WINDSTREAM
LEARNING AND DEVELOPMENT

WE Connect Partners Portal

Version 2.4
October 2023

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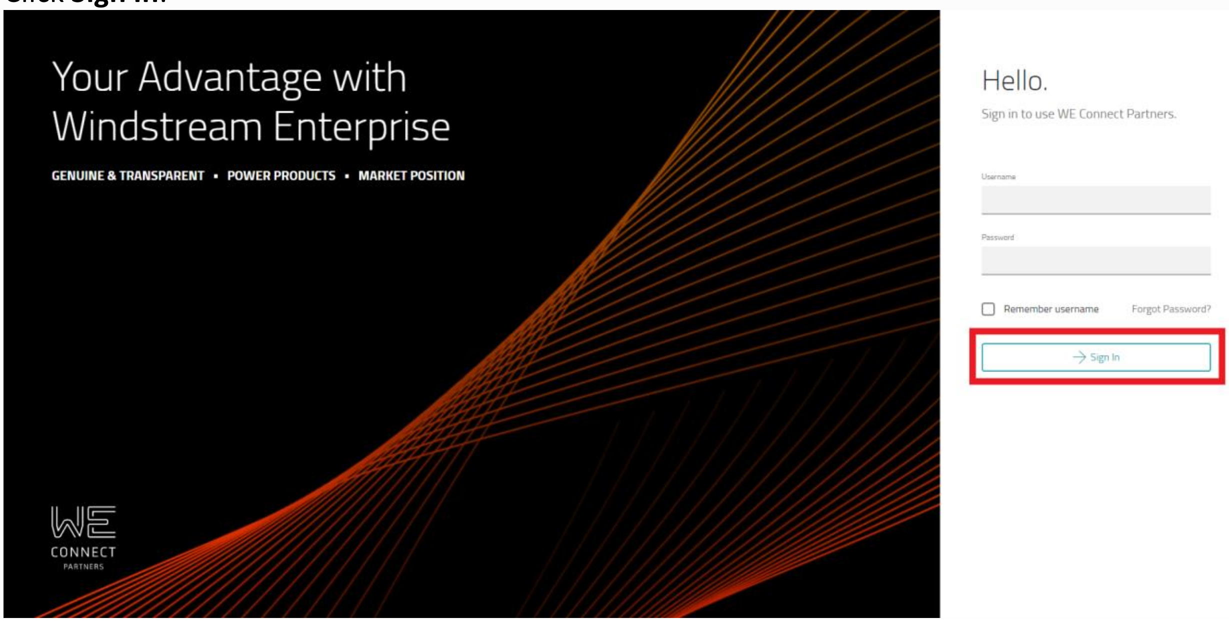
HOW TO USE THIS GUIDE

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.

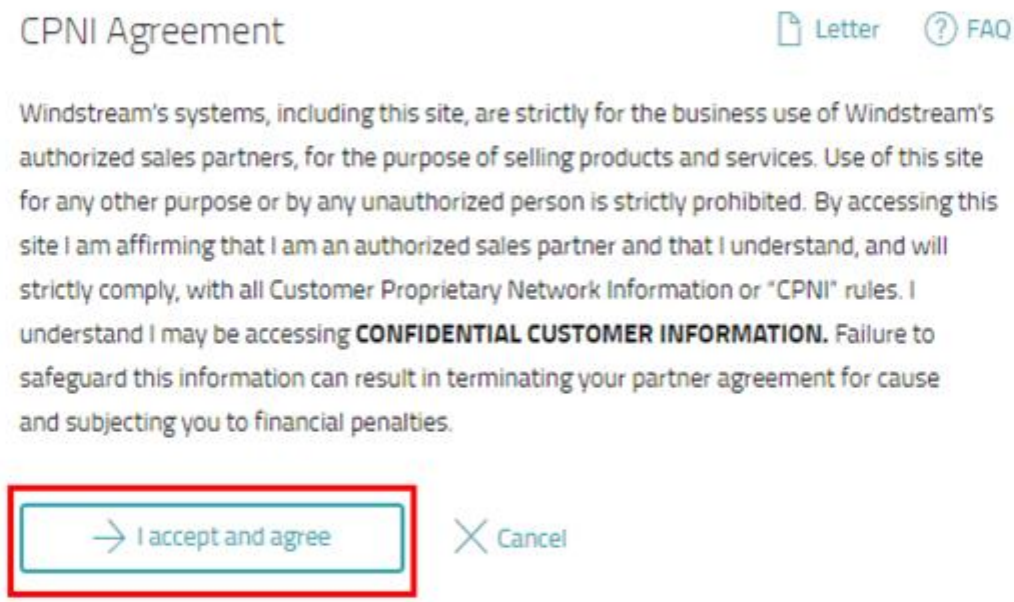
This guide covers the basics of the WE Connect Partner Portal, including the Home page and Navigation.

LOGGING IN

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

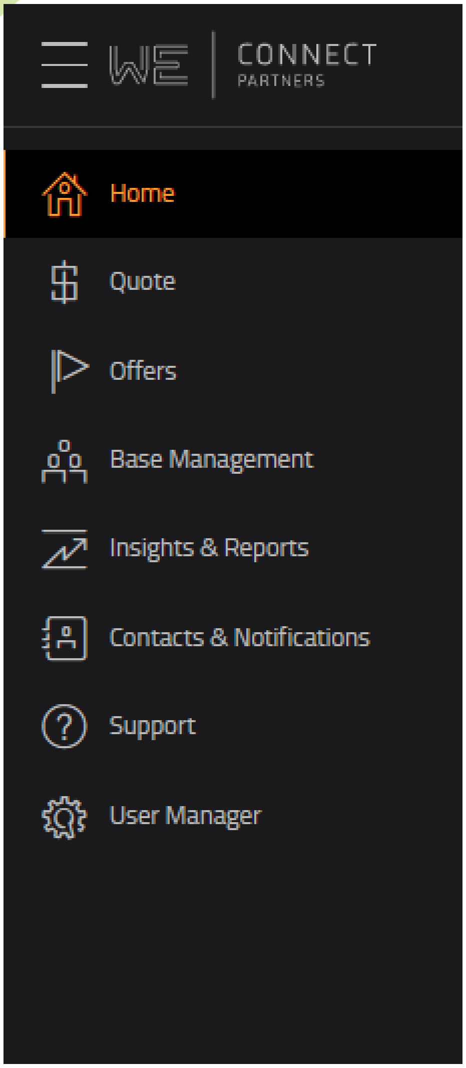


4. CPNI Agreement box displays. Click **I accept and agree.**



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

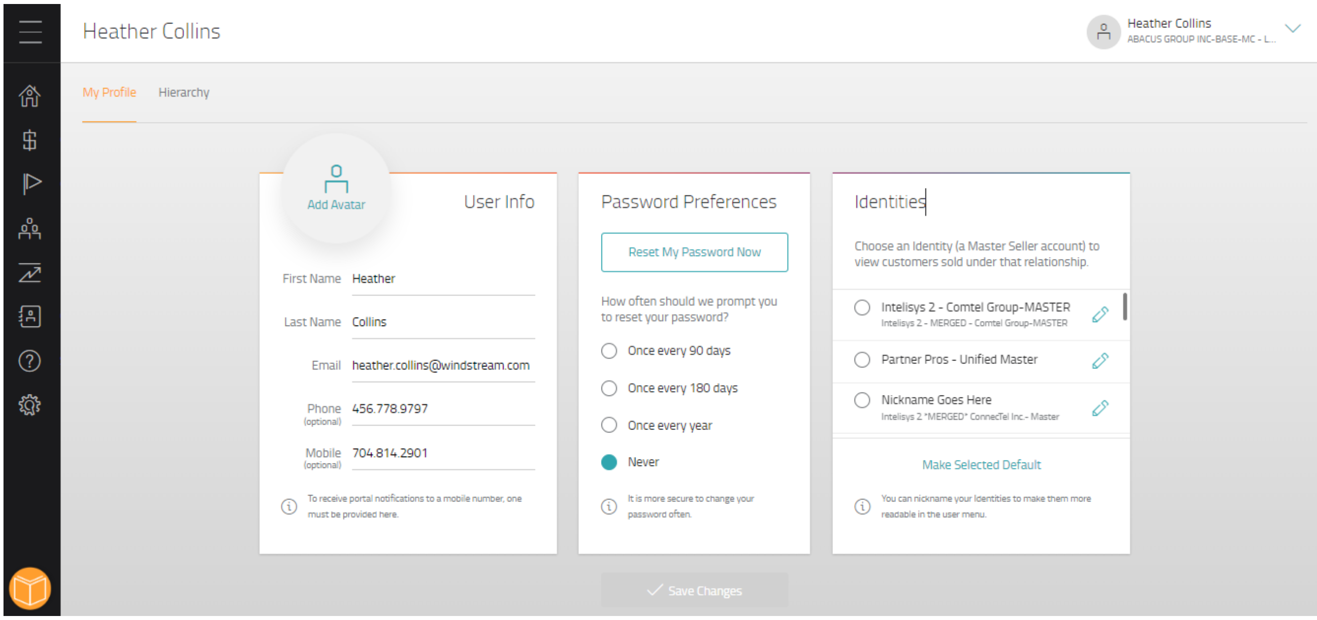
Insights & Reporting : insights into user's book of business

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

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

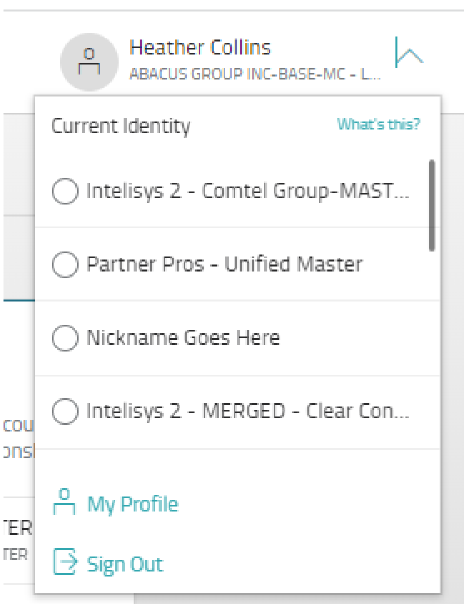
User Manager : portal user administration

MY PROFILE



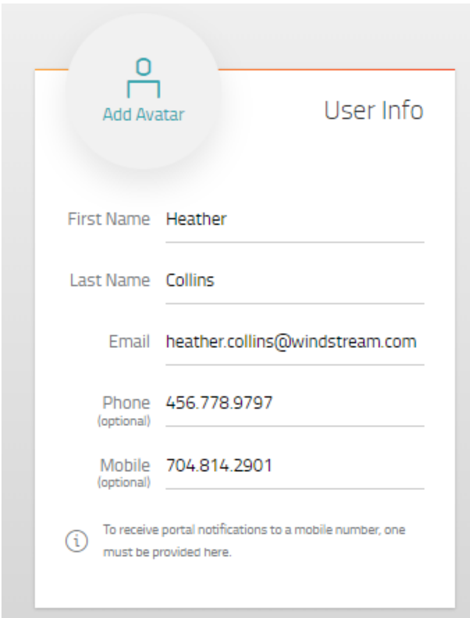
OVERVIEW

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.



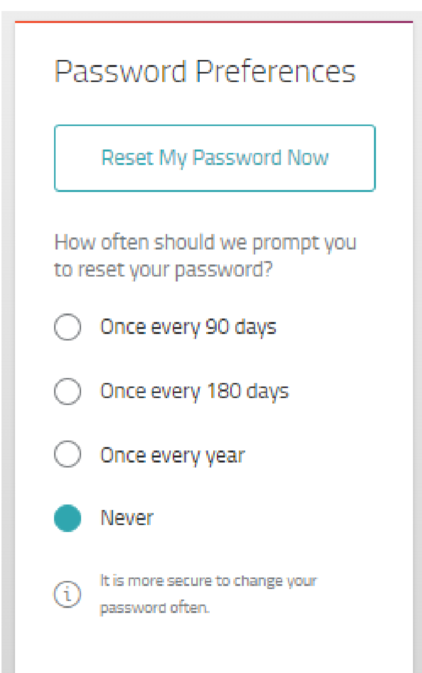
USER INFO

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.

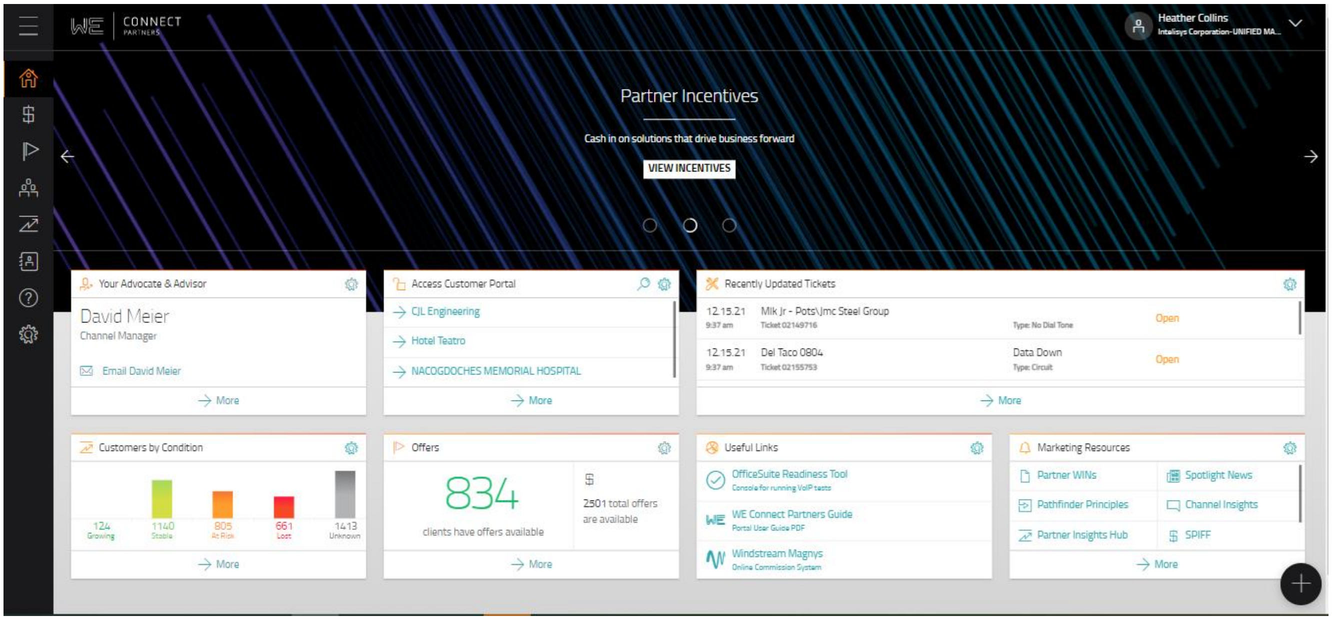


PASSWORD PREFERENCES

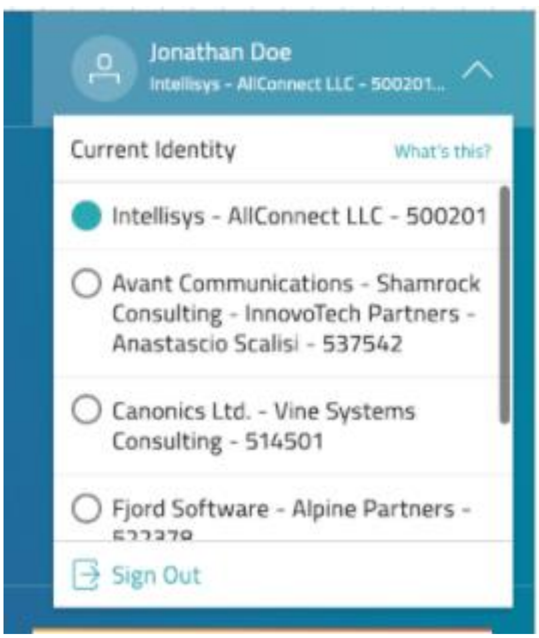
The Password Preferences widget allows the user to manage their own password settings. Users can reset their password and set the desired cadence of systematic password reset prompts. By default, the portal will request that users chage their passwords every 90 days.

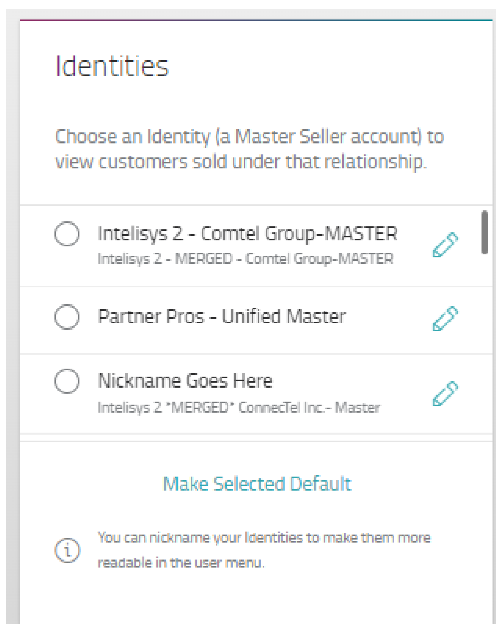


USER IDENTITY



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.



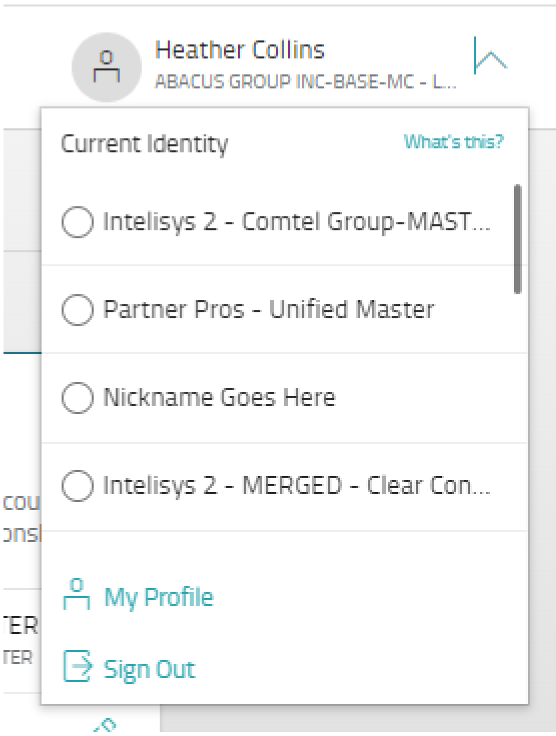


CHANGING IDENTITIES

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.

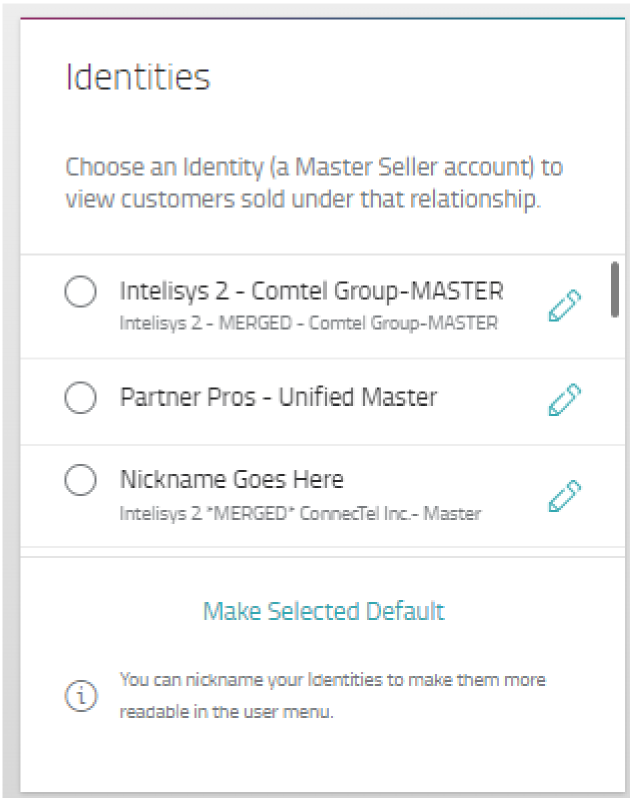


2. Portal shows an alert for confirmation.

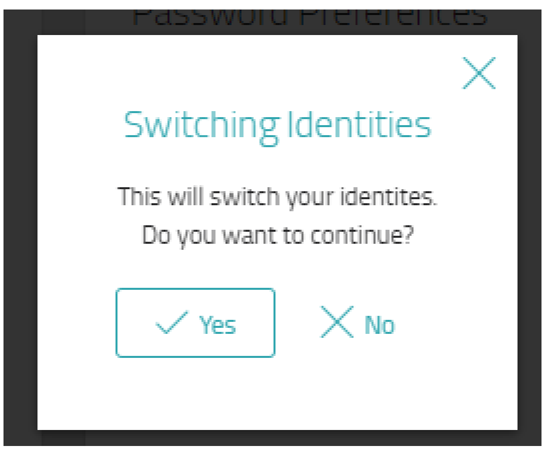
3. Click Yes. The portal resets to the home screen with new Identity loaded.

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

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



2. Portal shows an alert for confirmation



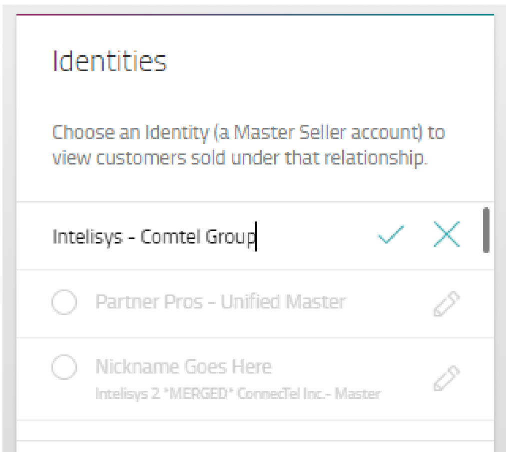
3. Click Yes. The portal resets to the homes screen with new Identity loaded

WINDSTREAM LEARNING AND DEVELOPMENT

NICKNAMING IDENTITIES

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

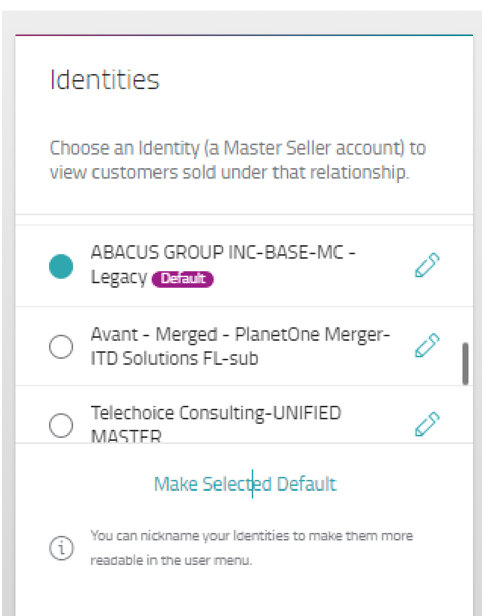
1. In the Identities widget, click the pencil icon next the Identity
2. Type in the desire name



3. Click the checkmark

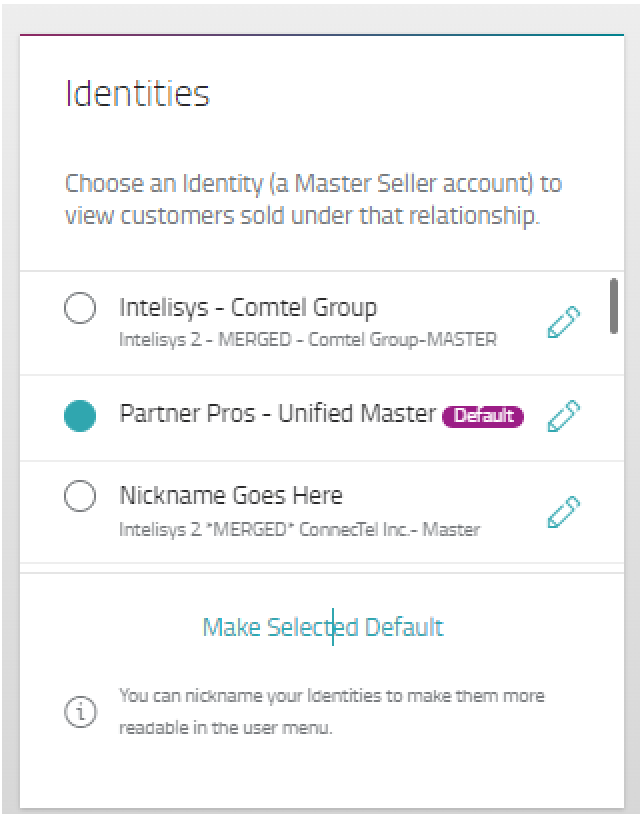
SETTING DEFAULT IDENTITY

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.



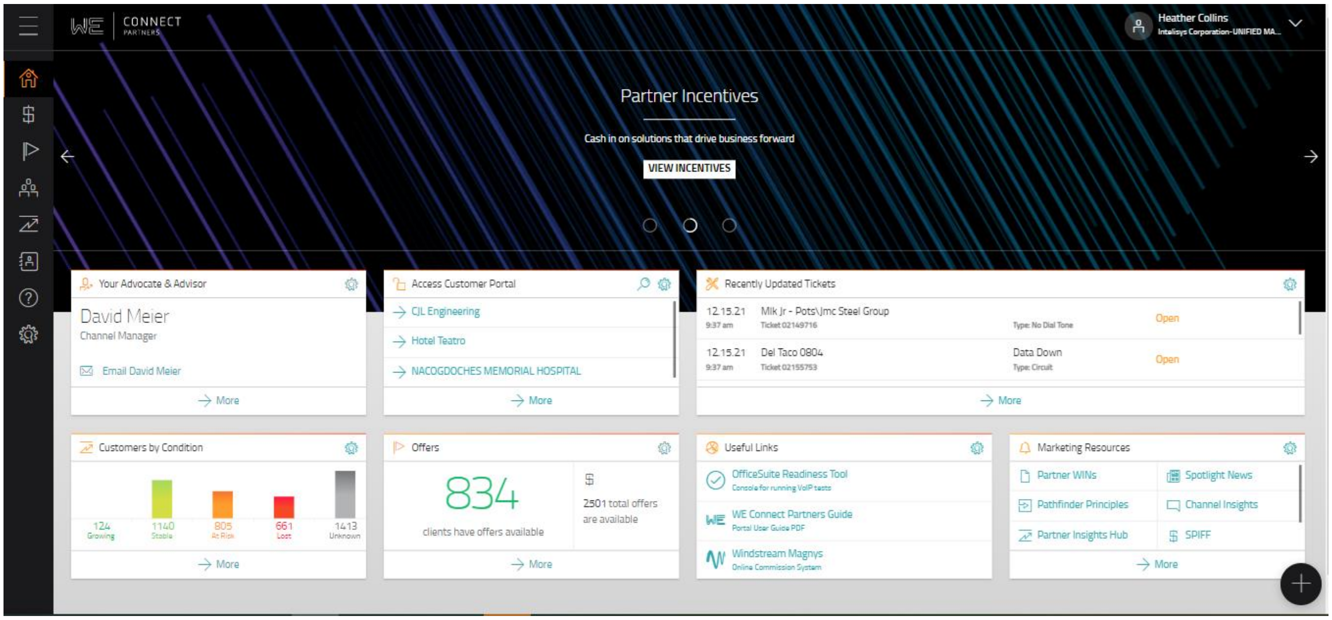
To change the selected default

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



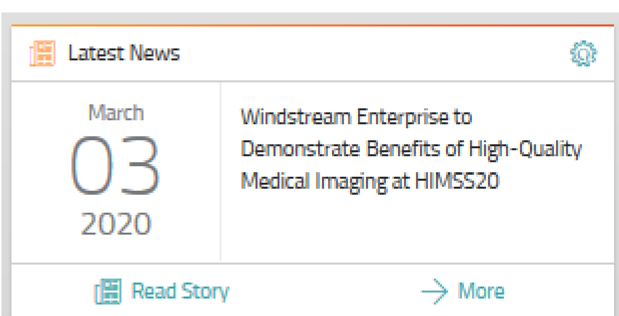
OVERVIEW

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.

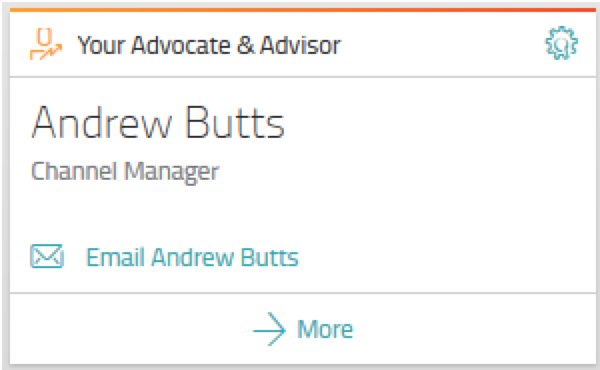
The Latest News link is now a widget showing the latest news article. Users can click "Read Story" to open the news link or click "More" to show a feed of recent Windstream news.



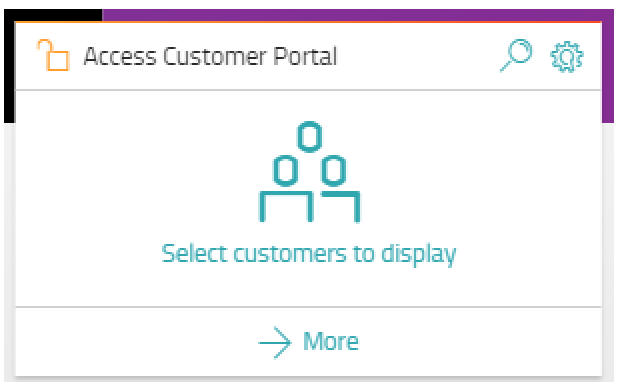
WIDGETS

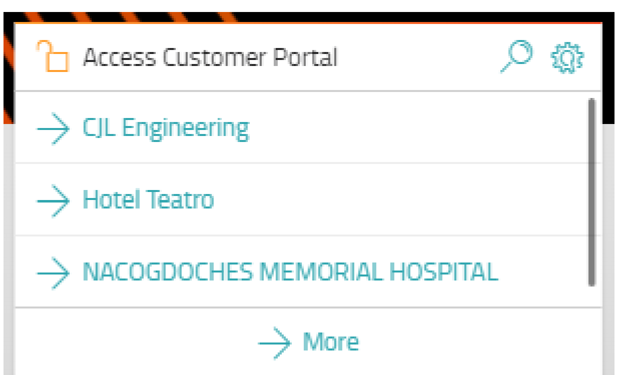
The current widgets available are:

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

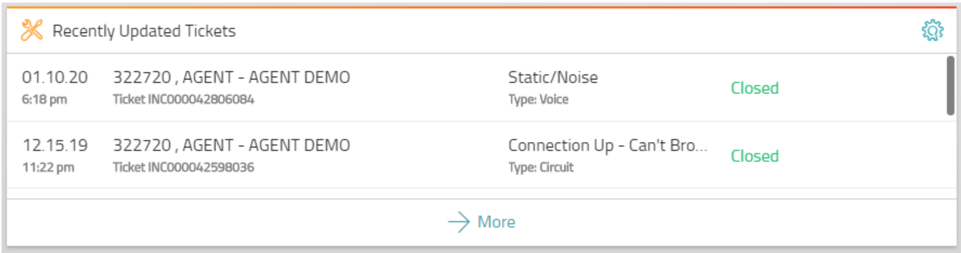


Access Customer Portal – users can choose up to 5 customers to show in the widget for click through access to WE Connect. Access must already be approved. Clicking **More** navigates the user to the Accounts dashboard

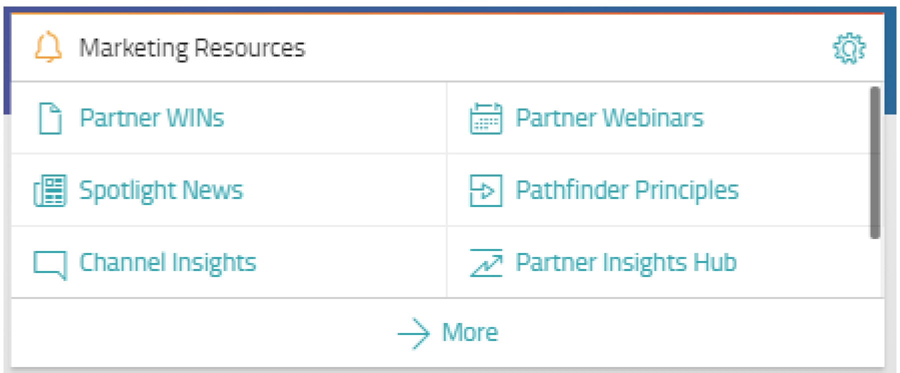




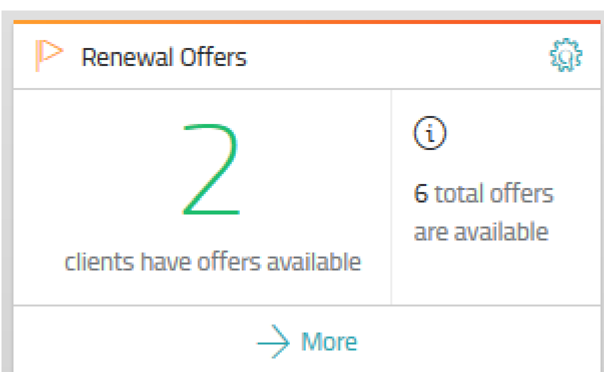
Recently Updated Tickets – last 5 updated trouble tickets associated to the user's base of accounts. Clicking **More** navigates the user to the Trouble Tickets page



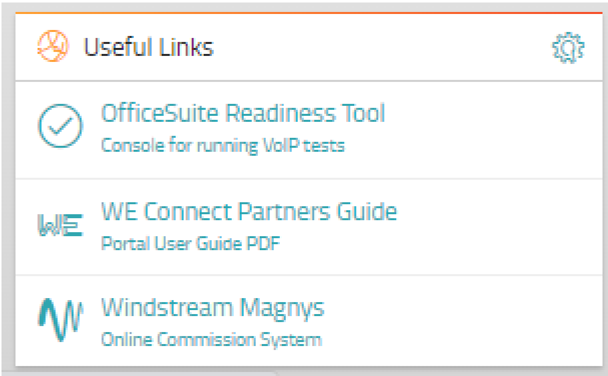
Marketing Resources – list of marketing resources. Clicking **More** navigates the user to the Marketing tab of the Support page



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

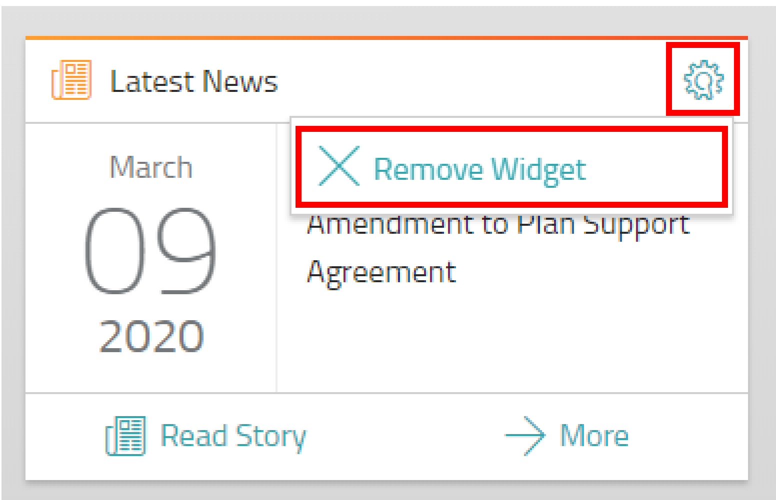


Useful Links – show links that are relevant to the user logged in, including this user guide, OS Readiness Tool & Magnys (if user has permissions)

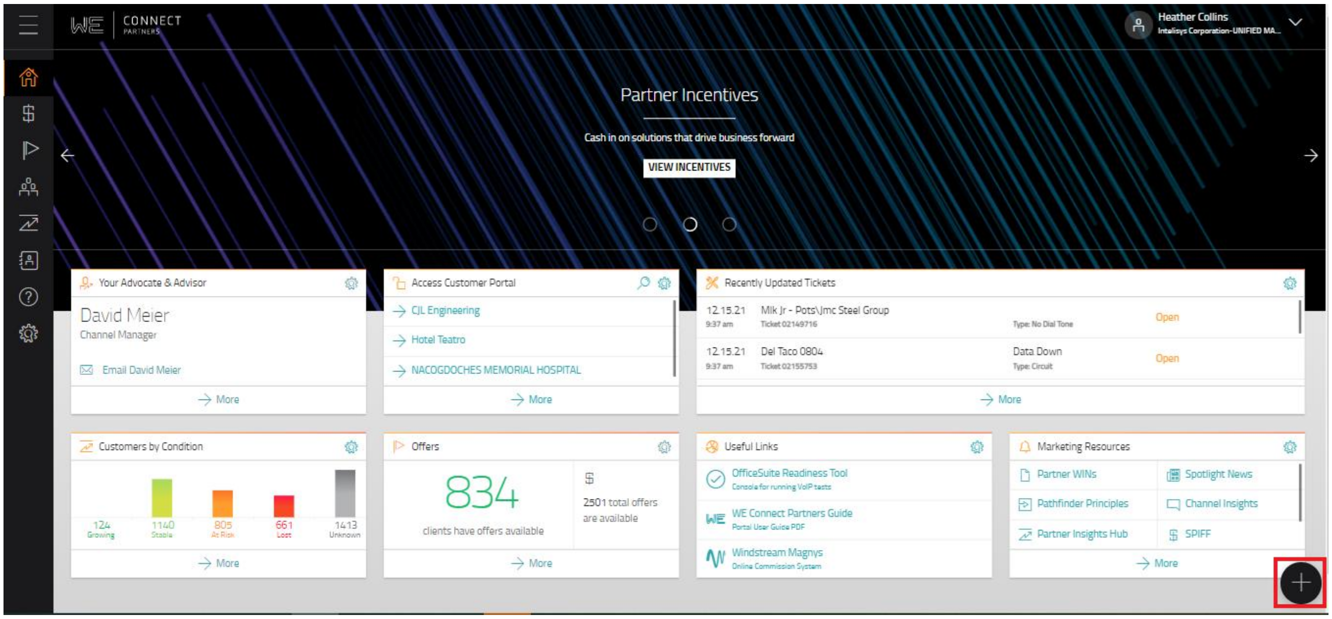


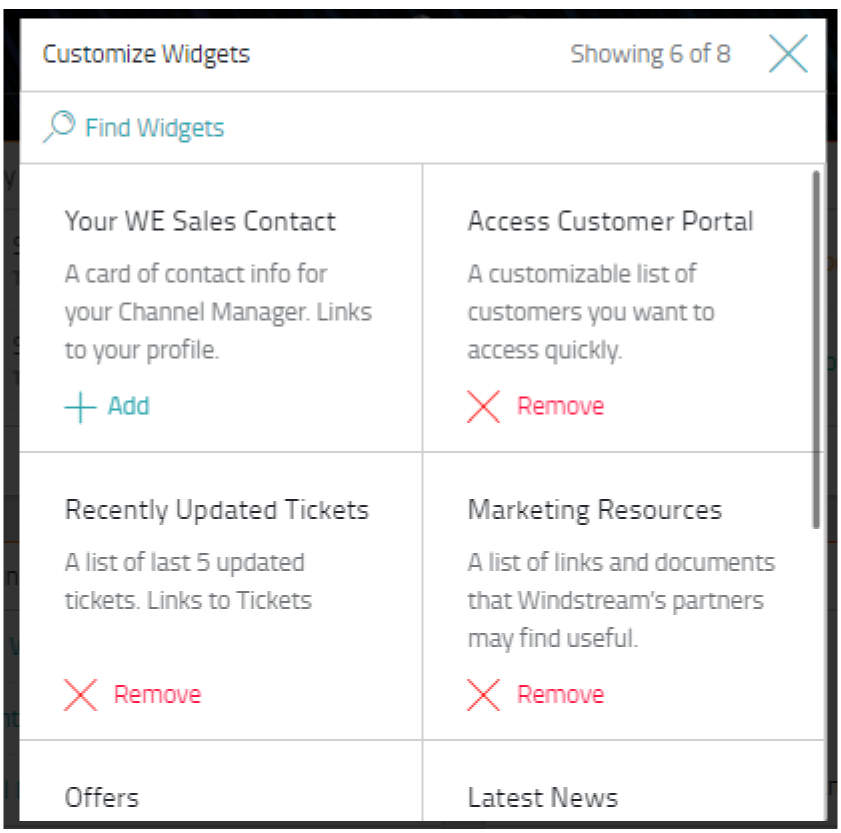
CUSTOMIZE WIDGETS

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



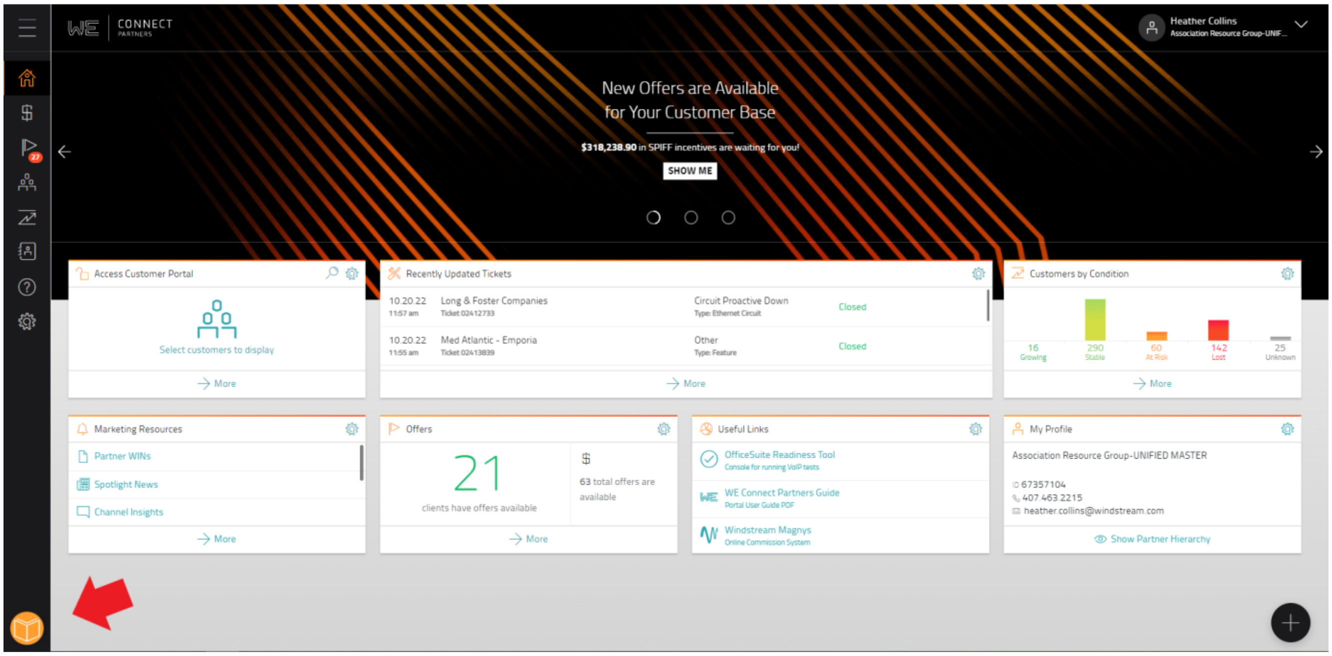
To add other widgets, click the **Add icon** in the lower right.



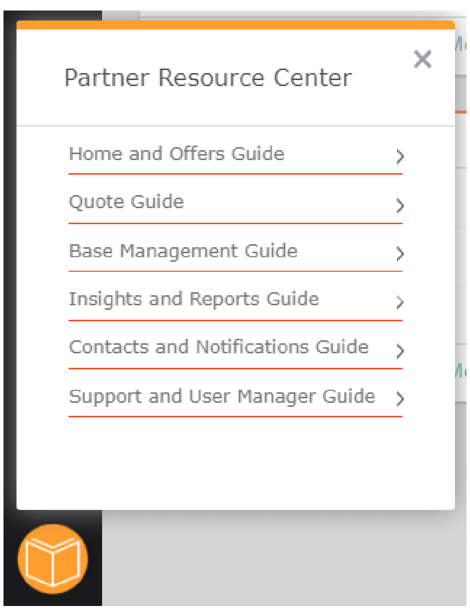


PARTNER RESOURCE CENTER

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.



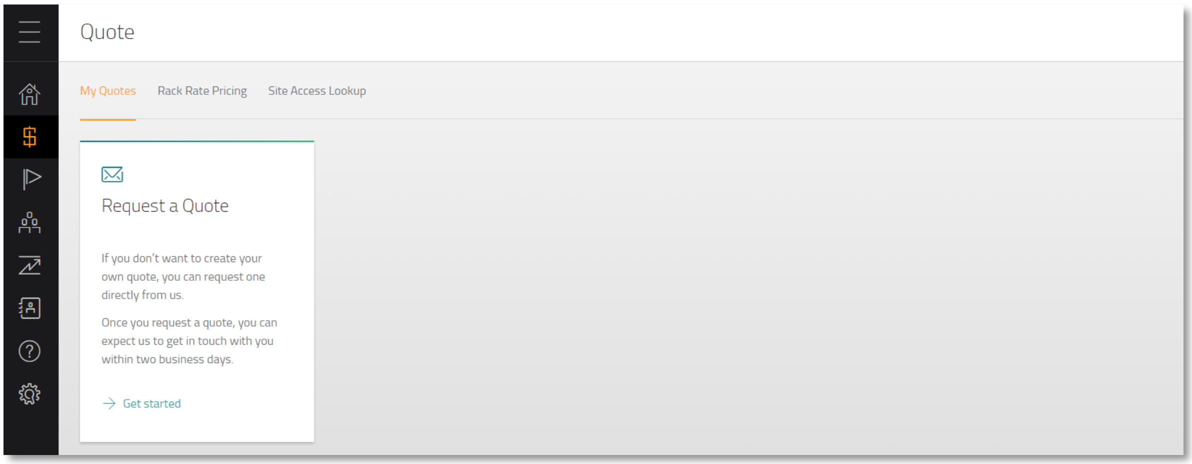
When the Resource Center is open, users can access information & guides for any area of the portal. There are walk-throughs for the most used pages giving lots of details about what's contained in each grid and what the information means to the user.



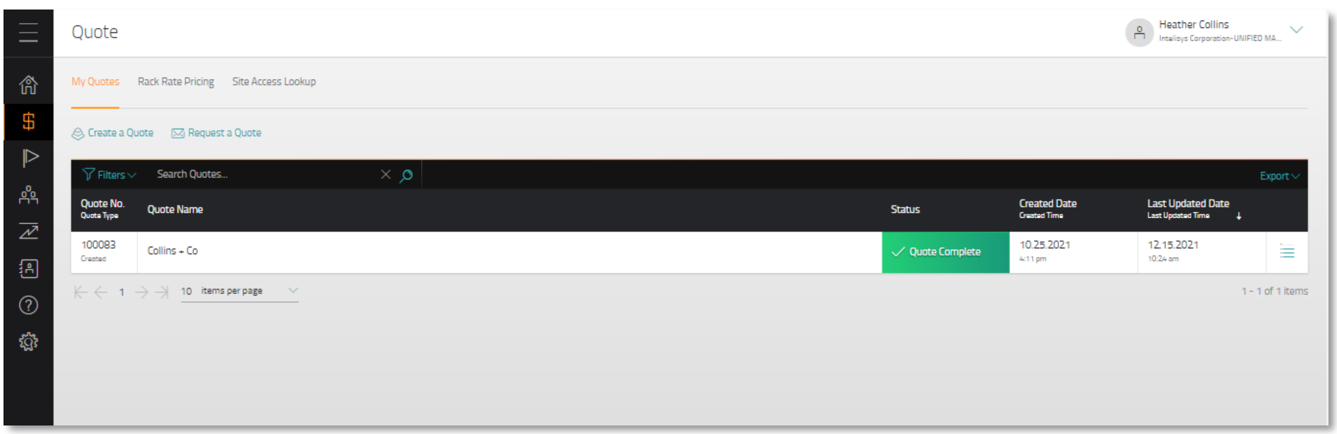
MY QUOTES

[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”.

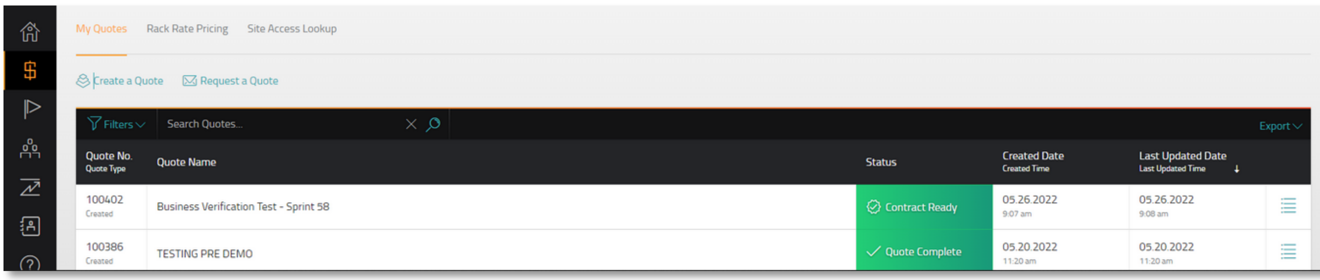


If you created a quote before the Quote Tool was retired, the My Quotes tab will show a list of saved quotes. The “Request a Quote” tile becomes a button above the grid.



CREATE A QUOTE

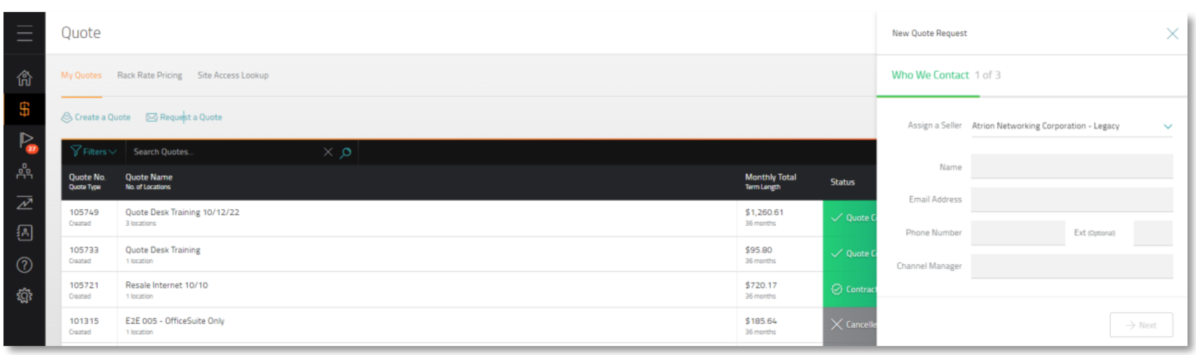
IMPORTANT: As of October 18, 2023 the Partner Portal Quote Tool has been retired and will no longer be available. Quote requests should be submitted through the ‘Request a Quote’ button with the portal or via your Channel Manager. All quotes must adhere to the Windstream Enterprise Ideal Customer Profile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



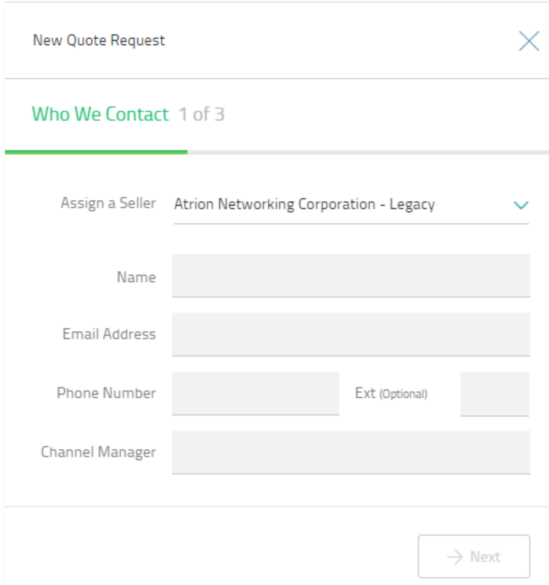
REQUEST A QUOTE

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.

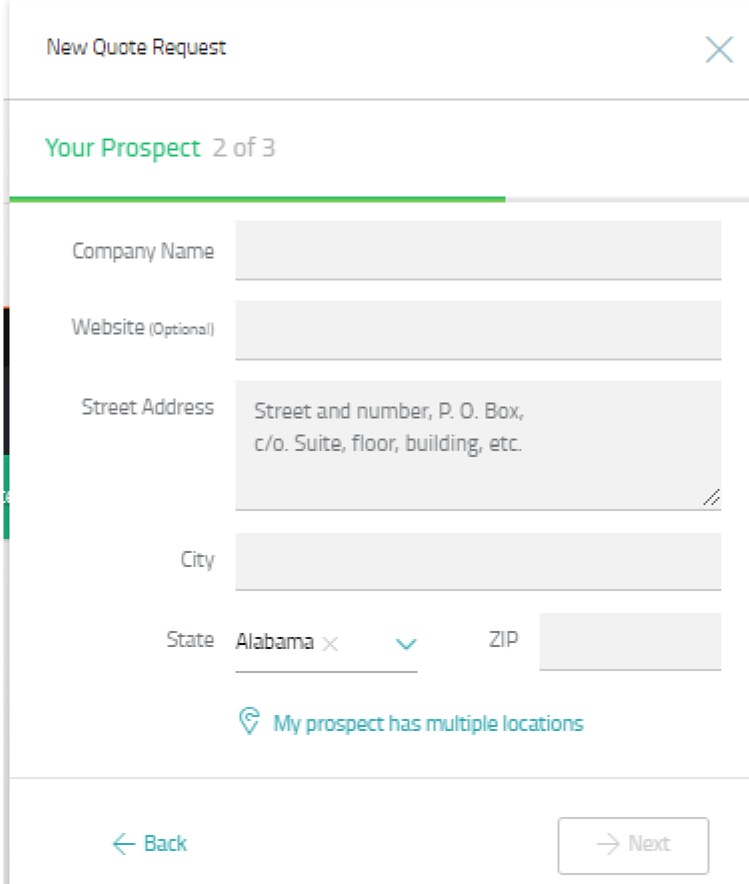
When the button is clicked, a flyout appears from the right side of the screen requesting 3 sets of information.



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)

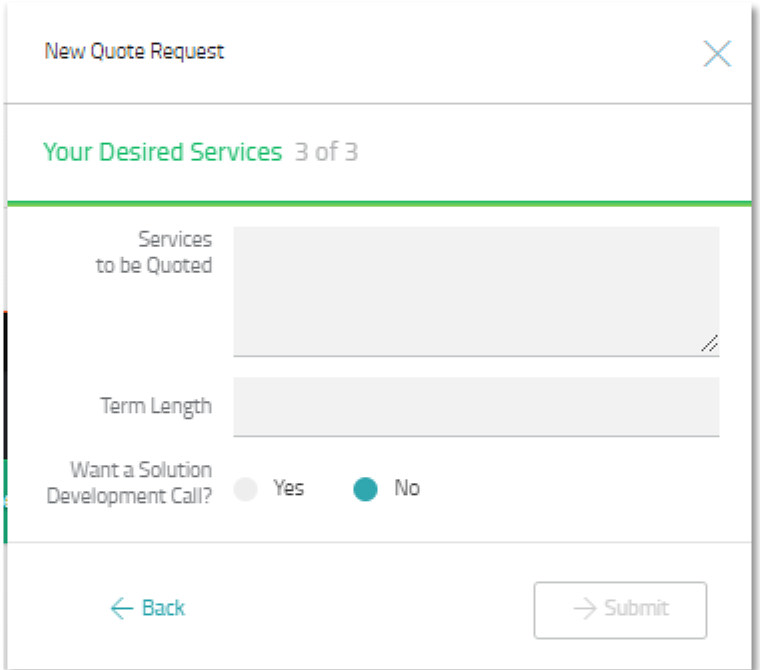


2. Your Prospect (prospect information): enter data into the following fields:
    - Company Name (required)
    - Website
    - Street Address (required)
    - City (required)
    - State (required)
    - Zip Code (required)



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

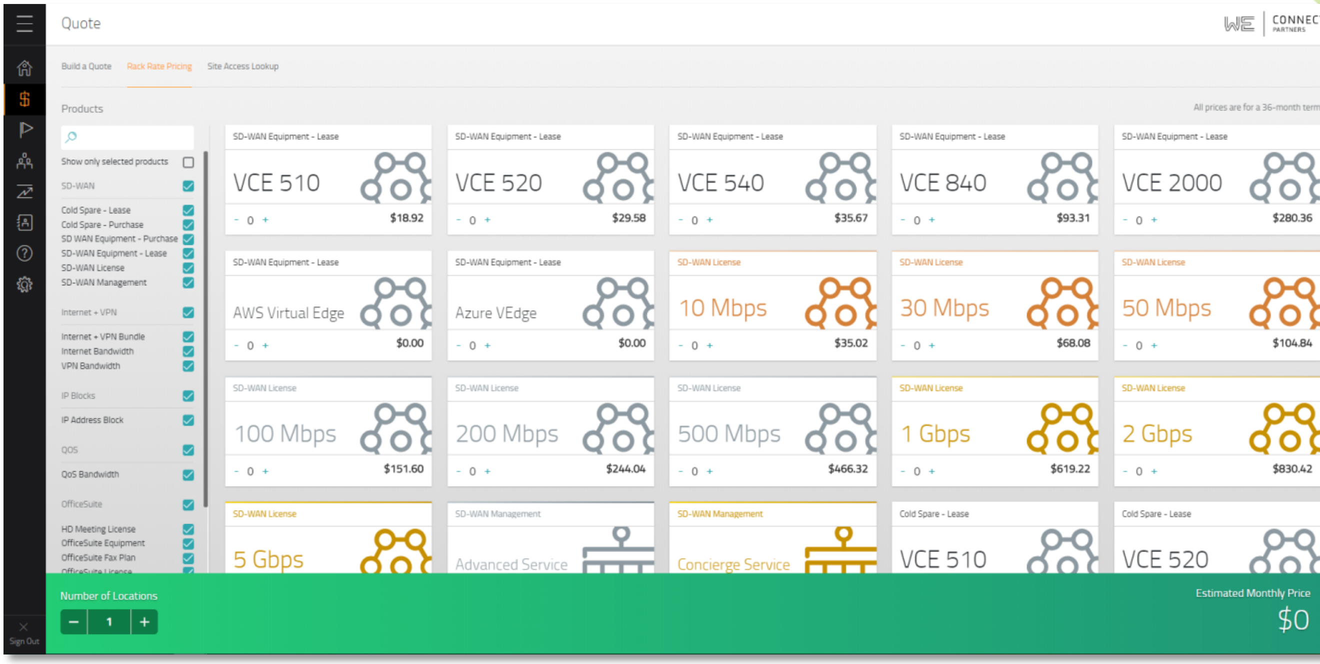
The Rack Rate Pricing tab allows the user to get budgetary pricing for some of Windstream's most requested products, on a 36-month term. Pricing found here does not constitute a guaranteed quote amount or product availability.

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

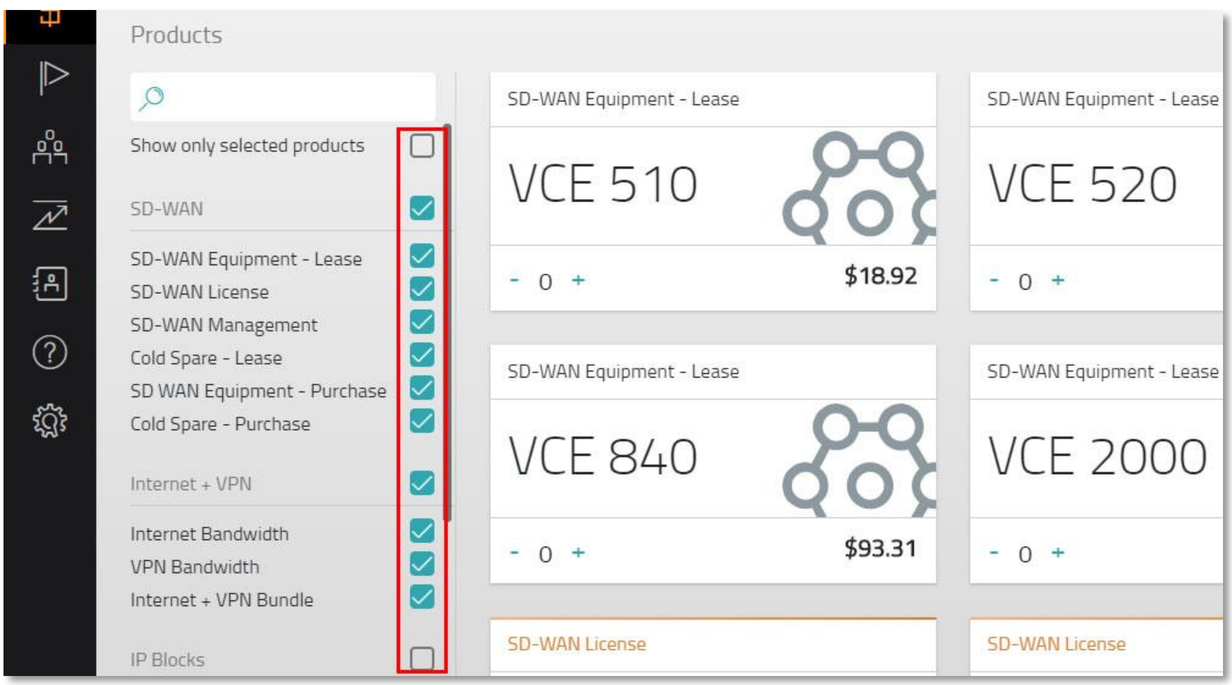
Current products as of the March 2020 release are:

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



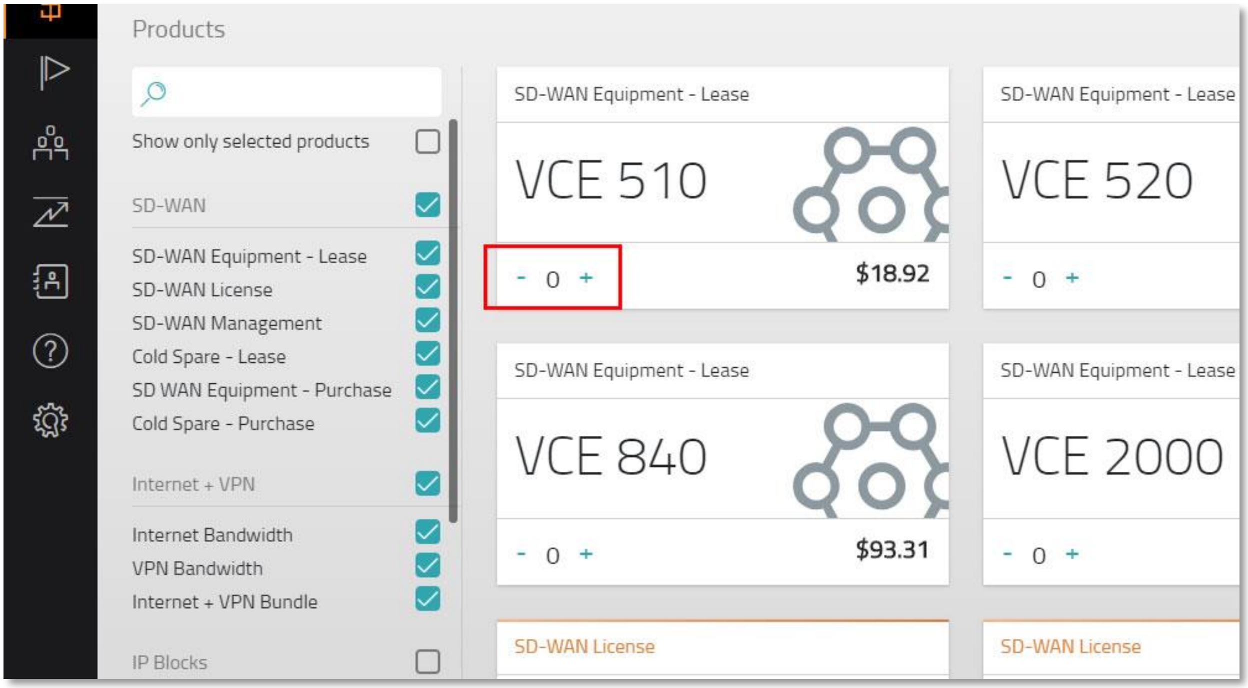
To get pricing:

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

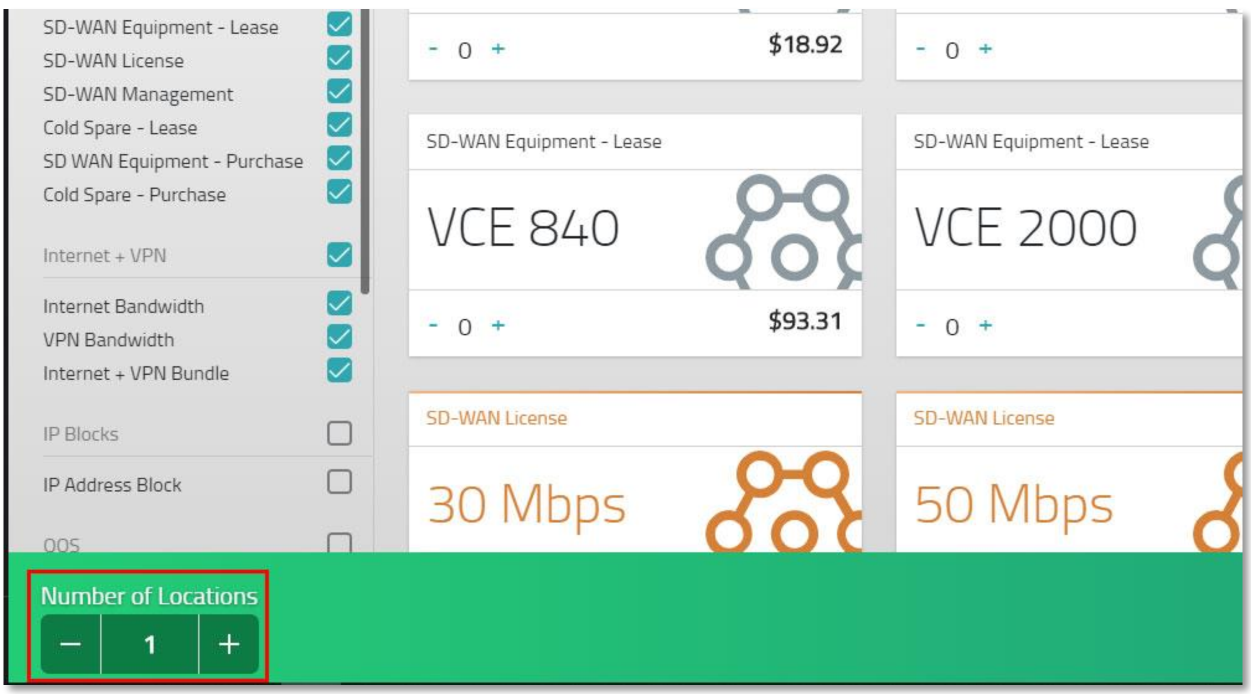


NOTE! Selecting the box for "Show only selected products" will show only those tiles where the quantity is set to 1 or more.

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

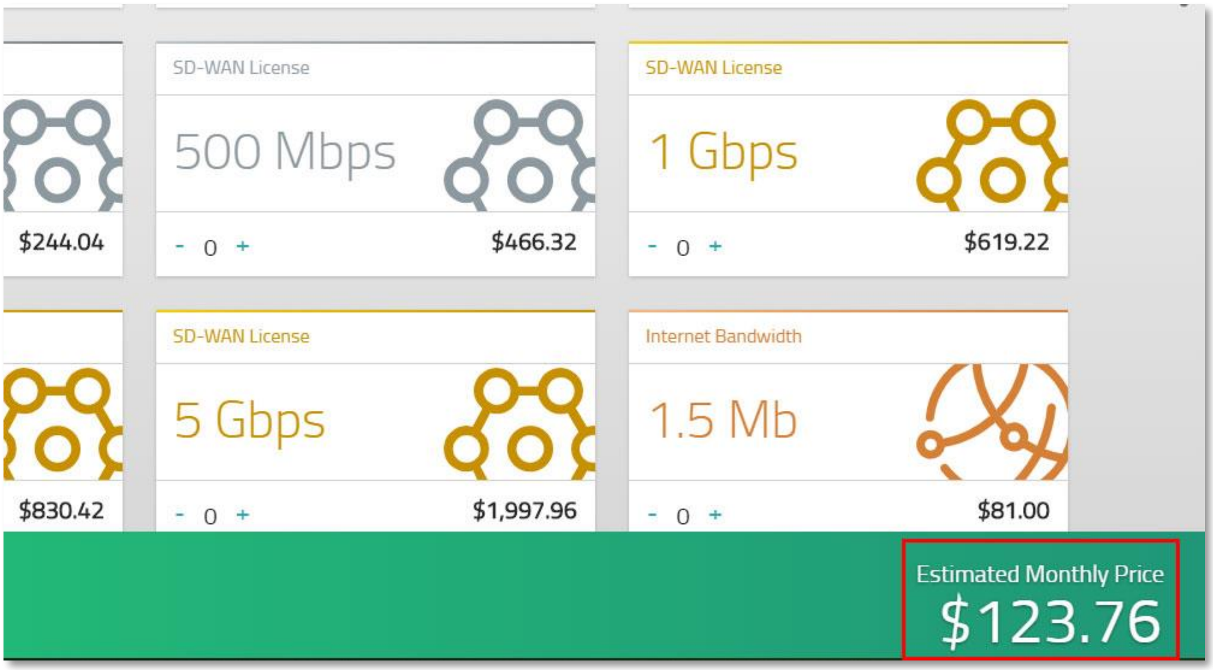


3. Select the number of locations at the bottom



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

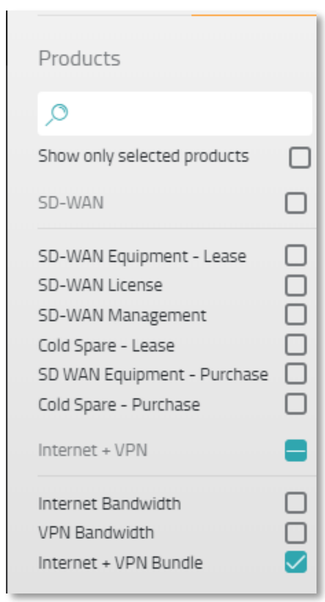
4. Estimated Monthly Price will be calculated based on selections.



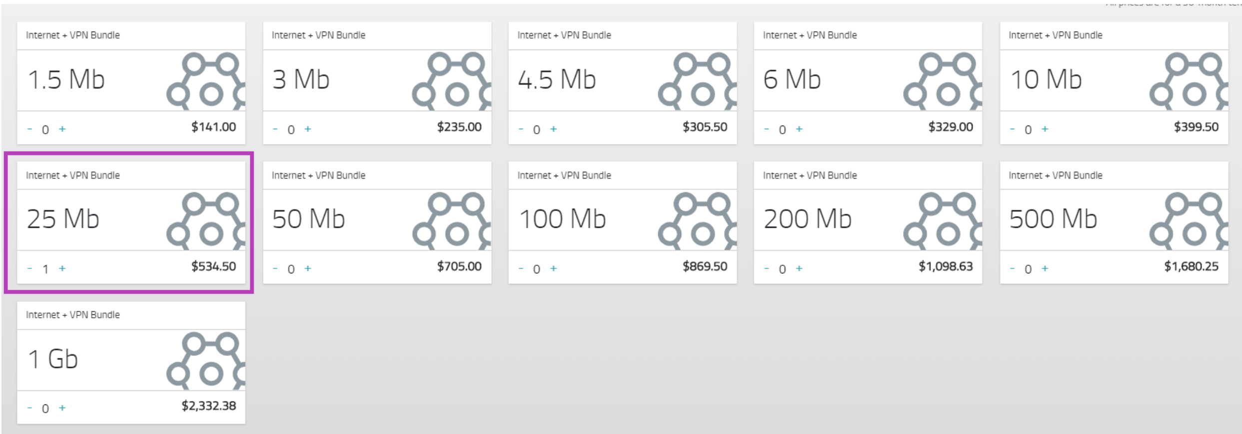
Example:

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



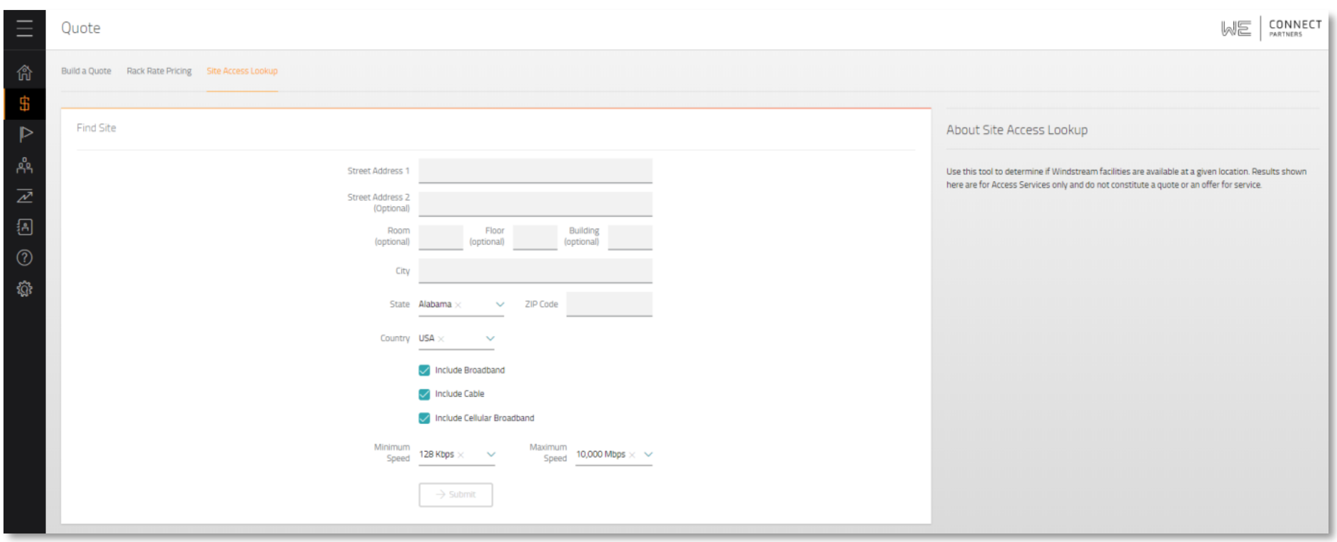
2. Find the 25Mbps tile and change quantity to “1”



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

SITE ACCESS LOOKUP

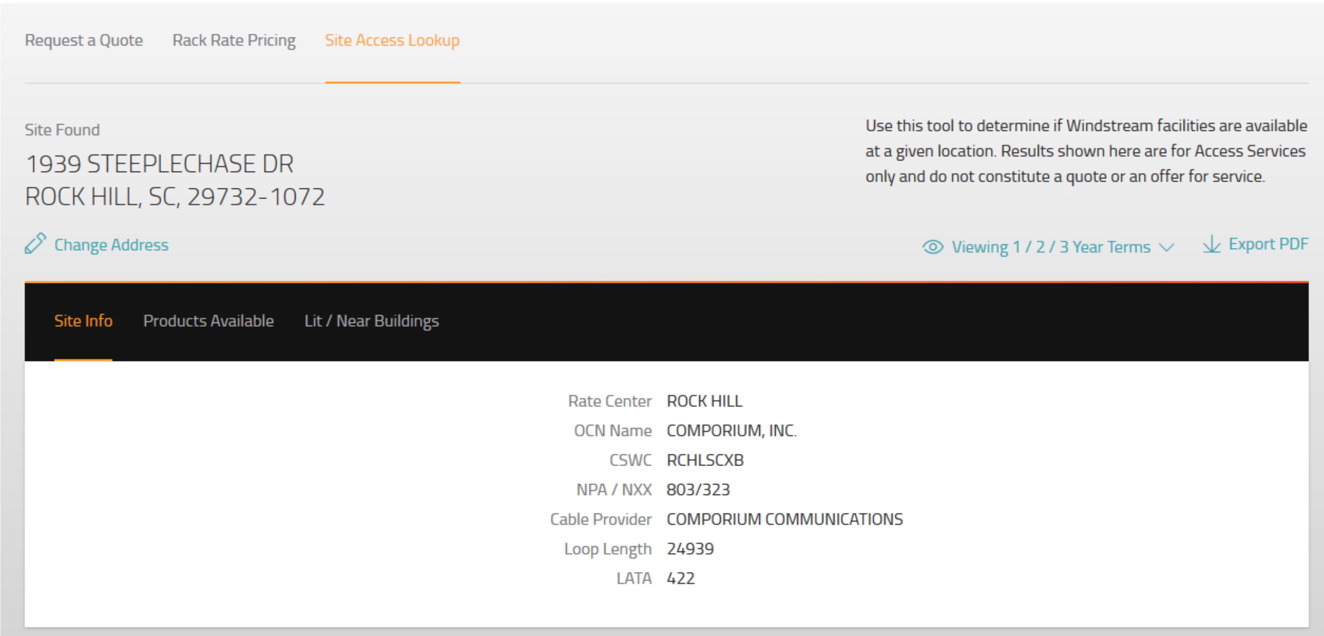
Site Access Lookup allows a user to input a customer address to determine if Windstream facilities are available, and if there are, what kind of facilities are there. This page also features Lit/Near Building information that can be leveraged when helping customers make decisions on which products/services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



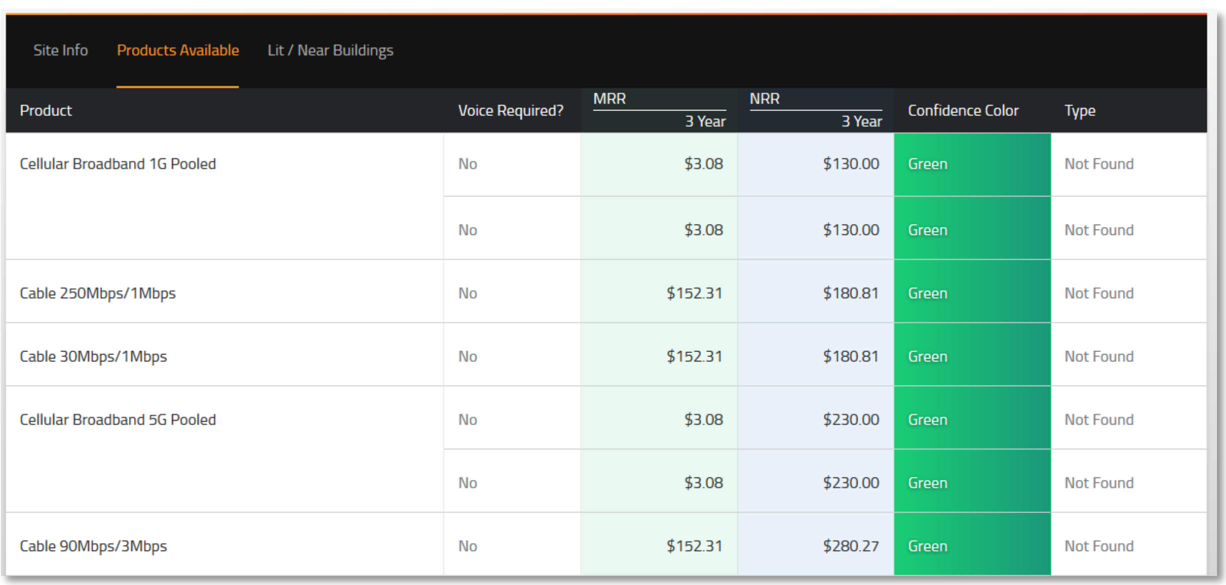
To use the tool:

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.



5. Click Products Available
    a. Product – the access product available
    b. Voice Required? - is voice required to have this access
    c. MRR - Monthly Recurring Amount
    d. NRR – Non-Recurring Amount
    e. Confidence Color – depicts how likely it is that this service is available



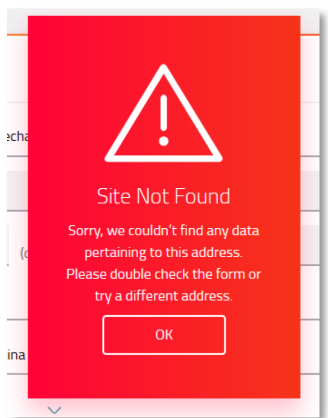
Product	Voice Required?	MRR 3 Year	NRR 3 Year	Confidence Color	Type
Cellular Broadband 1G Pooled	No	$3.08	$130.00	Green	Not Found
	No	$3.08	$130.00	Green	Not Found
Cable 250Mbps/1Mbps	No	$152.31	$180.81	Green	Not Found
Cable 30Mbps/1Mbps	No	$152.31	$180.81	Green	Not Found
Cellular Broadband 5G Pooled	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.

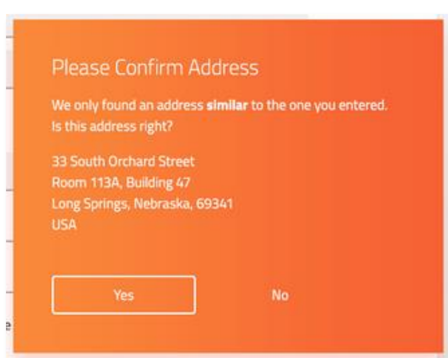
Site Info | Products Available | Lit / Near Buildings

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

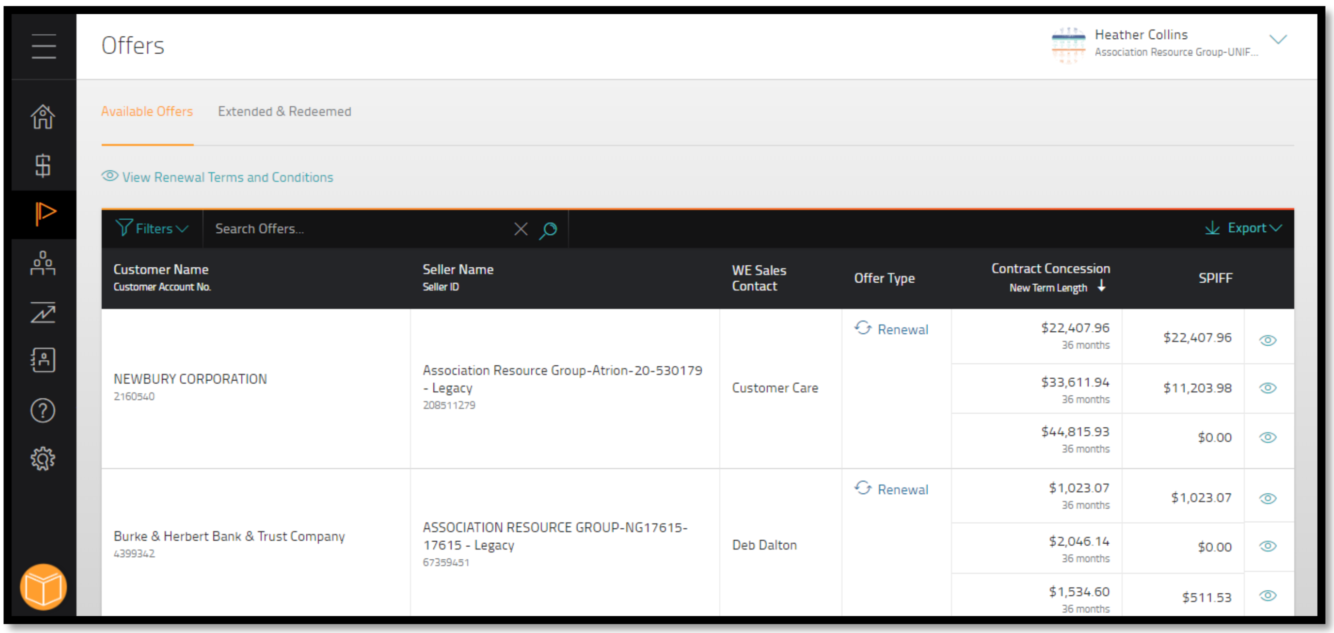


OFFERS

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.

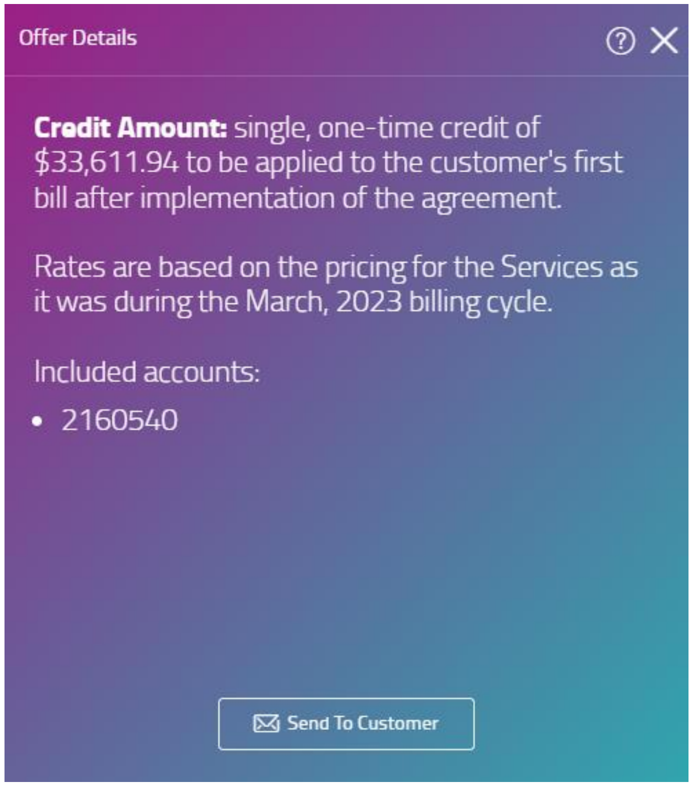


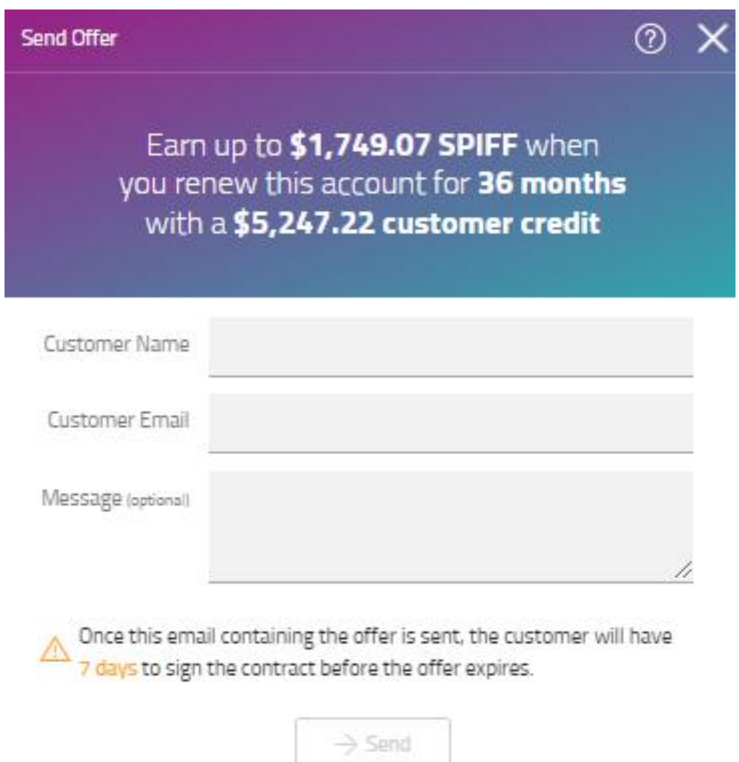
The portal will list the following attributes at an Offer level:

- Customer Name & Account Number – this is the customer, not a location
- Seller Name & ID – the sales ID that is tagge 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

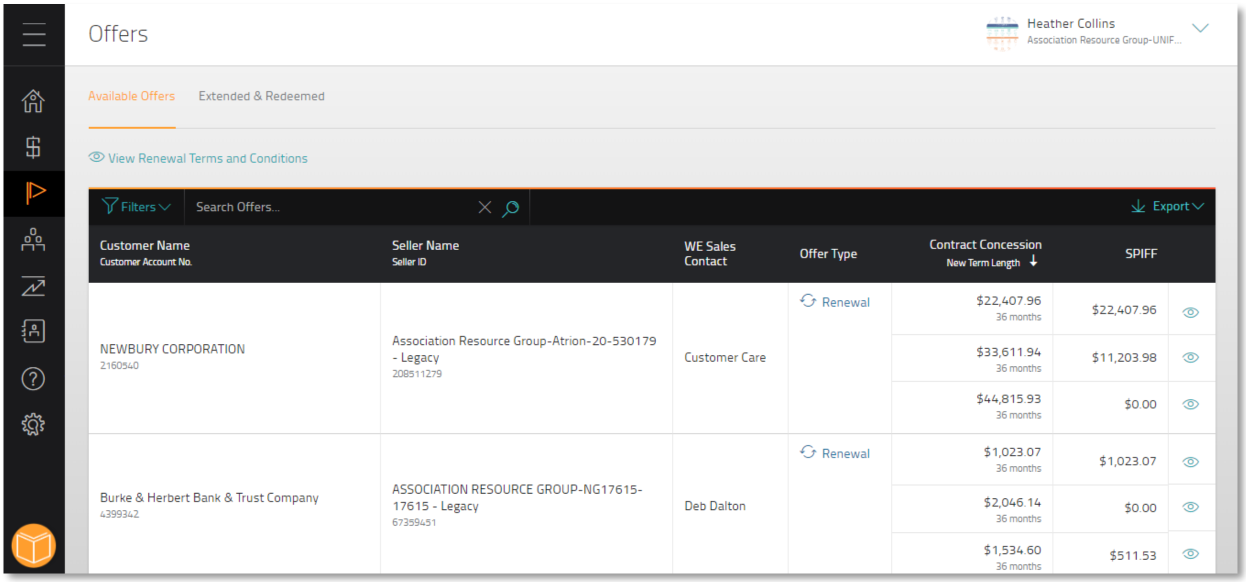
Clicking the eyeball to the right of the offer will produce a popup with the information for that offer and allows the user to send the offer directly to the customer contact. The Offers Details modal shows confirmation of the credit amount, billing cycle the rates are based on and the affected accounts.

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.

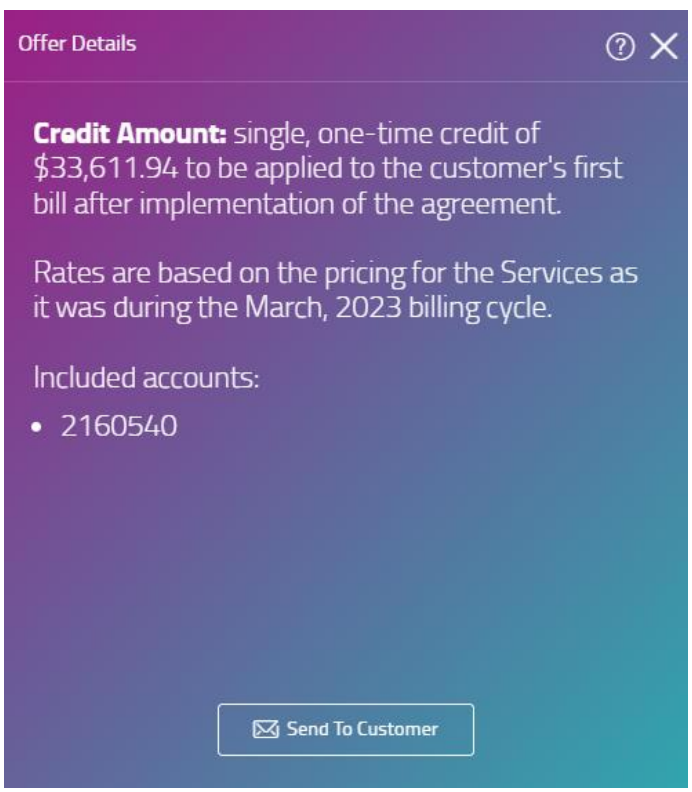




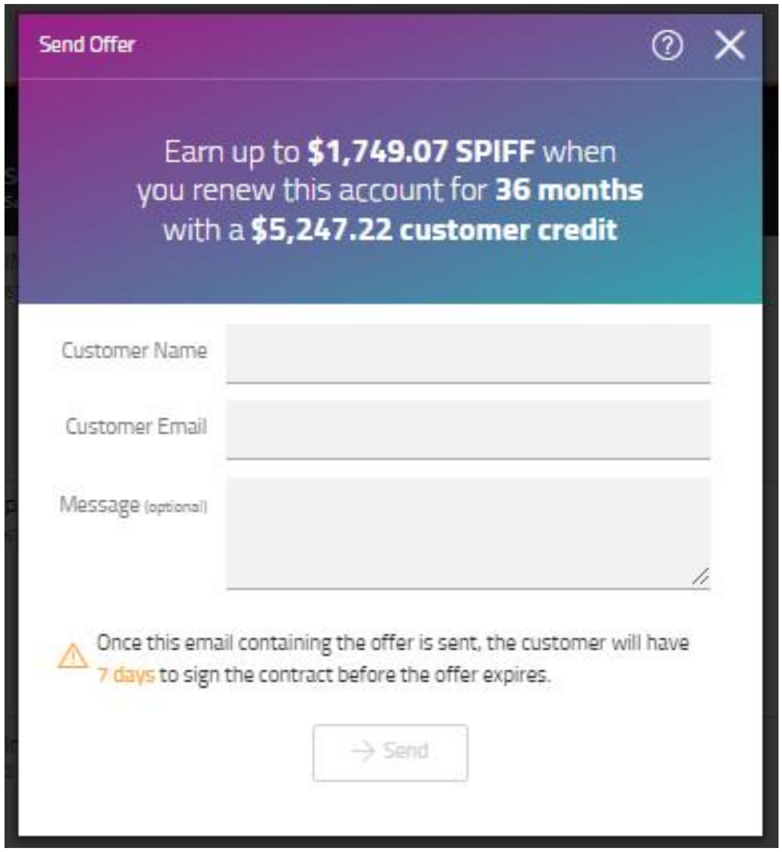
EXTEND OFFER TO CUSTOMER



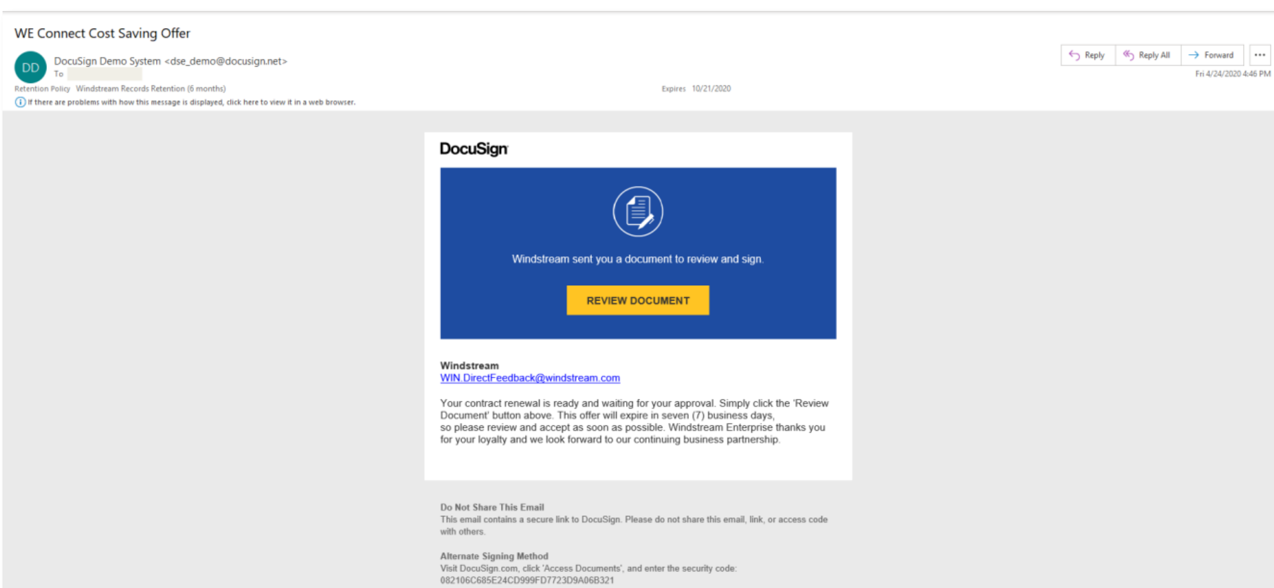
1. Click the eyeball next to offer being sent to the customer
2. Review the Offer Details and click Send to Customer

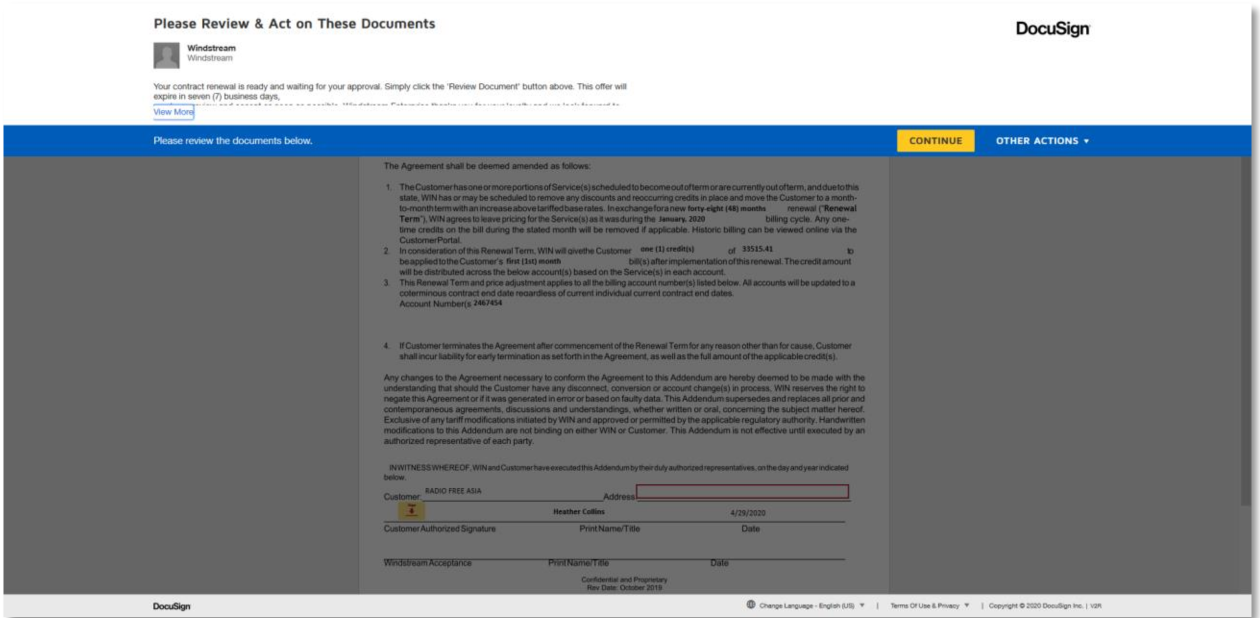


3. Enter information for the person who should receive the paperwork.

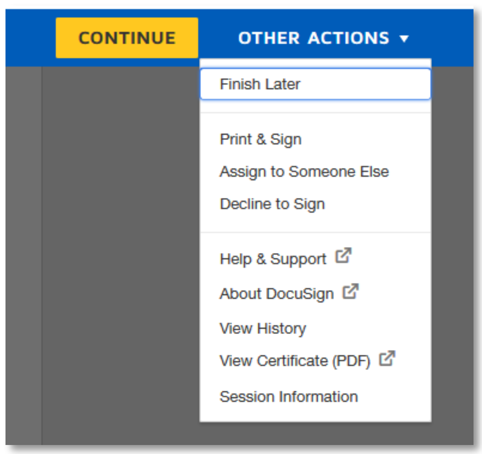


4. Click Send.
5. Customer will get an email with the docusign envelope. Partner user will also get an email with a copy of the paperwork.





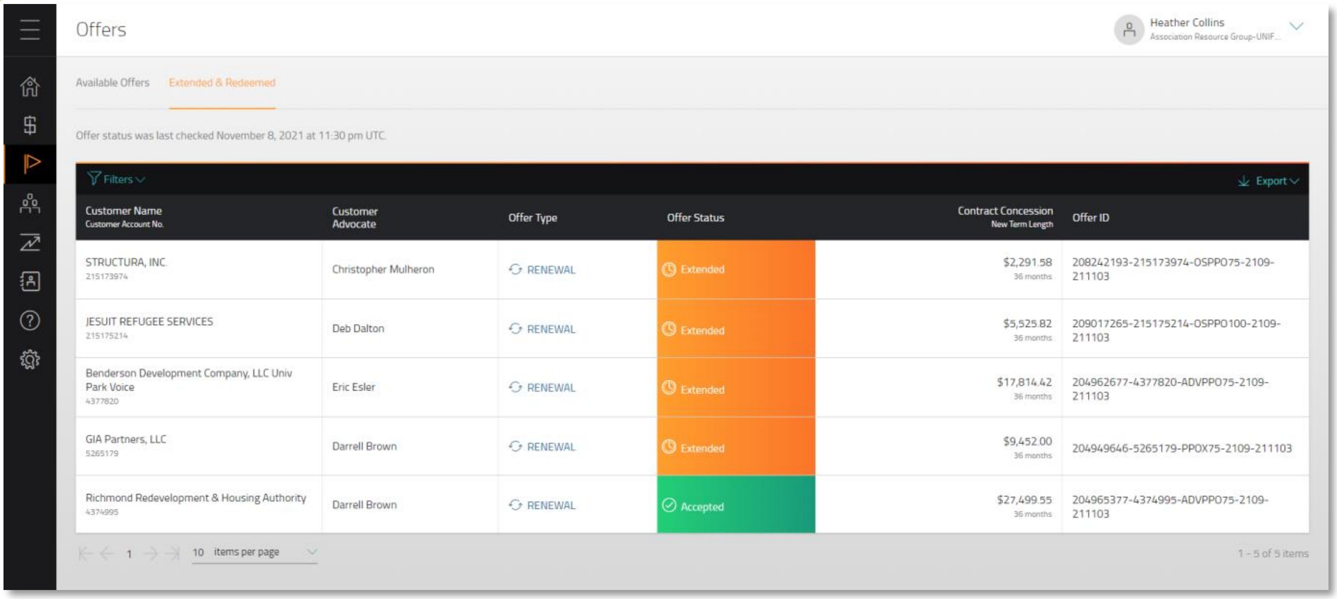
6. Customer can digitally sign the renewal or assign to someone else (send to the authorized person to sign) or decline to sign (declines the offer).



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

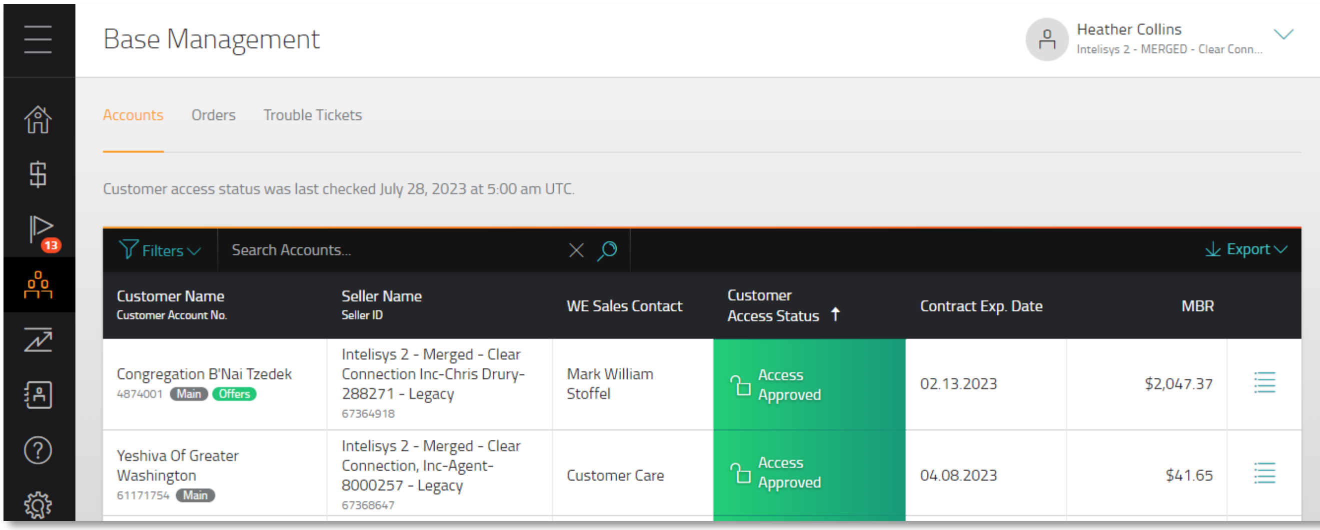
Once a user has extended an offer to the customer, the Offer will be moved from the Available Offers tab to the Extended & Redeemed tab in the Offers screen.



Offers 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).

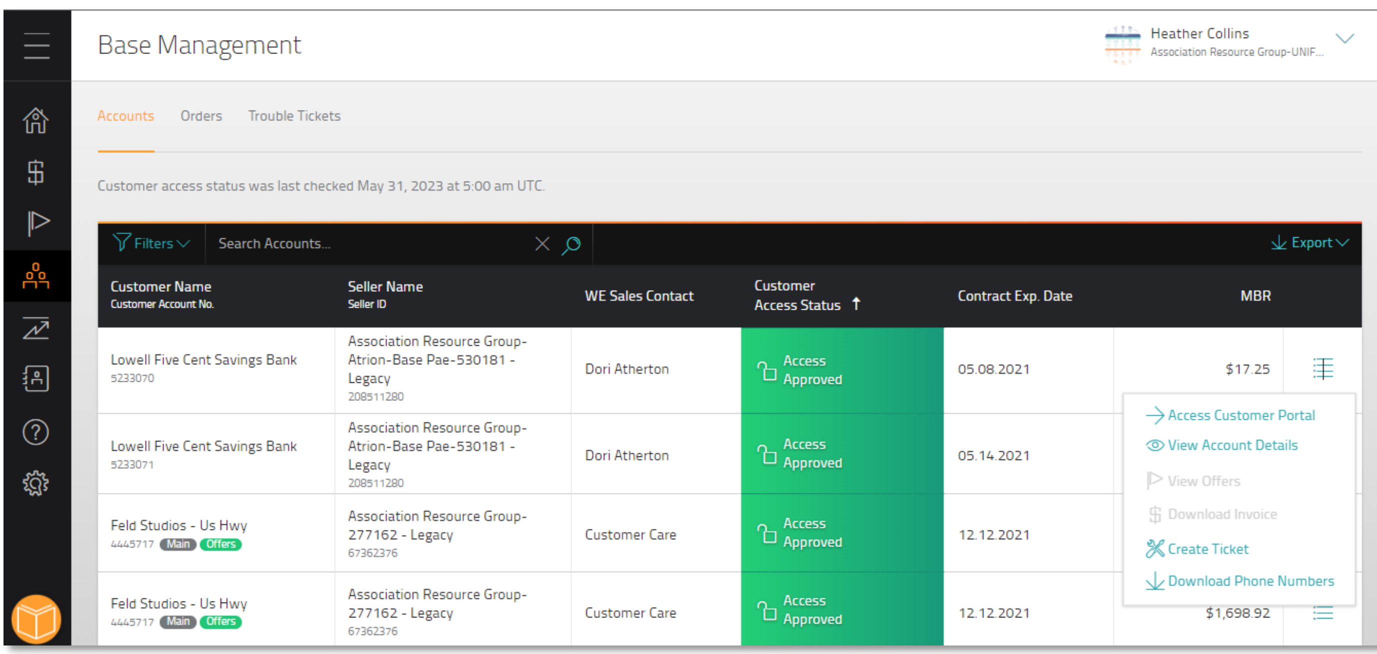
Offers that are accepted by the customer will have an “Accepted” status and will stay in the grid for 90 days.

BASE MANAGEMENT



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

ACCOUNTS



[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

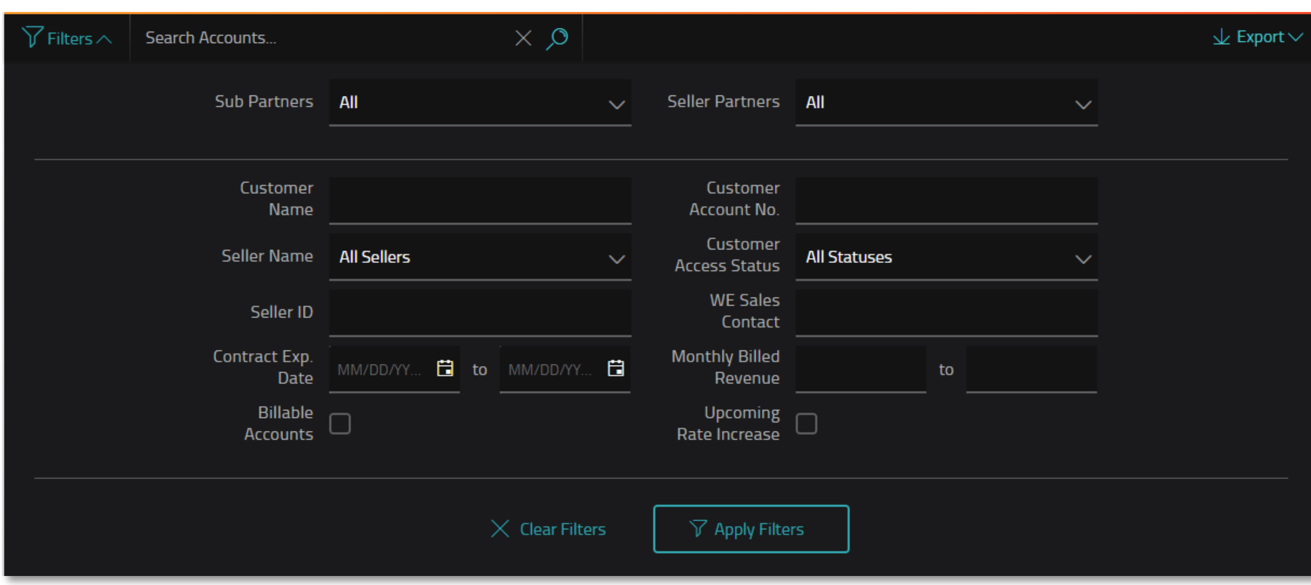
Tags will show next to the account number when applicable:

- 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:

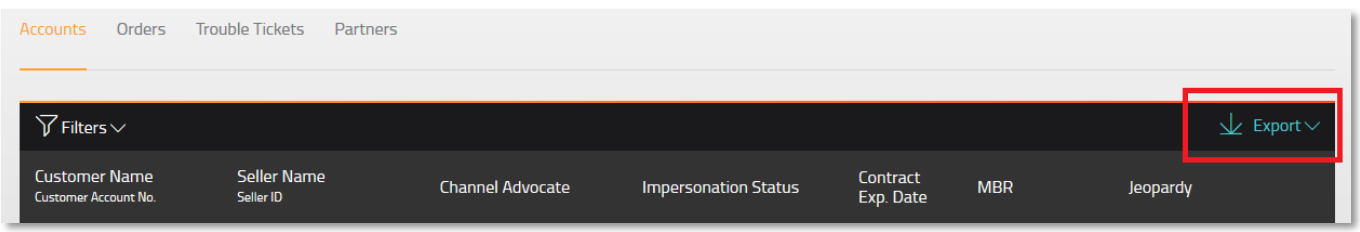
- Assigned Partner
- Customer Name
- Customer Account Number
- Customer Access Status
- Sales Contact
- Contract Expiration Date
- Monthly Billed Revenue
- Billable Acocunts
- Upcoming Rate Increase



EXPORT BASE LIST

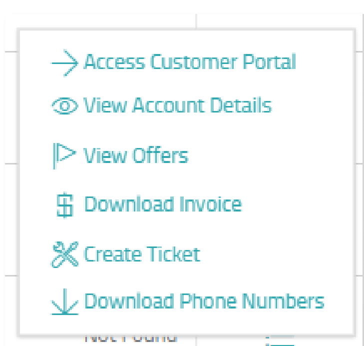
Expanded information can be exported to excel using the Export button on the top right of the Accounts table. Export contains:

- 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.



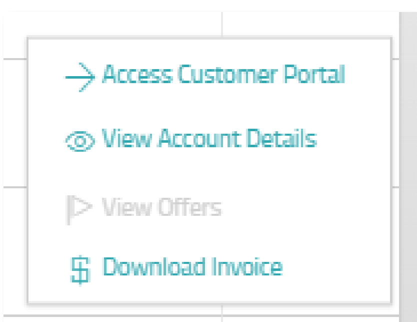
- Access Customer Portal – routes user to the customer's account in WE Connect (see Customer Portal Access for more details)
- View Account Details – fly out window with more detailed information about that customer location
- View Offers – popup modal to show the user any predefined renewal offers currently 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

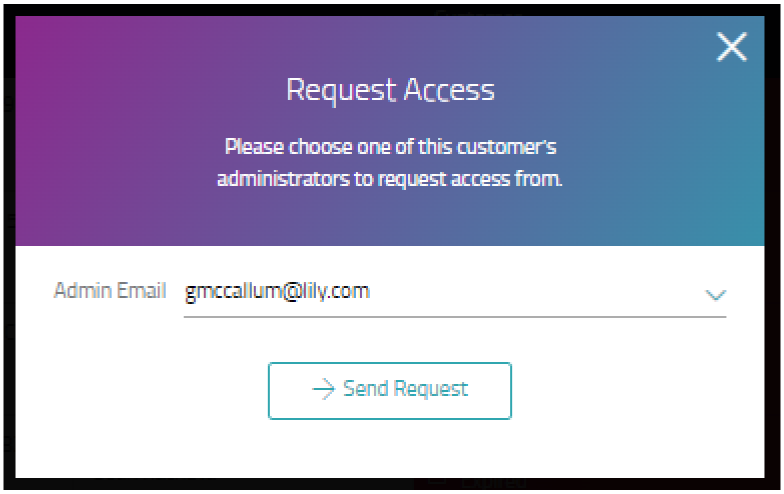
Customer Portal Access gives the Partner user the ability to log into the WE Connect customer portal as the Customer. At this time, all Partner users will need to request access from the Customer via the Partner Portal Accounts page.

REQUESTING CUSTOMER ACCESS

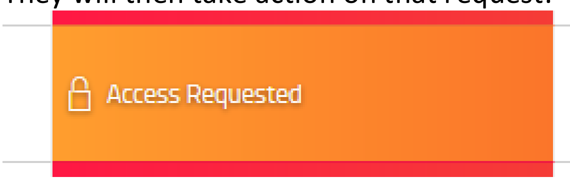
1. Click the Menu icon and Access Customer Portal



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

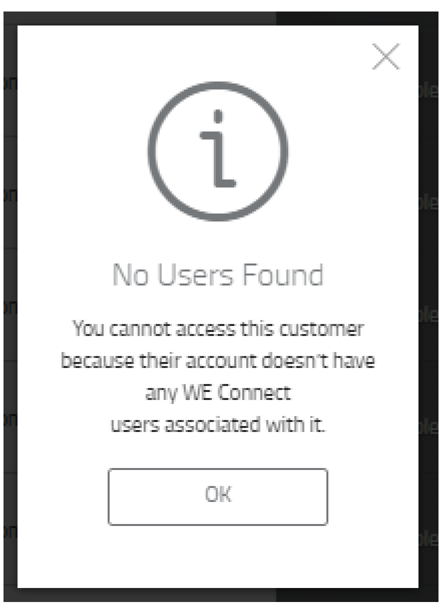


3. The Customer Access Status field for that Customer will turn orange with a status of "Access Requested". The admin selected will receive an email notifying them of the user's request. They will then take action on that request.



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

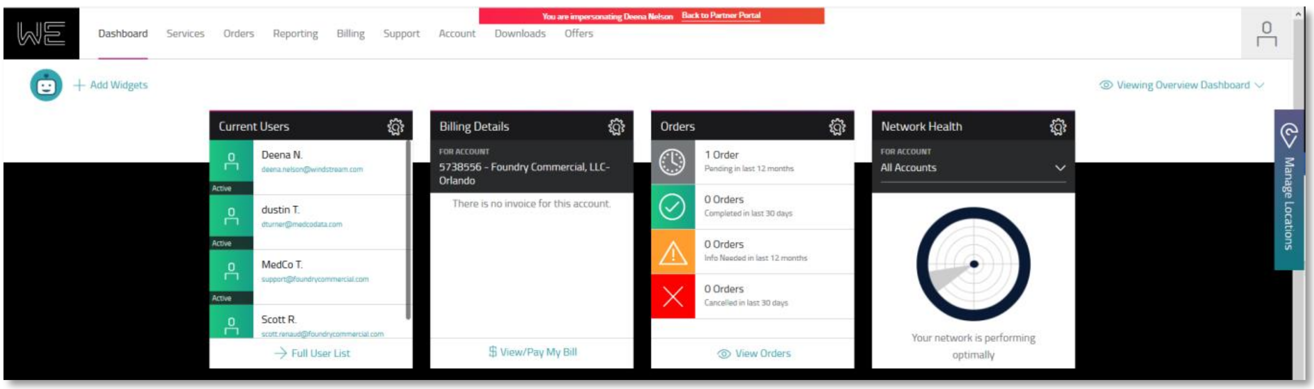
If a Customer does not have any admins in WE Connect, the Customer Access Status cell will be set to "Access Not Available". By clicking on the cell the user will see the pop up below. Please instruct the customer to register for WE Connect in order to request access.



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.

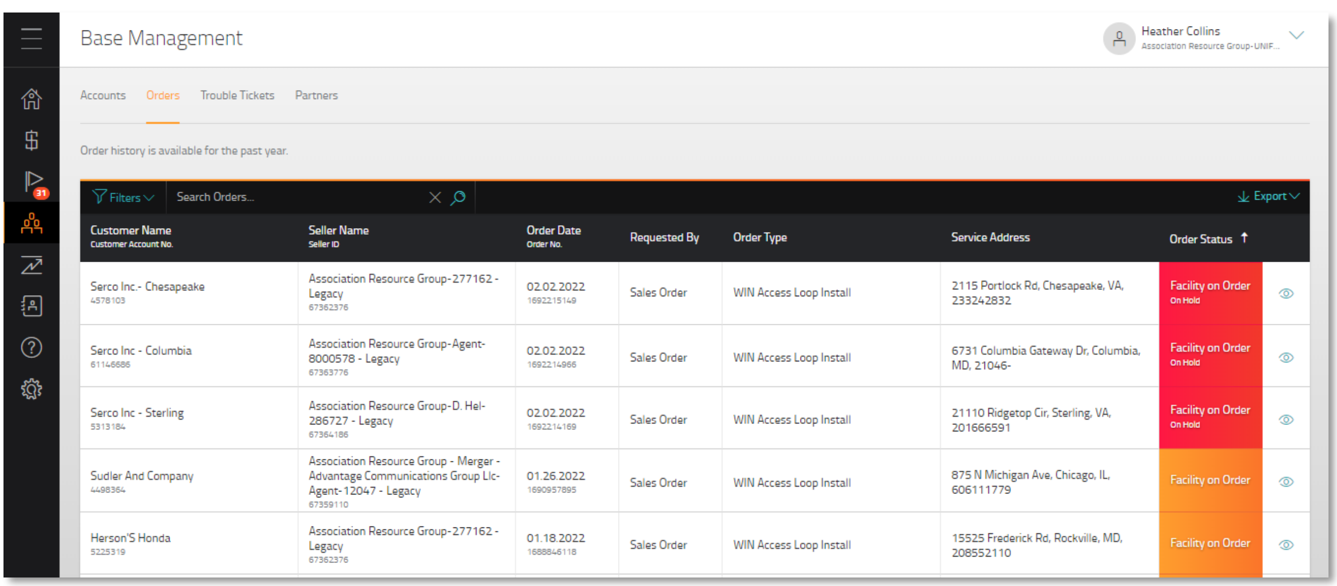
1. Find that Customer on the Accounts tab
2. Click the Menu icon
3. Click **Access Customer Portal**
4. The user will be automatically redirected to WE Connect. During access, there will be a red banner at the top of the screen calling out that the user is in the Customer's in WE Connect portal



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



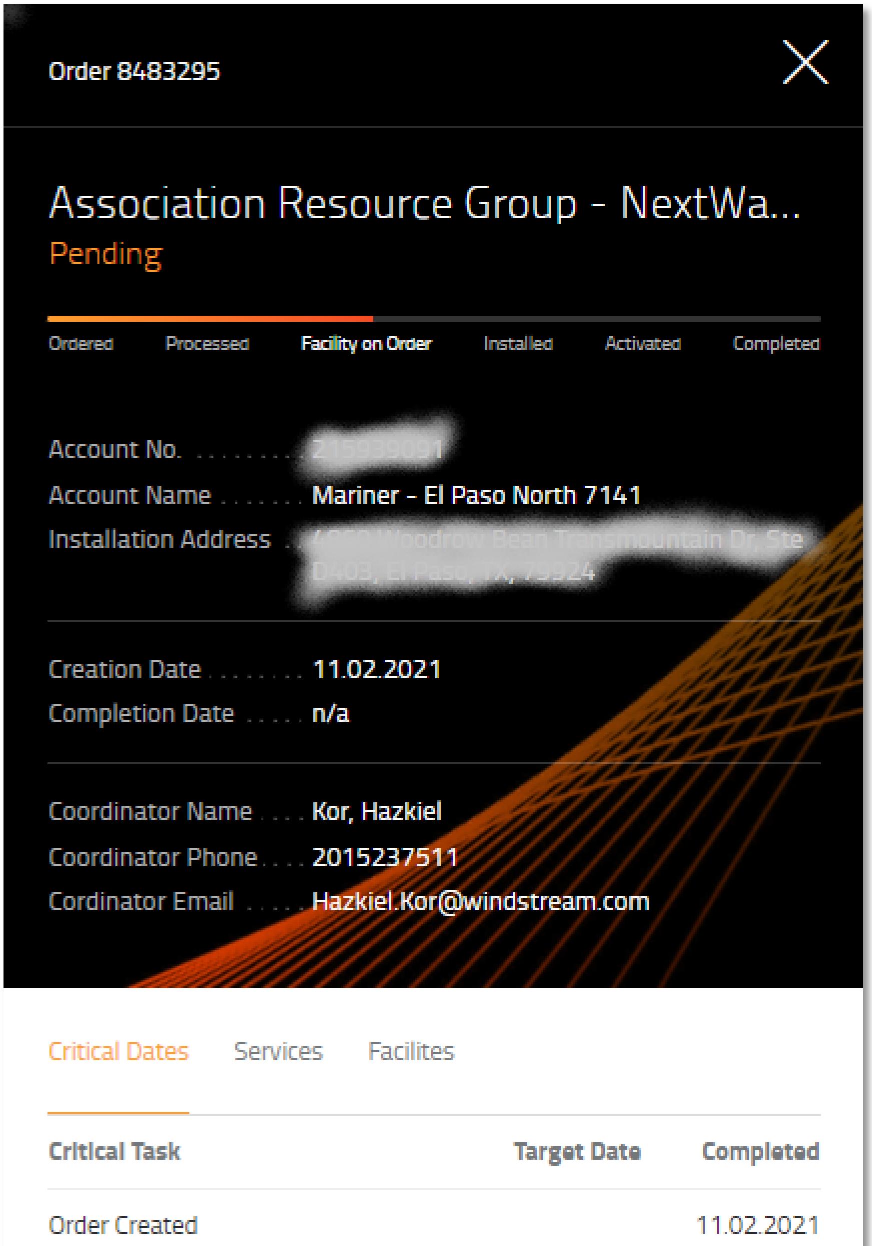
Orders associated to Customer accounts owned by the user will show on the Orders tab. The following columns will populate:

- 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

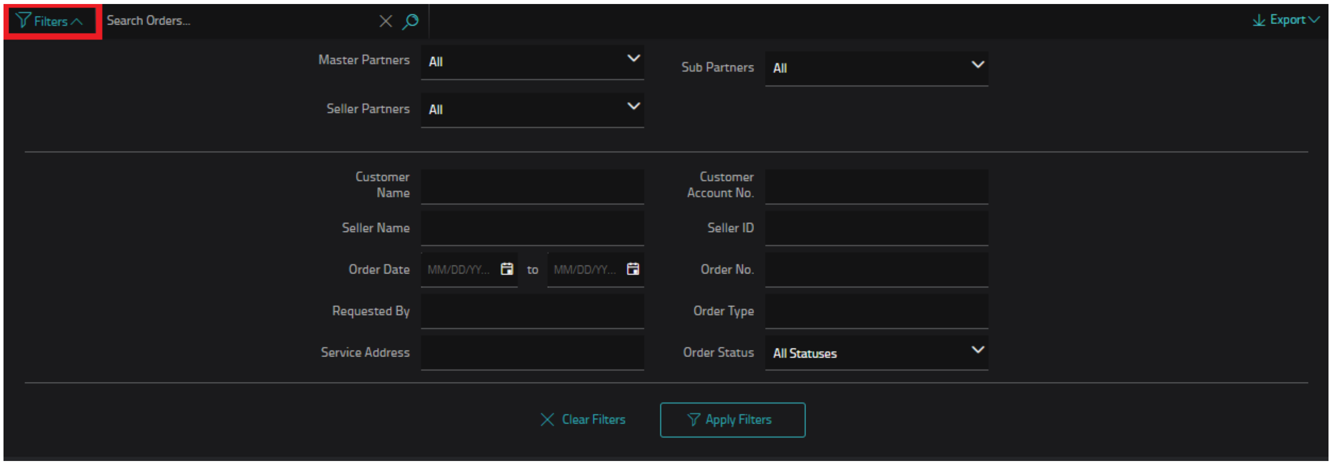
Clicking the eye in the far-right column will produce a fly out menu showing details about the order.

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.

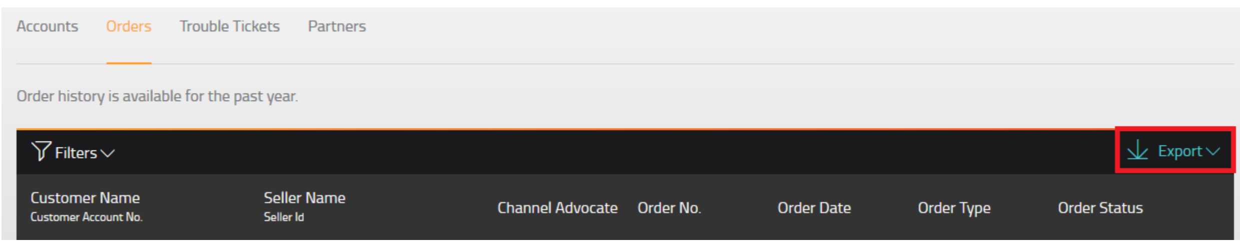
The Order Details flyout is now updated to more closely reflect the WE Connect order details flyout.


Order 8483295
Association Resource Group - NextWa...
Pending
Ordered
Processed
Facility on Order
Installed
Activated
Completed
Account No.
Account Name . . . . Mariner - El Paso North 7141
Installation Address
Creation Date 11.02.2021
Completion Date . . . . . n/a
Coordinator Name . . . . Kor, Hazkiel
Coordinator Phone 2015237511
Cordinator Email . . . . . Hazkiel.Kor@windstream.com
Critical Dates
Services
Facilites
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.

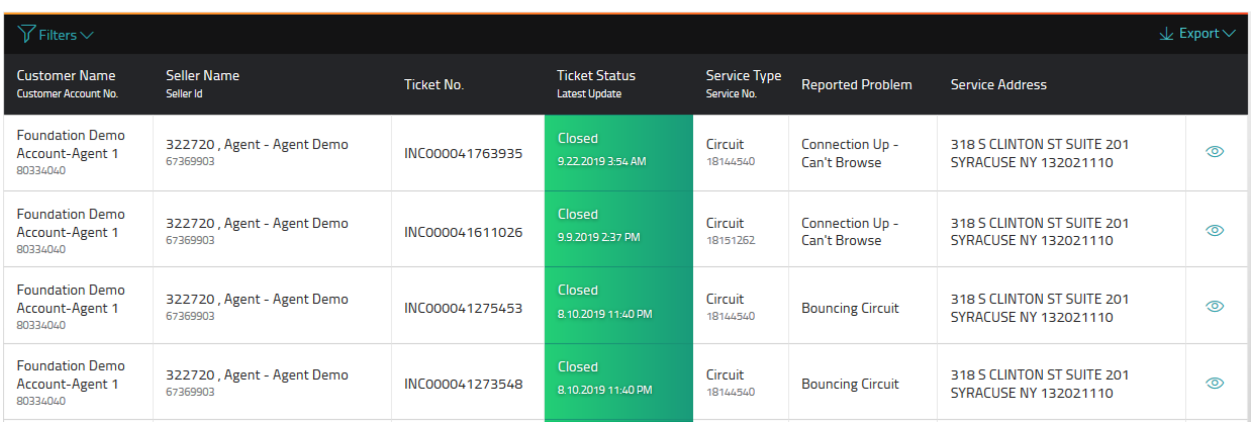


Information can be exported to Excel using the Export button on the top right of the table.



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:

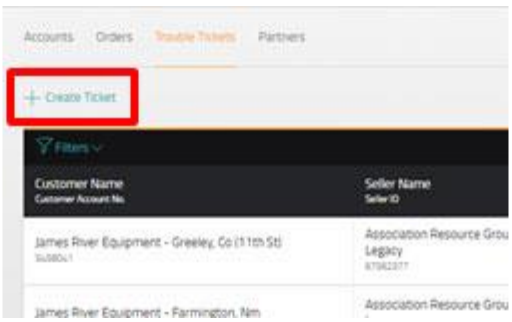
- Customer Name & Account Number
- Seller Name

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

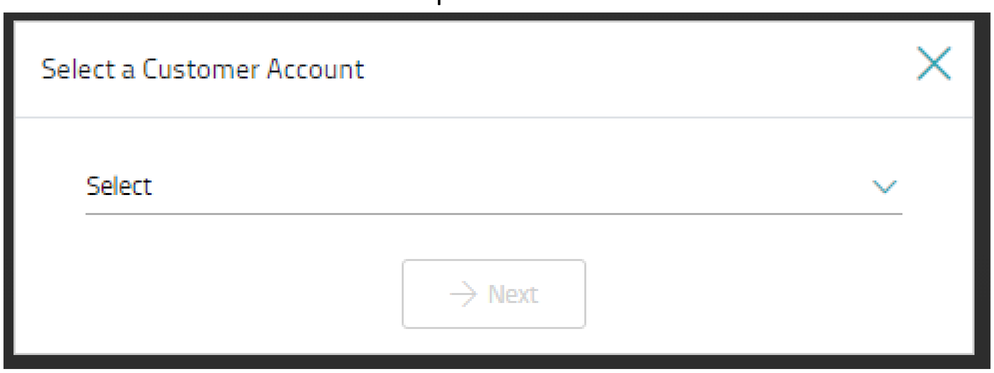
CREATE TICKET

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.

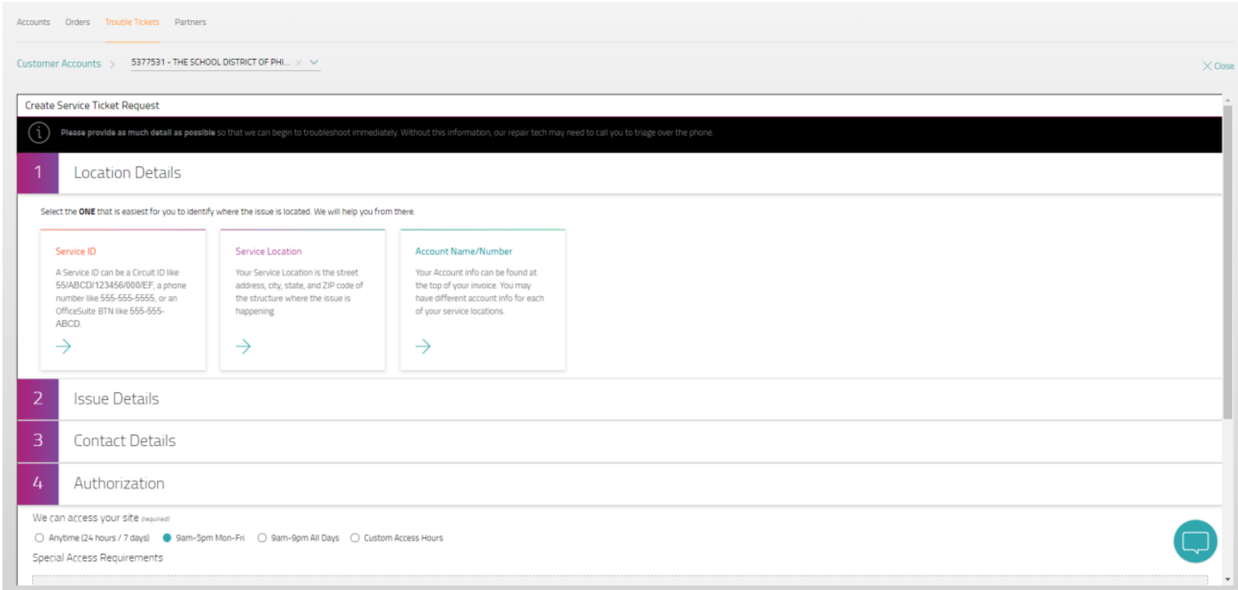
1. Click "+Create Ticket"



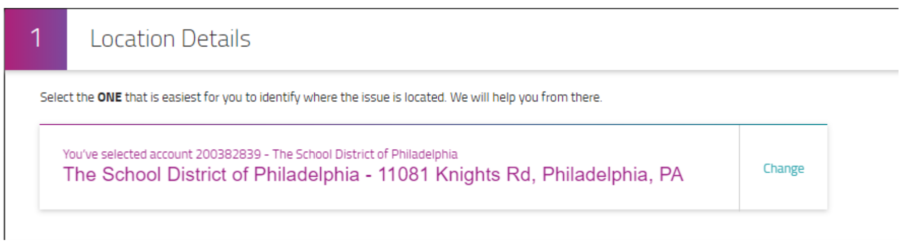
2. Select the customer from the drop down and click **Next**.



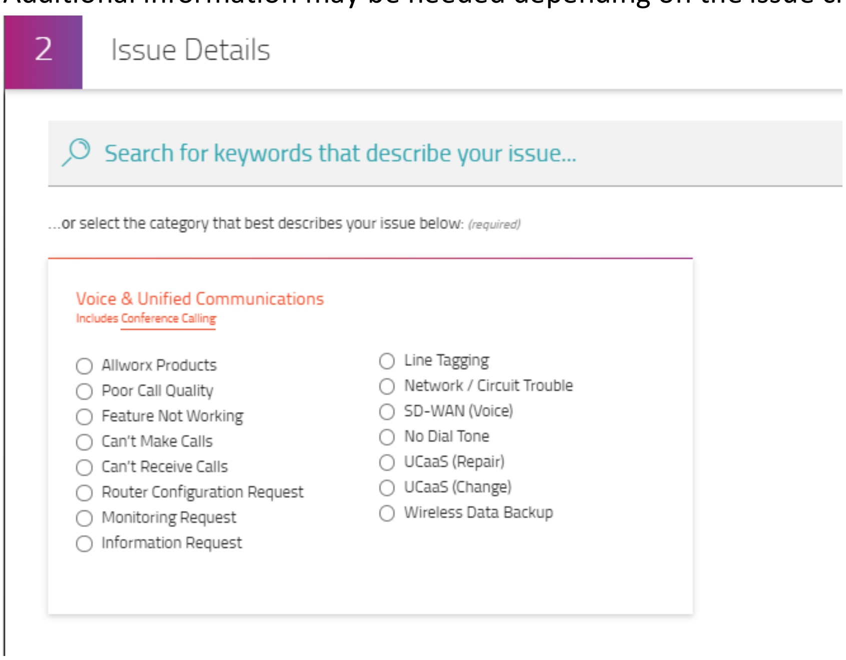
3. Ticket wizard opens



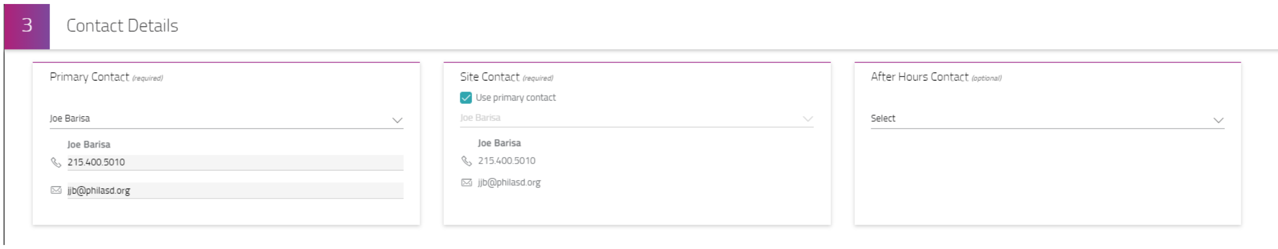
4. Follow the wizard prompts
   a. Location Details – choose the service ID, service location OR account name/number



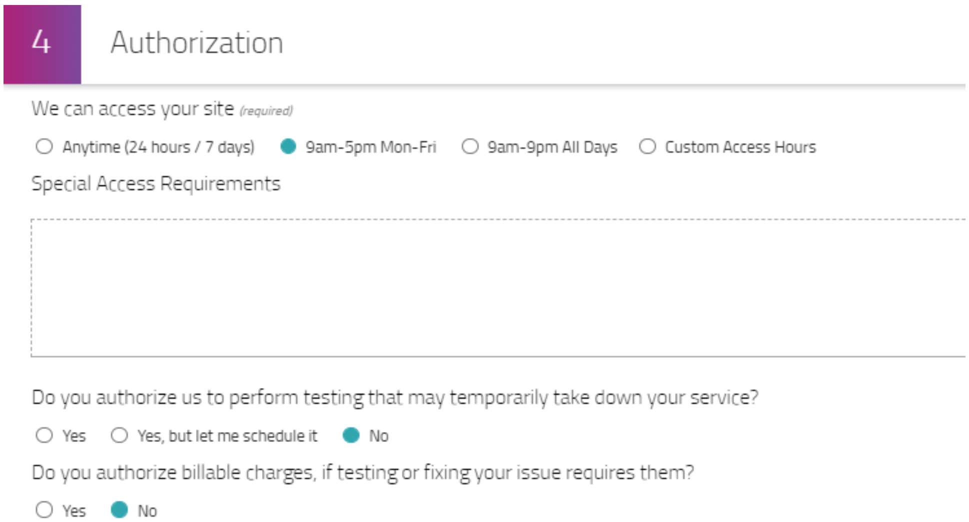
   b. Issue Details – select from a list of appropriate issues or search for the issue experienced
      i. Additional information may be needed depending on the issue chosen



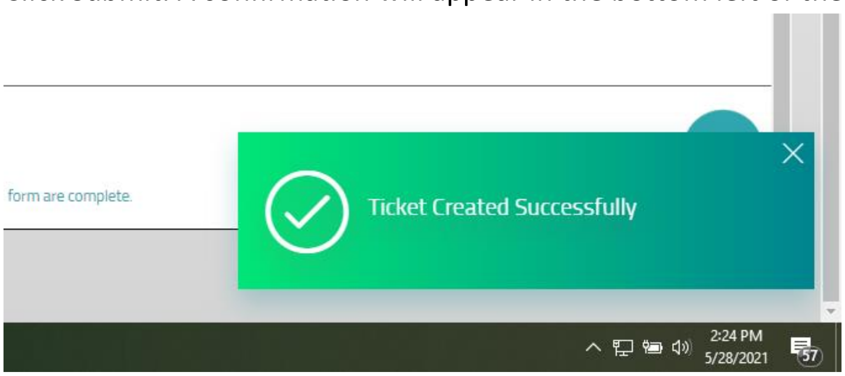
c. Contact Details – enter the contact associated to the ticket



d. Authorization to access the site if needed

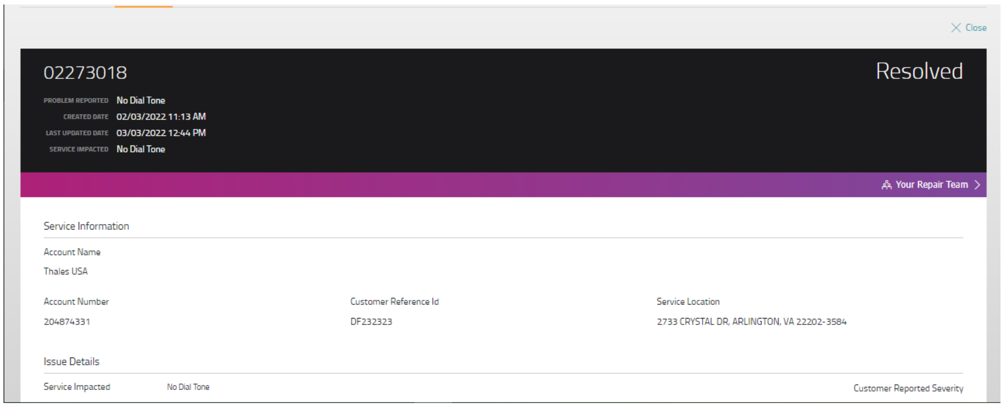


5. Click Submit. A confirmation will appear in the bottom left of the screen.

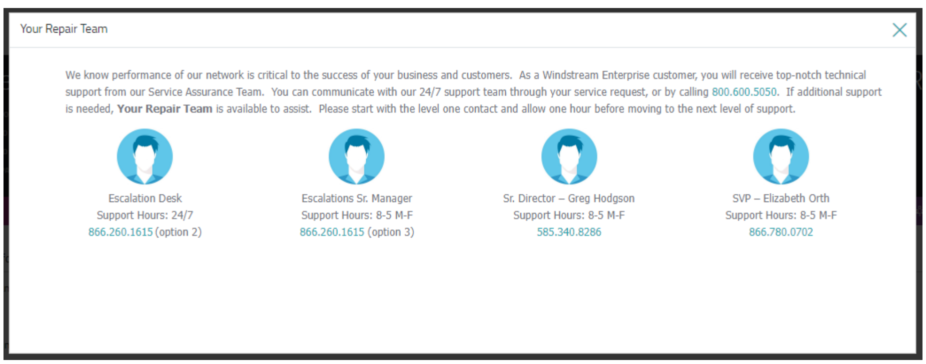


TICKET DETAILS

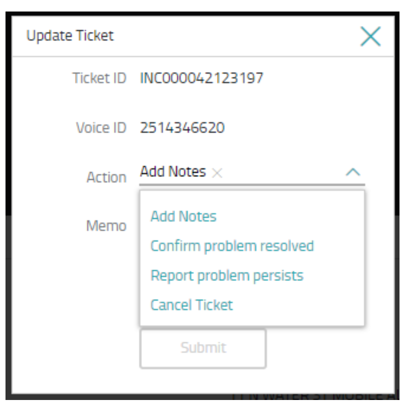
Clicking the eyeball icon to the right of the ticket this will open the Ticket Details screen with additional information about the ticket and notes from IT.



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.

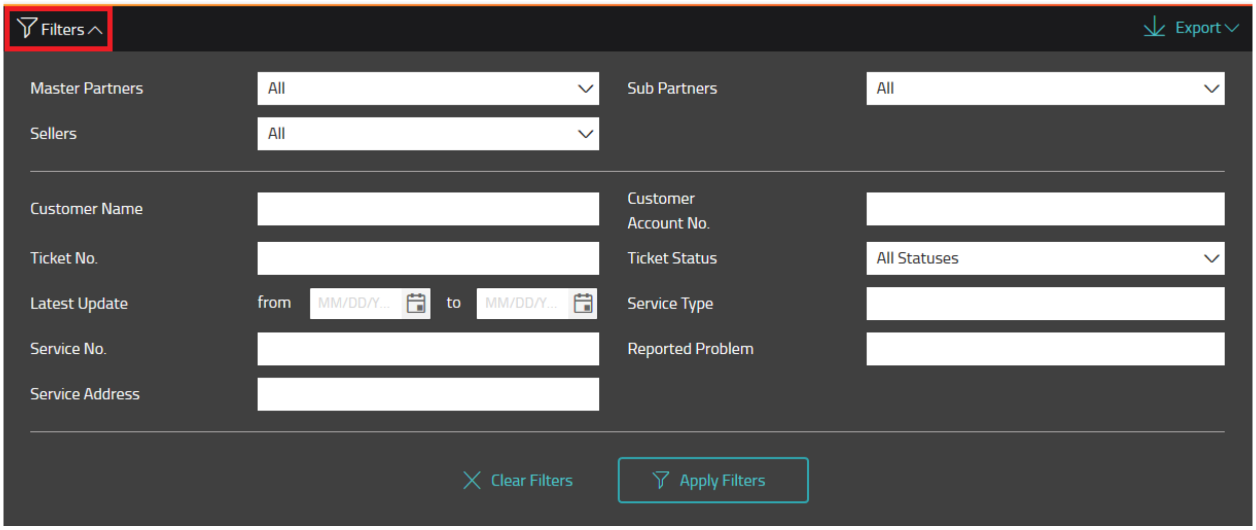


Users can click the "Update Ticket" button to add notes, confirm a problem persists or is resolved or cancel the ticket.

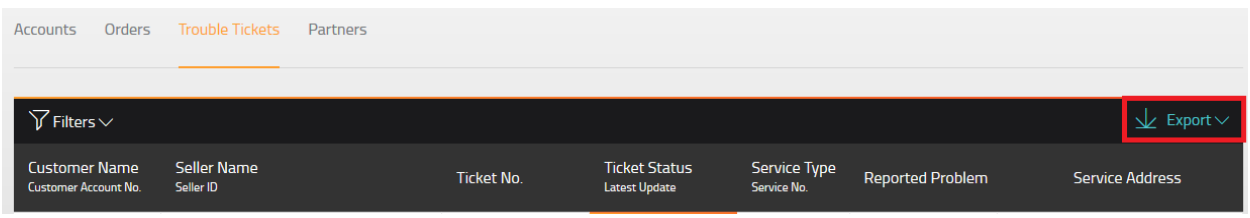


WINDSTREAM LEARNING AND DEVELOPMENT

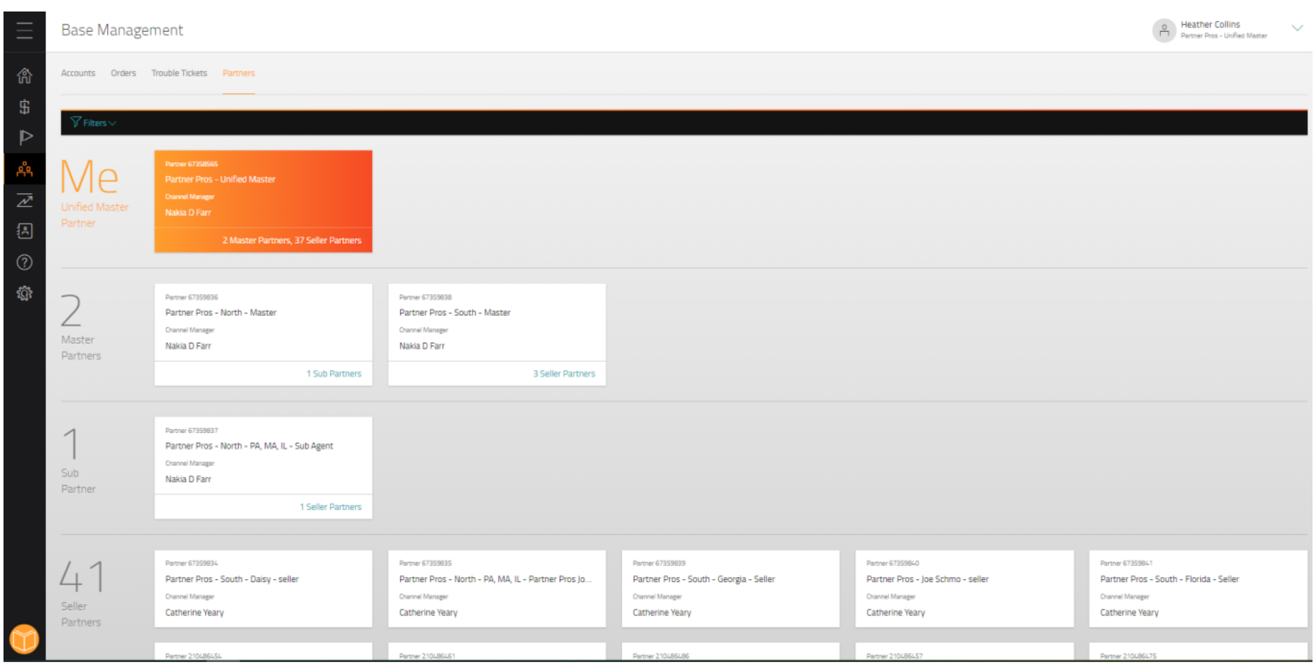
Users can search & filter tickets by using the Filters dropdown menu on the top left of the table.



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



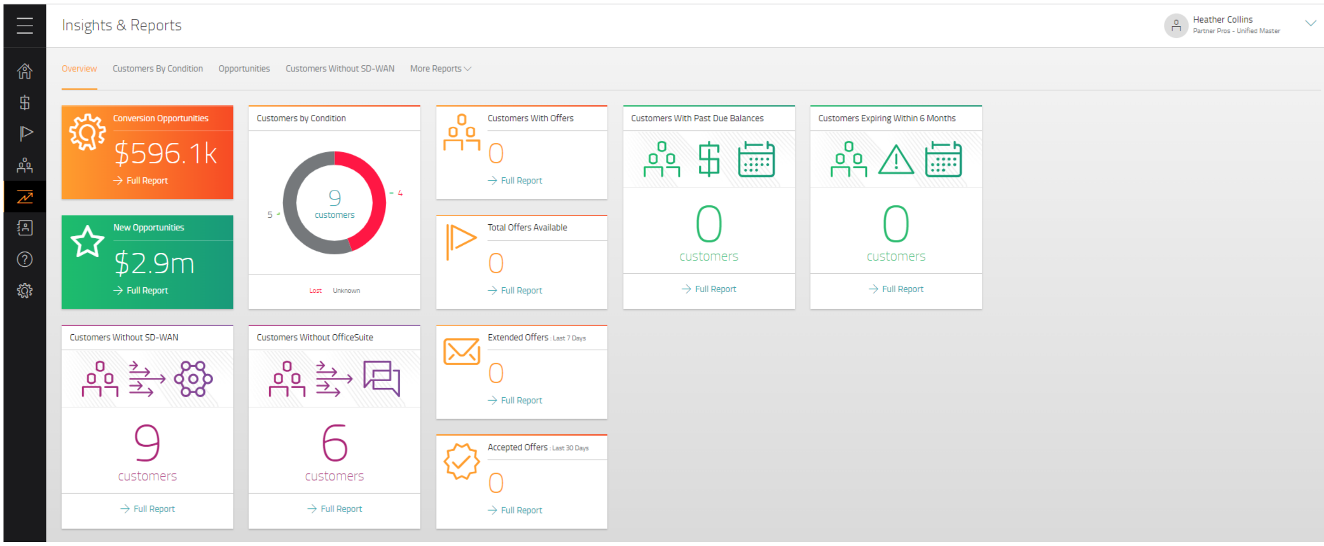
PARTNERS



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

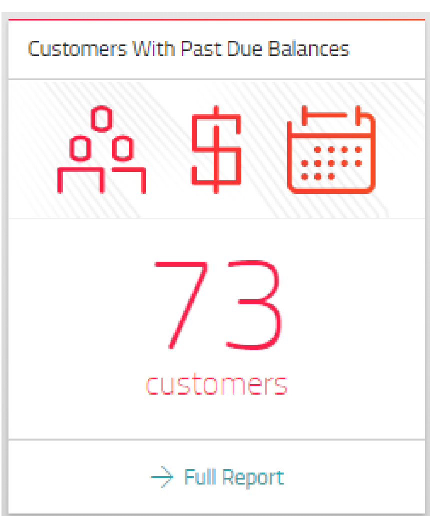
[Click here for a demo on Insights & Reports]



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.

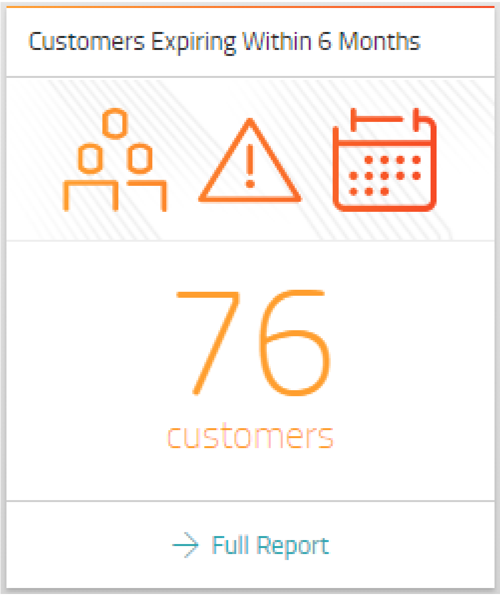
CUSTOMERS WITH PAST DUE BALANCES

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.

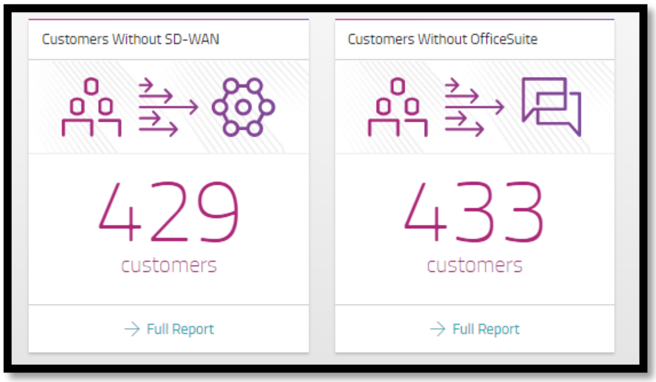


OPPORTUNITIES

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.



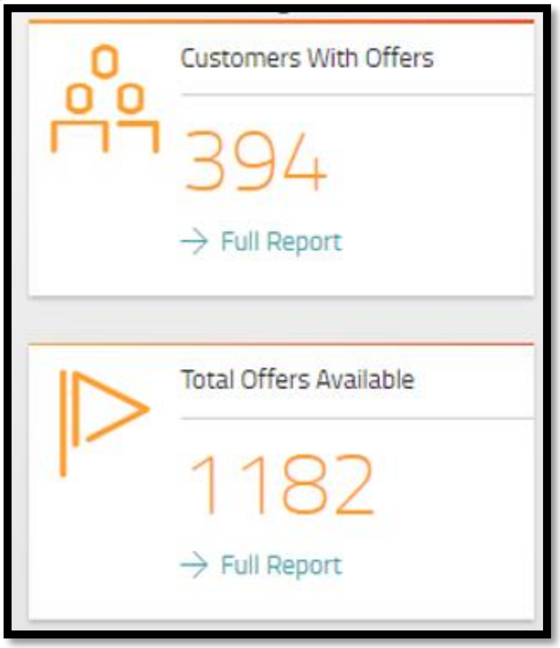
OFFERS WIDGETS

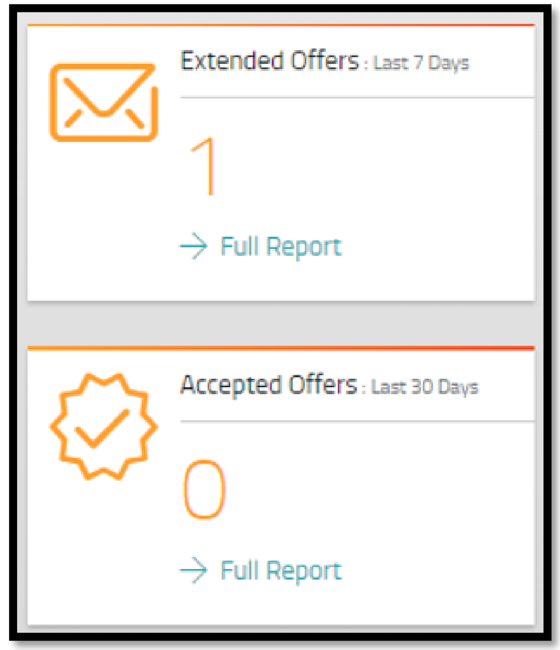
Customers with Offers – the number of customers in the user's base that have offers available

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

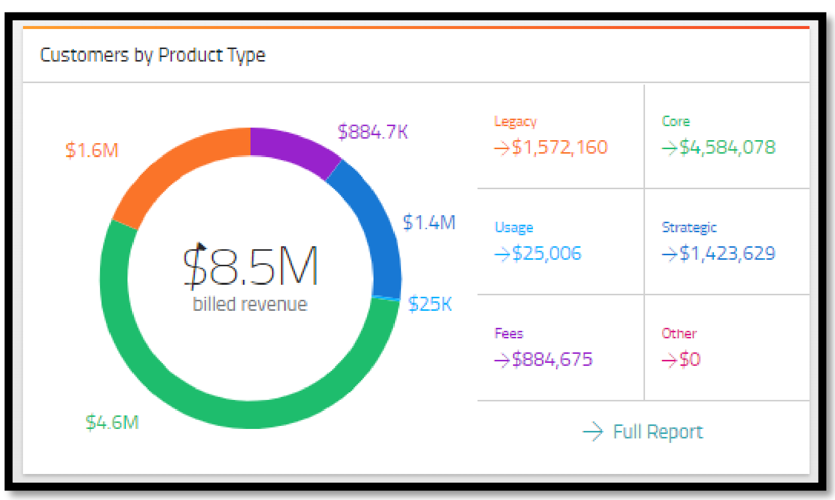
Accepted Offers – the number of accepted offers in the last 30 days





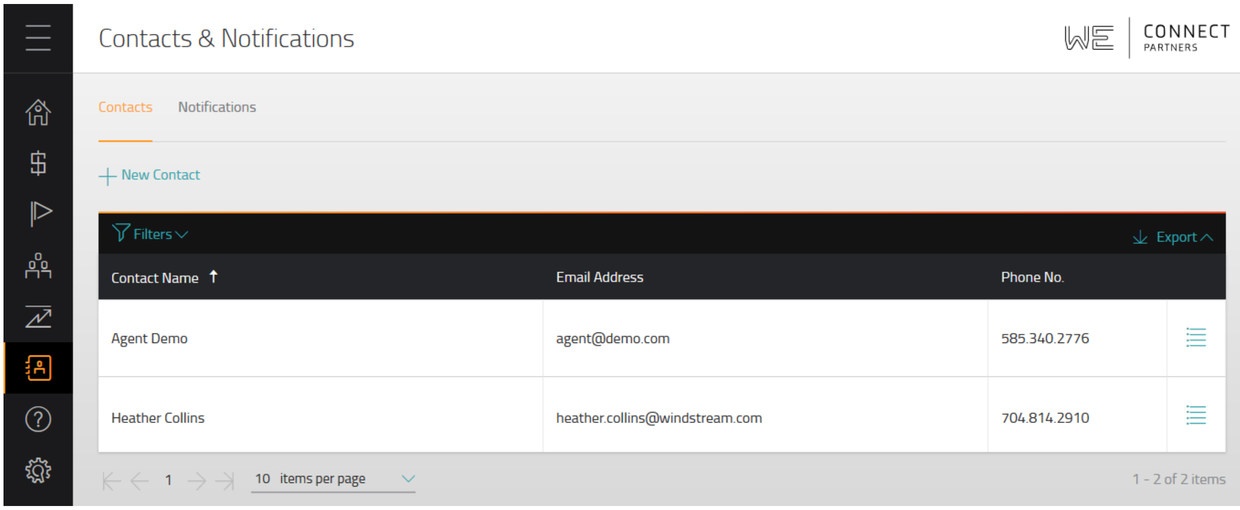
CUSTOMERS BY PRODUCT TYPE

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

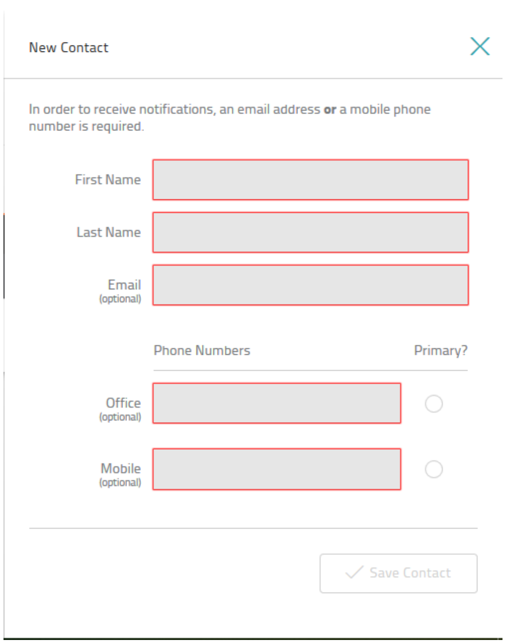
[Click here for a demo on Contacts & Notifications]



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

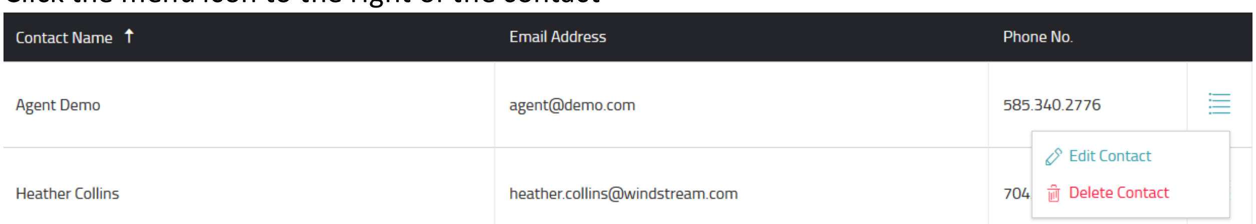
1. To add a new contact, click **+ New Contact.** A flyout will be produced to the right side of the screen



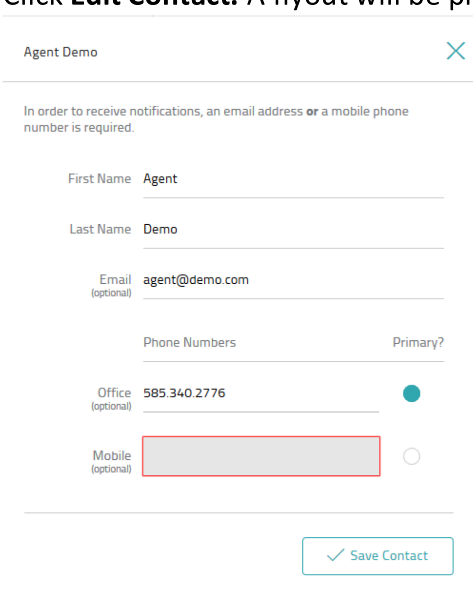
2. Fill out the required fields
    a. First Name
    b. Last Name
    c. Email
    d. Office Phone
    e. Mobile Phone
3. Select one number as primary
4. Click **Save Changes**
5. A popup will confirm you want to save changes. Click **Yes**.
6. Contact will be saved, and a confirmation will be displayed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

EDIT AN EXISTING CONTACT

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

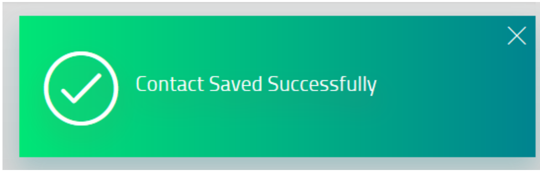


2. Click **Edit Contact.** A flyout will be produced.



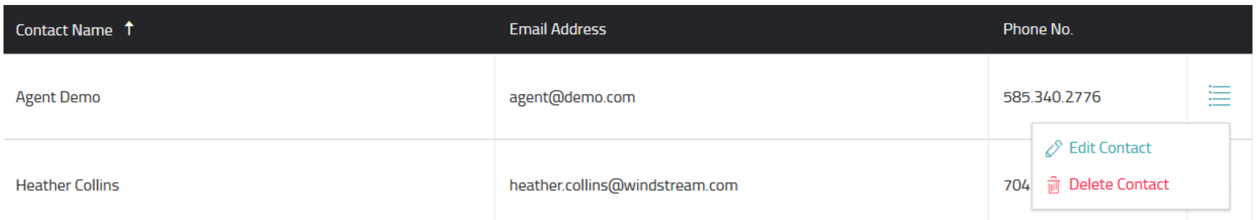
3. Make any edits necessary
4. Click **Save Changes**

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

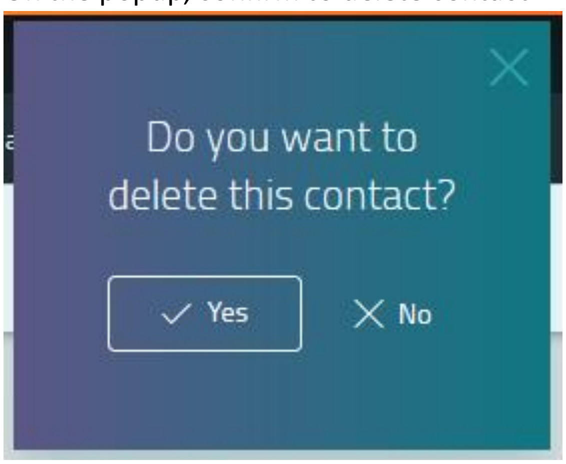


DELETE A CONTACT

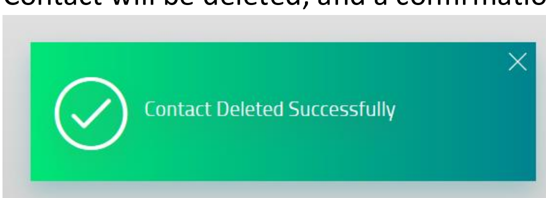
1. Click the menu icon to the right of the contact



2. Click **Delete Contact**
3. On the popup, confirm to delete contact

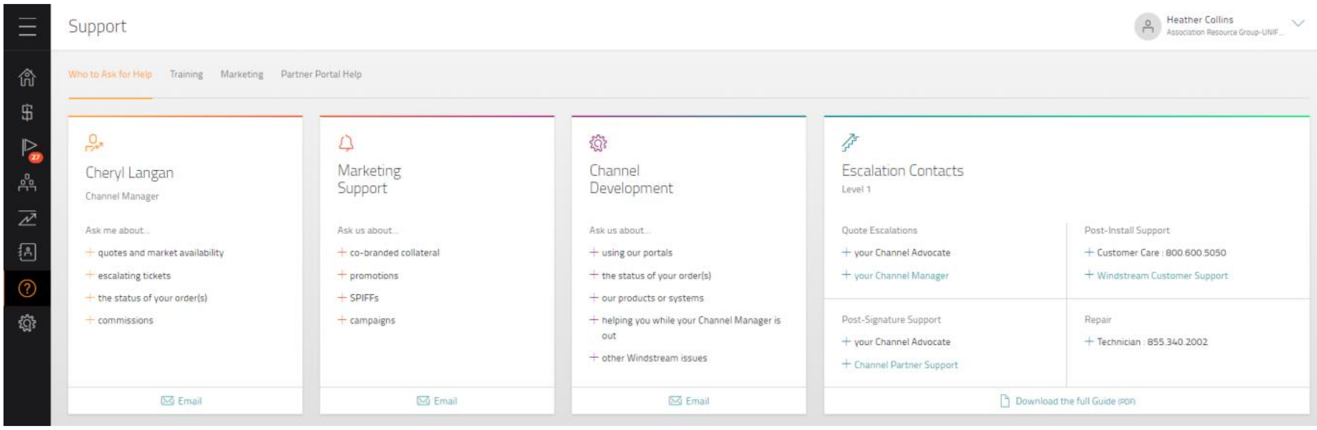


4. Contact will be deleted, and a confirmation will appear at the bottom of the screen



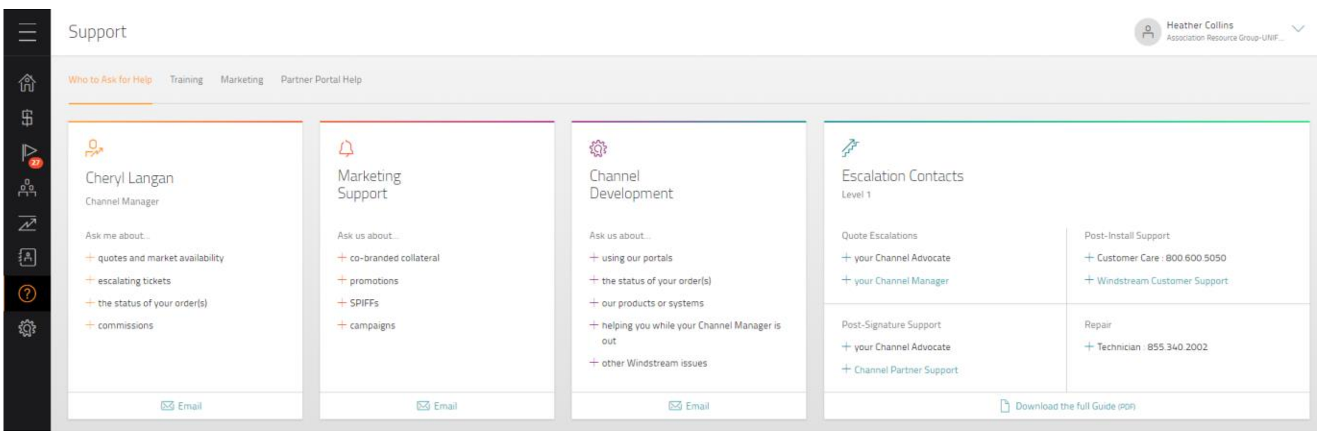
SUPPORT

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

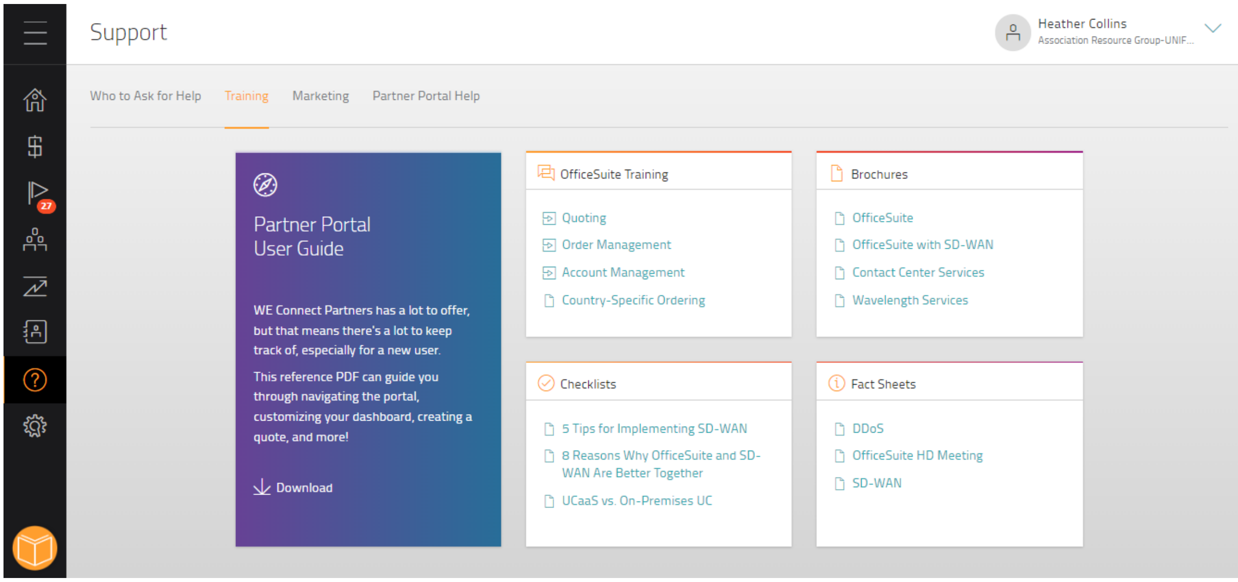


The Who to Ask for Help tab shows different resources that can be contacted depending on what information the user is looking for. Resources shown are:

- 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)

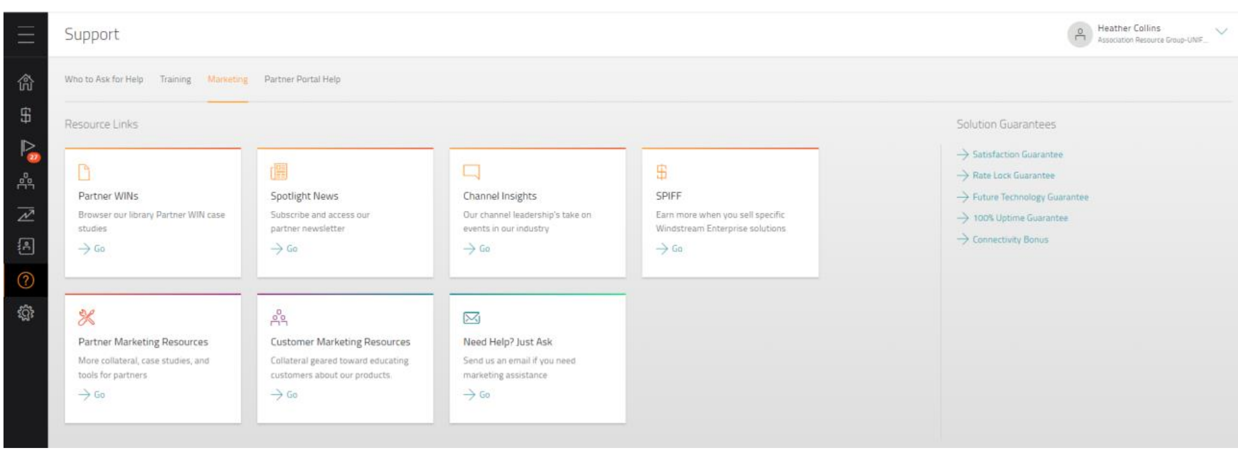
TRAINING

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.



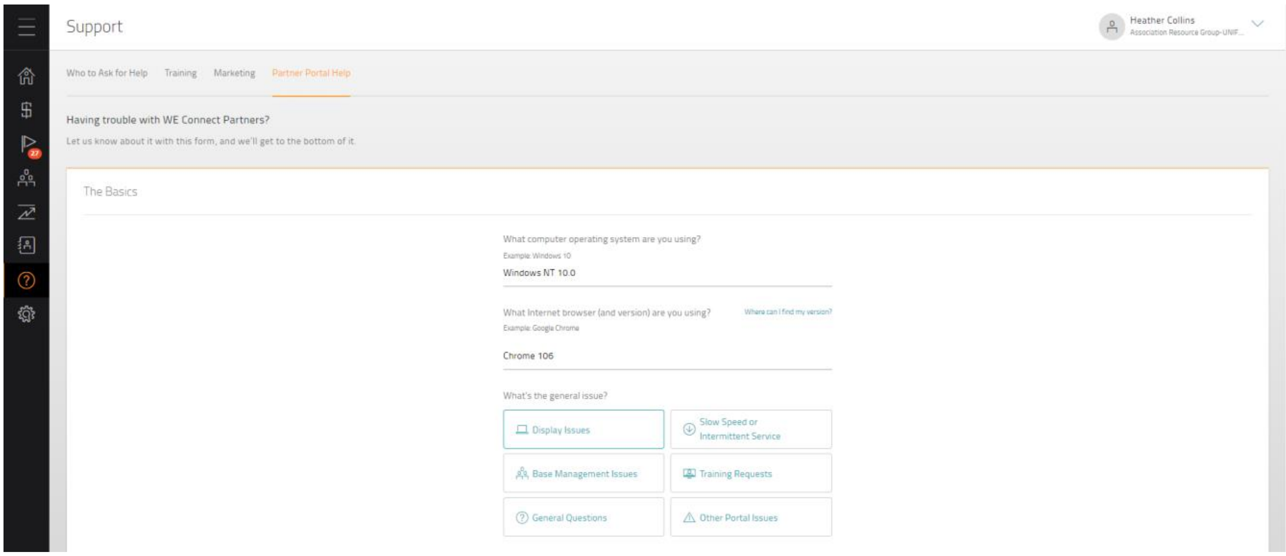
MARKETING

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

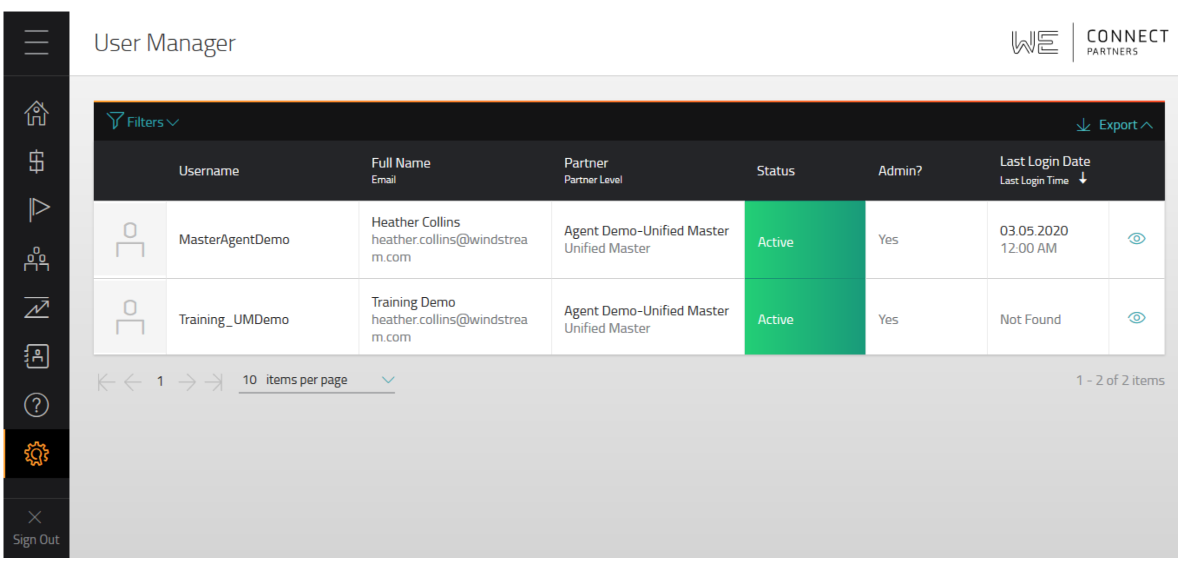
The Partner Portal Help screen allows the user the submit portal issues, questions or training requests. Issues are sent to the Channel Development team to review and triage. The team will then coach the user, submit tickets to IT, or set up training. Users should provide as much information as possible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



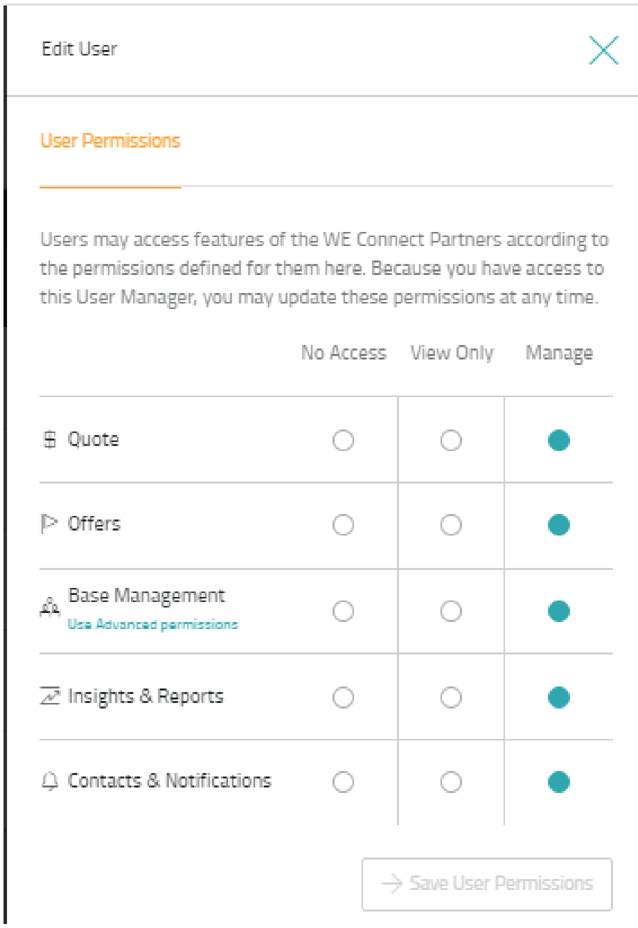
USER MANAGER

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.



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.



Acronyms

NONE

No acronyms at this time

Additional Information

- ✓ No Additional Information