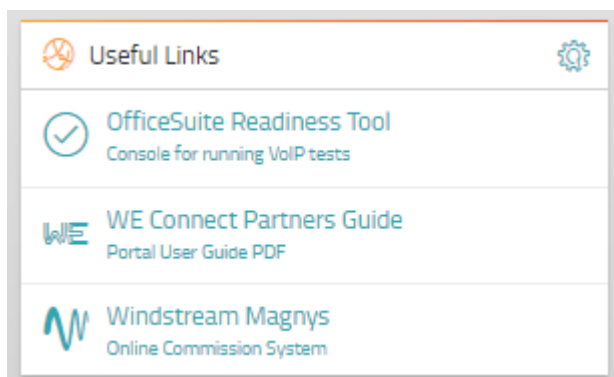
Marketing Resources – list of marketing resources. Clicking **More** navigates the user to the Marketing tab of the Support page

Marketing Resources	
 Partner WINs	 Partner Webinars
 Spotlight News	 Pathfinder Principles
 Channel Insights	 Partner Insights Hub
→ More	

Renewal Offers – shows the number of customers in the user's base with renewal offers along with the total number of offers available across the entire base. Clicking **More** navigates the user to the Offers page

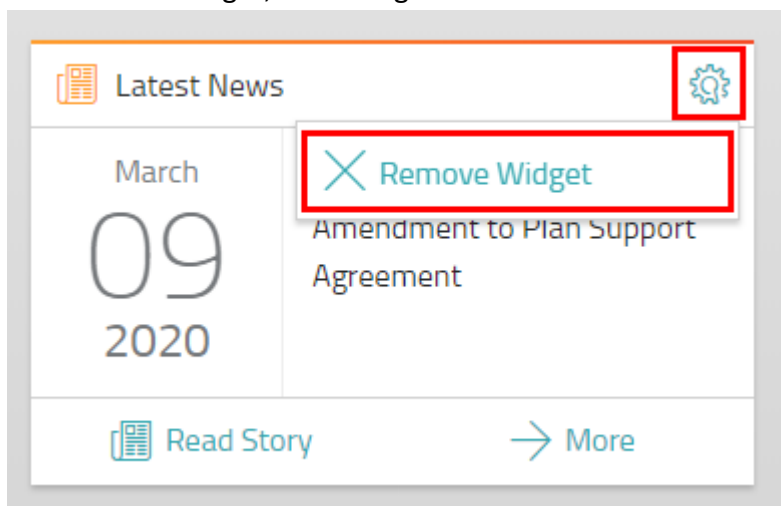
Renewal Offers	
2 clients have offers available	 6 total offers are available
→ More	

Useful Links – show links that are relevant to the user logged in, including this user guide, OS Readiness Tool & Magnys (if user has permissions)



CUSTOMIZE WIDGETS

To remove a widget, click the gear icon and select **Remove Widget**.



To add other widgets, click the **Add icon** in the lower right.

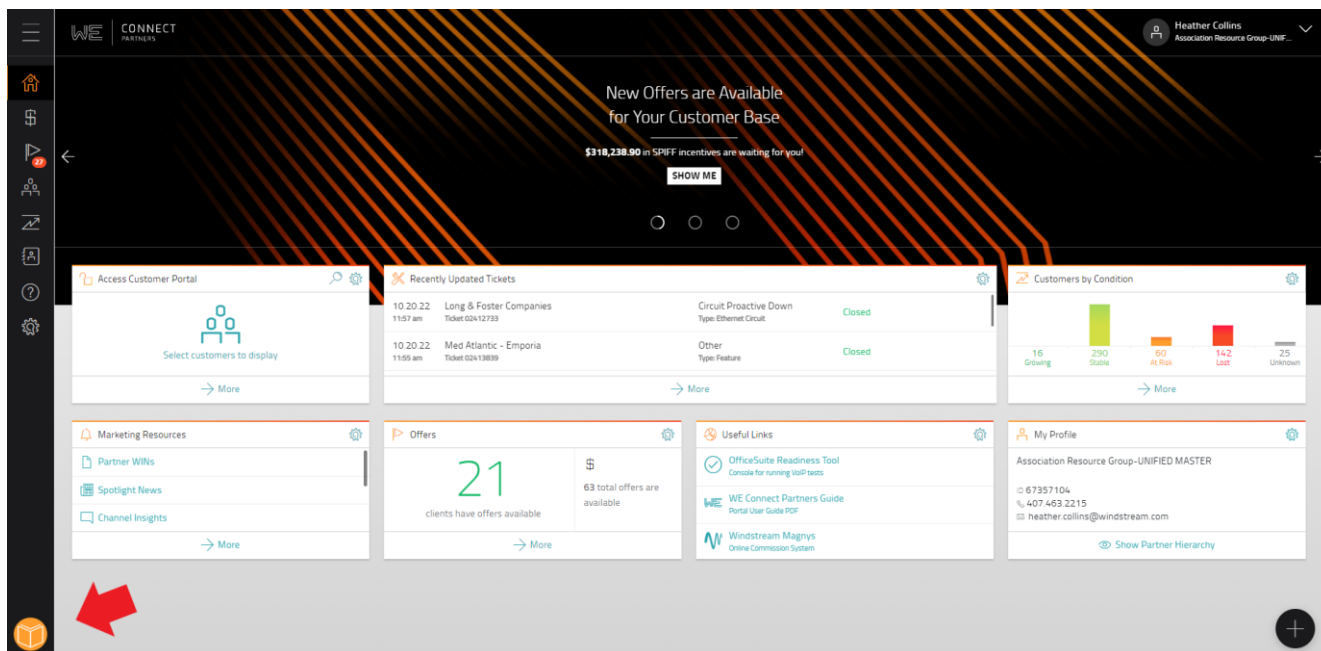
The screenshot shows the Windstream WE Connect Partners dashboard. The top navigation bar includes the WE Connect logo and the user's name, Heather Collins. The main header area displays "Partner Incentives" with a sub-header "Cash in on solutions that drive business forward" and a "VIEW INCENTIVES" button. Below the header, there are several widgets: "Your Advocate & Advisor" (showing David Meier, Channel Manager), "Access Customer Portal" (with links to CIL Engineering, Hotel Teatro, and NACOGDOCHES MEMORIAL HOSPITAL), "Recently Updated Tickets" (showing two tickets), "Customers by Condition" (a bar chart with categories: Growing, Stable, At Risk, Lost, Unknown), "Offers" (showing 834 clients have offers available), "Useful Links" (with links to OfficeSuite Readiness Tool, WE Connect Partners Guide, and Windstream Magnys), and "Marketing Resources" (with links to Partner WINS, Spotlight News, Pathfinder Principles, Channel Insights, Partner Insights Hub, and SPIFF). A red square in the bottom right corner highlights the "Add" icon, which is a circle with a plus sign.

The screenshot shows the "Customize Widgets" dialog box. The title bar says "Customize Widgets" and "Showing 6 of 8". Below the title bar is a search bar labeled "Find Widgets". The dialog box contains a list of widgets, each with a description and a "Remove" button (indicated by a red X icon). The widgets listed are:

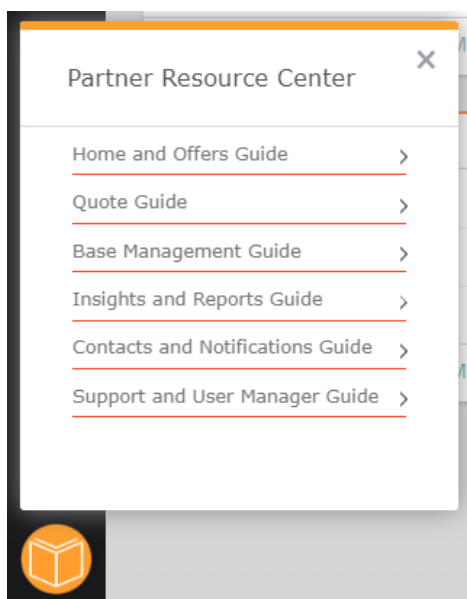
- Your WE Sales Contact**: A card of contact info for your Channel Manager. Links to your profile. (+ Add)
- Access Customer Portal**: A customizable list of customers you want to access quickly. (X Remove)
- Recently Updated Tickets**: A list of last 5 updated tickets. Links to Tickets. (X Remove)
- Marketing Resources**: A list of links and documents that Windstream's partners may find useful. (X Remove)
- Offers**
- Latest News**

PARTNER RESOURCE CENTER

In September 2022, the Partner Resource Center was added to the portal giving easier access to much of the information included in this pdf guide. The Resource Center can be seen on every page of the portal via the orange book icon in bottom left corner of the screen.



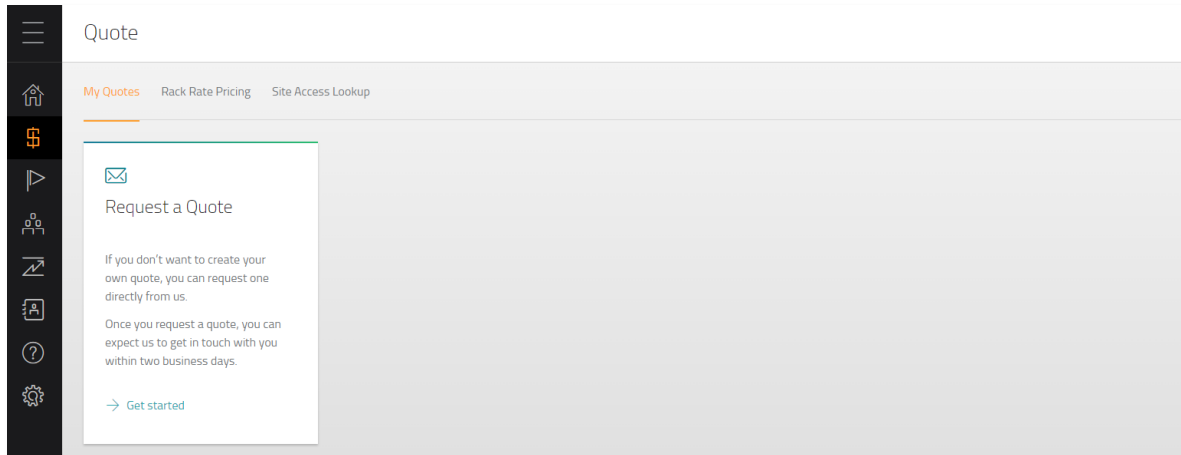
When the Resource Center is open, users can access information & guides for any area of the portal. There are walk-throughs for the most used pages giving lots of details about what's contained in each grid and what the information means to the user.



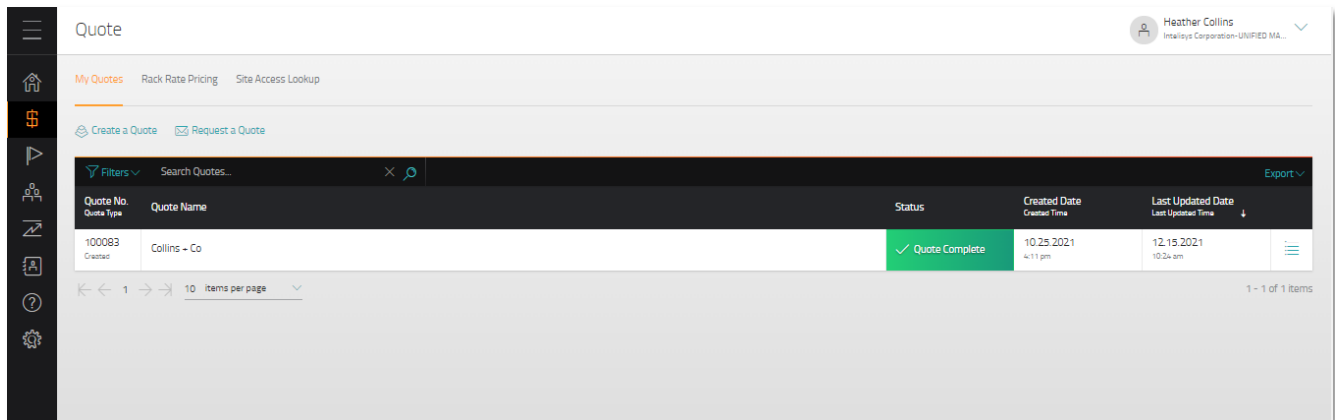
MY QUOTES

[Click here for a demo on the Quote section](#)

When navigating to the Quote page, a new tab will show title “My Quotes”. Upon first navigation, one tile will show – & “Request a Quote”.



If you created a quote before the Quote Tool was retired, the My Quotes tab will show a list of saved quotes. The “Request a Quote” tile becomes a button above the grid.



CREATE A QUOTE

IMPORTANT: As of October 18, 2023 the Partner Portal Quote Tool has been retired and will no longer be available. Quote requests should be submitted through the 'Request a Quote' button with the portal or via your Channel Manager. All quotes must adhere to the Windstream Enterprise Ideal Customer Profile (ICP).

Quote No. Quote Type	Quote Name	Status	Created Date Created Time	Last Updated Date Last Updated Time
100402 Created	Business Verification Test - Sprint 58	Contract Ready	05.26.2022 9:07 am	05.26.2022 9:08 am
100386 Created	TESTING PRE DEMO	Quote Complete	05.20.2022 11:20 am	05.20.2022 11:20 am

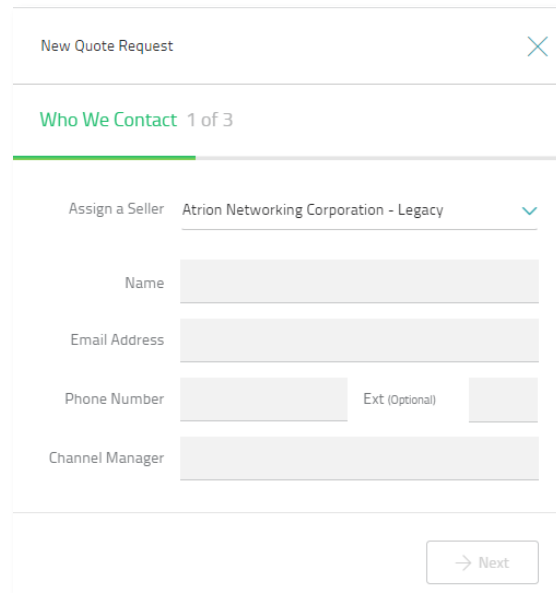
REQUEST A QUOTE

Using the Request a Quote button at the top of the My Quotes screen allows the user to submit a request for a **new logo** quote. This form replaces and digitizes the email that Partners are used to sending.

When the button is clicked, a flyout appears from the right side of the screen requesting 3 sets of information.

1. Who We Contact (user information): enter data into the following fields:

- Assign a Seller – Sub & Master level users will need to select the seller ID that should be assigned to the opportunity
- Name (required) – name of the Partner who Channel Support should work with regarding the quote
- Email Address (required) – Partner contact's email address
- Phone Number (required) – Partner contact's phone number
- Channel Manager (required)



New Quote Request

Who We Contact 1 of 3

Assign a Seller Atrion Networking Corporation - Legacy

Name

Email Address

Phone Number Ext (Optional)

Channel Manager

→ Next

2. Your Prospect (prospect information): enter data into the following fields:

- Company Name (required)
- Website
- Street Address (required)
- City (required)
- State (required)
- Zip Code (required)

New Quote Request

Your Prospect 2 of 3

Company Name

Website (Optional)

Street Address

City

State ZIP

[My prospect has multiple locations](#)

[← Back](#) [→ Next](#)

NOTE: If the prospect has more than one location, click “My prospect has multiple locations”. A popup will appear with a link to download the multi-location spreadsheet. Fill the spreadsheet out and attach using the Upload button on the popup.

3. Your Desired Services: enter data into the following fields:
- Services to be Quoted (required)
 - Term Length (required)
 - Would you like a Solution Development call?

4. Click Submit

RACK RATE PRICING

The Rack Rate Pricing tab allows the user to get budgetary pricing for some of Windstream's most requested products, on a 36-month term. Pricing found here does not constitute a guaranteed quote amount or product availability.

Important things to keep in mind:

- Access components are not included in pricing estimates
- Pricing Estimates are based on net new sales
- Pricing Estimates are subject to change when building a quote and configuration/features may vary

Current products as of the March 2020 release are:

- SD WAN
- OfficeSuite
- Internet + VPN
- IP Blocks
- QoS
- Managed Network Security

Quote

Build a Quote **Rack Rate Pricing** Site Access Lookup

Products

Show only selected products ☐

SD-WAN

Cold Spare - Lease ☒

Cold Spare - Purchase ☒

SD-WAN Equipment - Purchase ☒

SD-WAN Equipment - Lease ☒

SD-WAN License ☒

SD-WAN Management ☒

Internet + VPN

Internet + VPN Bundle ☒

Internet Bandwidth ☒

VPN Bandwidth ☒

IP Blocks ☒

IP Address Block ☒

QoS ☒

QoS Bandwidth ☒

OfficeSuite

HD Meeting License ☒

OfficeSuite Equipment ☒

OfficeSuite Fax Plan ☒

OfficeSuite License ☒

Number of Locations: - 1 +

Estimated Monthly Price: \$0

To get pricing:

1. Select the product category from the left check box menu. The associated product decision tiles will show on the right.

Products

Show only selected products ☐

SD-WAN ☒

SD-WAN Equipment - Lease ☒

SD-WAN License ☒

SD-WAN Management ☒

Cold Spare - Lease ☒

SD-WAN Equipment - Purchase ☒

Cold Spare - Purchase ☒

Internet + VPN ☒

Internet Bandwidth ☒

VPN Bandwidth ☒

Internet + VPN Bundle ☒

IP Blocks ☐

NOTE! Selecting the box for “Show only selected products” will show only those tiles where the quantity is set to 1 or more.

2. Select the quantity of items needed per tile option on the right.

The screenshot shows a configuration interface with a left sidebar and a main grid of product tiles. The sidebar has a search bar and a list of products with checkboxes. The main grid displays four tiles for 'SD-WAN Equipment - Lease' with quantities set to 0.

Product	Quantity	Price
VCE 510	0	\$18.92
VCE 840	0	\$93.31
VCE 520	0	
VCE 2000	0	

Below the grid, there are two tiles for 'SD-WAN License'.

3. Select the number of locations at the bottom

The screenshot shows the same configuration interface as before, but with the 'Number of Locations' section highlighted at the bottom. The quantity for 'VCE 510' is still 0.

Product	Quantity	Price
VCE 510	0	\$18.92
VCE 840	0	\$93.31
VCE 520	0	
VCE 2000	0	

At the bottom, the 'Number of Locations' is set to 1.

Note! The system assumes all locations will have the exact same setup

4. Estimated Monthly Price will be calculated based on selections.

Product	Selected Option	Price
SD-WAN License	500 Mbps	\$244.04
SD-WAN License	1 Gbps	\$466.32
SD-WAN License	5 Gbps	\$619.22
Internet Bandwidth	1.5 Mb	\$830.42
Internet Bandwidth	1.5 Mb	\$1,997.96
Internet Bandwidth	1.5 Mb	\$81.00
Estimated Monthly Price		\$123.76

Example:

User would like to price 3 locations with 25Mbps internet & VPN.

1. By default, all products are selected. Deselect all products except Internet + VPN Bundle

Products

Show only selected products ☐

SD-WAN ☐

SD-WAN Equipment - Lease ☐

SD-WAN License ☐

SD-WAN Management ☐

Cold Spare - Lease ☐

SD WAN Equipment - Purchase ☐

Cold Spare - Purchase ☐

Internet + VPN ☒

Internet Bandwidth ☐

VPN Bandwidth ☐

Internet + VPN Bundle ☒

2. Find the 25Mbps tile and change quantity to “1”

Bundle	Speed	Quantity	Price
Internet + VPN Bundle	1.5 Mb	0	\$141.00
Internet + VPN Bundle	3 Mb	0	\$235.00
Internet + VPN Bundle	4.5 Mb	0	\$305.50
Internet + VPN Bundle	6 Mb	0	\$329.00
Internet + VPN Bundle	10 Mb	0	\$399.50
Internet + VPN Bundle	25 Mb	1	\$534.50
Internet + VPN Bundle	50 Mb	0	\$705.00
Internet + VPN Bundle	100 Mb	0	\$869.50
Internet + VPN Bundle	200 Mb	0	\$1,098.63
Internet + VPN Bundle	500 Mb	0	\$1,680.25
Internet + VPN Bundle	1 Gb	0	\$2,332.38

3. Change Number of Locations to “3”. Estimated Monthly Price is updated.

Number of Locations	Estimated Monthly Price
3	\$1,603.5

SITE ACCESS LOOKUP

Site Access Lookup allows a user to input a customer address to determine if Windstream facilities are available, and if there are, what kind of facilities are there. This page also features Lit/Near Building information that can be leveraged when helping customers make decisions on which products/services to buy from Windstream.

Quote

Build a Quote | Rack Rate Pricing | **Site Access Lookup**

Find Site

Street Address 1: _____

Street Address 2 (Optional): _____

Room (optional): _____ Floor (optional): _____ Building (optional): _____

City: _____

State: Alabama ZIP Code: _____

Country: USA

☒ Include Broadband

☒ Include Cable

☒ Include Cellular Broadband

Minimum Speed: 128 Kbps Maximum Speed: 10,000 Mbps

About Site Access Lookup

Use this tool to determine if Windstream facilities are available at a given location. Results shown here are for Access Services only and do not constitute a quote or an offer for service.

To use the tool:

1. Input the customer's address information in the form
 - a. Street Address 2, Room, Floor, and Building numbers are optional
2. Select/De-select check boxes for Broadband, Cable and Cellular Broadband
3. Select Minimum & Maximum Speeds from dropdowns

4. Click Submit. Site Info will populate showing basic information.

[Request a Quote](#)
[Rack Rate Pricing](#)
[Site Access Lookup](#)

Site Found

1939 STEEPLECHASE DR
ROCK HILL, SC, 29732-1072

[Change Address](#)

Use this tool to determine if Windstream facilities are available at a given location. Results shown here are for Access Services only and do not constitute a quote or an offer for service.

Viewing 1 / 2 / 3 Year Terms

[Export PDF](#)

[Site Info](#)
[Products Available](#)
[Lit / Near Buildings](#)

Rate Center ROCK HILL

OCN Name COMPORIUM, INC.

CSWC RCHLSCXB

NPA / NXX 803/323

Cable Provider COMPORIUM COMMUNICATIONS

Loop Length 24939

LATA 422

5. Click Products Available

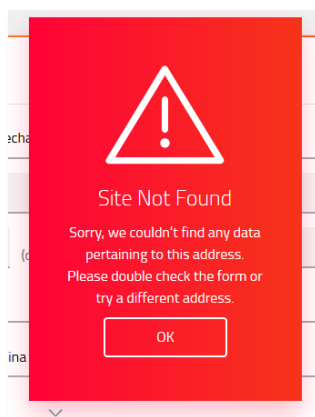
- Product – the access product available
- Voice Required? - is voice required to have this access
- MRR - Monthly Recurring Amount
- NRR – Non-Recurring Amount
- Confidence Color – depicts how likely it is that this service is available

Site Info Products Available Lit / Near Buildings					
Product	Voice Required?	MRR 3 Year	NRR 3 Year	Confidence Color	Type
Cellular Broadband 1G Pooled	No	\$3.08	\$130.00	Green	Not Found
	No	\$3.08	\$130.00	Green	Not Found
Cable 250Mbps/1Mbps	No	\$152.31	\$180.81	Green	Not Found
Cable 30Mbps/1Mbps	No	\$152.31	\$180.81	Green	Not Found
Cellular Broadband 5G Pooled	No	\$3.08	\$230.00	Green	Not Found
	No	\$3.08	\$230.00	Green	Not Found
Cable 90Mbps/3Mbps	No	\$152.31	\$280.27	Green	Not Found

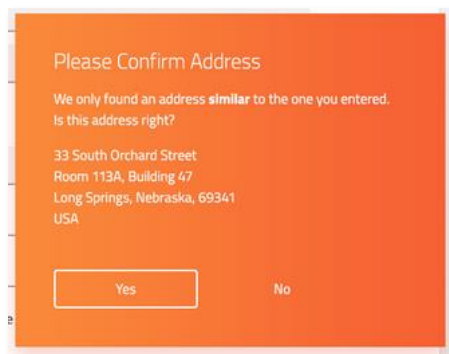
6. Click Lit/Near Buildings. Lit building(s) nearby will populate if available.

Site Info Products Available Lit / Near Buildings						
Distance (mi.)	Vendor	Type	Street Address	City	State	ZIP
0.1560606...	Other	LIT	360 S HERLONG AVE	Rock Hill	SC	29732
0.1782196...	Other	LIT	370 S HERLONG AVE	Rock Hill	SC	29732
0.3357954...	Other	LIT	228 S HERLONG AVE	Rock Hill	SC	29732
0.5028409...	Other	LIT	198 S HERLONG AVE	ROCK HILL	SC	29732

- If the address entered is not found, the portal will display the following message



- If the address entered is close to one found by the system, the portal will display the following message

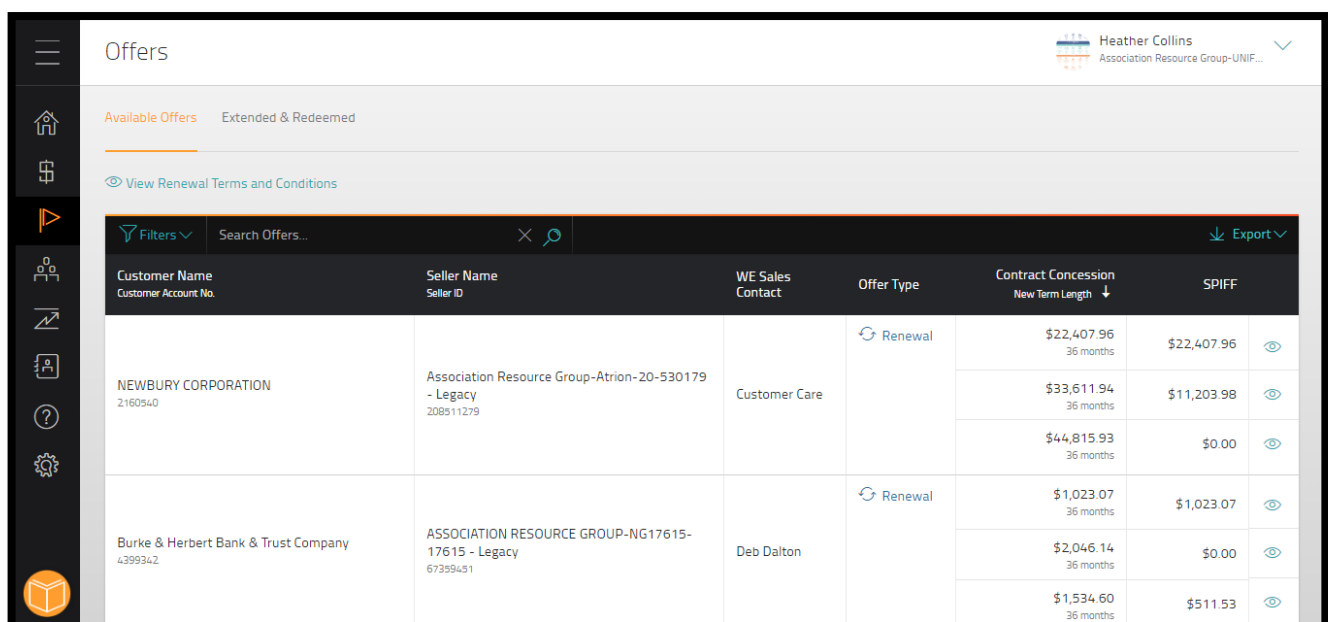


OFFERS

[Click here for a demo on the offers section](#)

The Offers screen shows all accounts that have special offers available, consolidating the view for the user. A line will show for each customer that has an offer available. User can sort on the columns to group information or filter based on the data in the table.

Predefined renewal offers are determined by Windstream, can be used when a customer doesn't need any changes to their current products & services. Typically, there will be 3 offers to choose from. Requesting to take advantage of an offer sends an email to the Customer via DocuSign where they can digitally sign the renewal. The offer will expire 7 business days after it has been extended.



Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Offer Type	Contract Concession New Term Length ↓	SPIFF	
NEWBURY CORPORATION 2160540	Association Resource Group-Atrion-20-530179 - Legacy 208511279	Customer Care	Renewal	\$22,407.96 36 months	\$22,407.96	👁
				\$33,611.94 36 months	\$11,203.98	👁
				\$44,815.93 36 months	\$0.00	👁
Burke & Herbert Bank & Trust Company 4399342	ASSOCIATION RESOURCE GROUP-NG17615- 17615 - Legacy 67359451	Deb Dalton	Renewal	\$1,023.07 36 months	\$1,023.07	👁
				\$2,046.14 36 months	\$0.00	👁
				\$1,534.60 36 months	\$511.53	👁

The portal will list the following attributes at an Offer level:

- Customer Name & Account Number – this is the customer, not a location
- Seller Name & ID – the sales ID that is tagged to that customer
- Customer Advocate – CA associated to the customer's account
- Offer Type
- Contract Concession & New Term Length – how much the customer can save & new contract term
- Partner SPIFF – Will display if applies to customer or customer offer

Clicking the eyeball to the right of the offer will produce a popup with the information for that offer and allows the user to send the offer directly to the customer contact. The Offers Details modal shows confirmation of the credit amount, billing cycle the rates are based on and the affected accounts.

If help is needed with the renewal offers, click the question mark icon at the top of the popup to send an email to the Offers team.

Offer Details

?

✕

Credit Amount: single, one-time credit of \$33,611.94 to be applied to the customer's first bill after implementation of the agreement.

Rates are based on the pricing for the Services as it was during the March, 2023 billing cycle.

Included accounts:

- 2160540

✉

 Send To Customer

Send Offer

?

✕

Earn up to **\$1,749.07 SPIFF** when you renew this account for **36 months** with a **\$5,247.22 customer credit**

Customer Name

Customer Email

Message (optional)

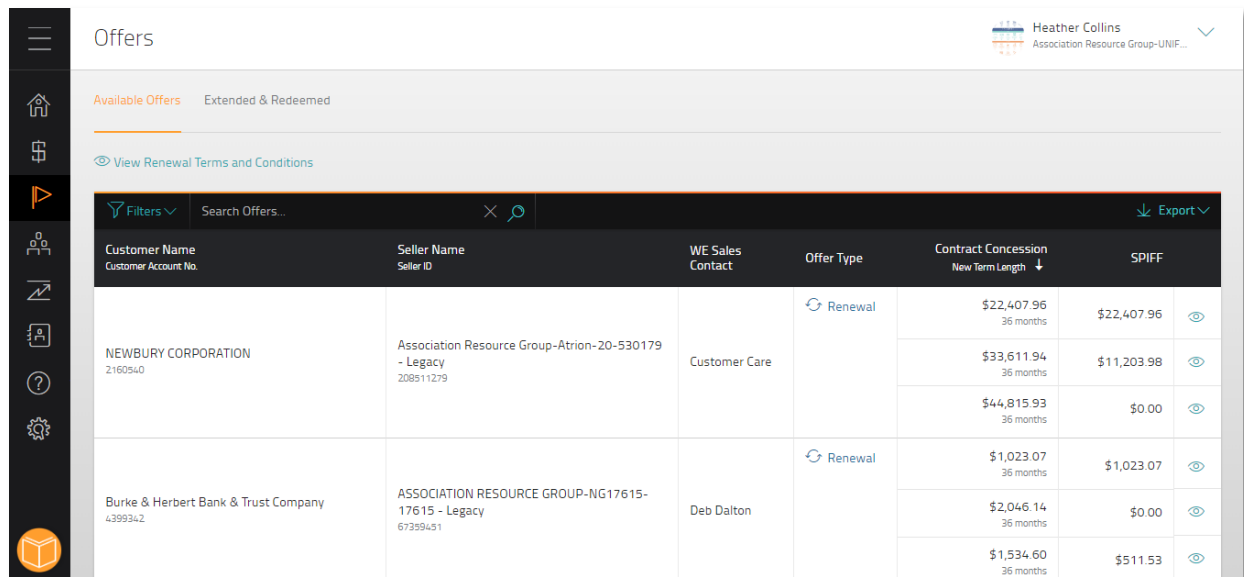
⚠

 Once this email containing the offer is sent, the customer will have **7 days** to sign the contract before the offer expires.

→

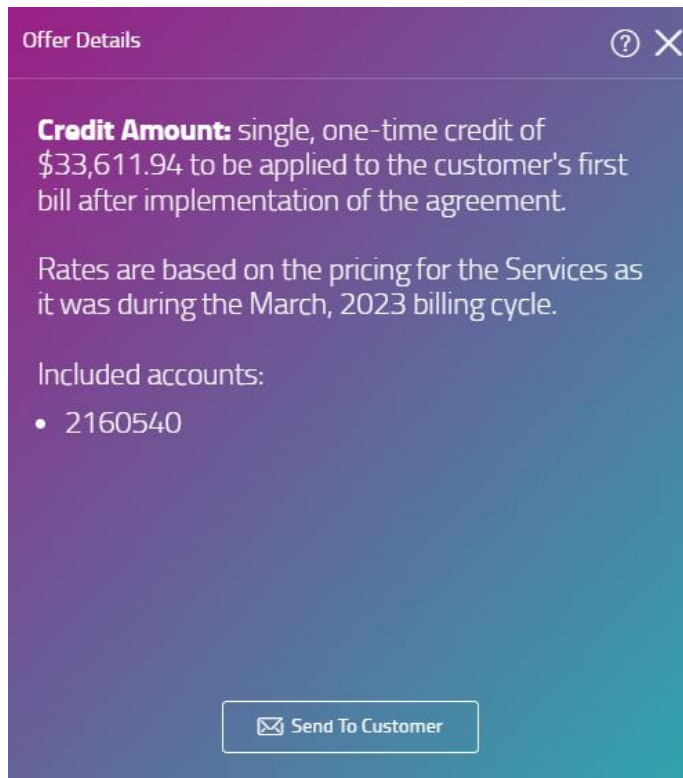
 Send

EXTEND OFFER TO CUSTOMER



Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Offer Type	Contract Concession New Term Length ↓	SPIFF	
NEWBURY CORPORATION 2160540	Association Resource Group-Atrion-20-530179 - Legacy 208511279	Customer Care	Renewal	\$22,407.96 36 months	\$22,407.96	👁
				\$33,611.94 36 months	\$11,203.98	👁
				\$44,815.93 36 months	\$0.00	👁
Burke & Herbert Bank & Trust Company 4399342	ASSOCIATION RESOURCE GROUP-NG17615- 17615 - Legacy 67359451	Deb Dalton	Renewal	\$1,023.07 36 months	\$1,023.07	👁
				\$2,046.14 36 months	\$0.00	👁
				\$1,534.60 36 months	\$511.53	👁

1. Click the eyeball next to offer being sent to the customer
2. Review the Offer Details and click Send to Customer




Offer Details

Credit Amount: single, one-time credit of \$33,611.94 to be applied to the customer's first bill after implementation of the agreement.

Rates are based on the pricing for the Services as it was during the March, 2023 billing cycle.

Included accounts:

- 2160540



3. Enter information for the person who should receive the paperwork.

Send Offer

Earn up to **\$1,749.07 SPIFF** when you renew this account for **36 months** with a **\$5,247.22 customer credit**

Customer Name

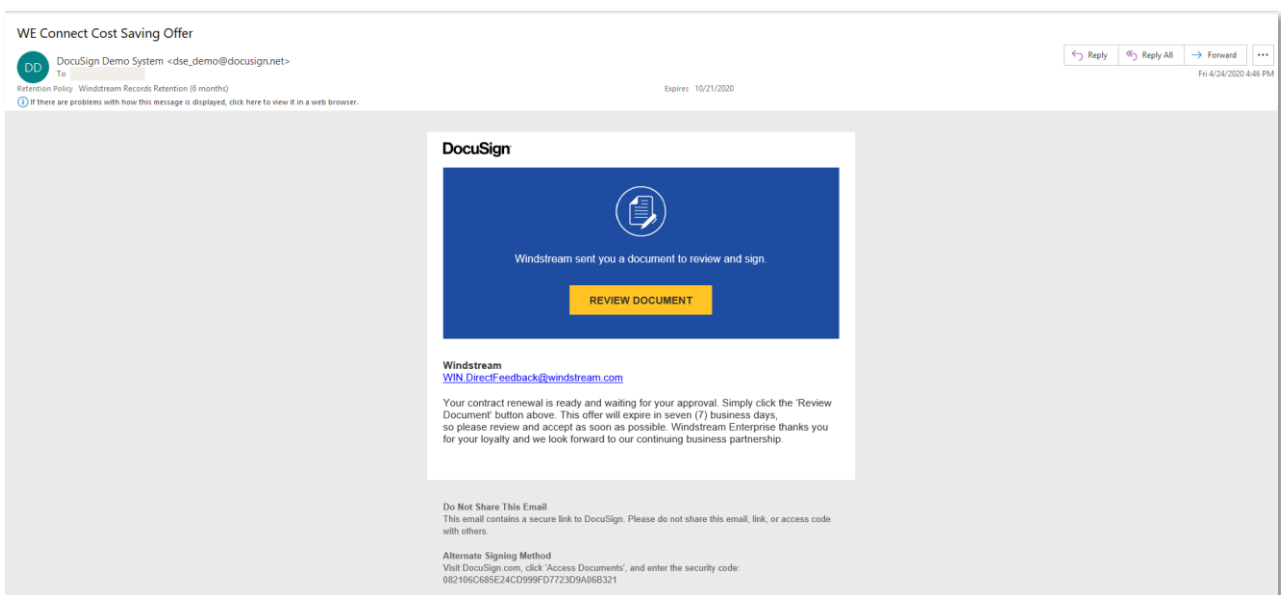
Customer Email

Message (optional)

⚠ Once this email containing the offer is sent, the customer will have **7 days** to sign the contract before the offer expires.

[→ Send](#)

4. Click Send.
5. Customer will get an email with the docusign envelope. Partner user will also get an email with a copy of the paperwork.



Please Review & Act on These Documents

Windstream
Windstream

Your contract renewal is ready and waiting for your approval. Simply click the "Review Document" button above. This offer will expire in seven (7) business days.

[View More](#)

Please review the documents below.

CONTINUE **OTHER ACTIONS ▾**


The Agreement shall be deemed amended as follows:

1. The Customer has one or more portions of Service(s) scheduled to become out of term or are currently out of term, and due to this state, WIN has or may be scheduled to remove any discounts and recurring credits in place and move the Customer to a month-to-month term with an increase above tariffed base rates. In exchange for a new forty-eight (48) months renewal ("Renewal Term"), WIN agrees to leave pricing for the Service(s) as it was during the January, 2020 billing cycle. Any one-time credits on the bill during the stated month will be removed if applicable. Historic billing can be viewed online via the Customer Portal.
2. In consideration of this Renewal Term, WIN will give the Customer one (1) credit(s) of \$95.15.41 to be applied to the Customer's first bill month(s) after implementation of this renewal. The credit amount will be distributed across the below account(s) based on the Service(s) in each account.
3. This Renewal Term and price adjustment applies to all the billing account number(s) listed below. All accounts will be updated to a continuous contract end date regardless of current individual current contract end dates.
Account Number(s): 2467434
4. If Customer terminates the Agreement after commencement of the Renewal Term for any reason other than for cause, Customer shall incur liability for early termination as set forth in the Agreement, as well as the full amount of the applicable credit(s).

Any changes to the Agreement necessary to conform the Agreement to this Addendum are hereby deemed to be made with the understanding that should the Customer have any disconnect, conversion or account change(s) in process, WIN reserves the right to negate this Agreement or if it was generated in error or based on faulty data. This Addendum supersedes and replaces all prior and contemporaneous agreements, discussions and understandings, whether written or oral, concerning the subject matter hereof. Exclusive of any tariff modifications initiated by WIN and approved or permitted by the applicable regulatory authority. Handwritten modifications to this Addendum are not binding on either WIN or Customer. This Addendum is not effective until executed by an authorized representative of each party.

IN WITNESS WHEREOF, WIN and Customer have executed this Addendum by their duly authorized representatives, on the day and year indicated below.

Customer: RADIO FREE ASIA Address:

 Heather Collins 4/29/2020
Customer Authorized Signature Print Name/Title Date

Windstream Acceptance:
Print Name/Title Date

Confidential and Proprietary
Rev Date: October 2019

DocuSign

Change Language - English (US) Terms Of Use & Privacy Copyright © 2020 DocuSign Inc. 100%

6. Customer can digitally sign the renewal or assign to someone else (send to the authorized person to sign) or decline to sign (declines the offer).


CONTINUE **OTHER ACTIONS ▾**


Finish Later

Print & Sign


Assign to Someone Else

Decline to Sign

Help & Support 

About DocuSign 

View History

View Certificate (PDF) 

Session Information

7. If your customer signs-off on the offer, the paperwork will be routed to the Windstream COT Team to countersign and process. The customer will receive a copy of the paperwork after it has been countersigned.

EXTENDED & REDEEMED OFFERS

Once a user has extended an offer to the customer, the Offer will be moved from the Available Offers tab to the Extended & Redeemed tab in the Offers screen.

Offers

Available Offers **Extended & Redeemed**

Offer status was last checked November 8, 2021 at 11:30 pm UTC.

Filters Export

Customer Name Customer Account No.	Customer Advocate	Offer Type	Offer Status	Contract Concession New Term Length	Offer ID
STRUCTURA, INC. 215173974	Christopher Mulheron	RENEWAL	Extended	\$2,291.58 36 months	208242193-215173974-OSPP075-2109-211103
JESUIT REFUGEE SERVICES 215175214	Deb Dalton	RENEWAL	Extended	\$5,525.82 36 months	209017265-215175214-OSPP0100-2109-211103
Benderson Development Company, LLC Univ Park Voice 4377820	Eric Esler	RENEWAL	Extended	\$17,814.42 36 months	204962677-4377820-ADVPP075-2109-211103
GIA Partners, LLC 5265179	Darrell Brown	RENEWAL	Extended	\$9,452.00 36 months	204949646-5265179-PP0X75-2109-211103
Richmond Redevelopment & Housing Authority 4374995	Darrell Brown	RENEWAL	Accepted	\$27,499.55 36 months	204965377-4374995-ADVPP075-2109-211103

1 - 5 of 5 items

Offers in an “Extended” status will stay in the grid until they expire (7 days or until the Customer takes action on them - whichever comes first).

Offers that are accepted by the customer will have an “Accepted” status and will stay in the grid for 90 days.

BASE MANAGEMENT

Base Management

Accounts Orders Trouble Tickets

Customer access status was last checked July 28, 2023 at 5:00 am UTC.

Filters Search Accounts... Export

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status ↑	Contract Exp. Date	MBR
Congregation B'Nai Tzedek 4874001 Main Offers	Intelisys 2 - Merged - Clear Connection Inc-Chris Drury-288271 - Legacy 67364918	Mark William Stoffel	Access Approved	02.13.2023	\$2,047.37
Yeshiva Of Greater Washington 61171754 Main	Intelisys 2 - Merged - Clear Connection, Inc-Agent-8000257 - Legacy 67368647	Customer Care	Access Approved	04.08.2023	\$41.65

The Base Management screen shows Customer Accounts, Orders, & Trouble Tickets.

ACCOUNTS

Base Management

Accounts Orders Trouble Tickets

Customer access status was last checked May 31, 2023 at 5:00 am UTC.

Filters Search Accounts... Export

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status ↑	Contract Exp. Date	MBR
Lowell Five Cent Savings Bank 9233070	Association Resource Group-Atrion-Base Pae-530181 - Legacy 208511280	Dori Atherton	Access Approved	05.08.2021	\$17.25
Lowell Five Cent Savings Bank 9233071	Association Resource Group-Atrion-Base Pae-530181 - Legacy 208511280	Dori Atherton	Access Approved	05.14.2021	
Feld Studios - Us Hwy 4445717 Main Offers	Association Resource Group-277162 - Legacy 67362376	Customer Care	Access Approved	12.12.2021	
Feld Studios - Us Hwy 4445717 Main Offers	Association Resource Group-277162 - Legacy 67362376	Customer Care	Access Approved	12.12.2021	\$1,698.92

- Access Customer Portal
- View Account Details
- View Offers
- Download Invoice
- Create Ticket
- Download Phone Numbers

[Click here for a demo on Accounts](#)

Channel Partners access their Customer base list by clicking on **Accounts**. The information shown here will be dependent on the user who is logged in. For example: a Seller level user will only see accounts associated to their Seller ID, a Unified Master level user will see accounts associated to every Seller under them.

The portal will list the following account attributes at a location level:

- Customer Name & Account Number
- Seller Name & ID
- Customer Advocate – CA associated to the customer’s account
- Customer Access Status – cell color will change based on status
- Contract Exp. Date
- MBR – monthly billed revenue

Tags will show next to the account number when applicable:

- Main – billable account
- Offers – a renewal offer is available
- Rate Inc – location is expected to experience a rate increase in the current month or a future month (likely in the next 90 days)

Users can search & filter accounts by using the Filters dropdown menu on the top left of the table.

Filter by:

- Assigned Partner
- Customer Name
- Customer Account Number
- Customer Access Status
- Sales Contact
- Contract Expiration Date
- Monthly Billed Revenue
- Billable Accounts
- Upcoming Rate Increase

Filters ^ Search Accounts... Export

Sub Partners All Seller Partners All

Customer Name Customer Account No.

Seller Name All Sellers Customer Access Status All Statuses

Seller ID WE Sales Contact

Contract Exp. Date MM/DD/YY... to MM/DD/YY... Monthly Billed Revenue to

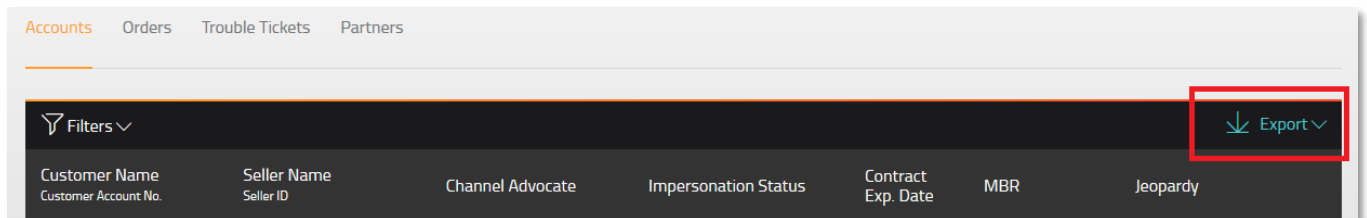
Billable Accounts Upcoming Rate Increase

Clear Filters Apply Filters

EXPORT BASE LIST

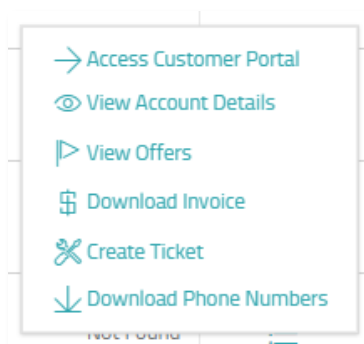
Expanded information can be exported to excel using the Export button on the top right of the Accounts table. Export contains:

- Customer Name
- Service Location Account Number
- Service Location Name
- Service Address
- Service Status
- Billing Status
- Contract Expiration Date
- Auto Renew Status
- Current MBR
- Last Rate Increase Date
- Future Rate Increase Date
- Customer Advocate
- Assigned Seller Name
- Assigned Seller GID
- Customer Access Status



LOCATION MENU

Clicking the hamburger menu icon in the far-right column will produce a small pop out menu with additional options for viewing and managed customers.



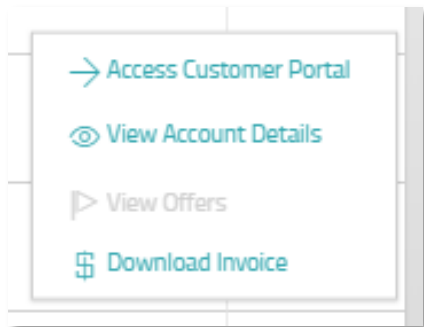
- Access Customer Portal – routes user to the customer’s account in WE Connect (see [Customer Portal Access](#) for more details)
- View Account Details – fly out window with more detailed information about that customer location
- View Offers – popup modal to show the user any predefined renewal offers currently available for that customer
- Download Invoice – flout with the customer’s last 12 invoices. Only those accounts which are billable will have this option. Non-billable accounts will have the optioned greyed out.
- Create Ticket – routes user to the Trouble Tickets screen with the Create Ticket screen open to the selected customer
- Download Phone Numbers – downloads an excel file with all the active telephone numbers for the selected location

CUSTOMER PORTAL ACCESS

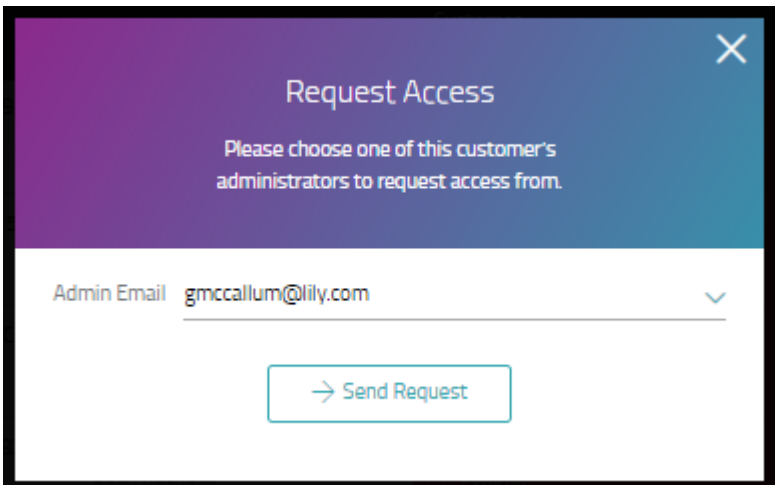
Customer Portal Access gives the Partner user the ability to log into the WE Connect customer portal as the Customer. At this time, all Partner users will need to request access from the Customer via the Partner Portal Accounts page.

REQUESTING CUSTOMER ACCESS

1. Click the Menu icon and Access Customer Portal



2. The Request Access pop up will appear. Choose a customer admin and click Send Request



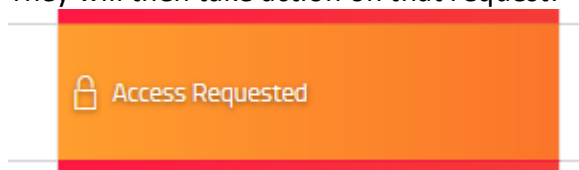
Request Access

Please choose one of this customer's administrators to request access from.

Admin Email

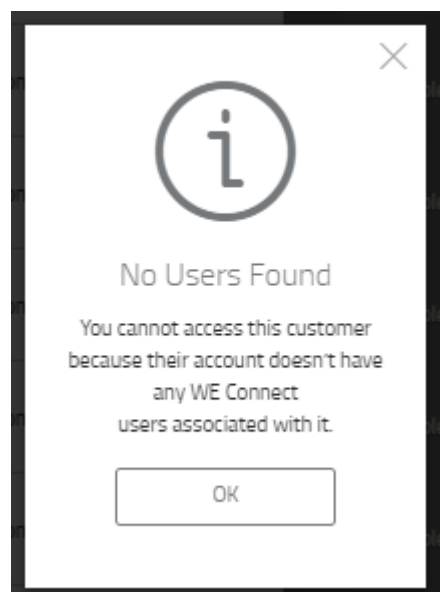
[→ Send Request](#)

- The Customer Access Status field for that Customer will turn orange with a status of "Access Requested". The admin selected will receive an email notifying them of the user's request. They will then take action on that request.



When approved, access will be given to all locations that the Customer user being impersonated can see.

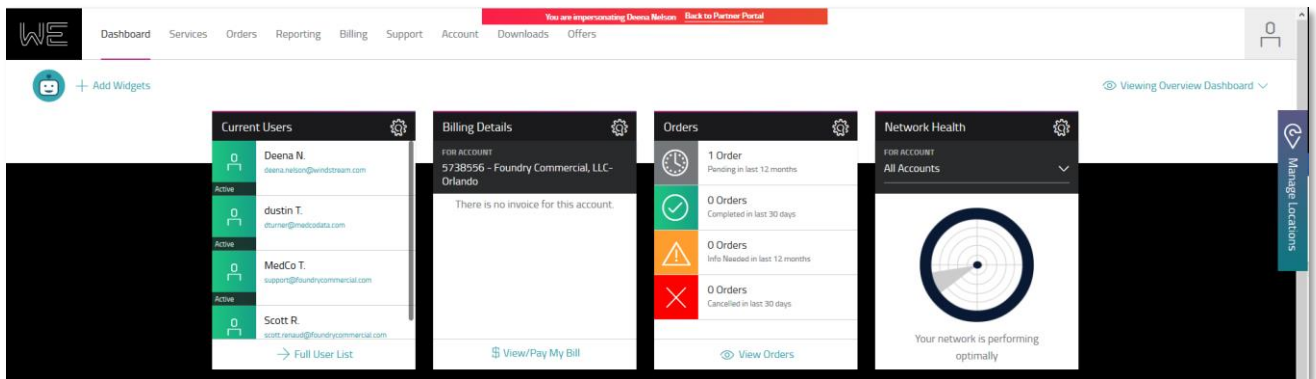
If a Customer does not have any admins in WE Connect, the Customer Access Status cell will be set to "Access Not Available". By clicking on the cell the user will see the pop up below. Please instruct the customer to register for WE Connect in order to request access.



ACCESSING A CUSTOMER'S PORTAL

Once a request to access a Customer has been approved, the user should follow the steps below to access the Customer's account in WE Connect.

1. Find that Customer on the Accounts tab
2. Click the Menu icon
3. Click **Access Customer Portal**
4. The user will be automatically redirected to WE Connect. During access, there will be a red banner at the top of the screen calling out that the user is in the Customer's in WE Connect portal



5. To navigate out of Customer Access mode, click **Back to Partner Portal** in the red banner.

ORDERS

[Click here for a demo on Orders](#)

Base Management							
<div> <div>Accounts</div> <div>Orders</div> <div>Trouble Tickets</div> <div>Partners</div> </div>							
Order history is available for the past year.							
Customer Name Customer Account No.	Seller Name Seller ID	Order Date Order No.	Requested By	Order Type	Service Address	Order Status	
Serco Inc - Chesapeake 4378103	Association Resource Group-277162 - Legacy 67352376	02.02.2022 1692215149	Sales Order	WIN Access Loop Install	2115 Portlock Rd, Chesapeake, VA, 233242832	Facility on Order On Hold	
Serco Inc - Columbia 61146585	Association Resource Group-Agent-8000578 - Legacy 67353776	02.02.2022 1692214965	Sales Order	WIN Access Loop Install	6731 Columbia Gateway Dr, Columbia, MD, 21046-	Facility on Order On Hold	
Serco Inc - Sterling 5313154	Association Resource Group-D. Hel-286727 - Legacy 67354185	02.02.2022 1692214169	Sales Order	WIN Access Loop Install	21110 Ridgeway Cir, Sterling, VA, 201666591	Facility on Order On Hold	
Sudler And Company 4488354	Association Resource Group - Merger - Advantage Communications Group Lic-Agent-12047 - Legacy 67359110	01.26.2022 1690957895	Sales Order	WIN Access Loop Install	875 N Michigan Ave, Chicago, IL, 606111779	Facility on Order	
Herson'S Honda 5225319	Association Resource Group-277162 - Legacy 67352376	01.18.2022 1688846118	Sales Order	WIN Access Loop Install	15525 Frederick Rd, Rockville, MD, 208552110	Facility on Order	

Orders associated to Customer accounts owned by the user will show on the Orders tab. The following columns will populate:

- Customer Name & Account Number
- Seller Name
- Order Day & Order Number
- Requested By
- Order Type
- Service Address
- Order Status – cell color will change based on status

Clicking the eye in the far-right column will produce a fly out menu showing details about the order.

As of 11/11/2021 the Orders grid is sorted by open orders first. Cancelled and Complete orders will show at the bottom of the list.

The Order Details flyout is now updated to more closely reflect the WE Connect order details flyout.

Order 8483295

Association Resource Group - NextWa...
Pending

Ordered Processed **Facility on Order** Installed Activated Completed

Account No. 2155237511
Account Name Mariner - El Paso North 7141
Installation Address ... 4000 Woodrow Bean Transmountain Dr. Ste B403, El Paso, TX, 79924

Creation Date 11.02.2021
Completion Date n/a

Coordinator Name Kor, Hazkiel
Coordinator Phone 2015237511
Coordinator Email Hazkiel.Kor@windstream.com

Critical Dates Services Facilities

Critical Task	Target Date	Completed
Order Created		11.02.2021

Users can search & filter orders by using the Filters dropdown menu on the top left of the table.

Filters Search Orders... Export

Master Partners All Sub Partners All

Seller Partners All

Customer Name Customer Account No.

Seller Name Seller ID

Order Date MM/DD/YY... to MM/DD/YY... Order No.

Requested By Order Type

Service Address Order Status All Statuses

Clear Filters Apply Filters

Information can be exported to Excel using the Export button on the top right of the table.

Accounts Orders Trouble Tickets Partners

Order history is available for the past year.

Filters Export

Customer Name Seller Name Channel Advocate Order No. Order Date Order Type Order Status

Customer Account No. Seller Id

TRouble TICKETS

[Click here for a demo on Trouble Tickets](#)

Customer Name Customer Account No.	Seller Name Seller Id	Ticket No.	Ticket Status Latest Update	Service Type Service No.	Reported Problem	Service Address	
Foundation Demo Account-Agent 1 80334040	322720 , Agent - Agent Demo 67369903	INC000041763935	Closed 9.22.2019 3:54 AM	Circuit 18144540	Connection Up - Can't Browse	318 S CLINTON ST SUITE 201 SYRACUSE NY 132021110	
Foundation Demo Account-Agent 1 80334040	322720 , Agent - Agent Demo 67369903	INC000041611026	Closed 9.9.2019 2:37 PM	Circuit 18151262	Connection Up - Can't Browse	318 S CLINTON ST SUITE 201 SYRACUSE NY 132021110	
Foundation Demo Account-Agent 1 80334040	322720 , Agent - Agent Demo 67369903	INC000041275453	Closed 8.10.2019 11:40 PM	Circuit 18144540	Bouncing Circuit	318 S CLINTON ST SUITE 201 SYRACUSE NY 132021110	
Foundation Demo Account-Agent 1 80334040	322720 , Agent - Agent Demo 67369903	INC000041273548	Closed 8.10.2019 11:40 PM	Circuit 18144540	Bouncing Circuit	318 S CLINTON ST SUITE 201 SYRACUSE NY 132021110	

Tickets associated to Customer accounts owned by the user will show on the Trouble Tickets tab. The following columns will populate:

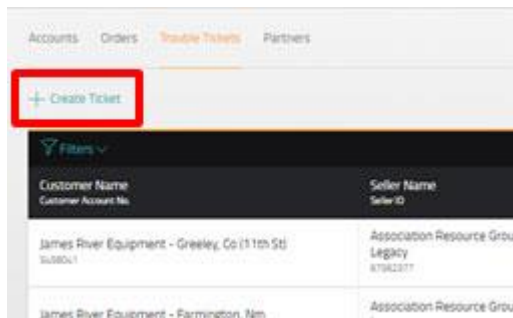
- Customer Name & Account Number
- Seller Name

- Ticket Number
- Ticket Status – cell color will change based on status
- Service Type
- Reported Problem
- Service Address

CREATE TICKET

Users can create a trouble ticket for their customers directly in WE | Connect Partners by clicking the “+Create Ticket” button at the top left of the grid.

1. Click “+Create Ticket”



2. Select the customer from the drop down and click **Next**.

A screenshot of a dialog box titled 'Select a Customer Account'. The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu with the word 'Select' and a downward arrow. Below the dropdown menu is a button labeled '→ Next'.

3. Ticket wizard opens

Accounts Orders **Trouble Tickets** Partners

Customer Accounts > 5377531 - THE SCHOOL DISTRICT OF PHIL... > Close

Create Service Ticket Request

1 Please provide as much detail as possible so that we can begin to troubleshoot immediately. Without this information, our repair tech may need to call you to troubleshoot over the phone.

1 Location Details

Select the **ONE** that is easiest for you to identify where the issue is located. We will help you from there.

Service ID

A Service ID can be a Circuit ID like 55/ABCD/123456/000/EF, a phone number like 555-555-5555, or an OfficeSuite BTN like 555-555-ABCD.

→

Service Location

Your Service Location is the street address, city, state, and ZIP code of the structure where the issue is happening.

→

Account Name/Number

Your Account info can be found at the top of your invoice. You may have different account info for each of your service locations.

→

2 Issue Details

3 Contact Details

4 Authorization

We can access your site *(required)*

☐ Anytime (24 hours / 7 days) ☒ 9am-5pm Mon-Fri ☐ 9am-5pm All Days ☐ Custom Access Hours

Special Access Requirements

4. Follow the wizard prompts

- a. Location Details – choose the service ID, service location OR account name/number

1 Location Details

Select the **ONE** that is easiest for you to identify where the issue is located. We will help you from there.

You've selected account 200382839 - The School District of Philadelphia

The School District of Philadelphia - 11081 Knights Rd, Philadelphia, PA

Change

- b. Issue Details – select from a list of appropriate issues or search for the issue experienced
- i. Additional information may be needed depending on the issue chosen

2 Issue Details

Search for keywords that describe your issue...

...or select the category that best describes your issue below: *(required)*

Voice & Unified Communications

Includes Conference Calling

☐ Allworx Products

☐ Poor Call Quality

☐ Feature Not Working

☐ Can't Make Calls

☐ Can't Receive Calls

☐ Router Configuration Request

☐ Monitoring Request

☐ Information Request

☐ Line Tagging

☐ Network / Circuit Trouble

☐ SD-WAN (Voice)

☐ No Dial Tone

☐ UCaaS (Repair)

☐ UCaaS (Change)

☐ Wireless Data Backup

- c. Contact Details – enter the contact associated to the ticket

3 Contact Details

<p>Primary Contact <i>(required)</i></p> <p>Joe Barisa</p> <p>Joe Barisa</p> <p>215.400.5010</p> <p>jib@philasd.org</p>	<p>Site Contact <i>(required)</i></p> <p><input checked="" type="checkbox"/> Use primary contact</p> <p>Joe Barisa</p> <p>Joe Barisa</p> <p>215.400.5010</p> <p>jib@philasd.org</p>	<p>After Hours Contact <i>(optional)</i></p> <p>Select</p>
---	---	--

- d. Authorization to access the site if needed

4 Authorization

We can access your site *(required)*

☐ Anytime (24 hours / 7 days)
 ☒ 9am-5pm Mon-Fri
 ☐ 9am-9pm All Days
 ☐ Custom Access Hours

Special Access Requirements

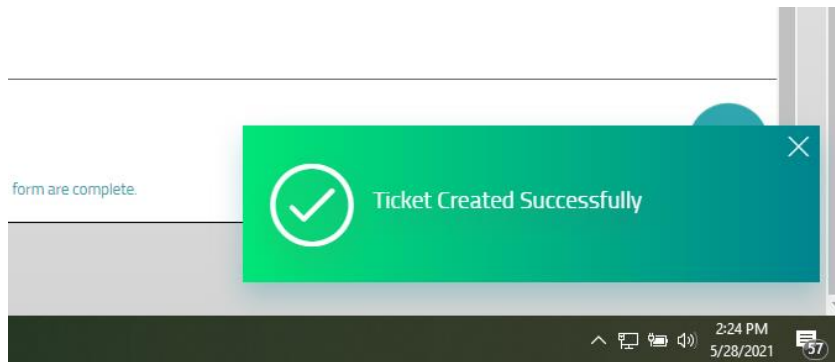
Do you authorize us to perform testing that may temporarily take down your service?

☐ Yes
 ☐ Yes, but let me schedule it
 ☒ No

Do you authorize billable charges, if testing or fixing your issue requires them?

☐ Yes
 ☒ No

5. Click Submit. A confirmation will appear in the bottom left of the screen.



TICKET DETAILS

Clicking the eyeball icon to the right of the ticket this will open the Ticket Details screen with additional information about the ticket and notes from IT.

02273018 Resolved

PROBLEM REPORTED: No Dial Tone
 CREATED DATE: 02/03/2022 11:13 AM
 LAST UPDATED DATE: 03/03/2022 12:44 PM
 SERVICE IMPACTED: No Dial Tone

[Your Repair Team](#)

Service Information

Account Name	Thales USA	
Account Number	Customer Reference Id	Service Location
204874331	DF232323	2733 CRYSTAL DR, ARLINGTON, VA 22202-3584

Issue Details

Service Impacted	No Dial Tone	Customer Reported Severity
------------------	--------------	----------------------------

Near the top of each Ticket Details screen will be a purple banner with “Your Repair Team”. Clicking this banner will produce a popup with the Repair Team assigned to the customer.

Your Repair Team

We know performance of our network is critical to the success of your business and customers. As a Windstream Enterprise customer, you will receive top-notch technical support from our Service Assurance Team. You can communicate with our 24/7 support team through your service request, or by calling 800.600.5050. If additional support is needed, **Your Repair Team** is available to assist. Please start with the level one contact and allow one hour before moving to the next level of support.

 Escalation Desk Support Hours: 24/7 866.260.1615 (option 2)	 Escalations Sr. Manager Support Hours: 8-5 M-F 866.260.1615 (option 3)	 Sr. Director – Greg Hodgson Support Hours: 8-5 M-F 585.340.8286	 SVP – Elizabeth Orth Support Hours: 8-5 M-F 866.780.0702
--	---	--	---

Users can click the “Update Ticket” button to add notes, confirm a problem persists or is resolved or cancel the ticket.

Update Ticket

Ticket ID: INC000042123197

Voice ID: 2514346620

Action: **Add Notes**

Memo:

- Add Notes
- Confirm problem resolved
- Report problem persists
- Cancel Ticket

Submit

Users can search & filter tickets by using the Filters dropdown menu on the top left of the table.

The screenshot shows a dark-themed interface with a 'Filters' dropdown menu on the top left. The menu contains several filter categories with input fields or dropdowns:

- Master Partners:** All (dropdown)
- Sellers:** All (dropdown)
- Customer Name:** (text input)
- Ticket No.:** (text input)
- Latest Update:** from MM/DD/YYYY (calendar icon) to MM/DD/YYYY (calendar icon)
- Service No.:** (text input)
- Service Address:** (text input)
- Sub Partners:** All (dropdown)
- Customer Account No.:** (text input)
- Ticket Status:** All Statuses (dropdown)
- Service Type:** (text input)
- Reported Problem:** (text input)

At the bottom of the filter panel, there are two buttons: 'Clear Filters' and 'Apply Filters'.

Information can be exported to Excel using the Export button on the top right of the table.

The screenshot shows the 'Trouble Tickets' tab selected in the top navigation bar. Below the navigation bar, there is a 'Filters' dropdown menu on the left and an 'Export' button (with a download icon) on the right. Below the filter and export controls, a table header is visible with columns: Customer Name, Customer Account No., Seller Name, Seller ID, Ticket No., Ticket Status, Latest Update, Service Type, Service No., Reported Problem, and Service Address.

PARTNERS

The screenshot shows the 'Partners' tab in the 'Base Management' section. The interface displays a partner hierarchy for a user named Heather Collins (Partner Pros - Unified Master). The hierarchy is organized into levels:

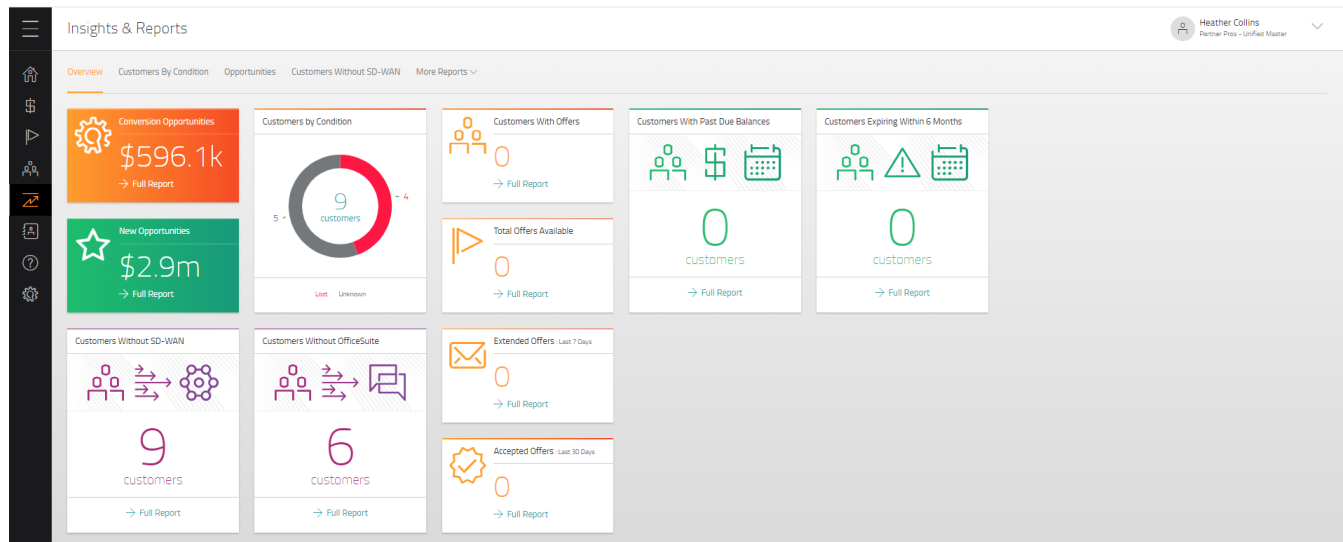
- Level 1:** Unified Master Partner (Nakia D Farr, 2 Master Partners, 37 Seller Partners)
- Level 2:** Master Partners (Nakia D Farr, 1 Sub Partners)
- Level 3:** Sub Partner (Nakia D Farr, 1 Seller Partners)
- Level 4:** Seller Partners (Catherine Yearry, 41 Seller Partners)

Each level shows the partner's name, role, and the number of sub-partners or seller partners. The interface also includes a sidebar with navigation icons and a top navigation bar with tabs for Accounts, Orders, Trouble Tickets, and Partners.

The Partners tab allows users to see the Partner Hierarchy associated to their login. Users can see one level up and unlimited levels below them.

INSIGHTS & REPORTS

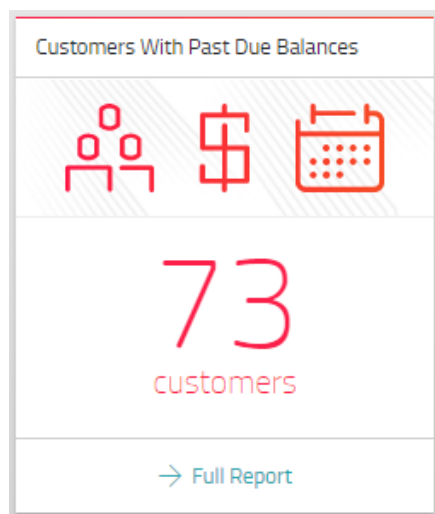
[Click here for a demo on Insights & Reports](#)



The Insights & Reports page houses graphical representations of different reports (such as Current Opportunities, Past Due Balances, & Customers with upcoming contract expirations) as well as the ability to pull reports about the Partner's book of business. Data will be representative of the user level who is logged in.

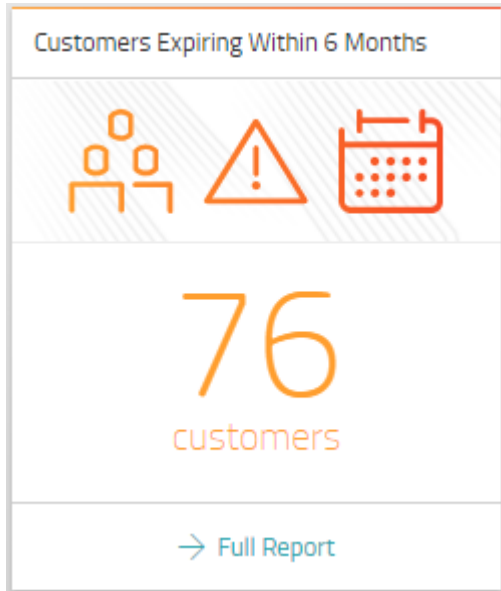
CUSTOMERS WITH PAST DUE BALANCES

The Customers by Condition insight shows the user how many customers in their base have past due balances with Windstream. Clicking on the widget shows a table view of those customers with information on how the overdue amount and how many days overdue it is. This information allows the partner to help ensure their customers do not get services turned off due to non-payment.



CUSTOMERS EXPIRING WITHIN 6 MONTHS

The Customers Expiring Within 6 Months insights show the user how many customers within their base have contracts expiring in the next 6 months. Clicking through takes the user to the Accounts tab with the grid filtered to show only those customers in the widget.



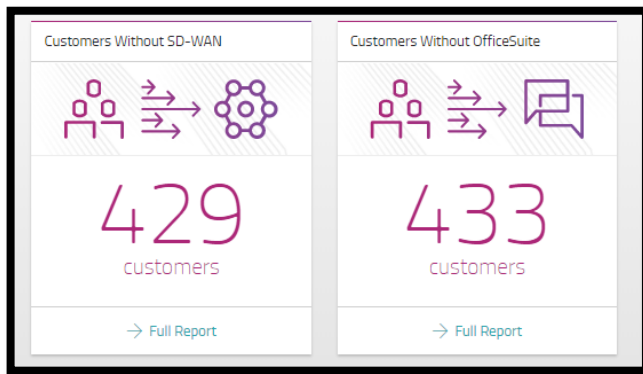
OPPORTUNITIES

The Opportunities insight shows how much revenue in the user's funnel is associated to New, Upsell, Renewals, & Conversions. Windstream recently changed how we bucket opportunities (collapsed down to 4 types) so any opportunities with the old types will show under the category of "Other". Clicking on the insight will take the user to the Opportunities tab for a table of open opportunities and the information associated to them.



UPSELL OPPORTUNITIES BY PRODUCT

The Customers with SD-WAN & Customers Without OfficeSuite insights show how many customers in the user's base do NOT have the products OfficeSuite and/or SD WAN billing on their account. Clicking on the insight will take the user to the tab with the supporting data, showing those customers that do not have the product.



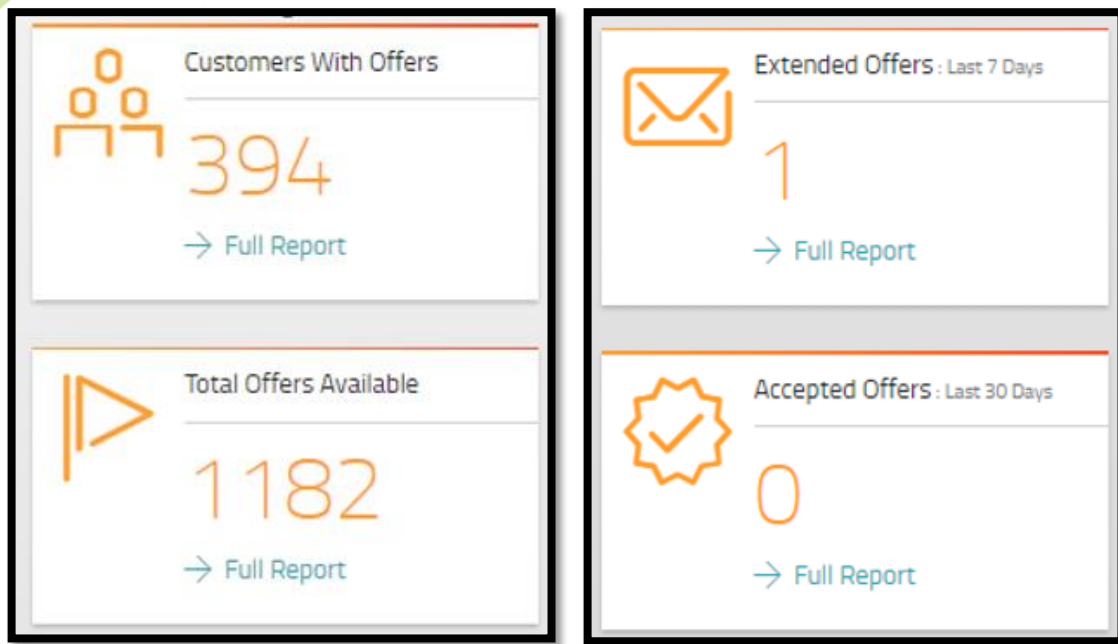
OFFERS WIDGETS

Customers with Offers – the number of customers in the user's base that have offers available

Total Offers Available – the total number of offers available to the user's base

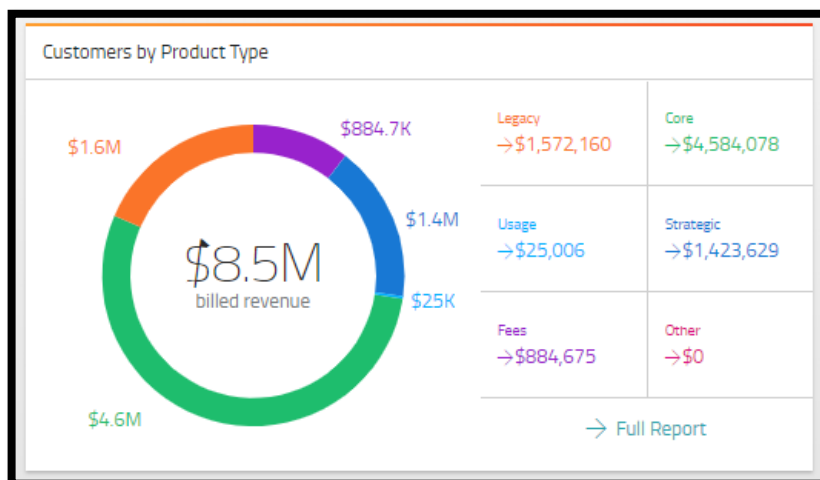
Extended Offers – the number of extended offers in the last 7 days

Accepted Offers – the number of accepted offers in the last 30 days



CUSTOMERS BY PRODUCT TYPE

The Customers by Product Type widget shows the user a breakdown of the customer base by product type and the revenue associated to that product type. Clicking on any section of the widget takes the user to the report tab showing the customers associated to the area clicked.



CONTACTS & NOTIFICATIONS

[Click here for a demo on Contacts & Notifications](#)

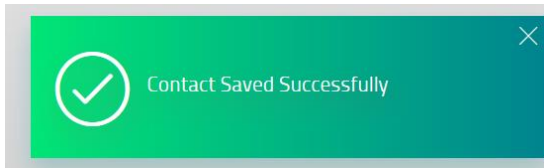
Contact Name ↑	Email Address	Phone No.
Agent Demo	agent@demo.com	585.340.2776
Heather Collins	heather.collins@windstream.com	704.814.2910

The Contacts page houses any contacts that Windstream has associated to the Partner Company the user is tagged to. Users can add and edit the contact information associated to their company and the updates will be sent back to internal Windstream systems for reference.

ADD A NEW CONTACT

1. To add a new contact, click **+ New Contact**. A flyout will be produced to the right side of the screen

2. Fill out the required fields
 - a. First Name
 - b. Last Name
 - c. Email
 - d. Office Phone
 - e. Mobile Phone
3. Select one number as primary
4. Click **Save Changes**
5. A popup will confirm you want to save changes. Click **Yes**.
6. Contact will be saved, and a confirmation will be displayed on the bottom right of screen



EDIT AN EXISTING CONTACT

1. Click the menu icon to the right of the contact

Contact Name ↑	Email Address	Phone No.	
Agent Demo	agent@demo.com	585.340.2776	⋮
Heather Collins	heather.collins@windstream.com	704	<div> Edit Contact Delete Contact </div>

2. Click **Edit Contact**. A flyout will be produced.

Agent Demo
 ✕

In order to receive notifications, an email address or a mobile phone number is required.

First Name

Last Name

Email (optional)

Phone Numbers Primary? ☒

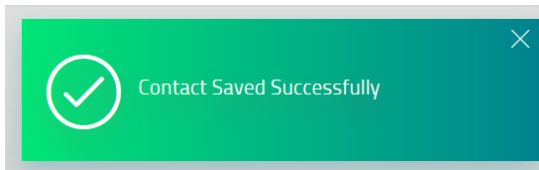
Office (optional)

Mobile (optional)

[Save Contact](#)

3. Make any edits necessary
4. Click **Save Changes**

- Contact will be saved, and a confirmation will be displayed at the bottom of the screen

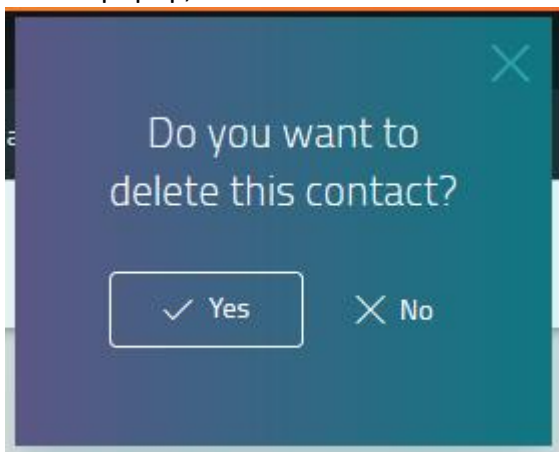


DELETE A CONTACT

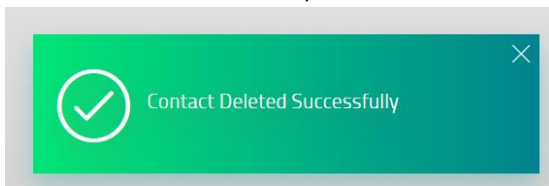
- Click the menu icon to the right of the contact

Contact Name ↑	Email Address	Phone No.	
Agent Demo	agent@demo.com	585.340.2776	⋮
Heather Collins	heather.collins@windstream.com	704	<div> Edit Contact Delete Contact </div>

- Click **Delete Contact**
- On the popup, confirm to delete contact

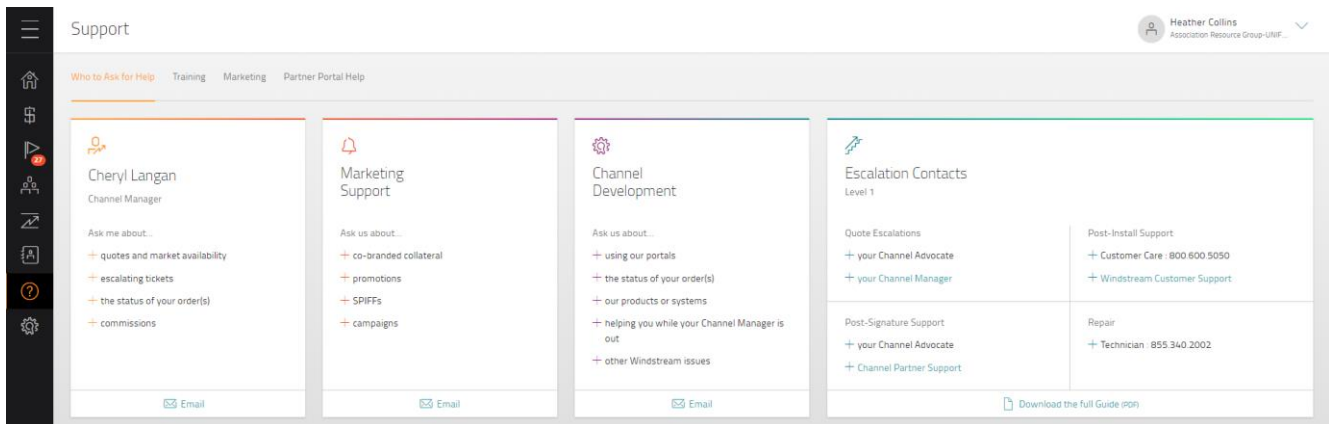


- Contact will be deleted, and a confirmation will appear at the bottom of the screen



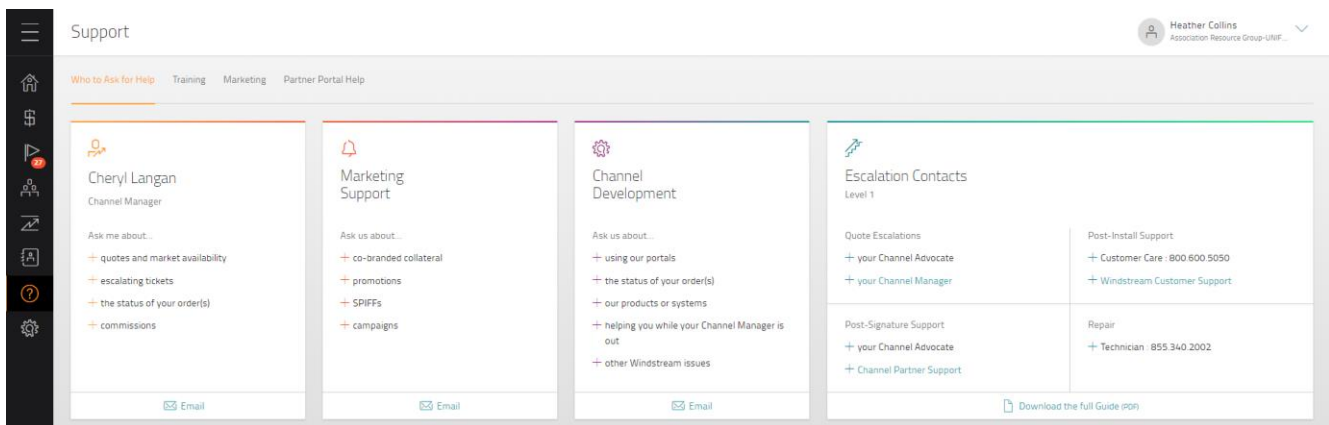
SUPPORT

The Support page houses information specific to the Partner's relationship with Windstream as well as resources for Partner users.



WHO TO ASK FOR HELP

[Click here for a demo on Support](#)

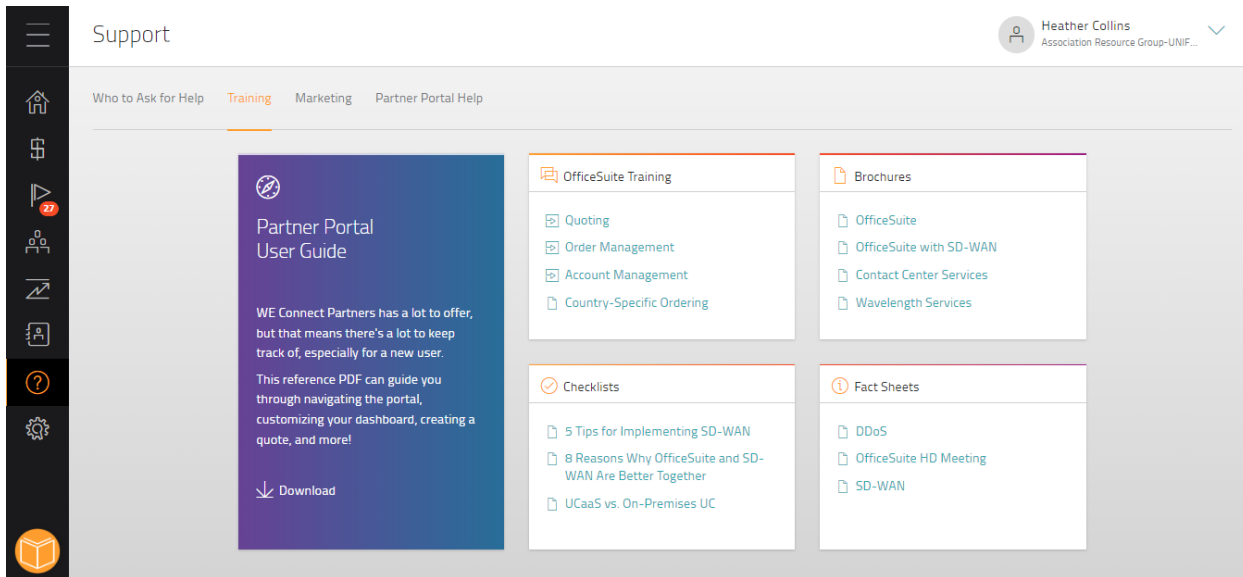


The Who to Ask for Help tab shows different resources that can be contacted depending on what information the user is looking for. Resources shown are:

- Channel Manager – quotes, market availability, escalations, order status & commissions
- Marketing – co-branded collateral & support for promotions, spiffs, and campaigns
- Channel Development – portal support, products or systems, order status, general Windstream questions
- Escalation Contact – shows level 1 escalation paths with a link to the full Escalation List (pdf)

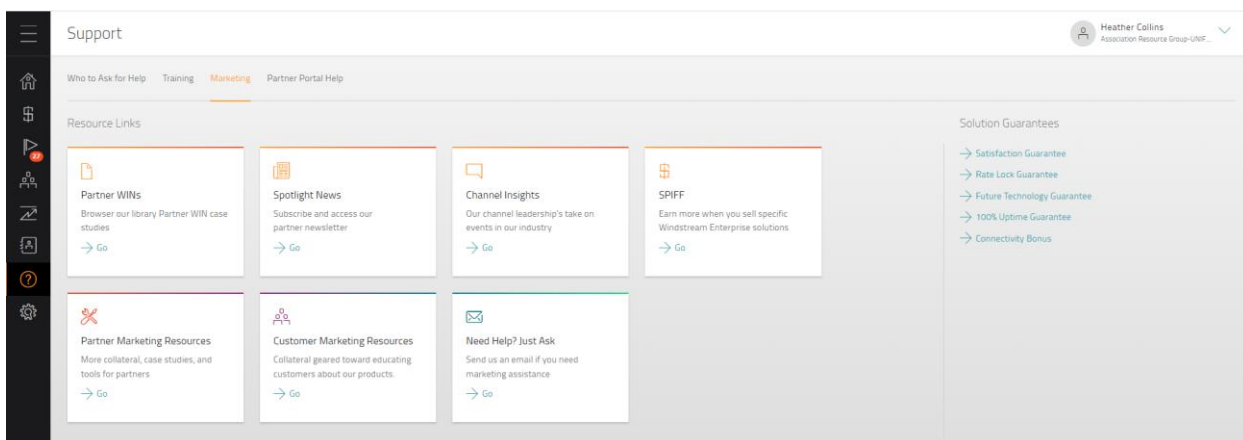
TRAINING

The Training tab offers information on various topics specifically for the Partner User. These resources are not intended for customer use. The OfficeSuite Training tile will be removed once all customers are migrated to WE Connect as those videos are specific to the MyOfficeSuite Agent portal which will eventually be obsolete.



MARKETING

The Marketing tab allows users to find and take advantage of many resources made available by Windstream's Channel Marketing team such as case studies & spiff info for partners and product collateral for customers.



PARTNER PORTAL HELP

The Partner Portal Help screen allows the user to submit portal issues, questions or training requests. Issues are sent to the Channel Development team to review and triage. The team will then coach the user, submit tickets to IT, or set up training. Users should provide as much information as possible when submitting an issue so that the team can triage quickly.

Support

Who to Ask for Help Training Marketing **Partner Portal Help**

Having trouble with WE Connect Partners?
Let us know about it with this form, and we'll get to the bottom of it.

The Basics

What computer operating system are you using?
Example: Windows 10
Windows NT 10.0

What Internet browser (and version) are you using? [Where can I find my version?](#)
Example: Google Chrome
Chrome 106

What's the general issue?

Display Issues Slow Speed or Intermittent Service

Base Management Issues Training Requests

General Questions Other Portal Issues

USER MANAGER

[Click here for a demo on User Manager](#)

The User Manager screen allows a user admin to view/manage other users associated to their account.

User Manager

WE CONNECT PARTNERS


Filters Export

	Username	Full Name Email	Partner Partner Level	Status	Admin?	Last Login Date Last Login Time	
	MasterAgentDemo	Heather Collins heather.collins@windstream.com	Agent Demo-Unified Master Unified Master	Active	Yes	03.05.2020 12:00 AM	
	Training_UMDemo	Training Demo heather.collins@windstream.com	Agent Demo-Unified Master Unified Master	Active	Yes	Not Found	

10 items per page 1 - 2 of 2 items

Sign Out






Clicking the eyeball icon on the far right will show what permissions the user has. The User Manager can change the user permissions as needed.

Edit User


User Permissions

Users may access features of the WE Connect Partners according to the permissions defined for them here. Because you have access to this User Manager, you may update these permissions at any time.

No Access
View Only
Manage

 Quote	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
 Offers	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
 Base Management Use Advanced permissions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
 Insights & Reports	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
 Contacts & Notifications	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

→ Save User Permissions

ACRONYMS

NONE

No acronyms at this time

ADDITIONAL INFORMATION

✓ No Additional Information