WINDSTREAM
LEARNING AND DEVELOPMENT

WE Connect Partners Portal

Version 2.9
January 2025

Table of Contents

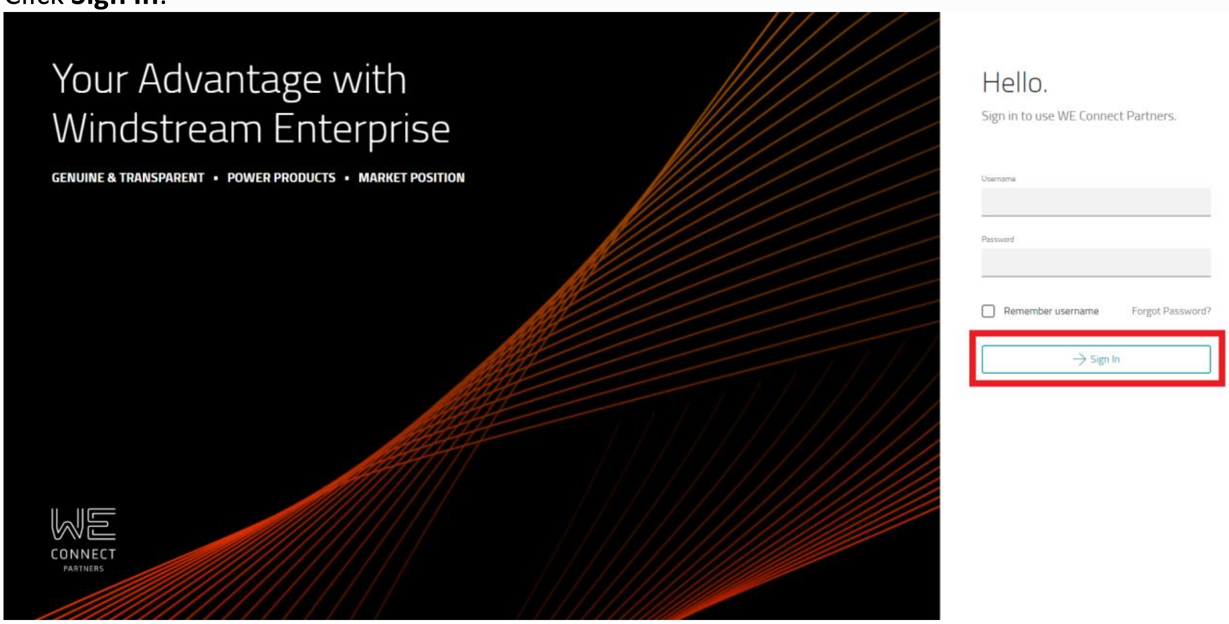
HOW TO USE THIS GUIDE

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.**

CPNI Agreement

Letter FAQ

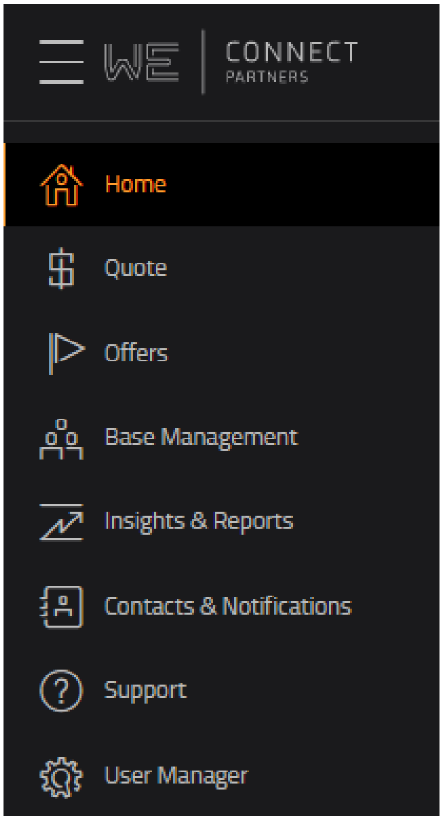
Windstream's systems, including this site, are strictly for the business use of Windstream's authorized sales partners, for the purpose of selling products and services. Use of this site for any other purpose or by any unauthorized person is strictly prohibited. By accessing this site I am affirming 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.

→ I accept and agree

Cancel

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

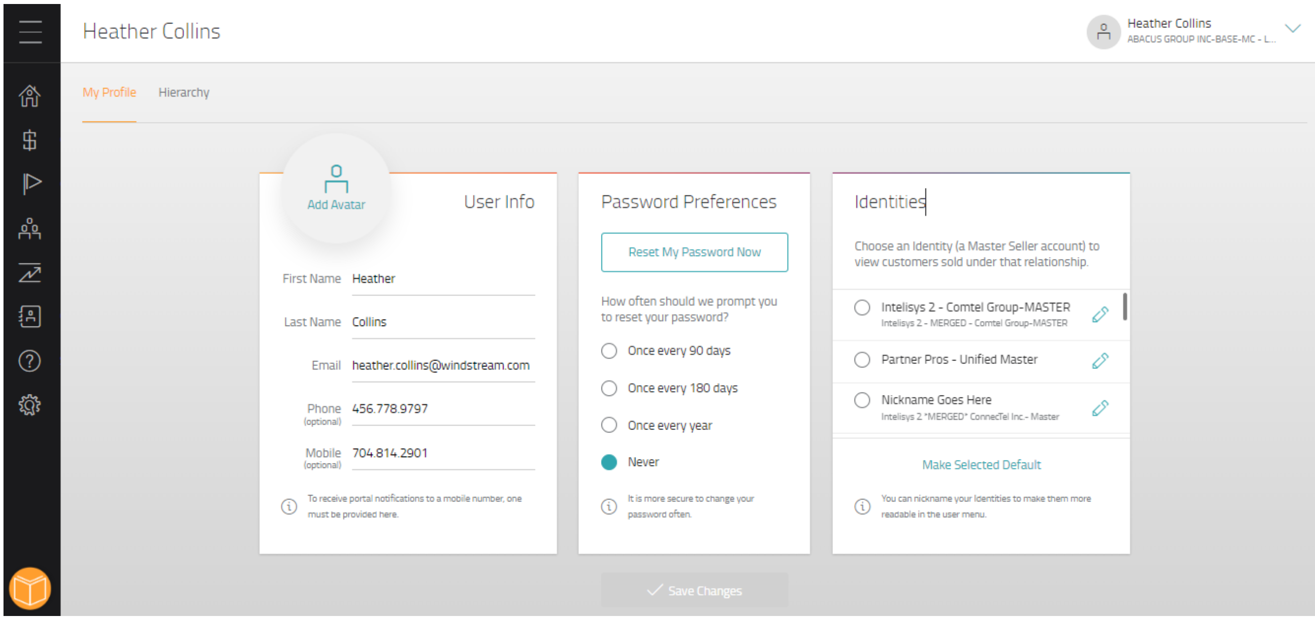
Insights & Reporting : insights into user's book of business

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

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

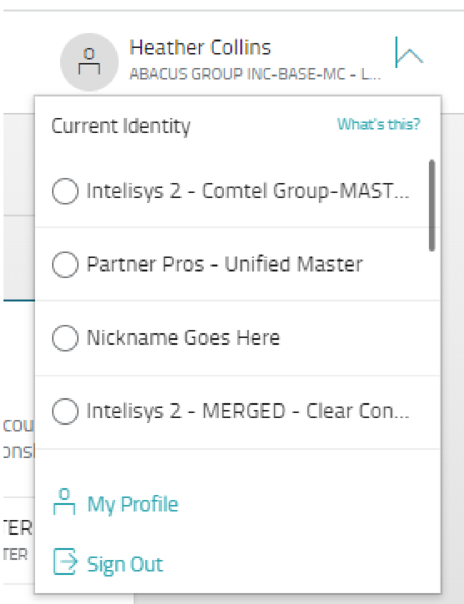
User Manager : portal user administration

MY PROFILE



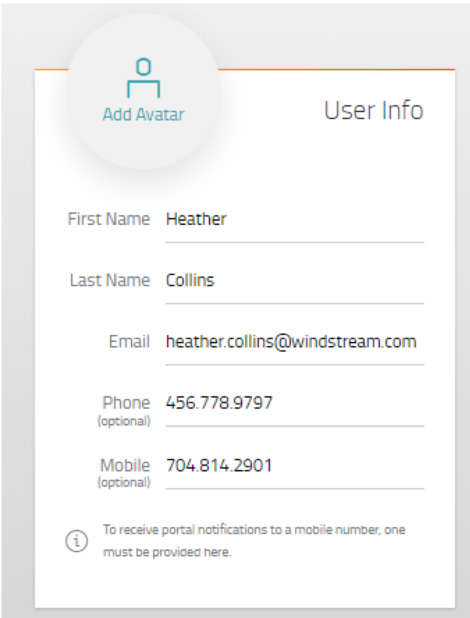
OVERVIEW

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.



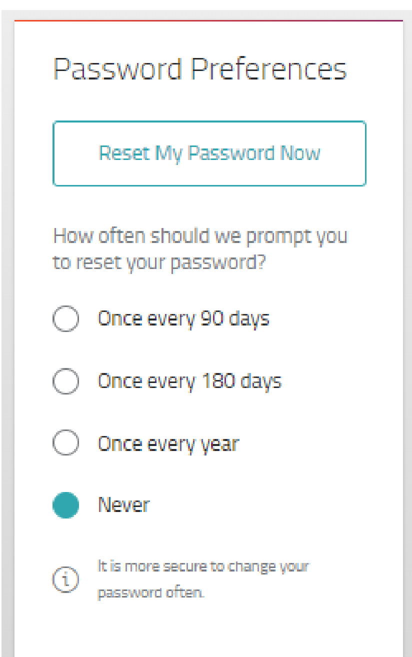
USER INFO

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.

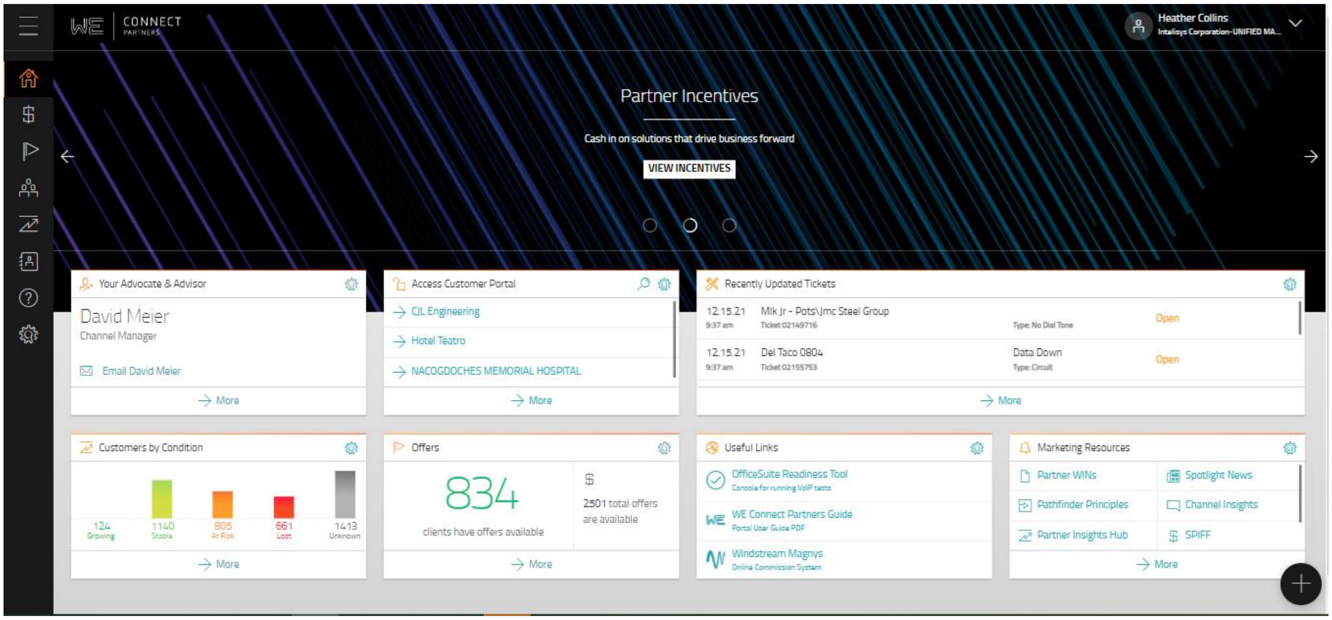


PASSWORD PREFERENCES

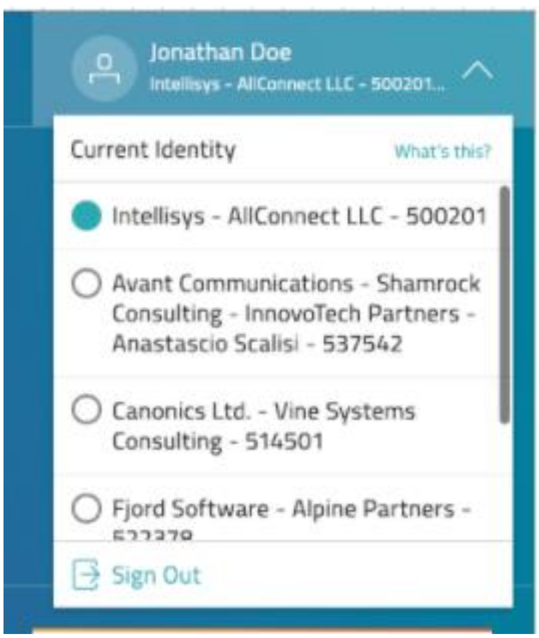
The Password Preferences widget allows the user to manage their own password settings. Users can reset their password and set the desired cadence of systematic password reset prompts. By default, the portal will request that users chage their passwords every 90 days.

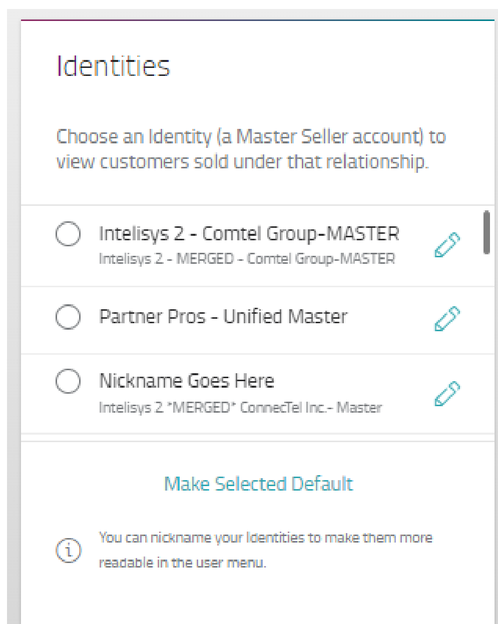


USER IDENTITY



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.



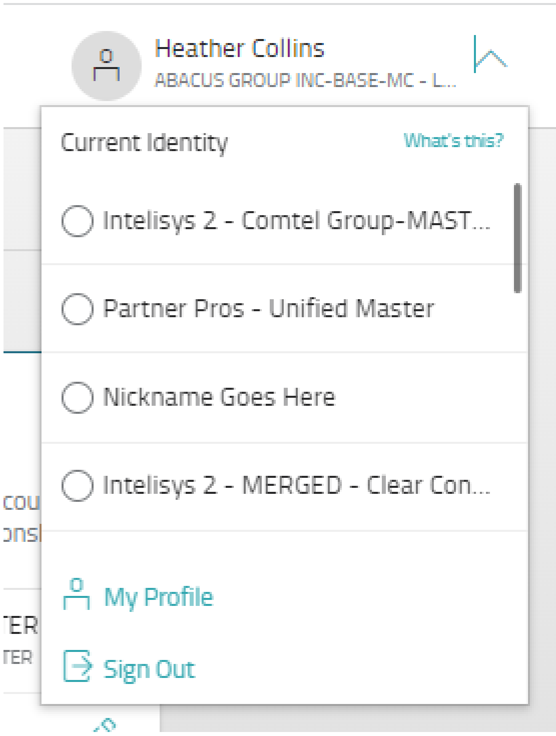


CHANGING IDENTITIES

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.

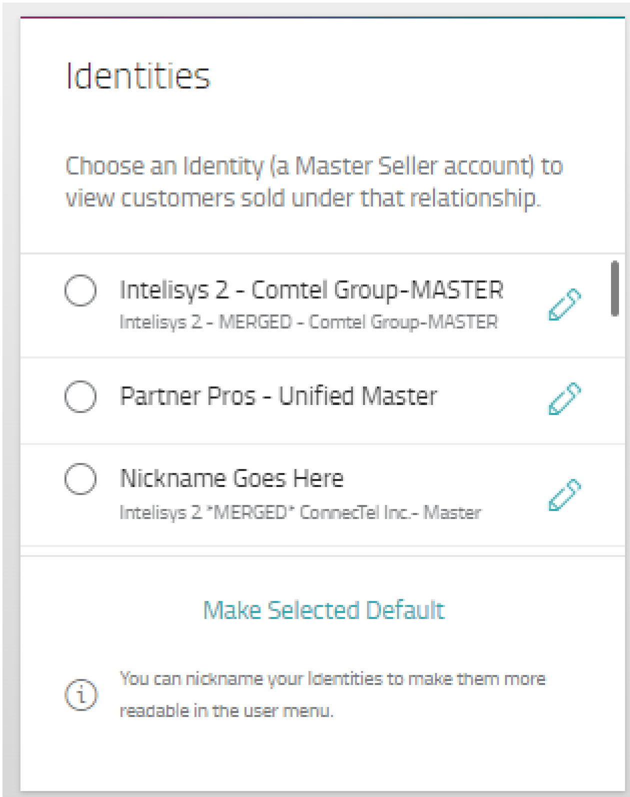


2. Portal shows an alert for confirmation.

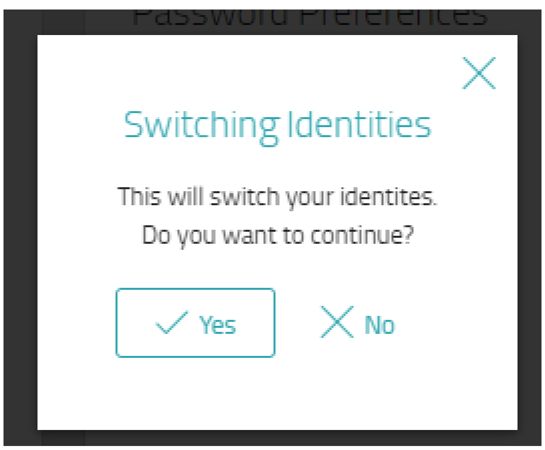
3. Click Yes. The portal resets to the home screen with new Identity loaded.

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

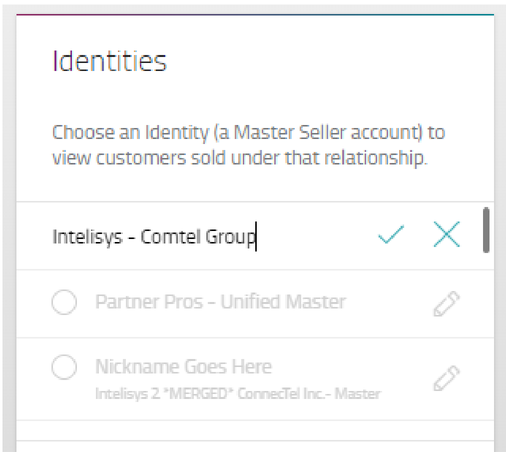


3. Click Yes. The portal resets to the homes screen with new Identity loaded

NICKNAMING IDENTITIES

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

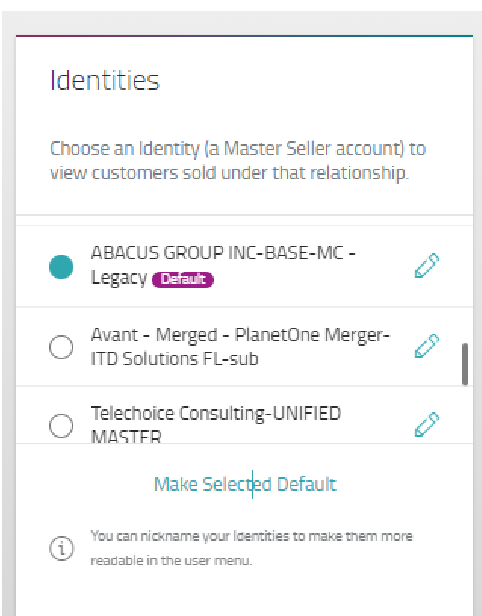
1. In the Identities widget, click the pencil icon next the Identity
2. Type in the desire name



3. Click the checkmark

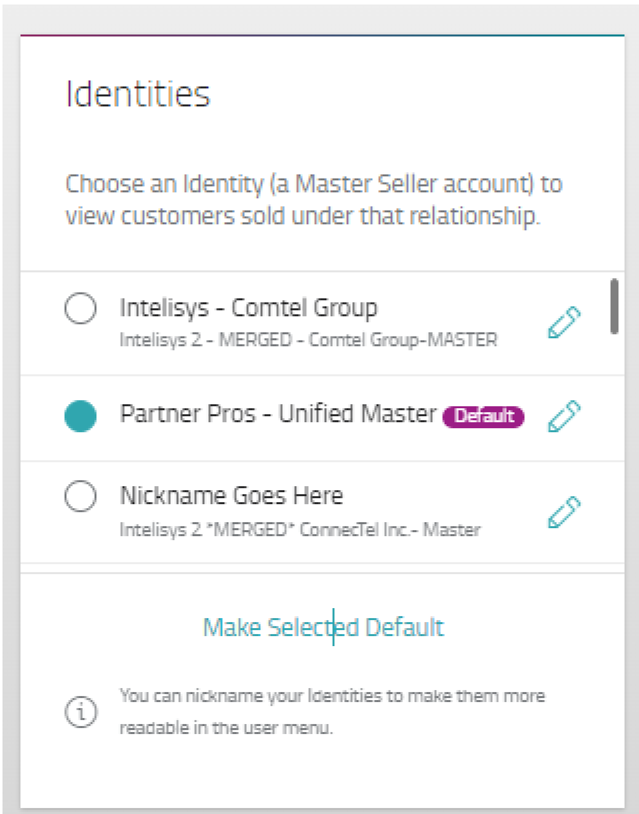
SETTING DEFAULT IDENTITY

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.



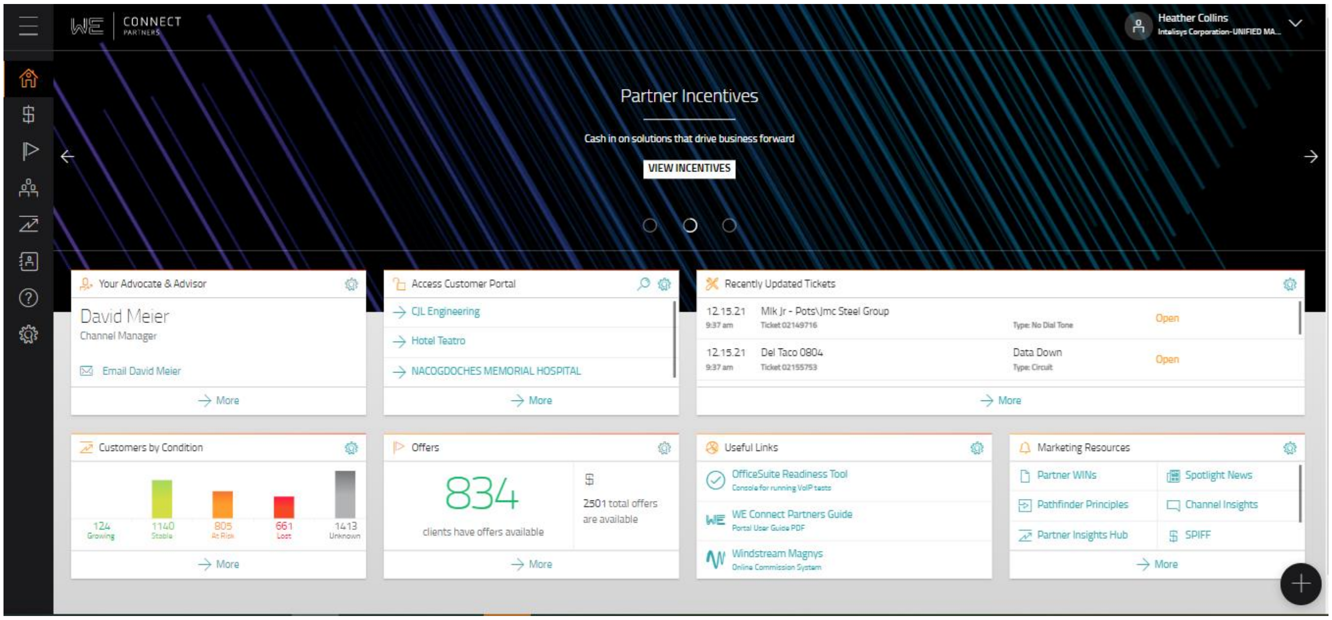
To change the selected default

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

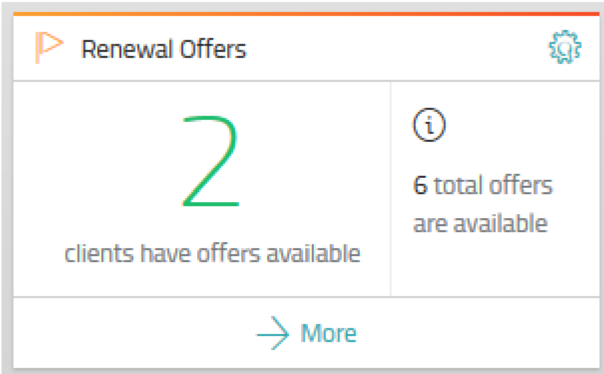
The Home screen shows a rotating banner with links to SPIFF information and the Channel Partner website.

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.

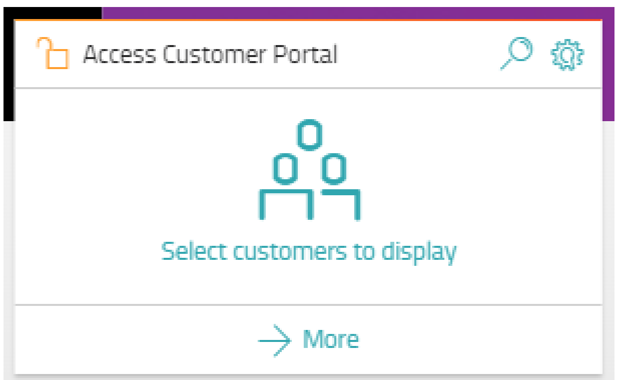
WIDGETS

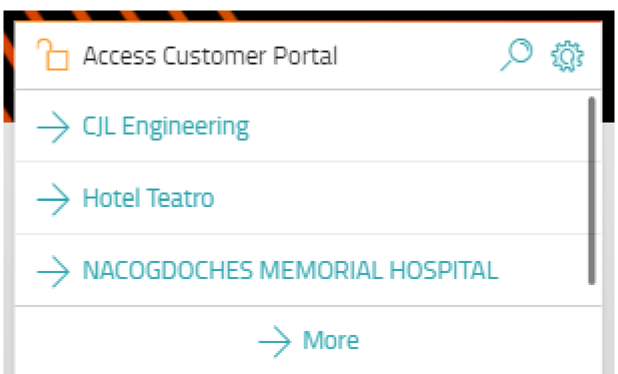
The current widgets available are:

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

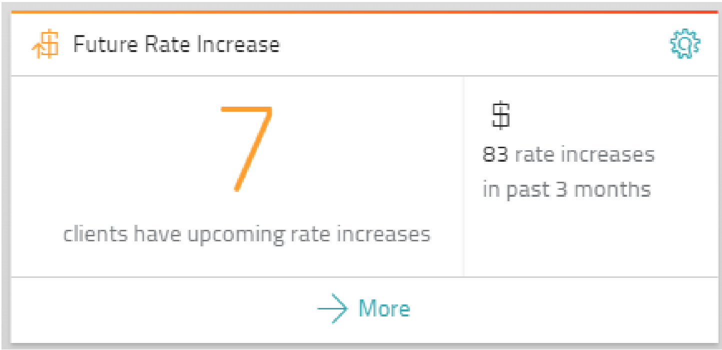


Access Customer Portal – users can choose up to 5 customers to show in the widget for click through access to WE Connect. Access must already be approved. Clicking **More** navigates the user to the Accounts dashboard

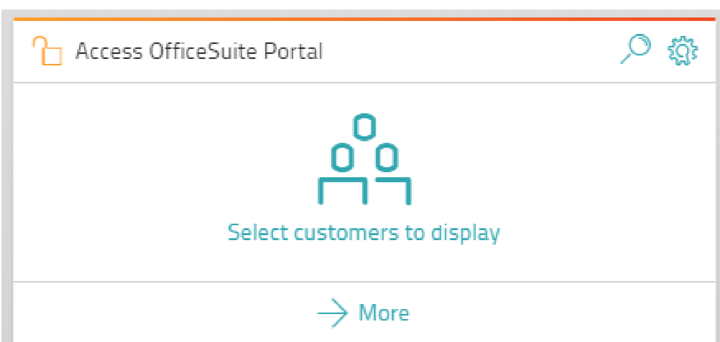


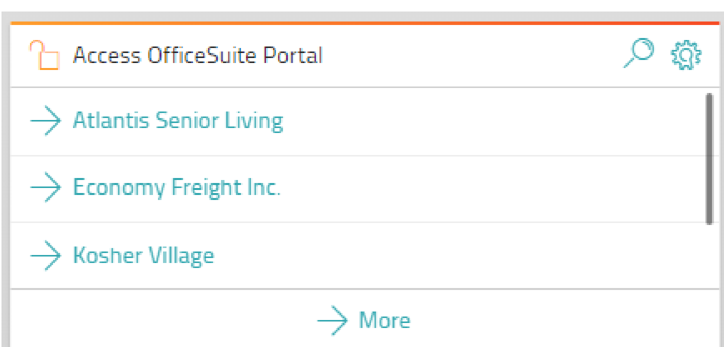


Future Rate Increase – shows the number of customers in the user's base with upcoming rate increases and the number of rate increases in the past 3 months. Clickin gMore navigates the user to the Acconts page filtered to only those accounts with a rate increase.

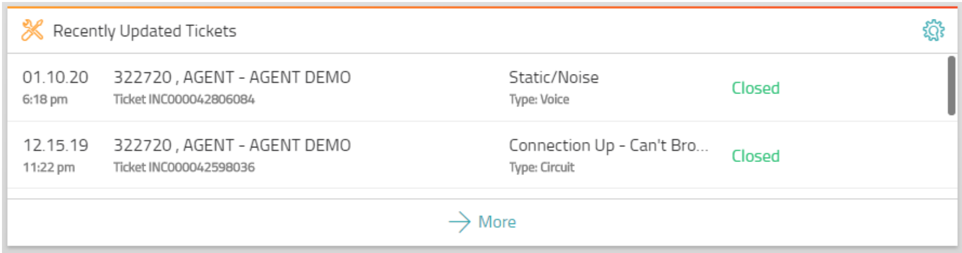


Access OfficeSuite Portal – users can choose up to 5 customers to show in the widget for click through access to the new OfficeSuite Portal. Access must already be approved. Clicking **More** navigates the user to the Accounts dashboard

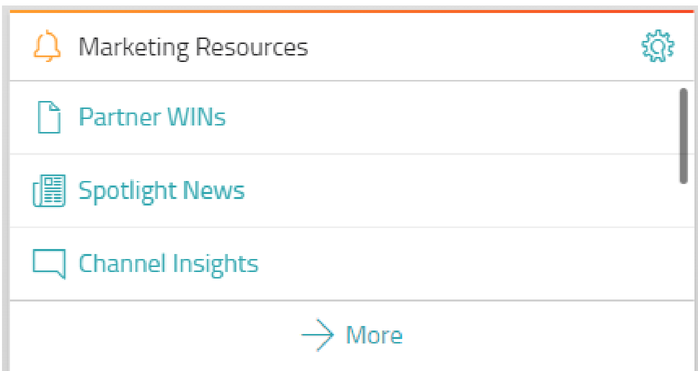




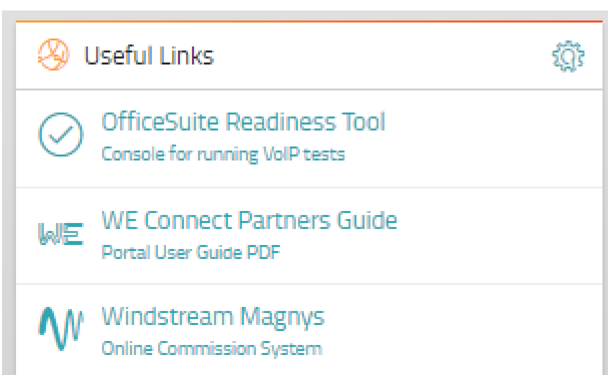
Recently Updated Tickets – last 5 updated trouble tickets associated to the user's base of accounts. Clicking **More** navigates the user to the Trouble Tickets page



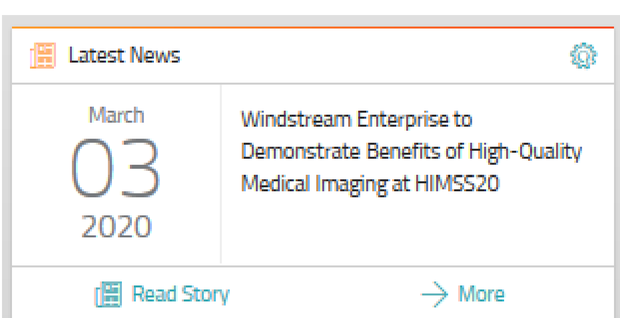
Marketing Resources – list of marketing resources. Clicking **More** navigates the user to the Marketing tab of the Support page



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

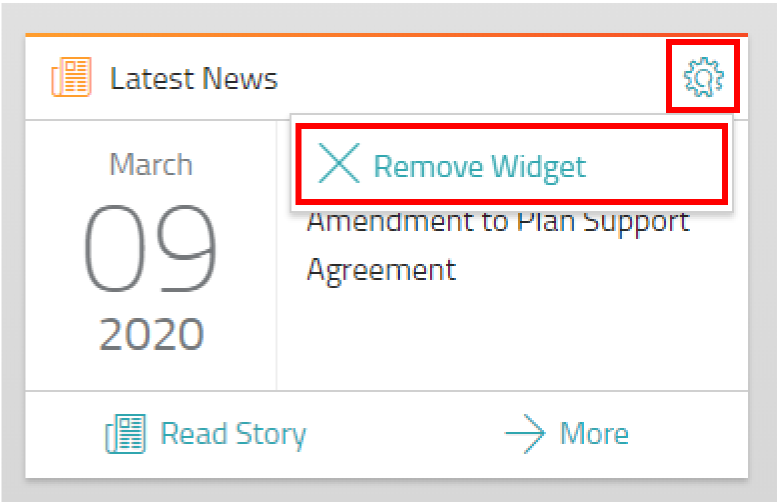


Latest News – shows the latest news article. Users can click "Read Story" to open the news link or click "More" to show a feed of recent Windstream news.

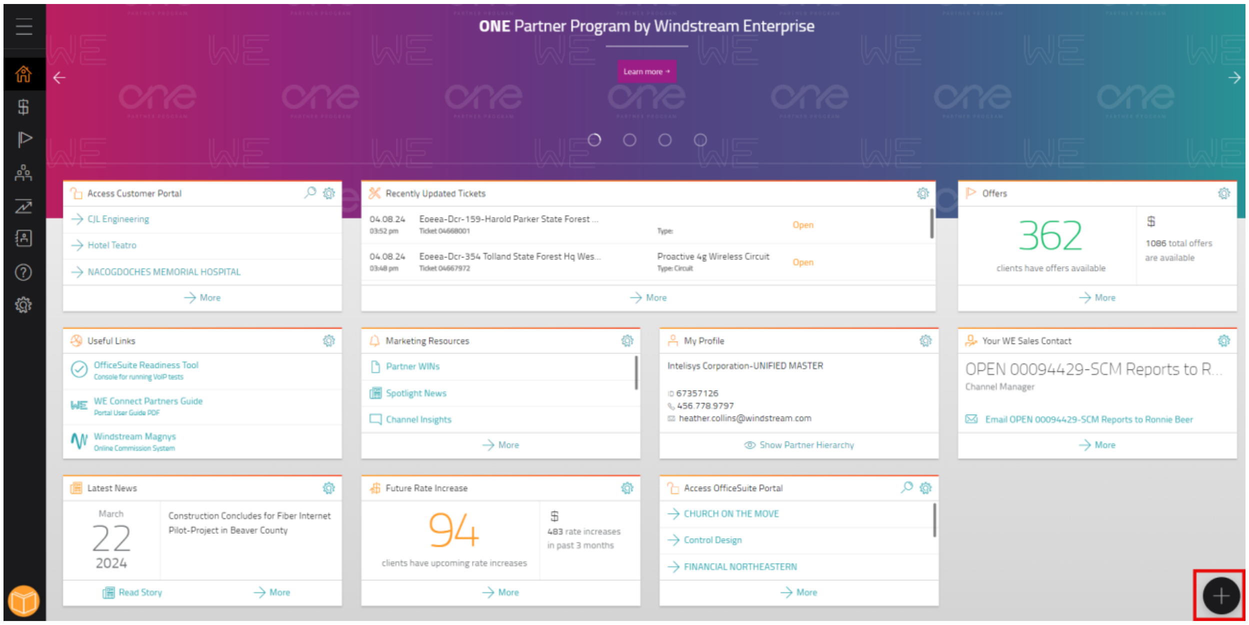


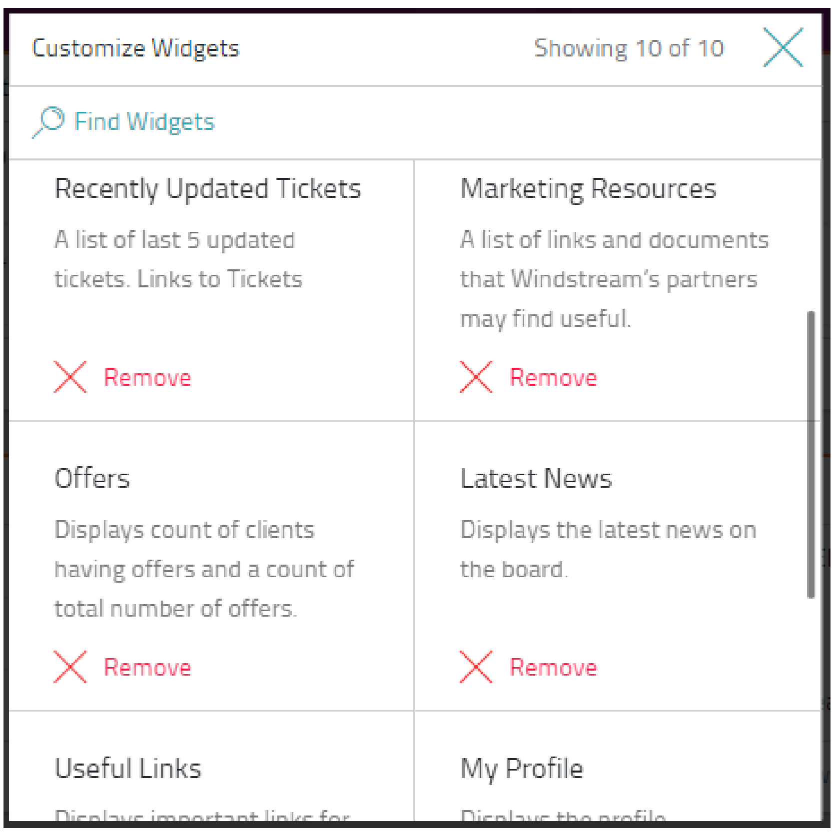
CUSTOMIZE WIDGETS

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



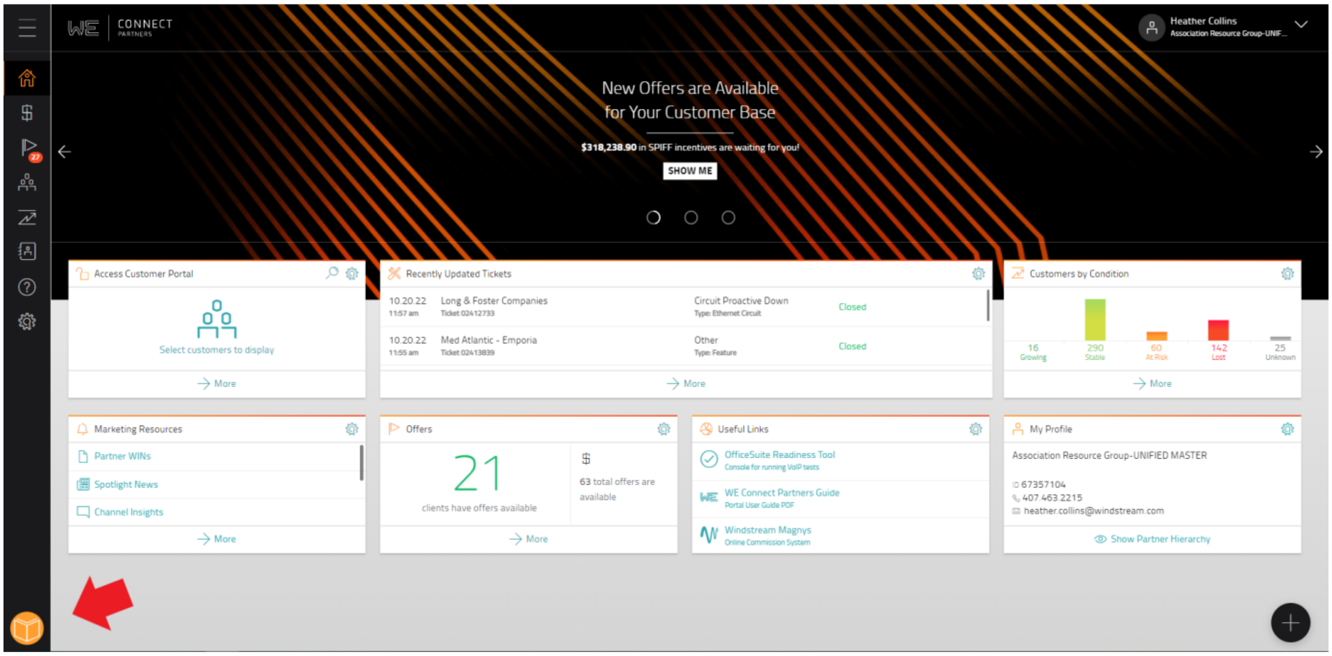
To add other widgets, click the **Add icon** in the lower right.



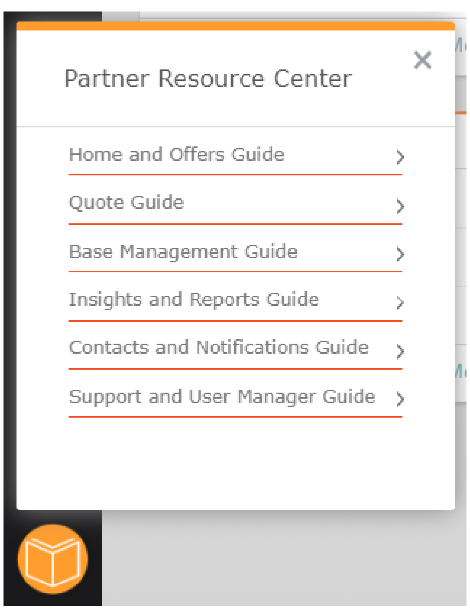


PARTNER RESOURCE CENTER

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.

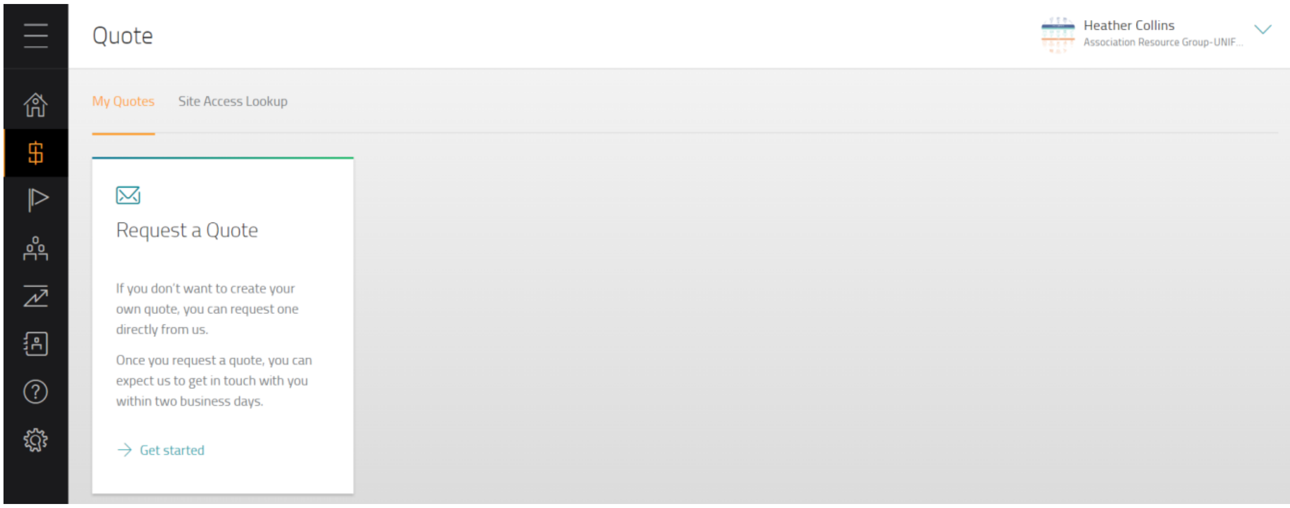


When the Resource Center is open, users can access information & guides for any area of the portal. There are walk-throughs for the most used pages giving lots of details about what is contained in each grid and what the information means to the user.



MY QUOTES

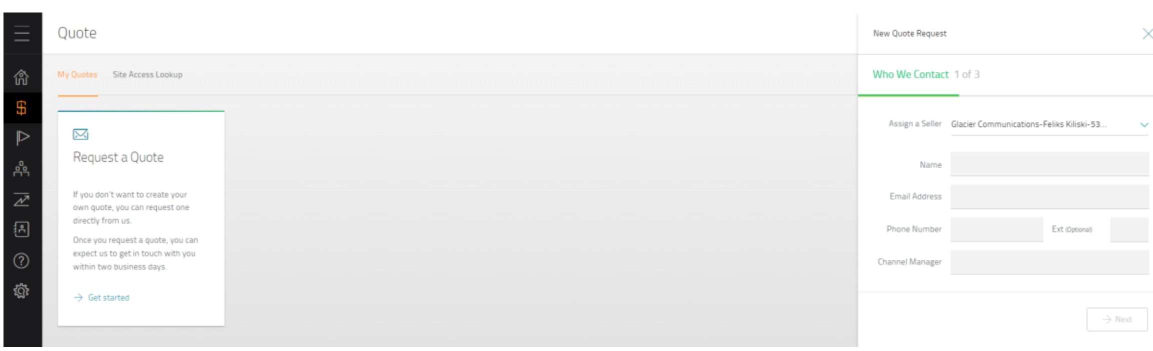
When navigating to the Quote page, a new tab will show the title “My Quotes”. Upon first navigation, one tile will show “Request a Quote”.



REQUEST A QUOTE

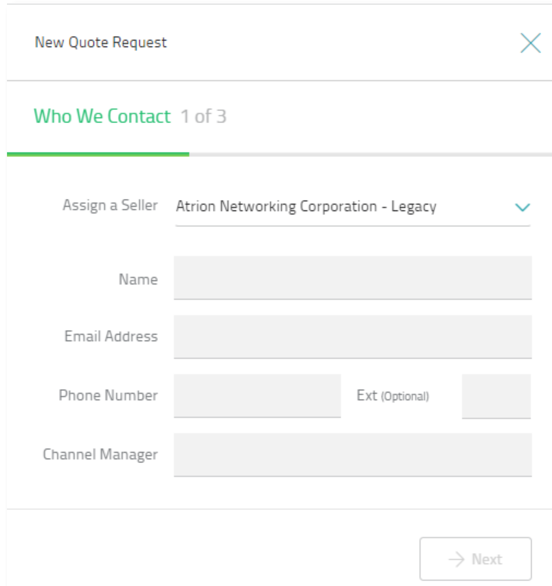
Using the Request a Quote button at the top of the My Quotes screen allows the user to submit a request for a **new logo** quote. This form replaces and digitizes the email that Partners are used to sending.

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

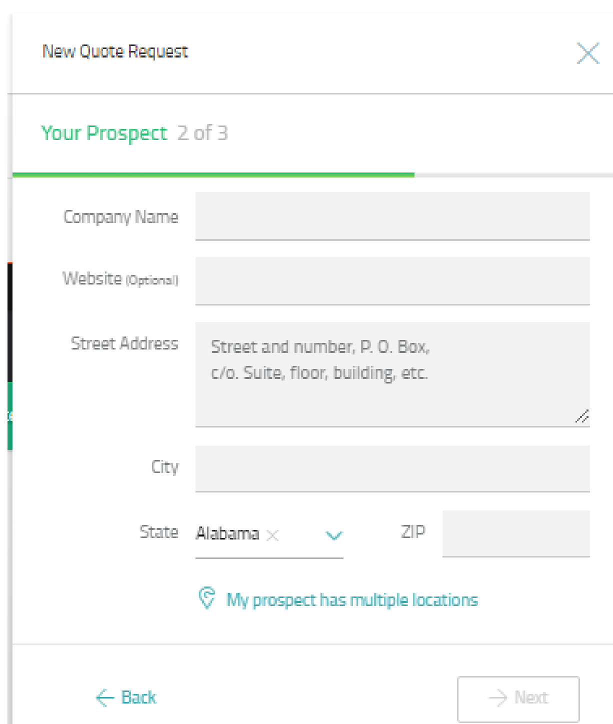


1. Who We Contact (user information): enter data into the following fields:
   - Assign a Seller – Sub & Master level users will need to select the seller ID that should be assigned to the opportunity
   - Name (required) – name of the Partner who Channel Support should work with regarding the quote
   - Email Address (required) – Partner contact’s email address
   - Phone Number (required) – Partner contact’s phone number

- Channel Manager (required)

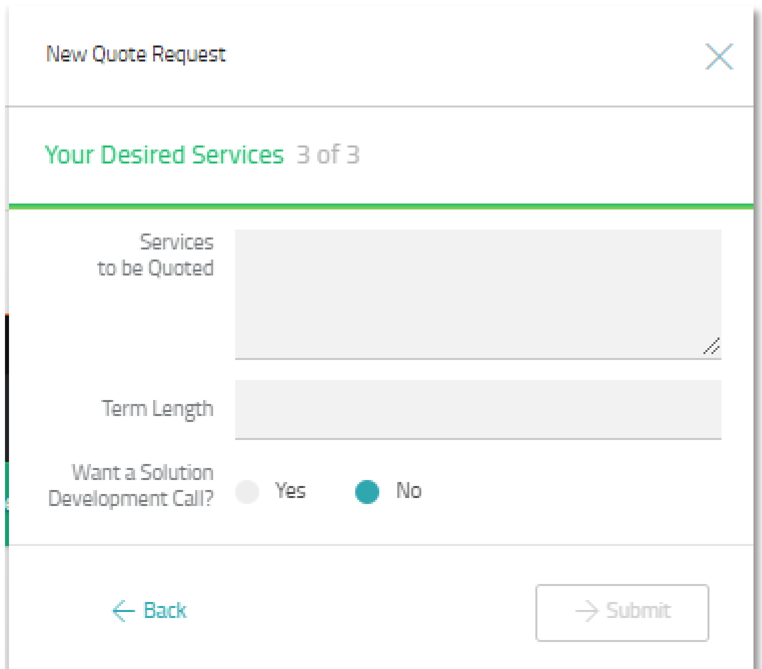


2. Your Prospect (prospect information): enter data into the following fields:
    - Company Name (required)
    - Website
    - Street Address (required)
    - City (required)
    - State (required)
    - Zip Code (required)



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.

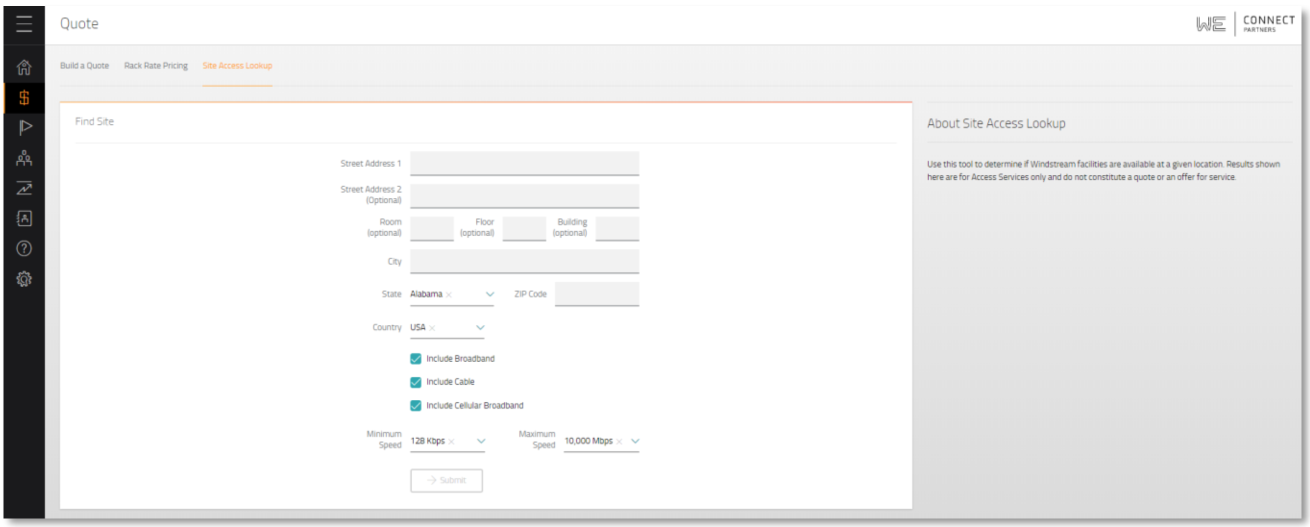
3. Your Desired Services: enter data into the following fields:
    - Services to be Quoted (required)
    - Term Length (required)
    - Would you like a Solution Development call?



4. Click Submit

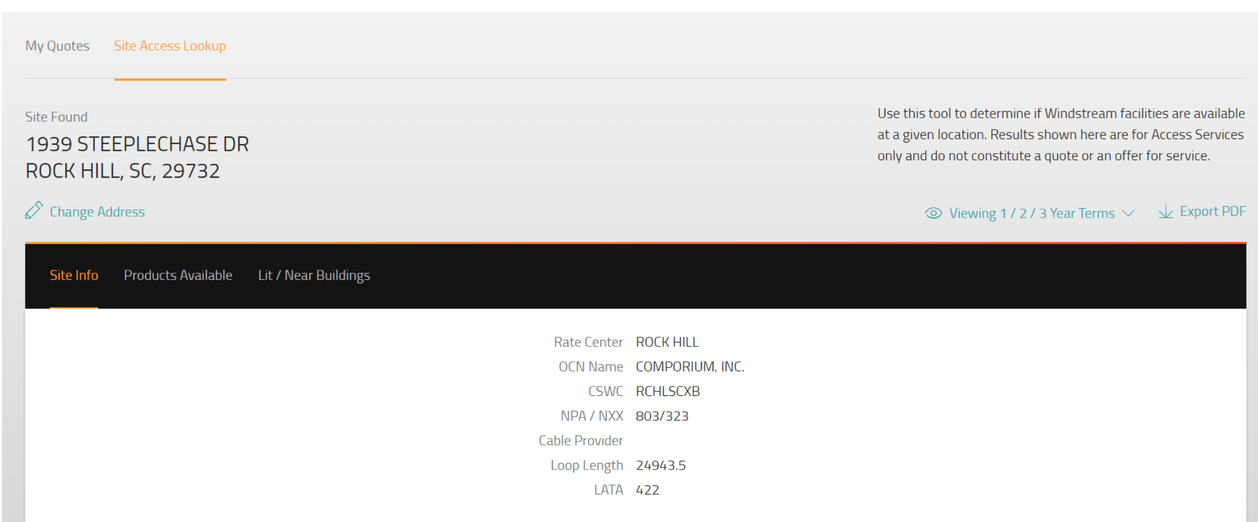
SITE ACCESS LOOKUP

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. Confidence Color – depicts how likely it is that this service is available

Site Info | Products Available | Lit / Near Buildings

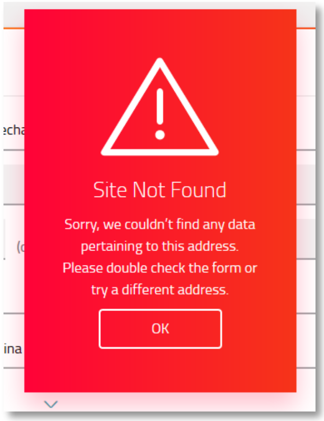
Product ↓	Voice Required?	Confidence Color	Type
Cellular Broadband 5GB Pooled	No	Green	Not Found
	No	Green	Not Found
Cellular Broadband 1GB Pooled	No	Green	Not Found
	No	Green	Not Found
Cellular Broadband 10GB Pooled	No	Green	Not Found
	No	Green	Not Found

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

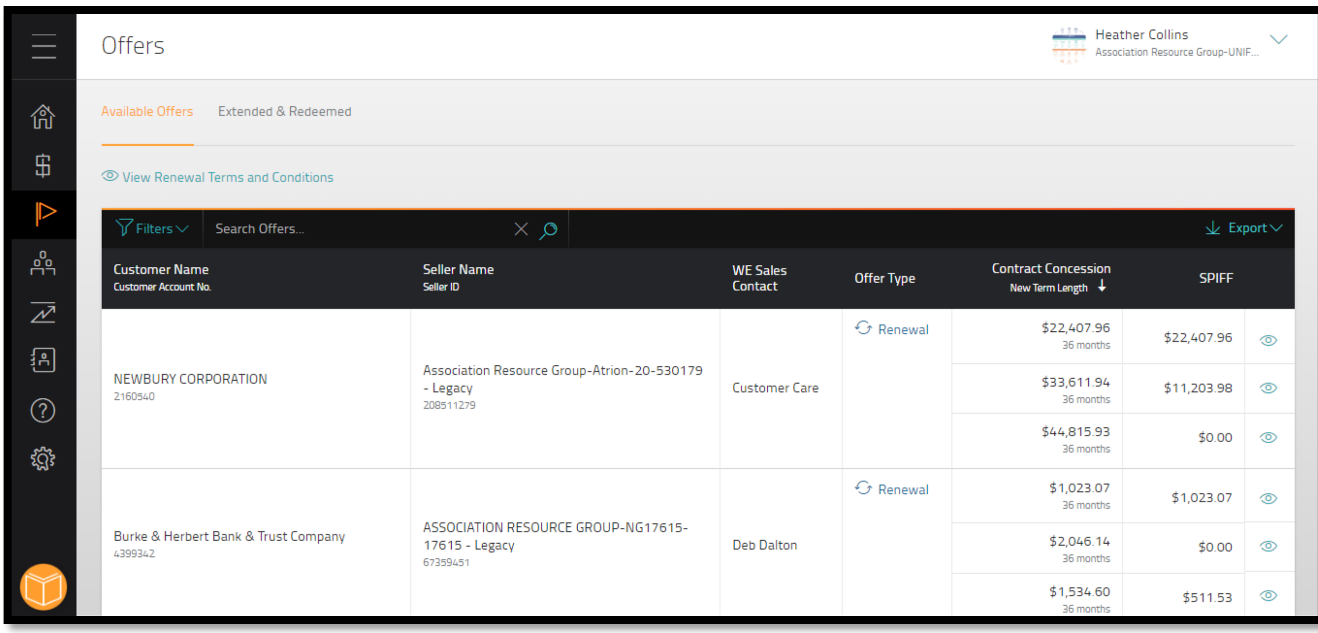

Please Confirm Address
We only found an address **similar** to the one you entered.
Is this address right?
33 South Orchard Street
Room 113A, Building 47
Long Springs, Nebraska, 69341
USA
Yes
No

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 the customer that has an offer available. Users can sort 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 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 $12,811.02 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 December, 2023 billing cycle.

Included accounts:

- 208159288
- 2369900
- 5818157

Send To Customer | Request Custom Offer

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

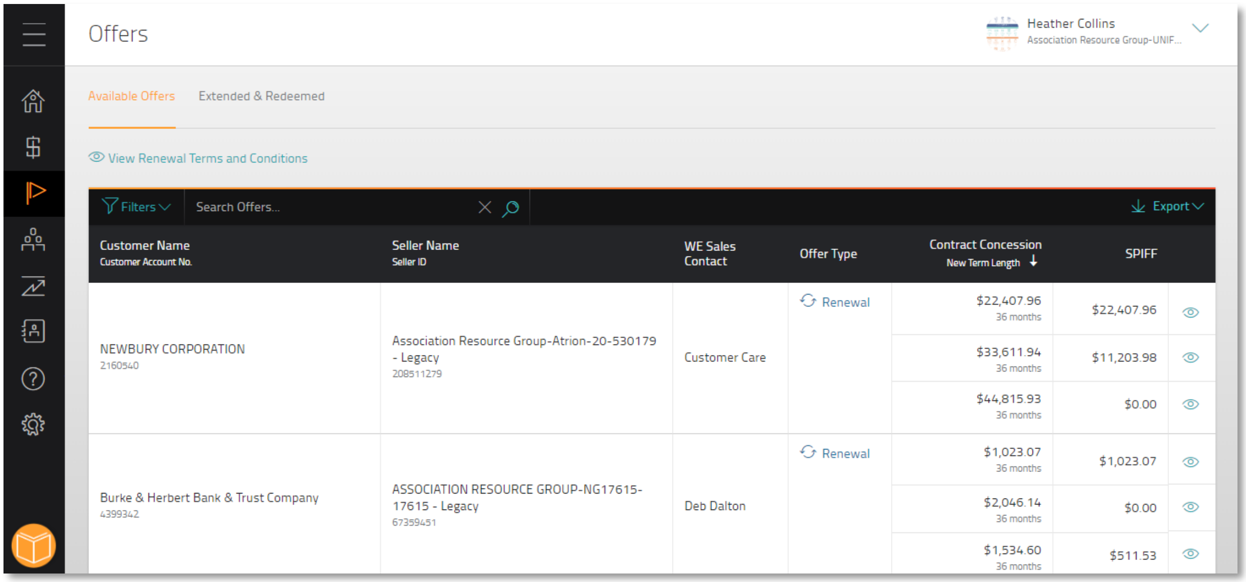
Customer Email

Message (optional)

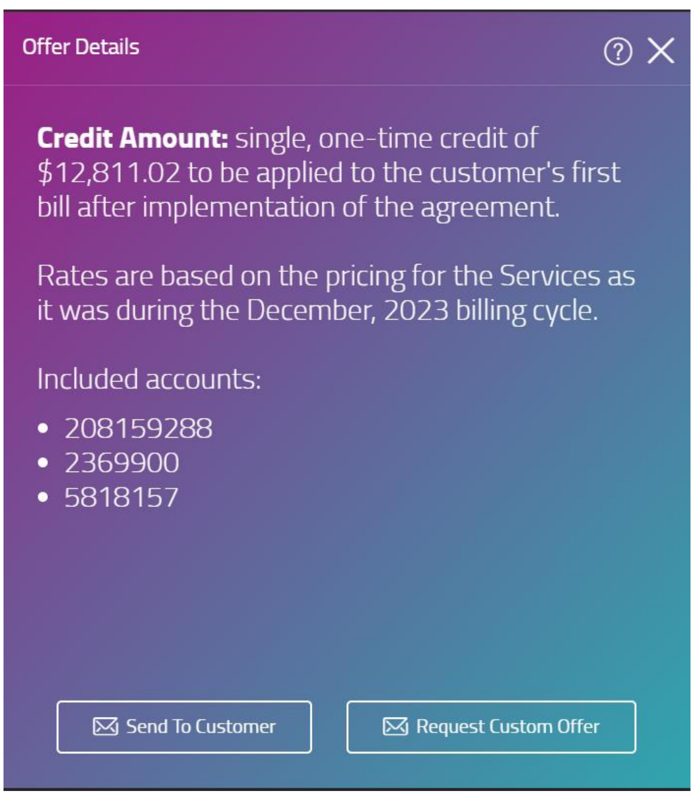
Once this email containing the offer is sent, the customer will have 7 days to sign the contract before the offer expires.

Send

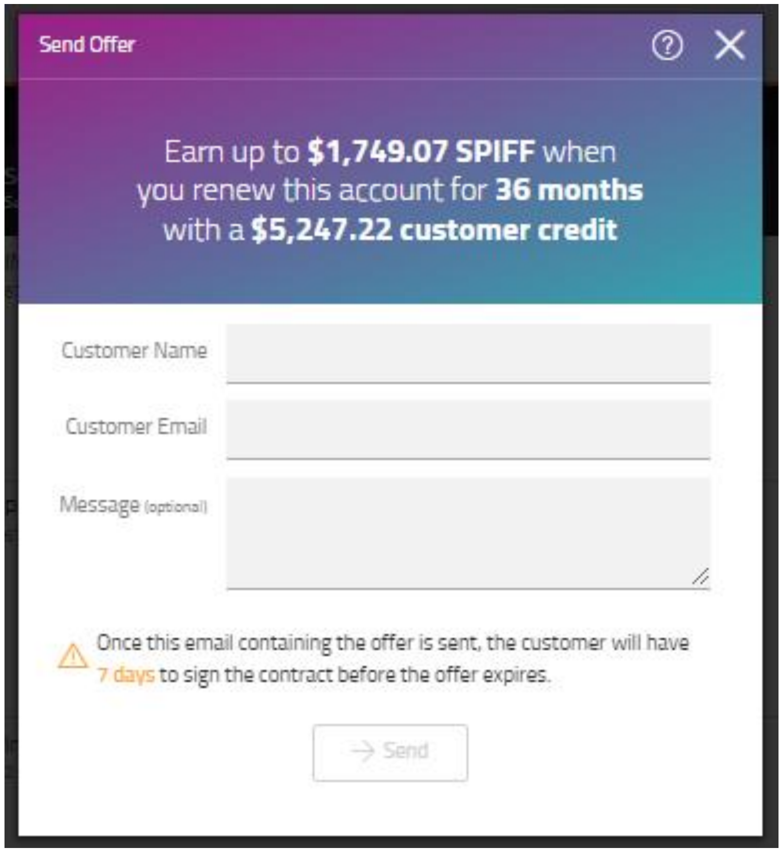
EXTEND OFFER TO CUSTOMER



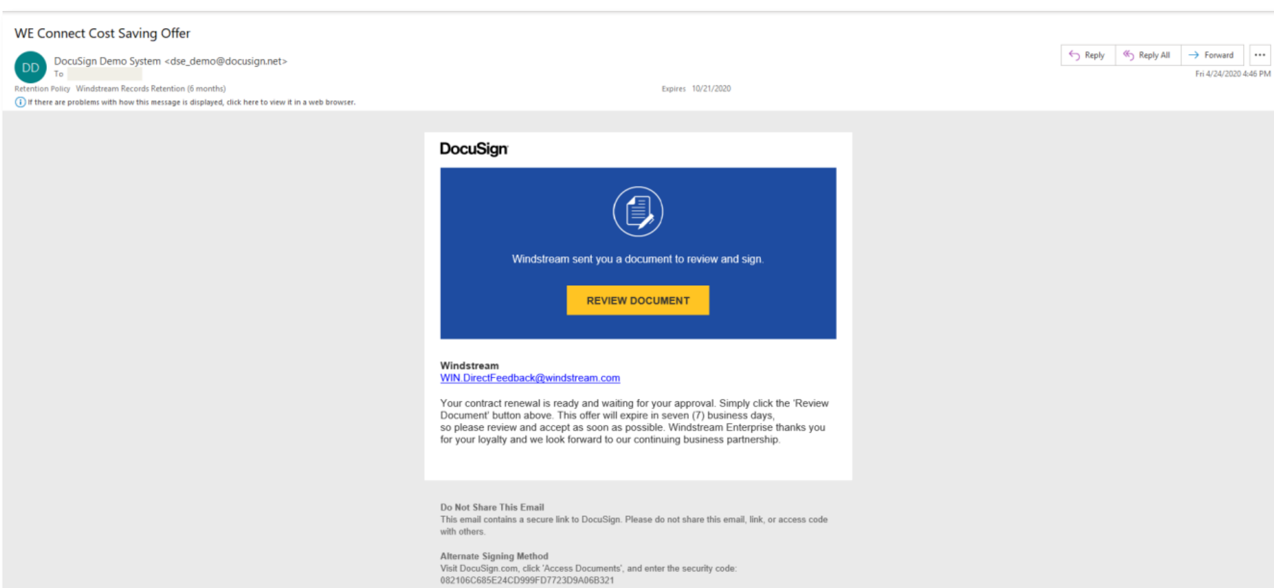
1. Click the eyeball next to offer being sent to the customer
2. Review the Offer Details and click Send to Customer

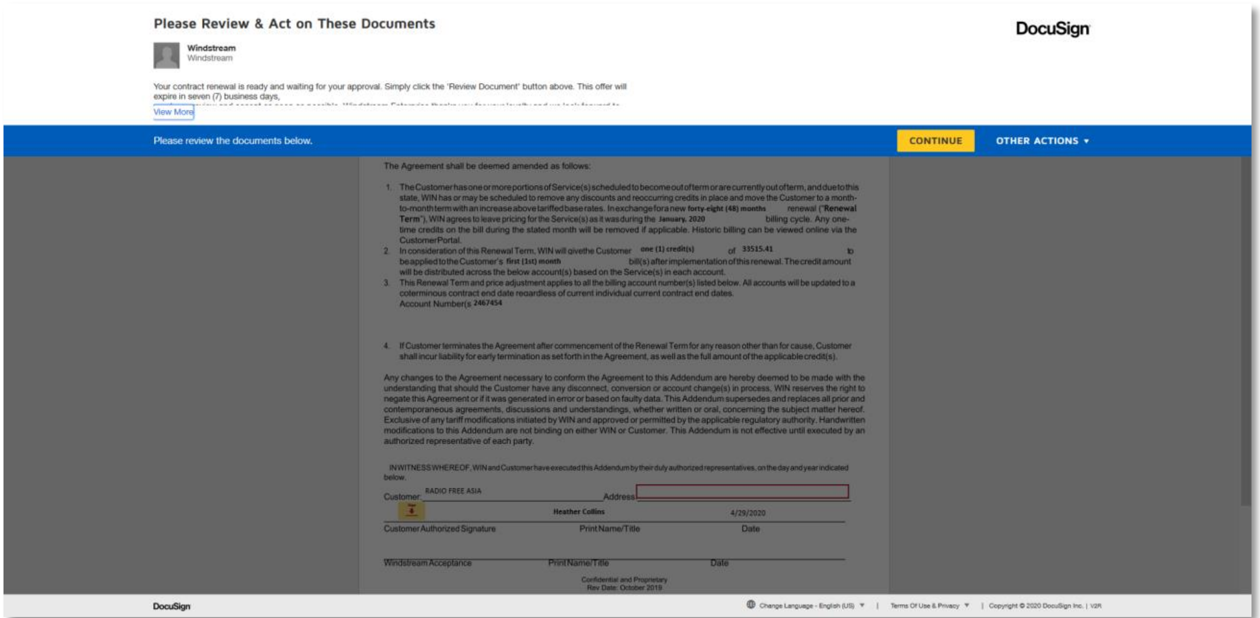


3. Enter information for the person who should receive the paperwork.

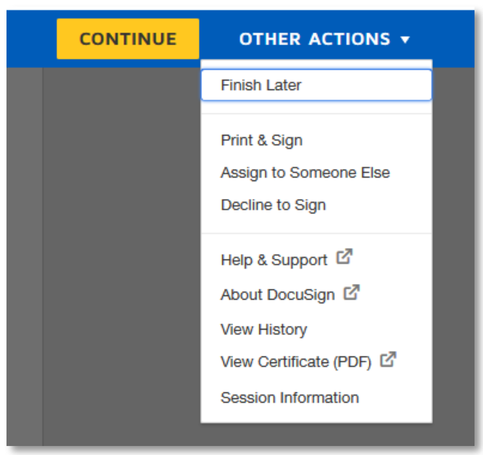


4. Click Send.
5. Customer will get an email with the DocuSign envelope. Partner users will also get an email with a copy of the paperwork.





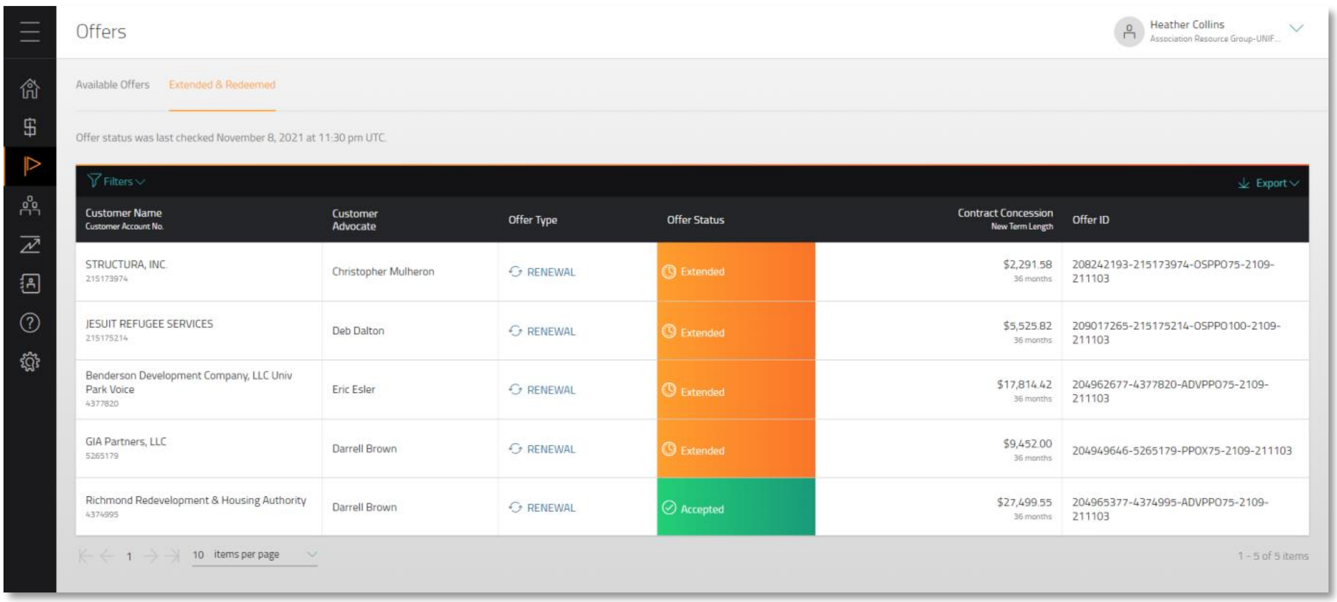
6. Customer can digitally sign the renewal or assign to someone else (send to the authorized person to sign) or decline to sign (declines the offer).



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 on the Offers screen.

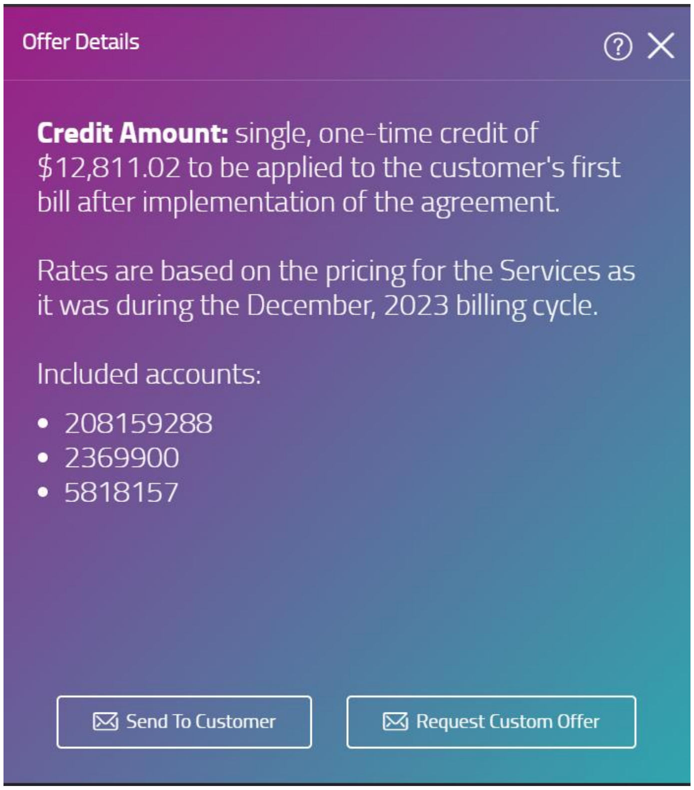


Offers in an "Extended" status will stay in the grid until they expire (7 days or until the Customer acts on them - whichever comes first).

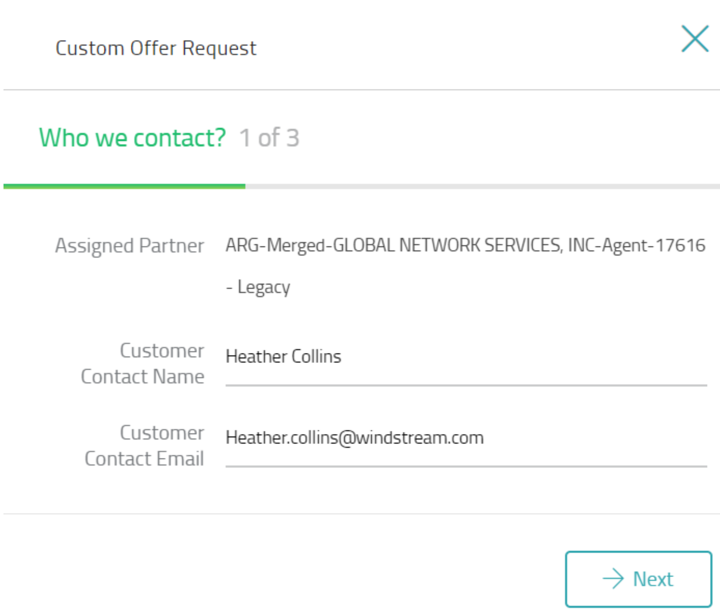
Offers that are accepted by the customer will have an "Accepted" status and will stay in the grid for 90 days.

REQUEST A CUSTOM OFFER

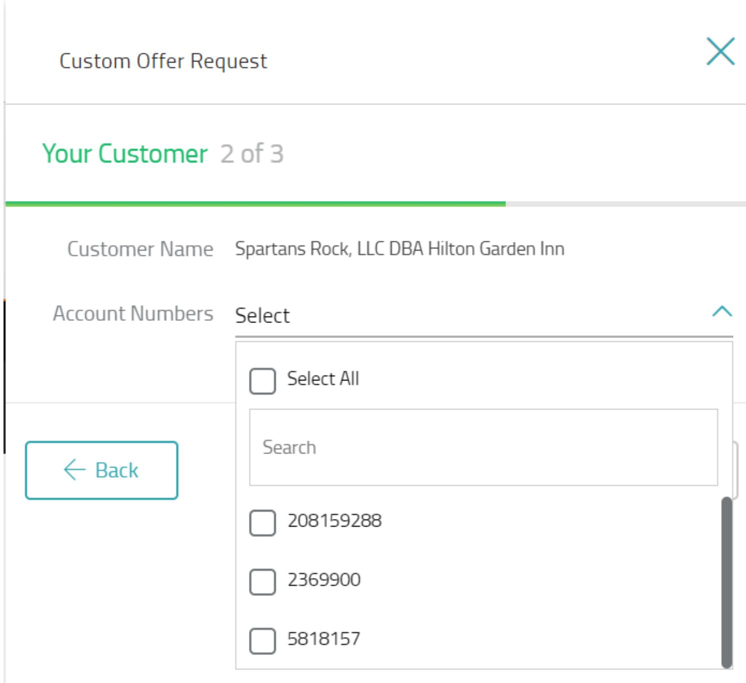
1. Click the eyeball next to offer being sent to the customer
2. Review the Offer Details and click Request Custom Offer



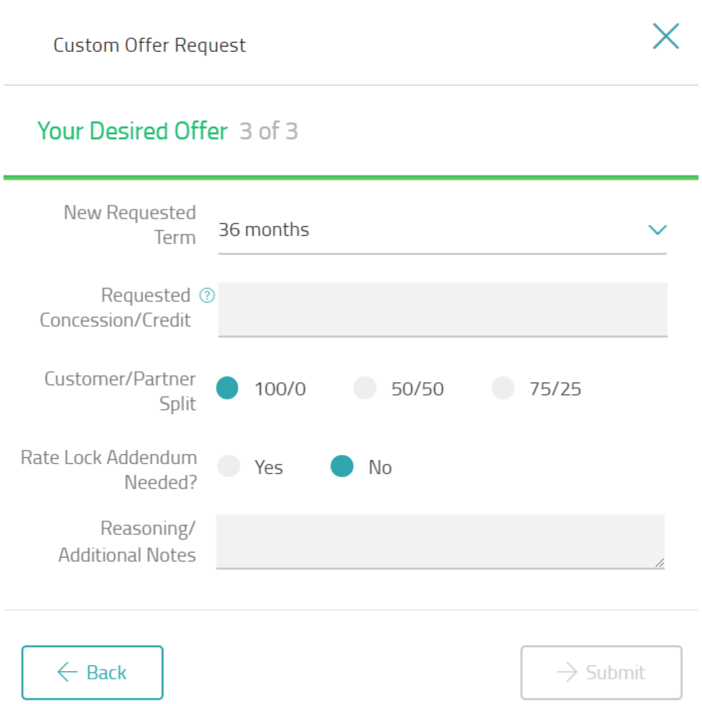
3. In the Custom Offer Request flyout, enter the Customer Contact Name and Email. Click Next.



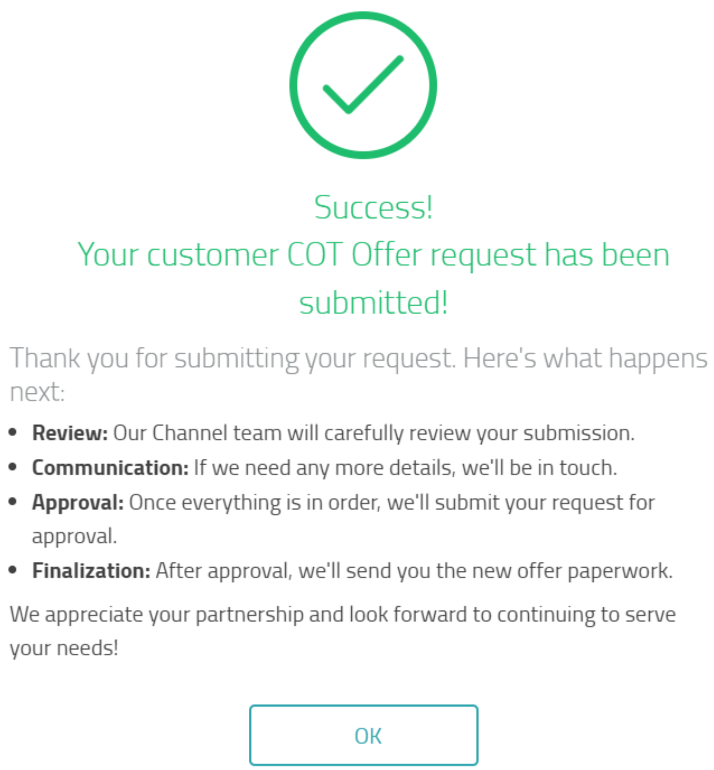
4. Select the billing accounts you want to include in the offer from the list. Click Next.



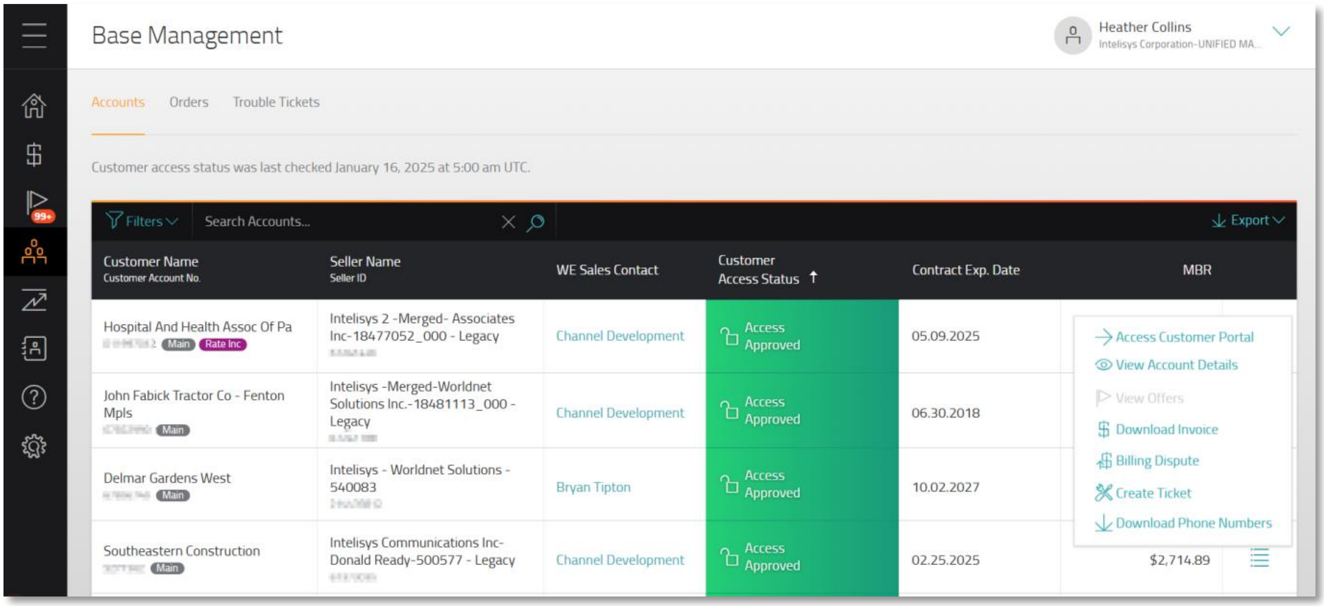
5. Enter the information about the desired offer. Click Submit.
    a. New Requested Term
    b. Requested Concession/Credit (the full amount including the SPIFF)
    c. Customer/Partner Split
    d. Rate Lock Addendum
    e. Reasoning/Notes
        i. If specific non-billable locations need to be excluded, put that information in the Notes.



6. The portal will send your request to Channel Development for review & submission.



BASE MANAGEMENT - 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
- WE Sales Contact – WE representative 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)
- Decomm – location is part of a larger decommission project and has a decomm date of the past 90 days or any future date

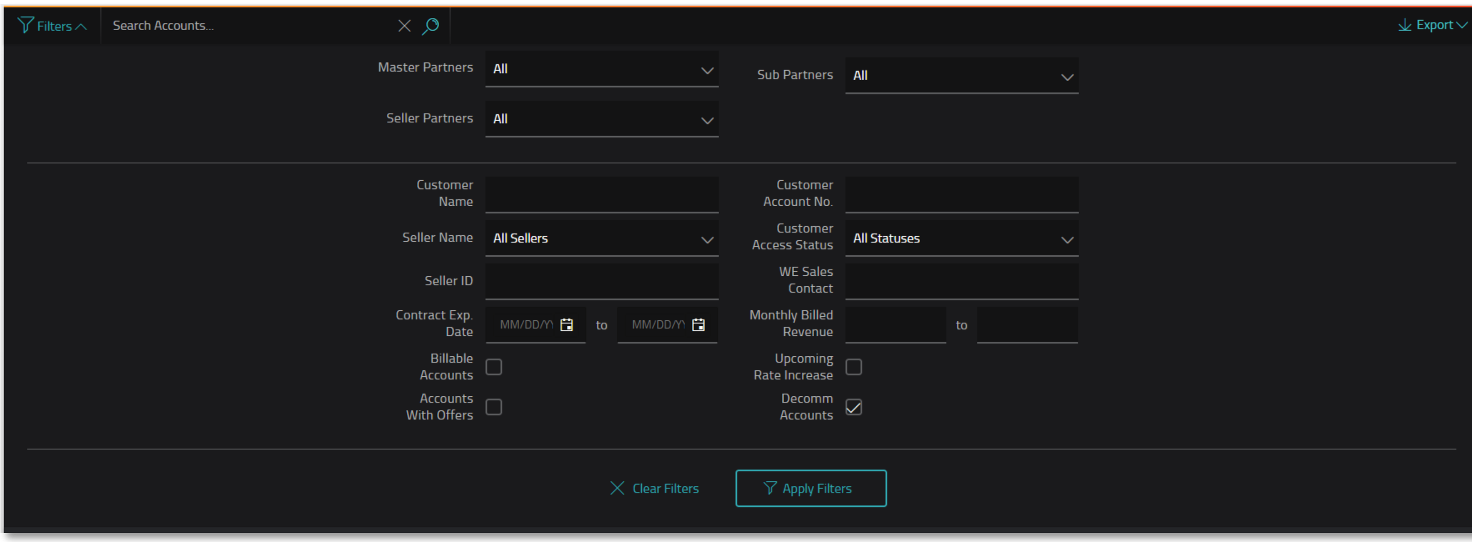
Users can search & filter accounts by using the Filters dropdown menu on the top left of the table.

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
- Offers Available
- Decomm Eligible

Search by keyword or Company Account Name

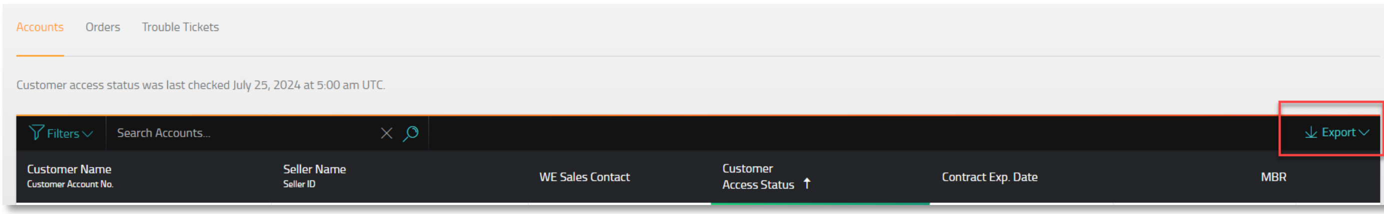


EXPORT BASE LIST

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

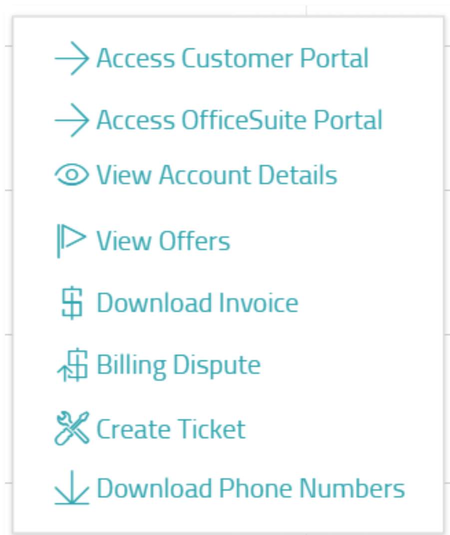
- Customer Name
- Service Location Account Number
- Service Location Name
- Service Address
- Service Status
- Billing Status
- Contract Expiration Date
- Auto Renew Status
- Current MBR
- Last Rate Increase Date
- Future Rate Increase Date
- WE Sales Contact
- Assigned Partner Seller Name
- Assigned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

- Decomm Date



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.

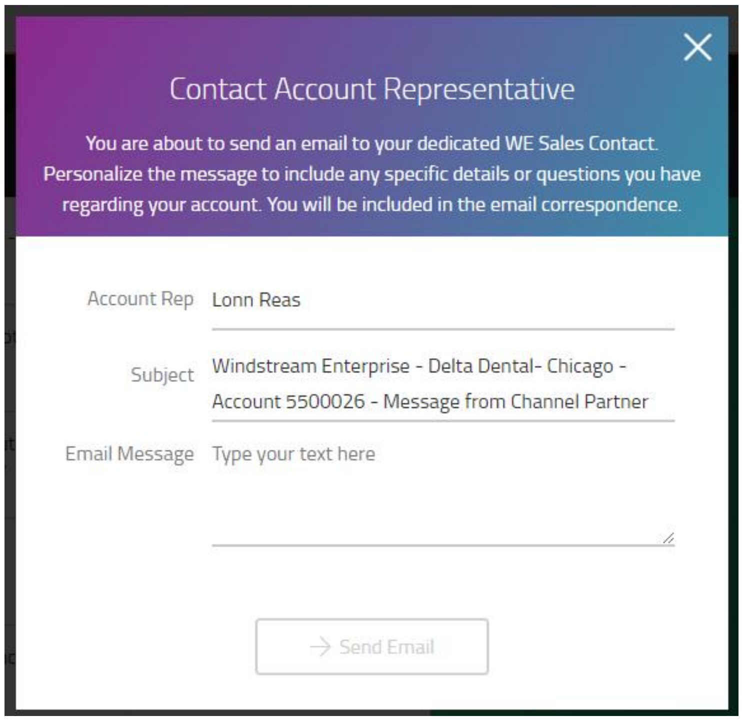


- Access Customer Portal – routes user to the customer's account in WE Connect (see Customer Portal Access for more details)
- View Account Details – fly out window with more detailed information about that customer location
- View Offers – popup modal to show the user any predefined renewal offers currently available for that customer
- Download Invoice – flyout with the customer's last 12 invoices. Only those accounts which are billable will have this option. Non-billable accounts will have the option greyed out.
- Billing Dispute – flyout window with 2-step billing dispute submission form
- 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

WE SALES CONTACT

From the Accounts grid, users can send an email to the designated WE Sales Contact assigned to their customer.

1. Click the name in the WE Sales Contact cell of the grid
2. The Contact Account Representative pop up will appear. The Account Rep and Subject of the email will be prepopulated to contact the appropriate information.
3. Enter the desired message in the Email Message field and click Send Email

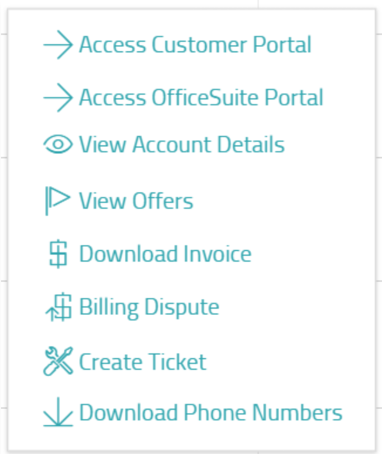


CUSTOMER PORTAL ACCESS

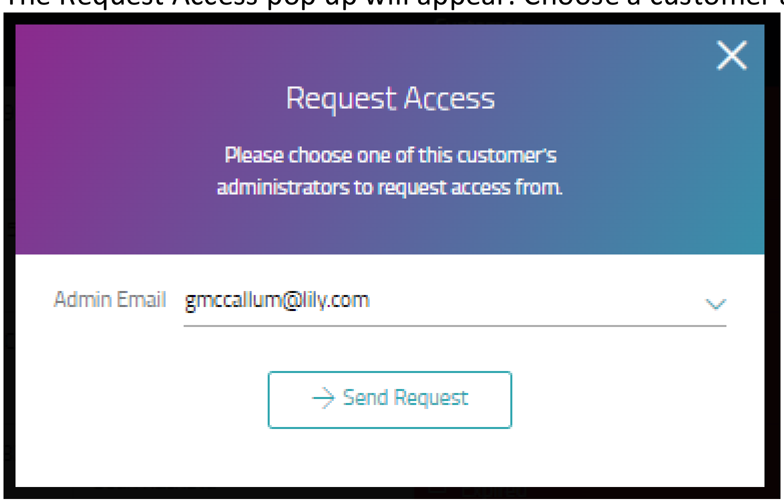
Customer Portal Access gives the Partner user the ability to log into the WE Connect customer portal as the Customer. At this time, all Partner users will need to request access from the Customer via the Partner Portal Accounts page.

REQUESTING CUSTOMER ACCESS

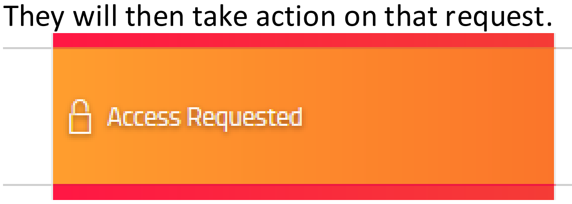
1. Click the Menu icon and Access Customer Portal



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

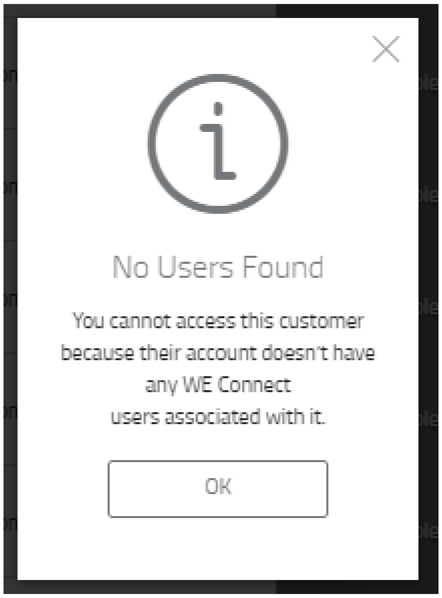


3. The Customer Access Status field for that Customer will turn orange with a status of “Access Requested”. The admin selected will receive an email notifying them of the user’s request. They will then take action on that request.



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

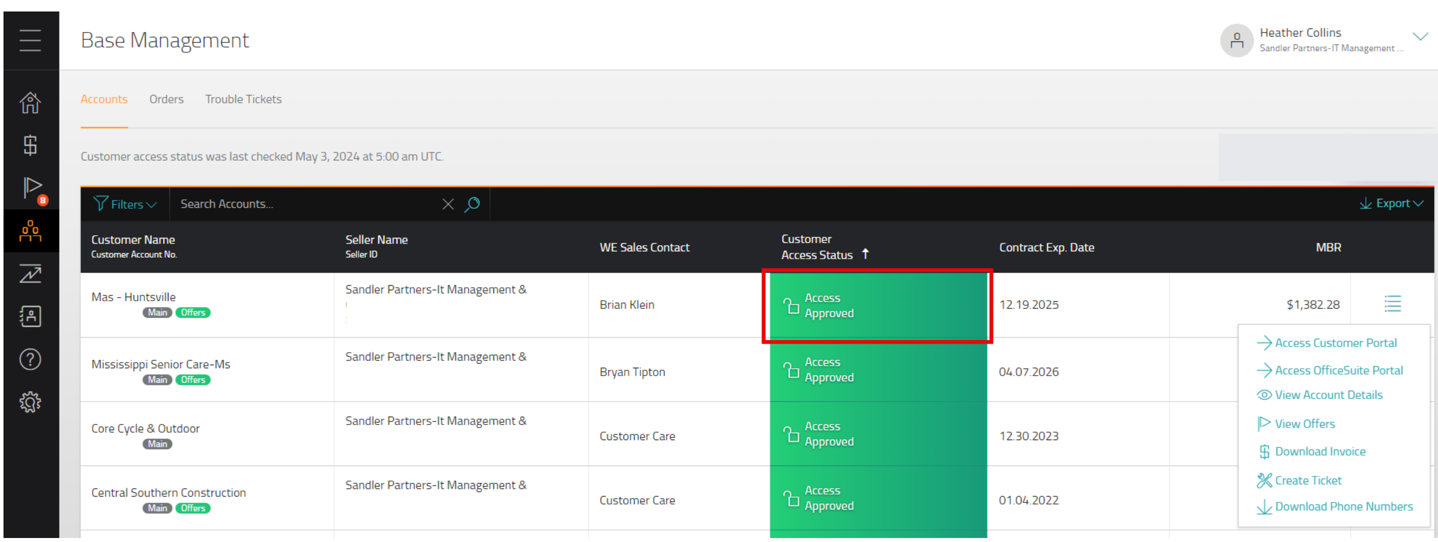
If a Customer does not have any admins in WE Connect, the Customer Access Status cell will be set to "Access Not Available". By clicking on the cell the user will see the pop up below. Please instruct the customer to register for WE Connect in order to request access.



ACCESSING A CUSTOMER'S PORTAL

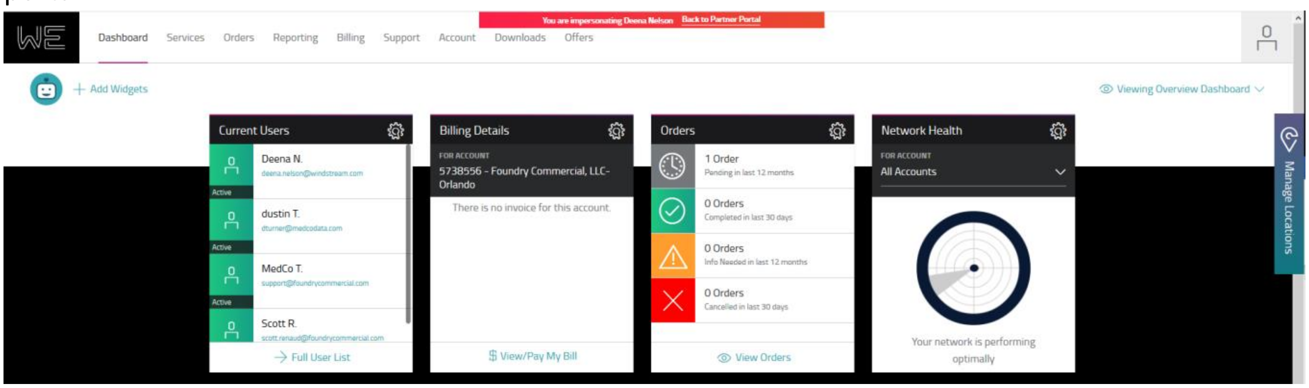
Once a request to access a Customer has been approved, the user can access the Customer's account in WE Connect in one of the two ways below. **Note**: Some features are unavailable during impersonation.

Via the Accounts Grid > Customer Access Status Cell



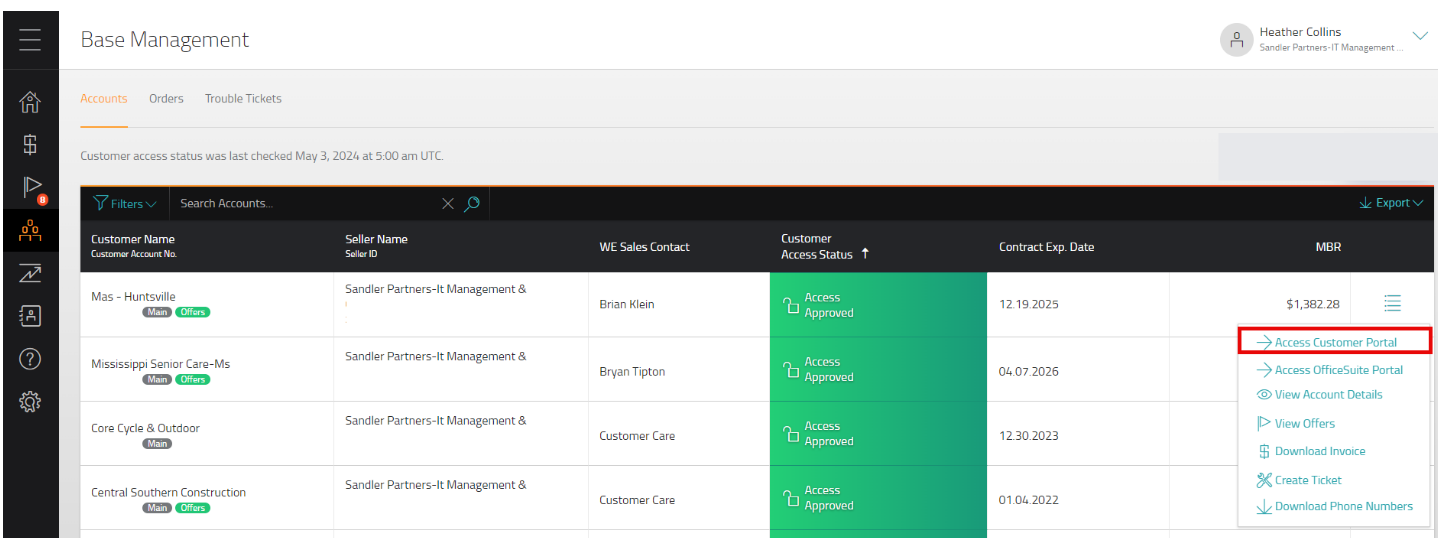
1. Find that Customer on the Accounts tab
2. Click the green Customer Access Status cell in the grid
3. Click **WE Connect Customer Portal** in the modal

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



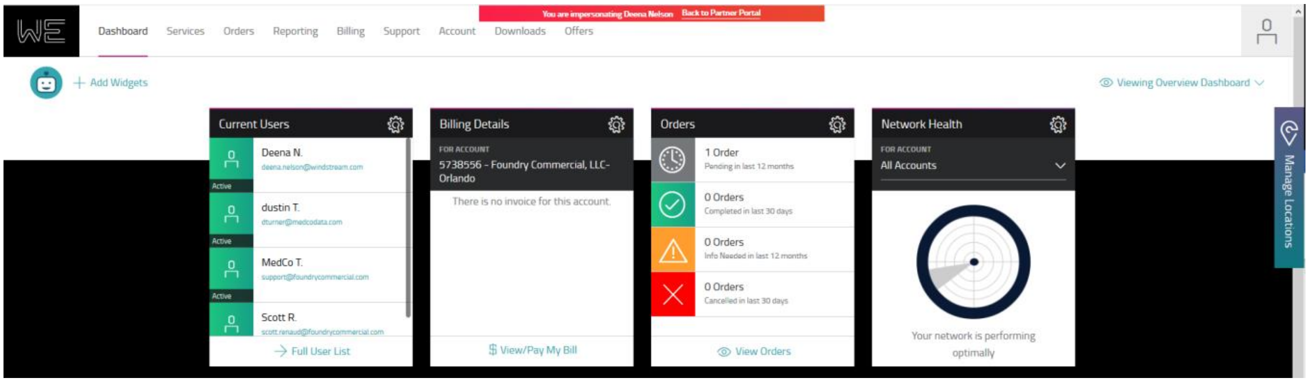
5. To navigate out of Customer Access mode, click **Back to Partner Portal** in the red banner.

Via the Accounts Grid Location Menu



1. Find that Customer on the Accounts tab
2. Click the location 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

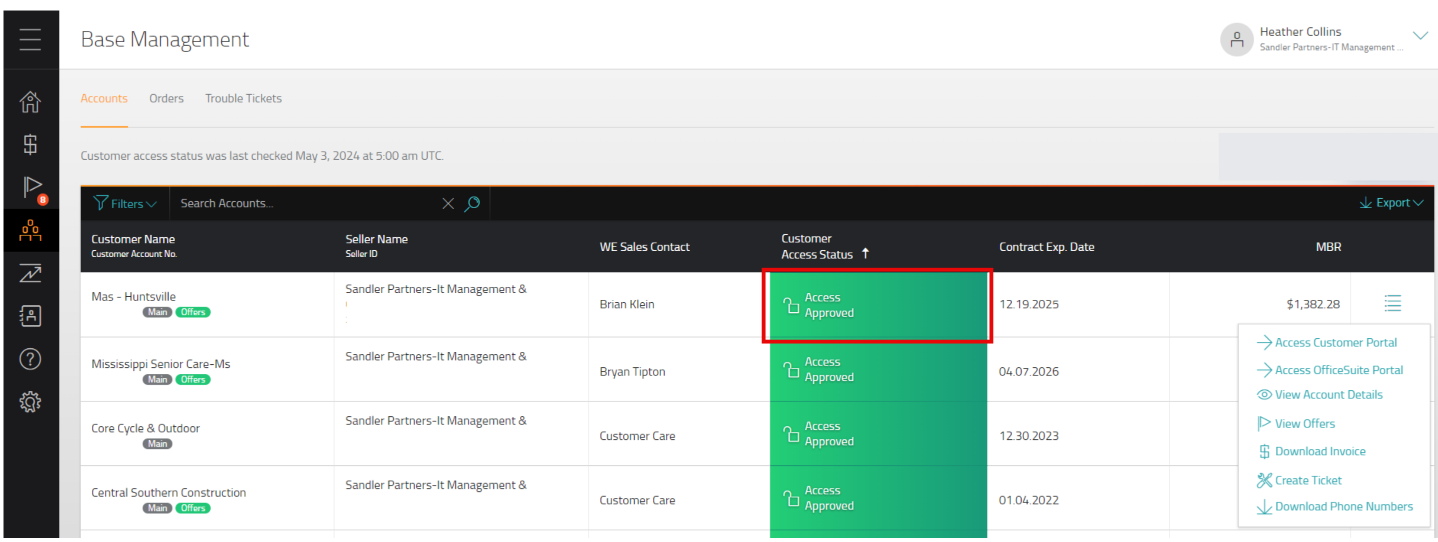


5. To navigate out of Customer Access mode, click **Back to Partner Portal** in the red banner.

ACCESSING A CUSTOMER'S OFFICESUITE PORTAL

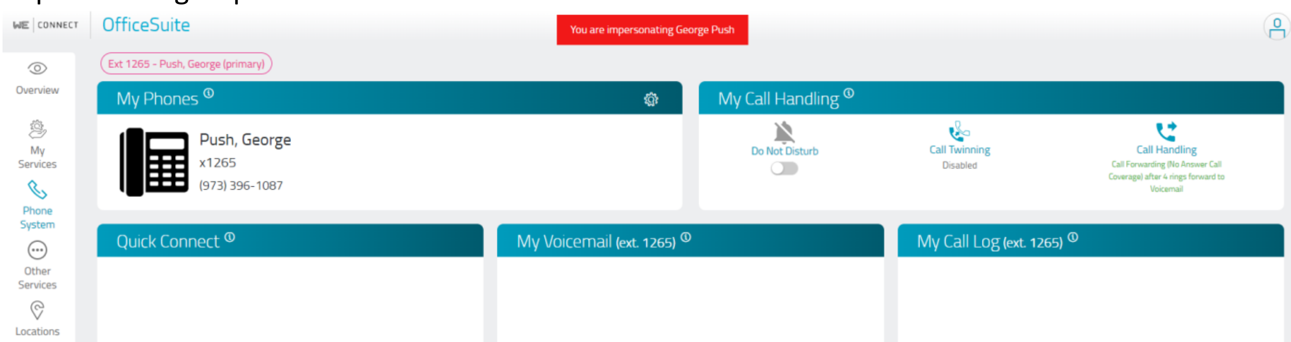
Once a request to access a Customer has been approved, the user can access the Customer's OfficeSuite account in one of the two ways below. **Note**: The portal will select the first admin in the user list for the customer. Some features are unavailable during impersonation.

Via the Accounts Grid > Customer Access Status Cell



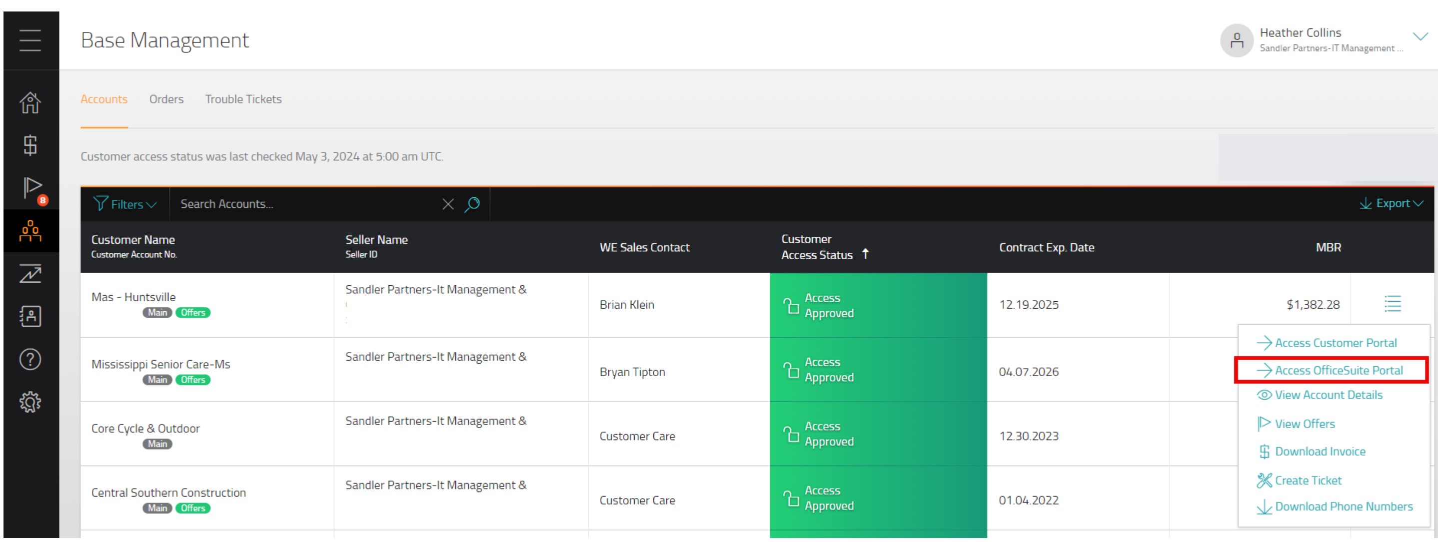
1. Find that Customer on the Accounts tab
2. Click the green Customer Access Status cell in the grid
3. Click **OfficeSuite Customer Portal** in the modal

4. A new tab will open and the user will be automatically redirected to the OfficeSuite Portal. During access, there will be a red banner at the top of the screen calling out that the user is impersonating a specific Customer user.



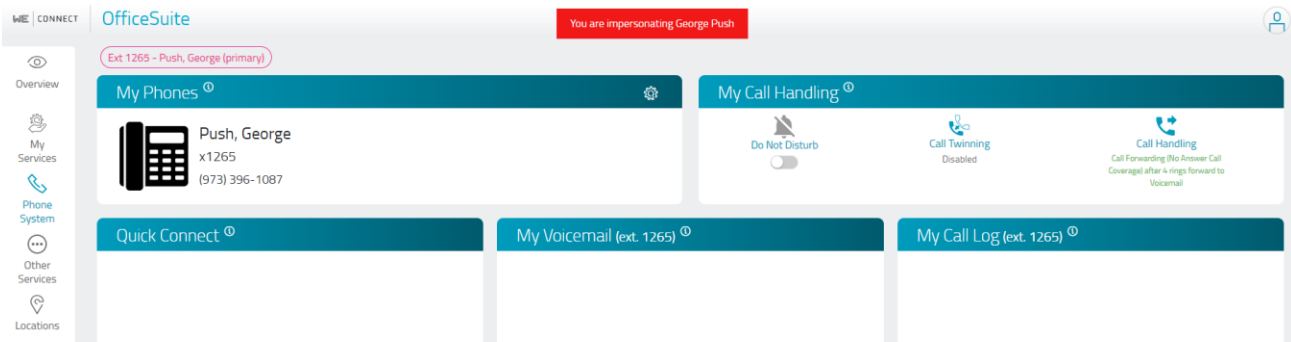
5. To navigate out of Customer Access mode, simply close the tab.

Via the Accounts Grid Location Menu



1. Find that Customer on the Accounts tab
2. Click the location Menu icon
3. Click **Access Officesuite Portal**

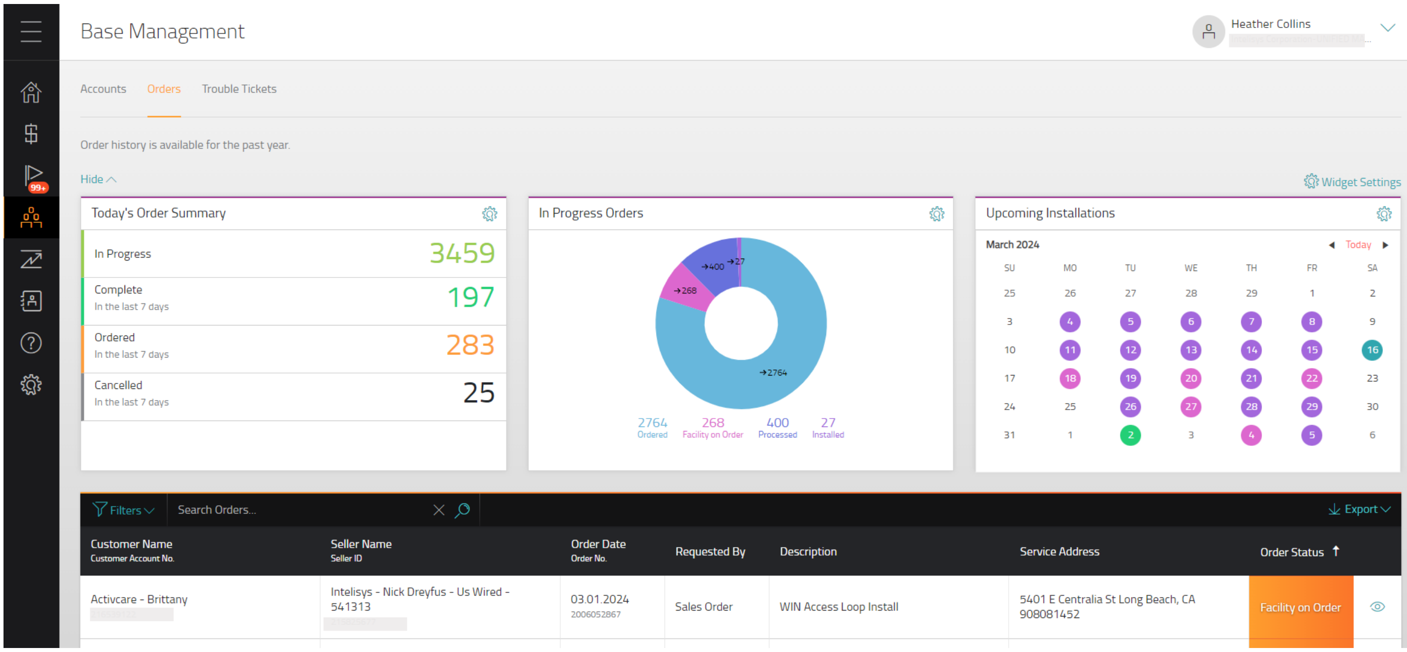
4. A new tab will open and the user will be automatically redirected to the OfficeSuite Portal. During access, there will be a red banner at the top of the screen calling out that the user is impersonating a specific Customer user.



5. To navigate out of Customer Access mode, simply close the tab.

BASE MANAGEMENT - ORDERS

[Click here for a demo on Orders]



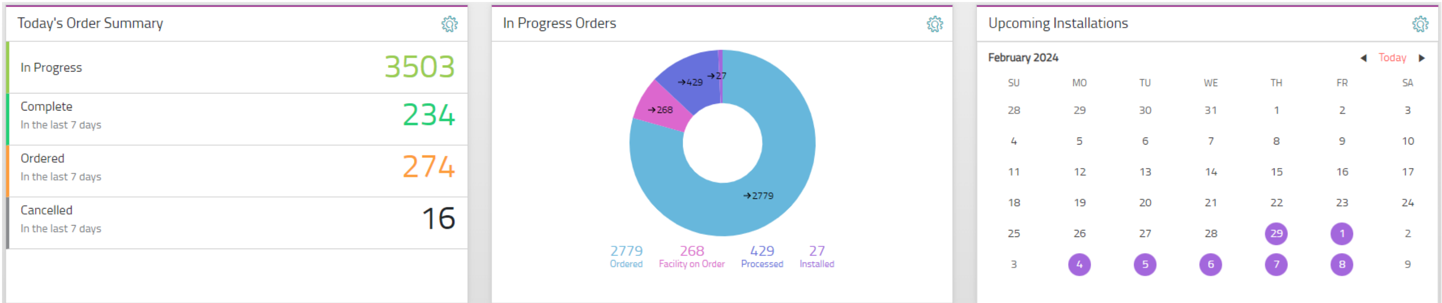
Orders associated to Customer accounts owned by the user will show on the Orders tab. The information shown here will be dependent on the user who is logged in. For example: a Seller level user will only see accounts associated to their Seller ID, a Unified Master level user will see accounts associated to every Seller under them.

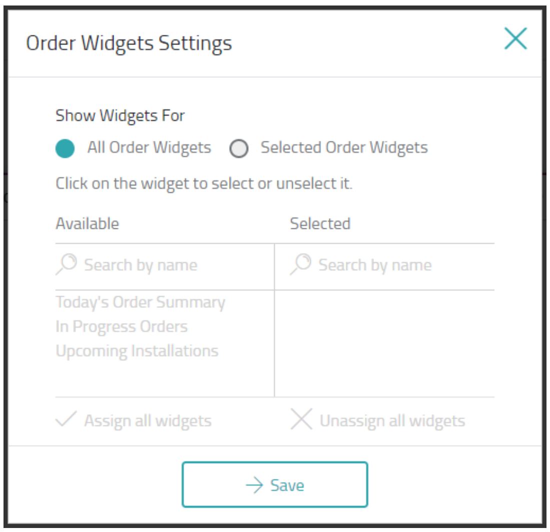
ORDER SUMMARY WIDGETS

The Order Summary Widgets provide a snapshot of the user's most recent order activity. They summarize the orders from the Orders grid in different ways. Users can interact with the widgets in the following ways:

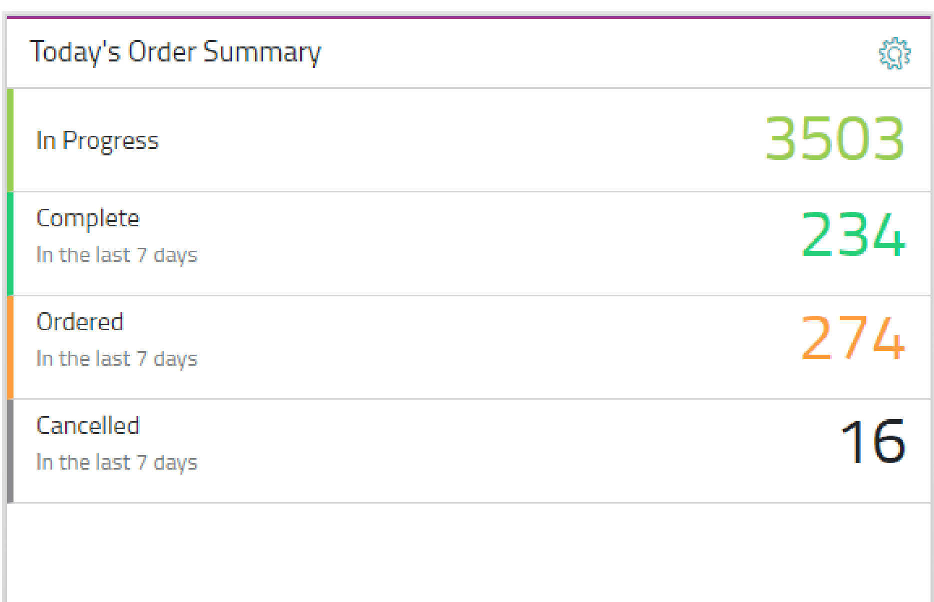
- Click on any of the data points, and the order grid below will filter to those specified orders
- Hide or Show to move the widgets out of view temporarily using the carot on the left
- Manage your view of the widgets in the Widget Settings gear on the right
- Click on any of the individual gear icons to change the data displayed in each of the widgets

While the portal is actively looking for new orders all the time, once the page loads the data into the summary widgets, they are current and static. To see if new updates have been submitted, simply refresh the browser.





TODAY'S ORDER SUMMARY WIDGET



The Today's Order Summary widget provides a count of orders in the grid by the current status. Depending on the status or the current orders, users may see

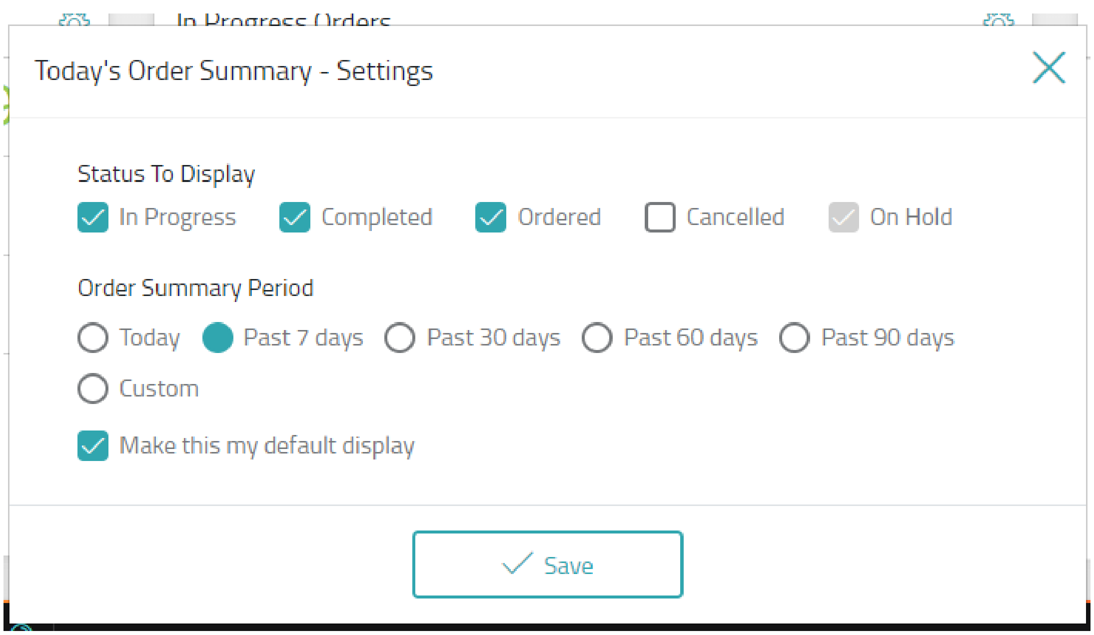
- In Progress - compiled of all in flight orders no matter their progression in the order process
- Completed - view the count that have closed in the timeframe specified

- Ordered - view the count that have initiated the order in the timeframe specified
- On Hold - view a count of orders that have been proactively put on hold during the order process
- Cancelled – view a count of orders that have been cancelled in the timeframe specified

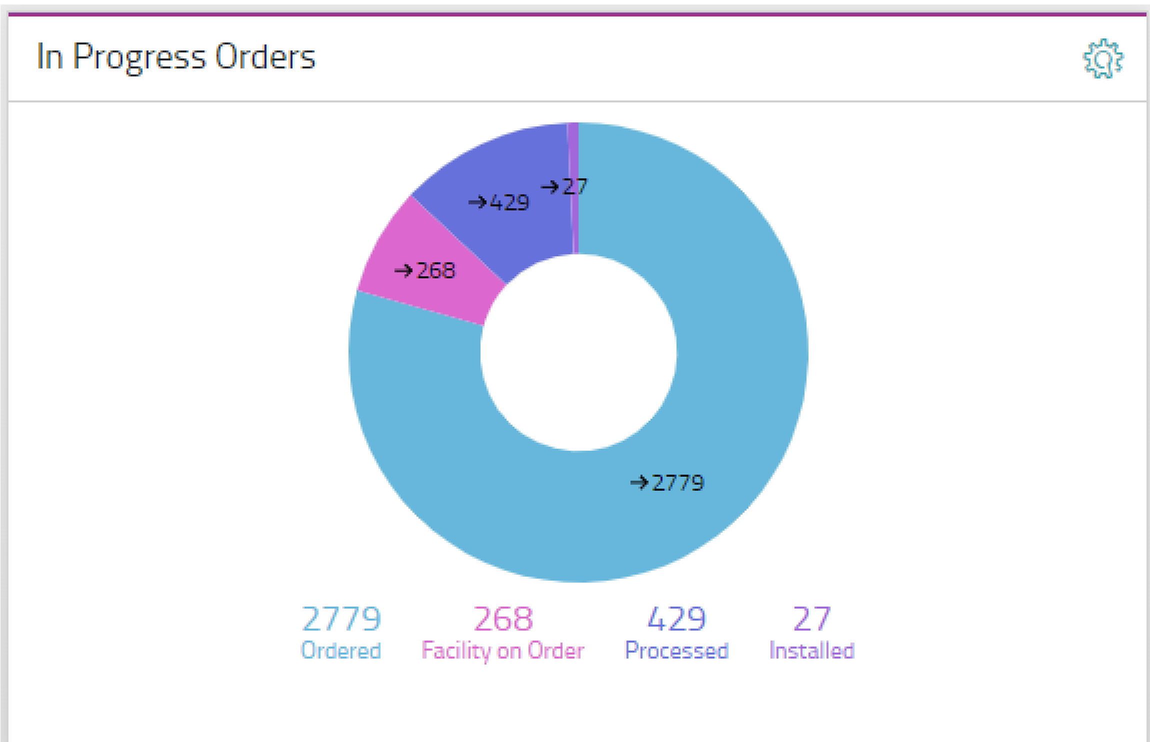
Clicking on any of the data points in the widget will filter the grid below to show only the orders in that category. Remove the filter by clicking the “X” in the Search Orders bar.

Users can manage the display parameters in the widget by using the gear icon in right corner.

- “Remove Widget” will remove the widget from view
- “Customize” will allow the user to change the content displayed in the widget
    - Status to Display – select from In Progress, Completed, Ordered & Cancelled
        - On Hold orders will always display
    - Order Summary Period – select timeframe for Ordered, Completed, Cancelled and On Hold orders being summarized in widget
        - Default settings are
            - ALL in progress orders
            - Past 7 days for Complete, Ordered and Cancelled orders
            - ALL on hold orders
        - Custom option allows the user to select a timeframe not in the pre-defined options
        - Timeframe being selected is the “ordered date”
            - Ie: selecting last 90 days will show ALL in progress orders and any Complete, Ordered, Cancelled or On Hold orders with an ordered date within the last 90 days
    - Customizing the widget does NOT change the information in the grid



IN PROGRESS ORDERS WIDGET



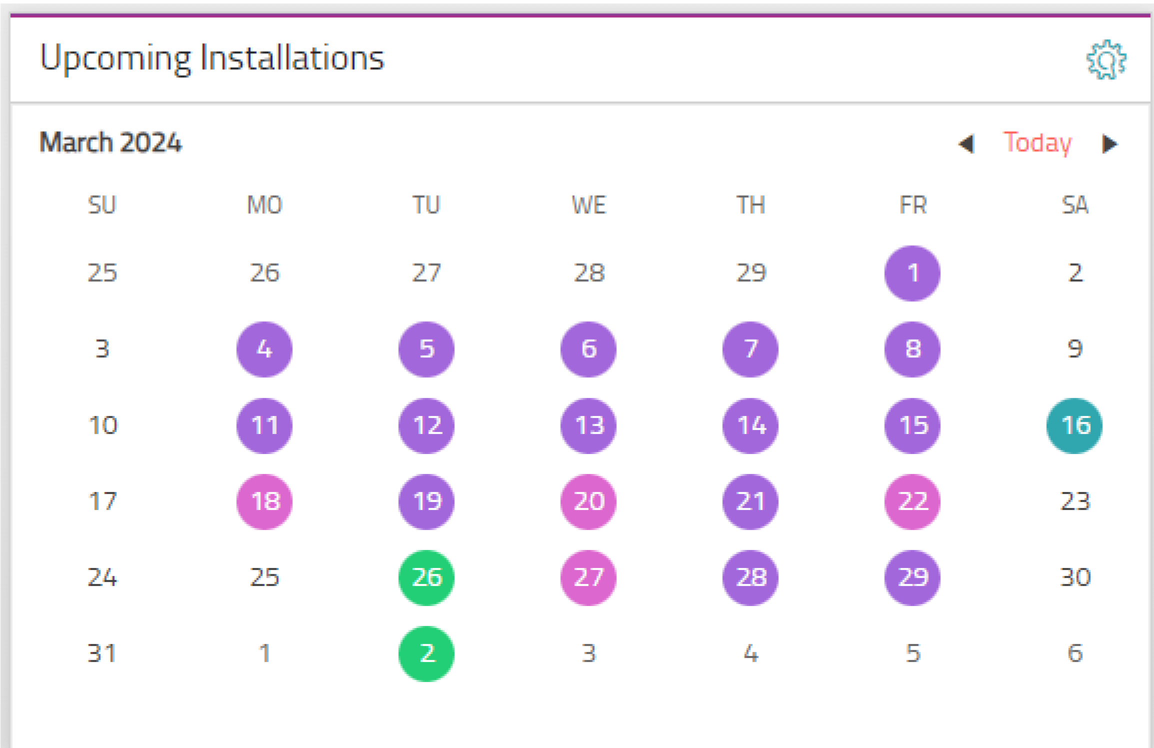
The In Progress Orders widget breaks down all orders currently In Progress by where they are in the order process. The orders are categorized by the Order Status Milestones:

- Ordered
- Processed
- Facilities on Order
- Installed
- Activated
- Completed

Clicking on any of the data points in the widget will filter the grid below to show only the orders in that category. Remove the filter by clicking the “X” in the Search Orders bar.

Users can select the Gear icon > Remove Widget to remove the widget from view.

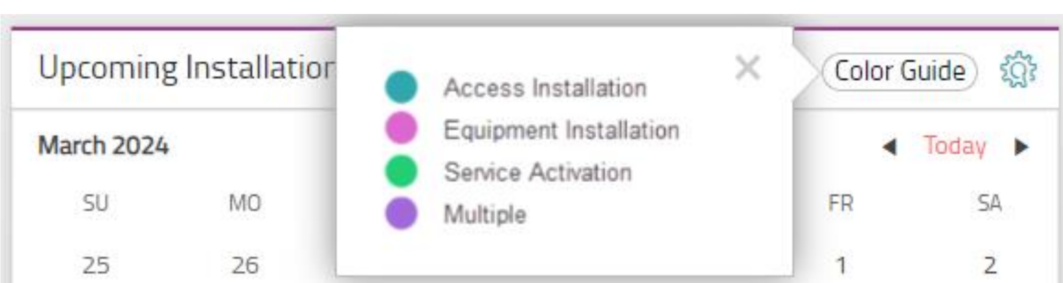
UPCOMING INSTALLATIONS WIDGET



The Upcoming Installations Widget displays the target installation dates currently assigned to your orders. These installations are TARGET dates and are subject to change. The events tracked on this calendar include:

- Access Installations
- Equipment Installations
- Service Activations

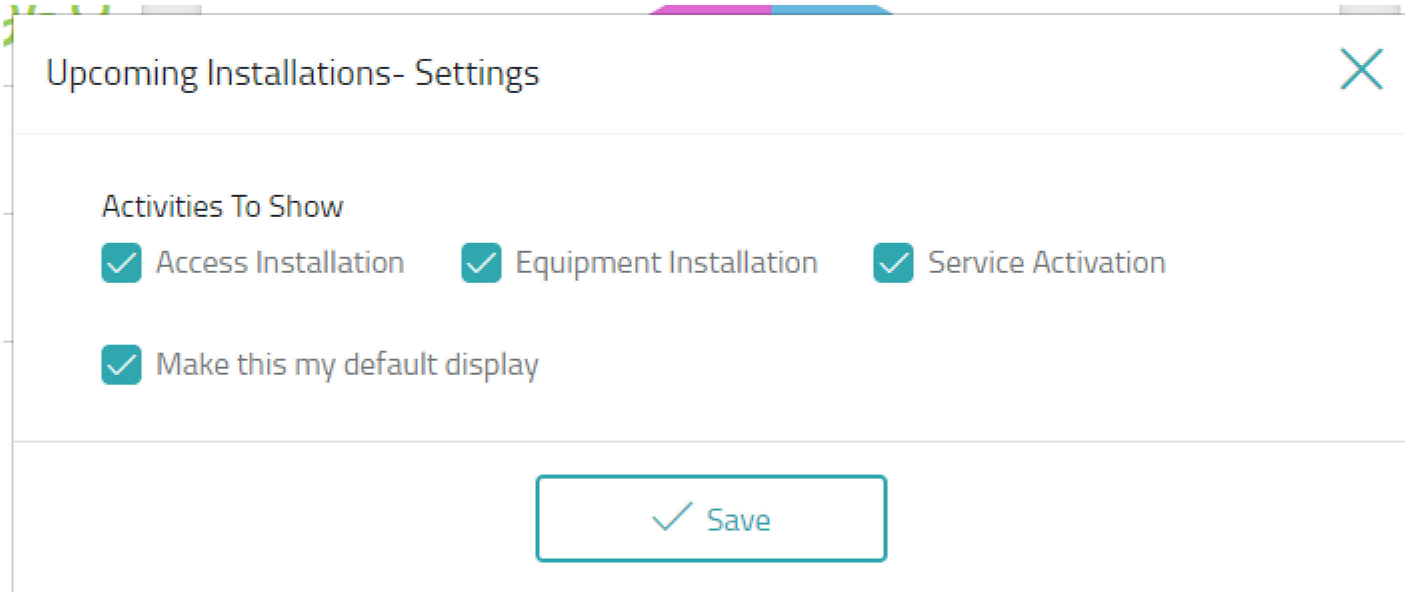
The COLOR GUIDE provides a key to what colors denote which event. On days where there are more than one installation and/or activation events occurring, it will be denoted as *Multiple*.



Clicking on any of the data points in the widget will filter the grid below to show only the orders in that category. Remove the filter by clicking the “X” in the Search Orders bar.

Users can manage the display parameters in the widget by using the gear icon in right corner.

- “Remove Widget” will remove the widget from view
- “Customize” will allow the user to change the content displayed in the widget
    - Users can select which installation types to include in the calendar
    - Customizing the widget does NOT change the information in the grid



ORDERS GRID

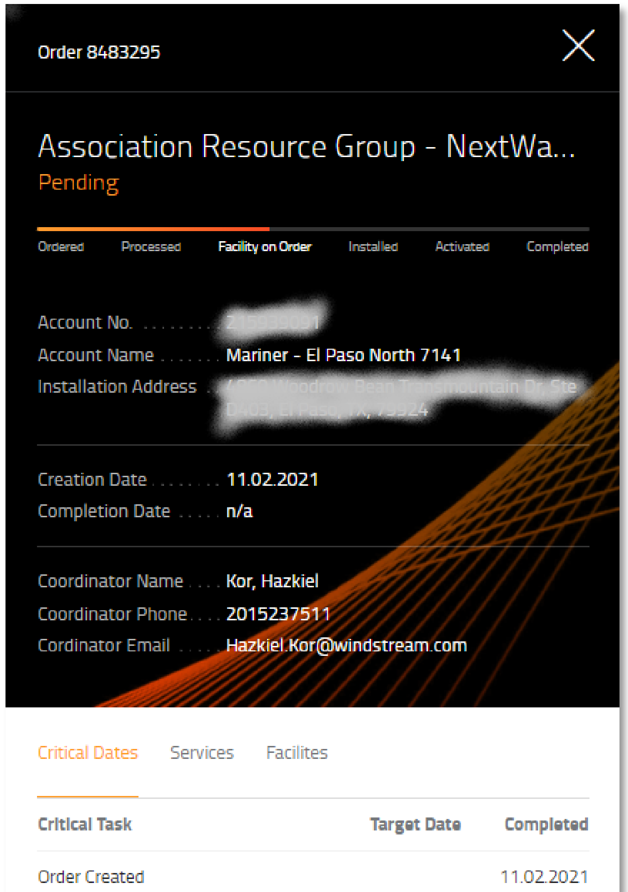
The following columns will populate in the Orders grid:

- 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

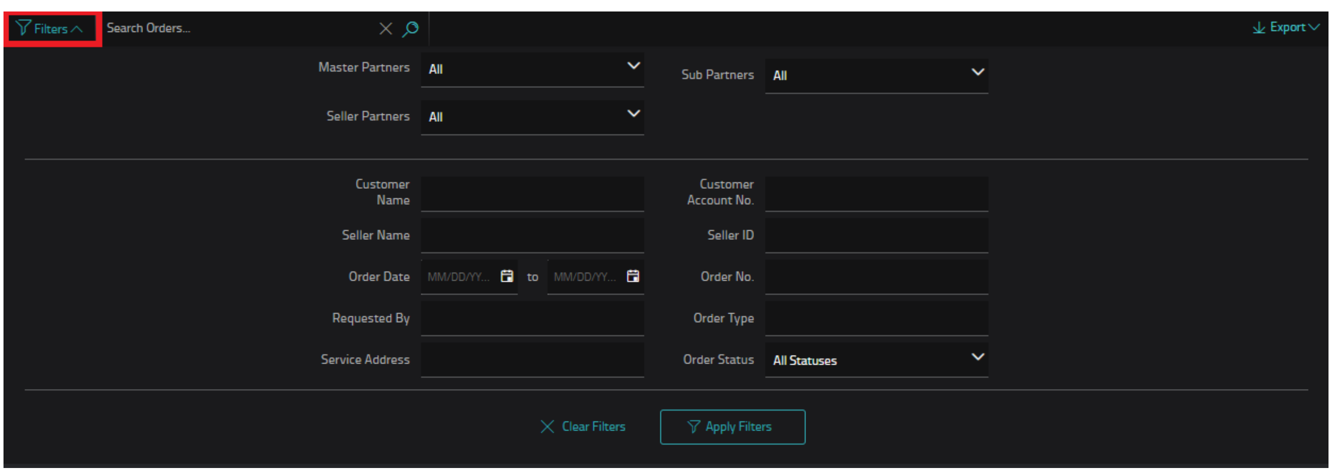
Clicking the eye in the far-right column will produce a fly out menu showing details about the order.

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.

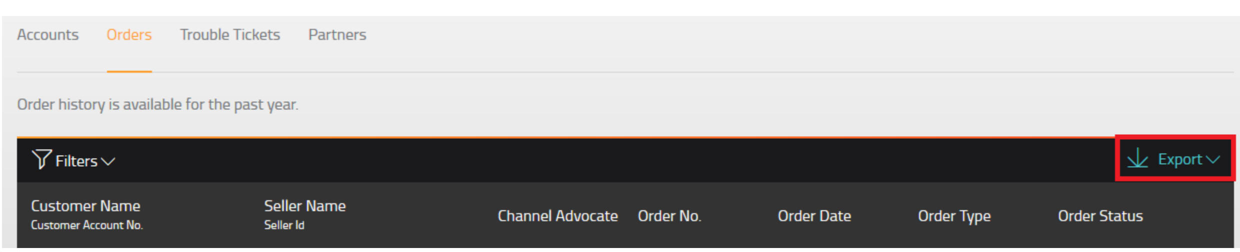
The Order Details flyout is now updated to reflect more closely the WE Connect order details flyout.



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

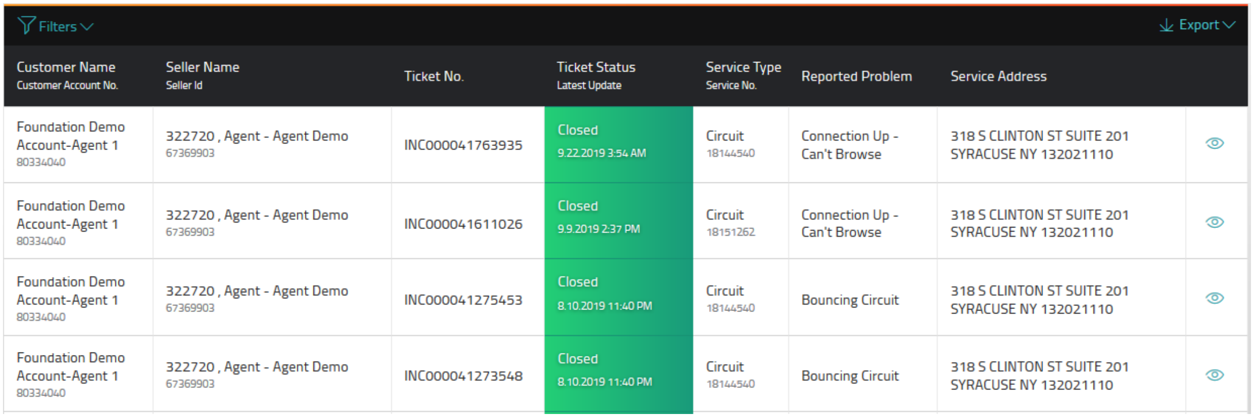


Information can be exported to Excel using the Export button on the top right of the table.



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	

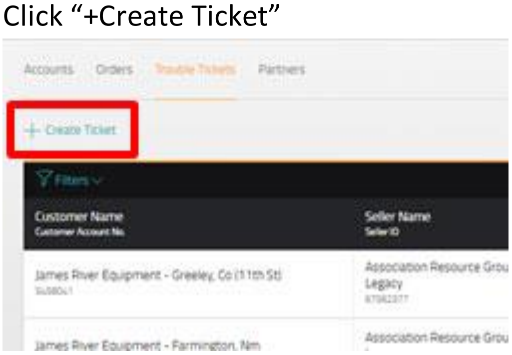
Tickets associated to Customer accounts owned by the user will show on the Trouble Tickets tab. The following columns will populate:

- Customer Name & Account Number
- Seller Name
- Ticket Number
- Ticket Status – cell color will change based on status
- Service Type
- Reported Problem
- Service Address

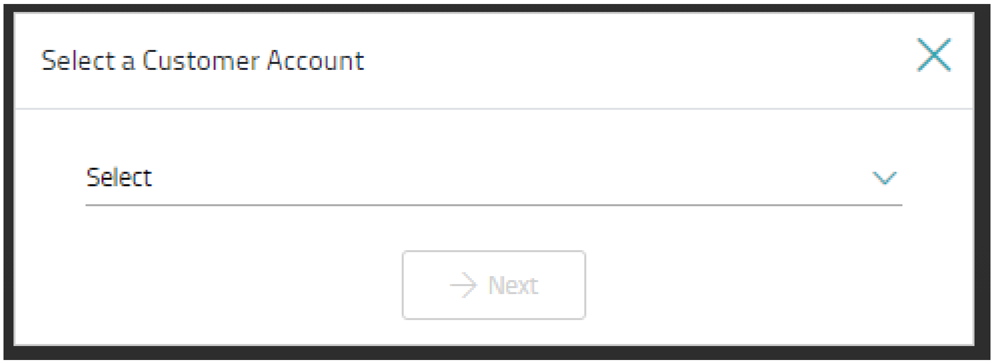
CREATE TICKET

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.

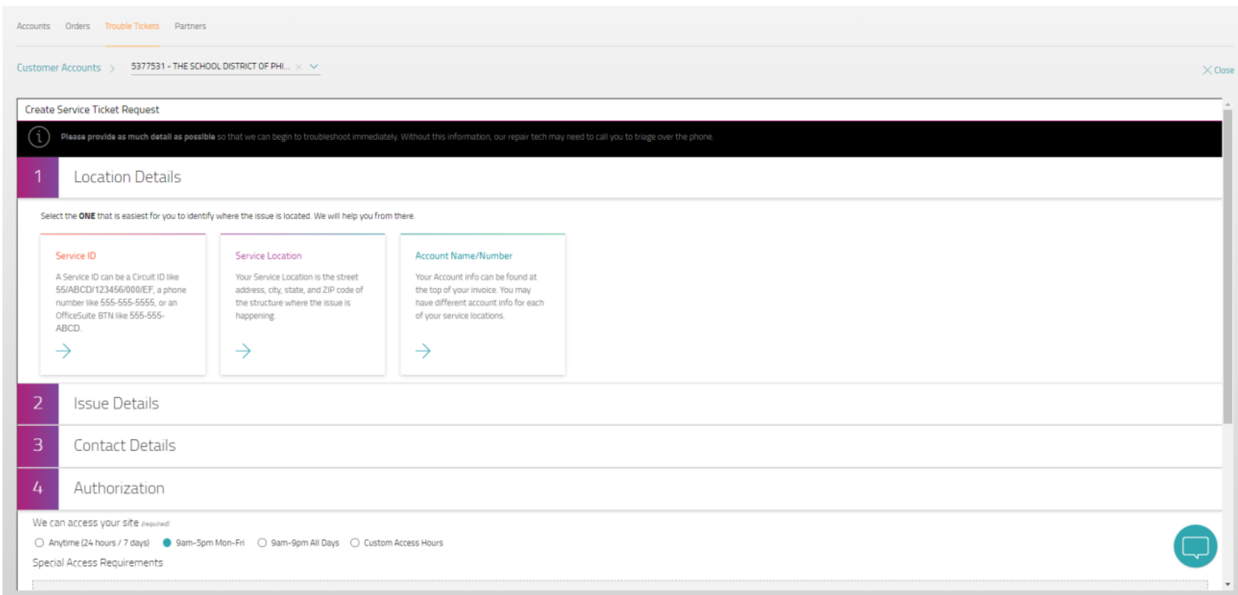
1. Click "+Create Ticket"



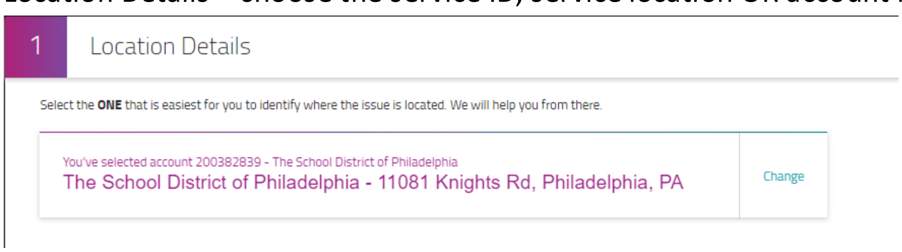
2. Select the customer from the drop down and click **Next**.



3. Ticket wizard opens

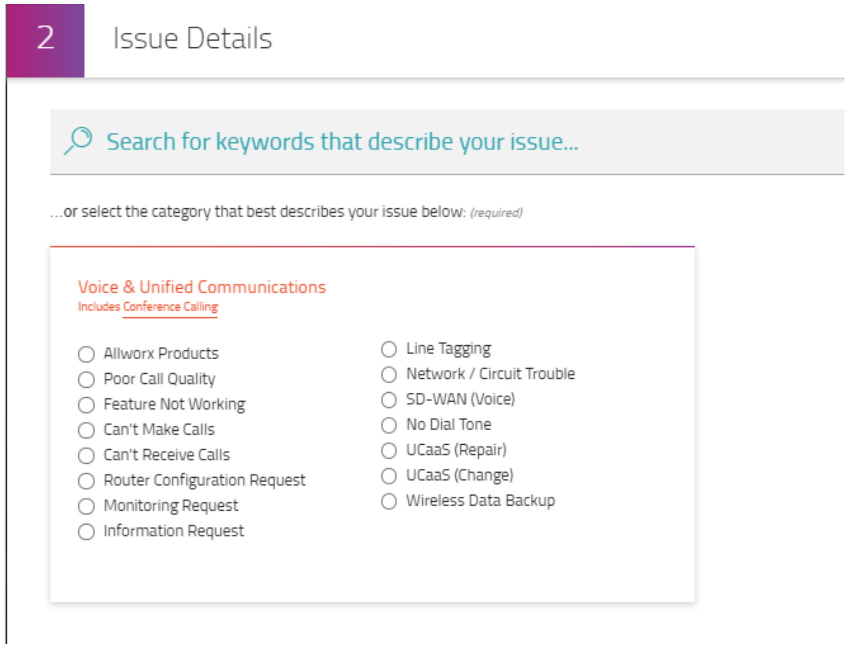


4. Follow the wizard prompts
   a. Location Details – choose the service ID, service location OR account name/number

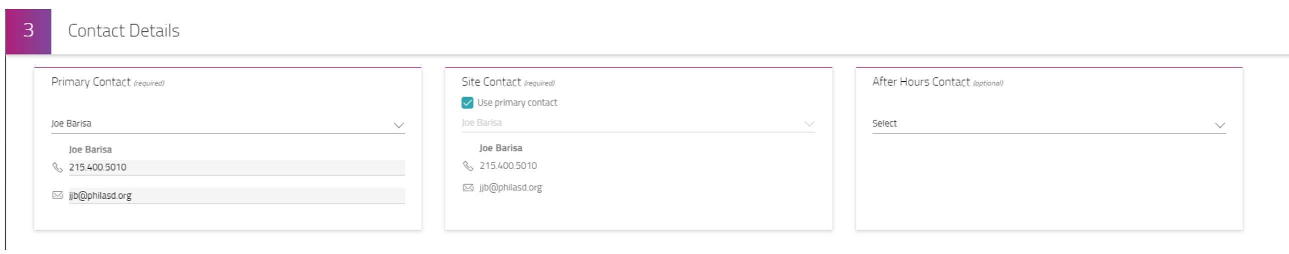


   b. Issue Details – select from a list of appropriate issues or search for the issue experienced

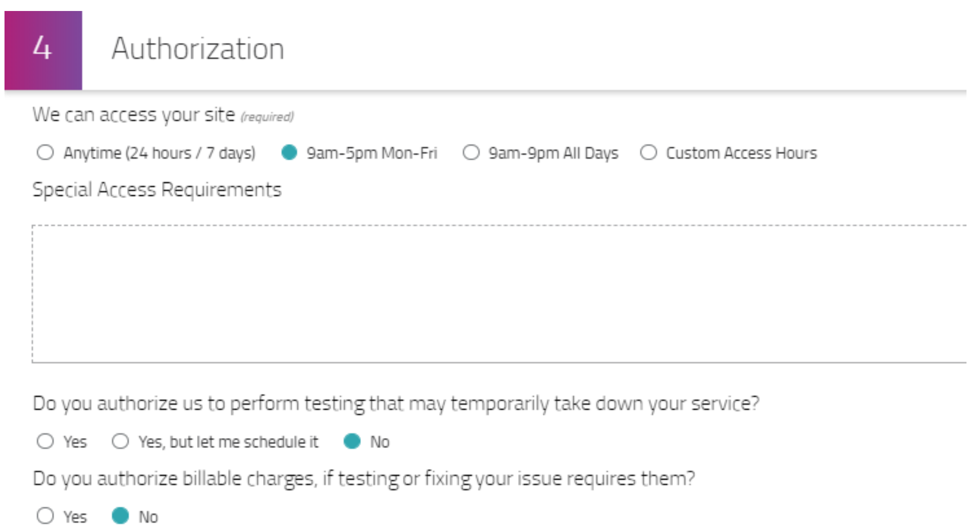
i. Additional information may be needed depending on the issue chosen



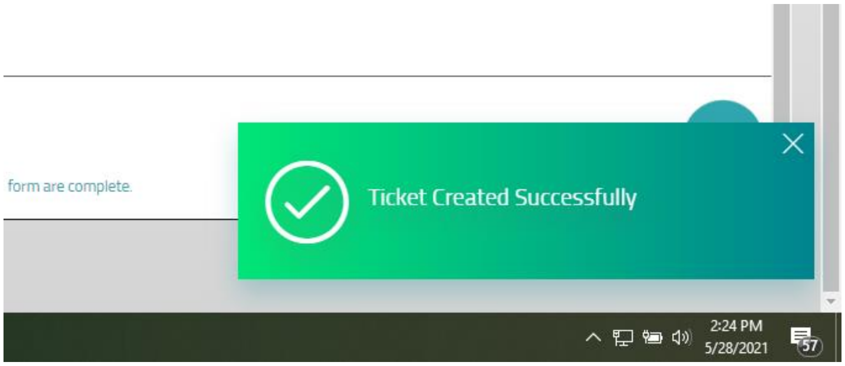
c. Contact Details – enter the contact associated to the ticket



d. Authorization to access the site if needed

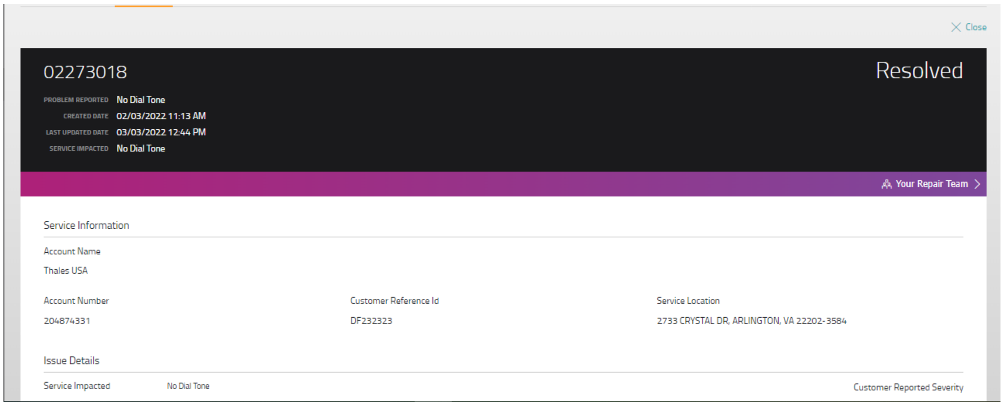


5. Click Submit. A confirmation will appear in the bottom left of the screen.

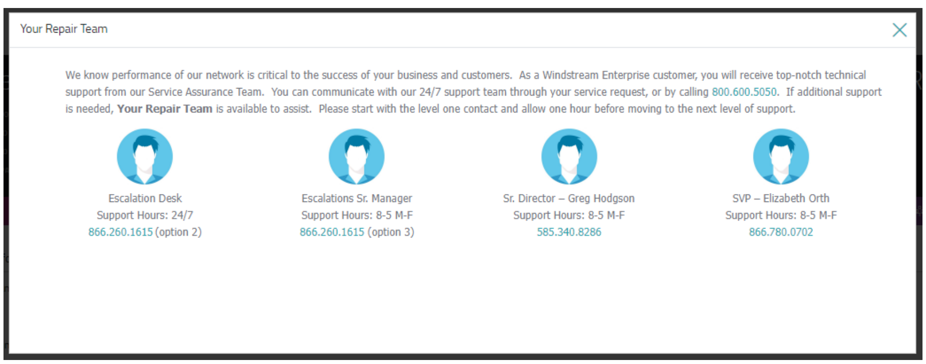


TICKET DETAILS

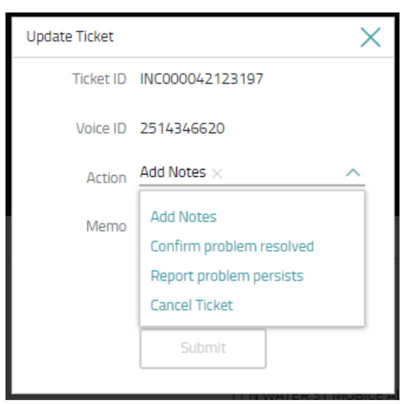
Clicking the eyeball icon to the right of the ticket will open the Ticket Details screen with additional information about the ticket and notes from IT.



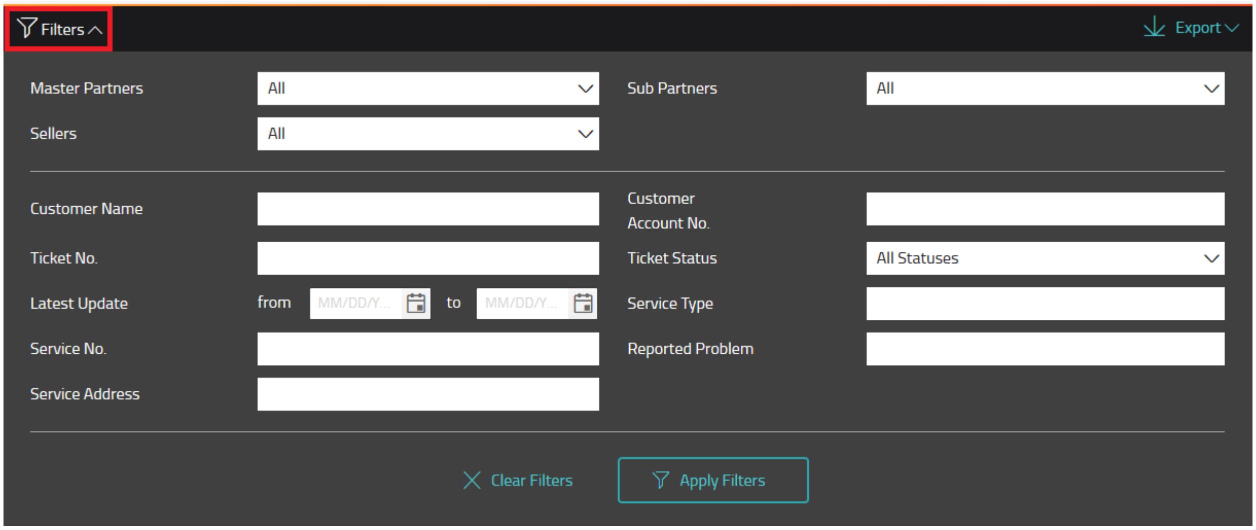
Near the top of each Ticket Details screen will be a purple banner with “Your Repair Team.” Clicking this banner will produce a popup with the Repair Team assigned to the customer.



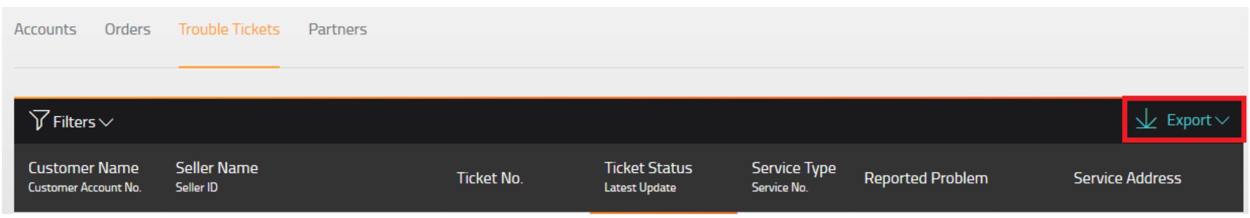
Users can click the “Update Ticket” button to add notes, confirm a problem persists or is resolved or cancel the ticket.



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

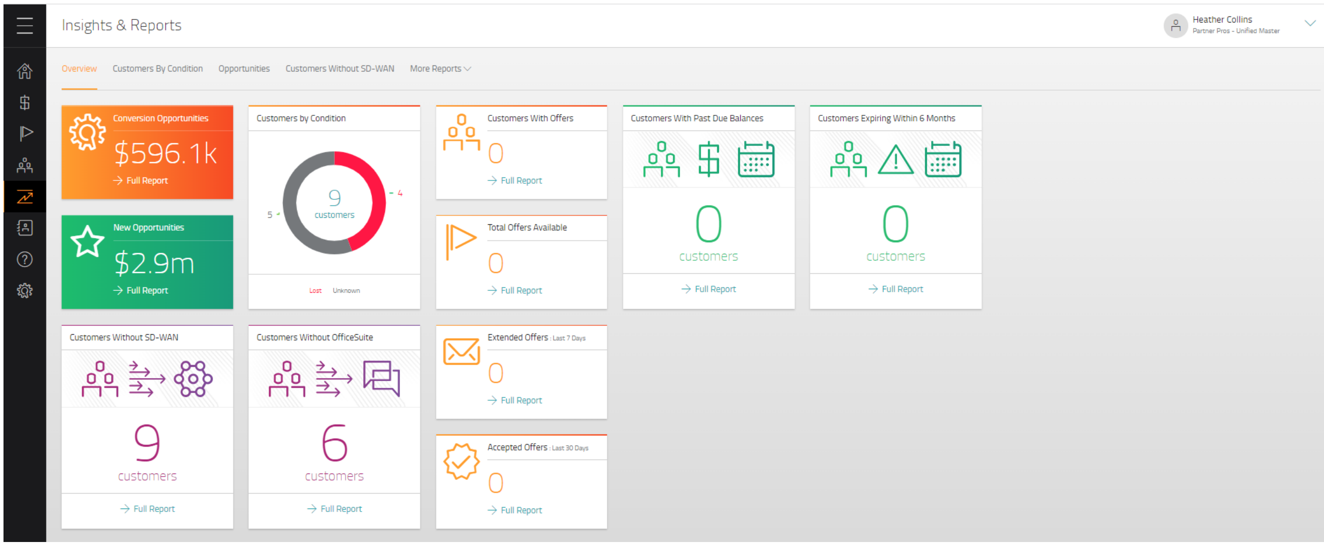


Information can be exported to Excel using the Export button on the top right of the table.



INSIGHTS & REPORTS

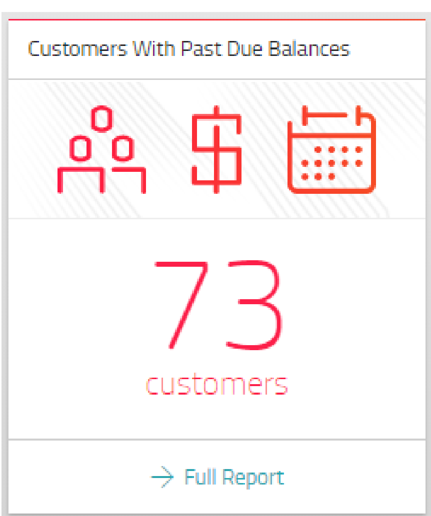
[Click here for a demo on Insights & Reports]



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.

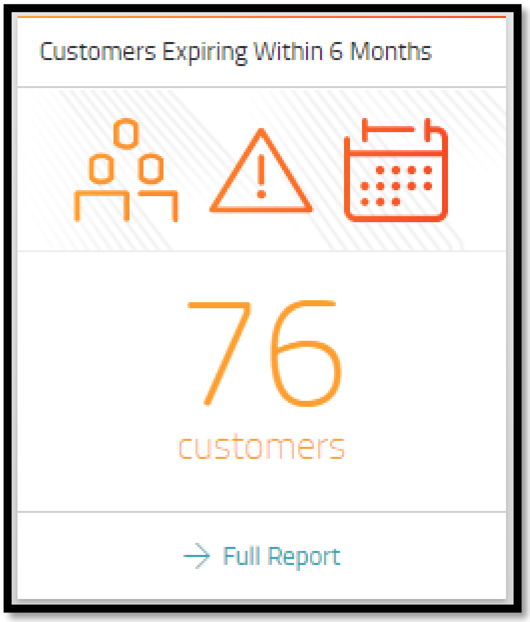
CUSTOMERS WITH PAST DUE BALANCES

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 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.



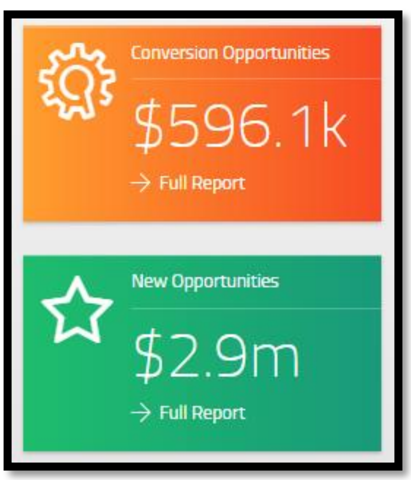
CUSTOMERS EXPIRING WITHIN 6 MONTHS

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.



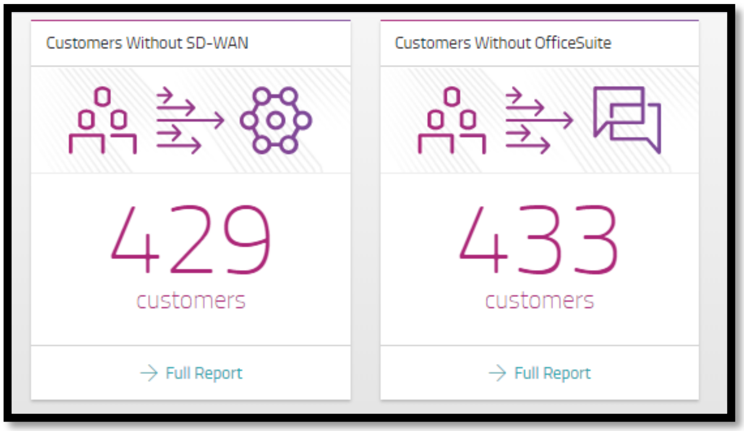
OPPORTUNITIES

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 with 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.



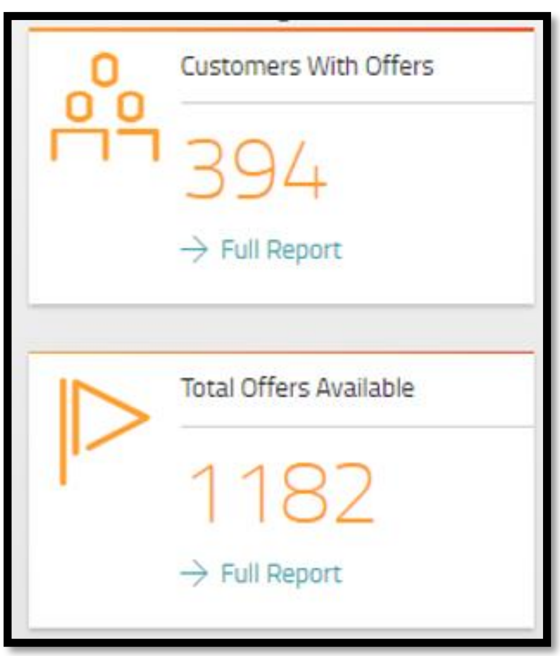
OFFERS WIDGETS

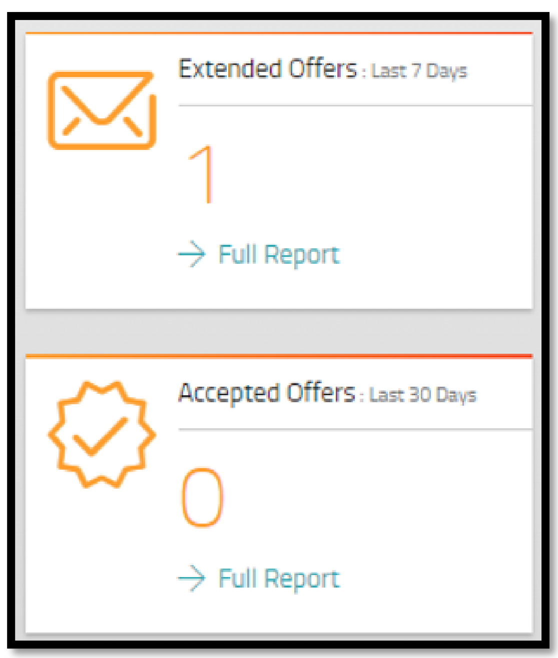
Customers with Offers – the number of customers in the user's base that have offers available

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

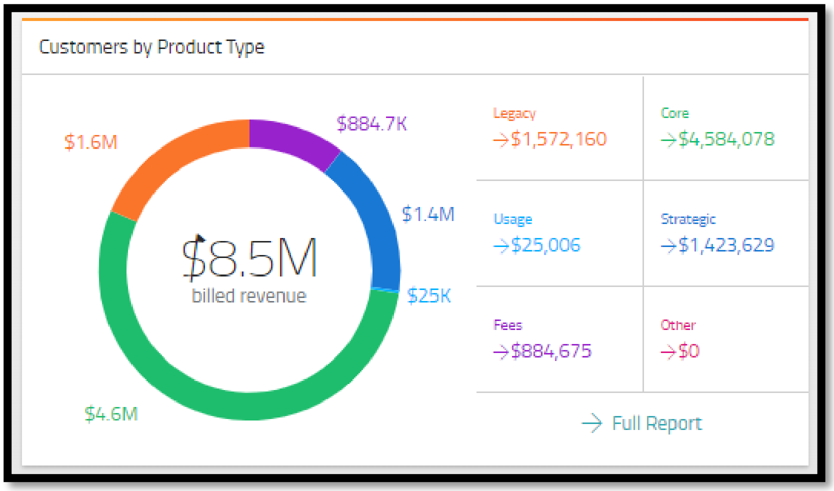
Accepted Offers – the number of accepted offers in the last 30 days





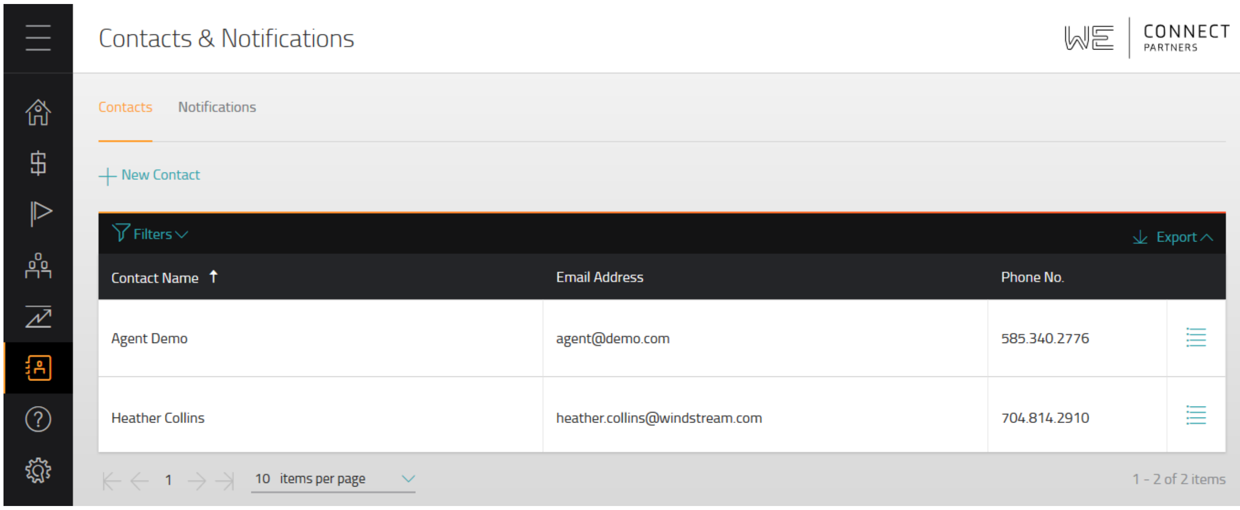
CUSTOMERS BY PRODUCT TYPE

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

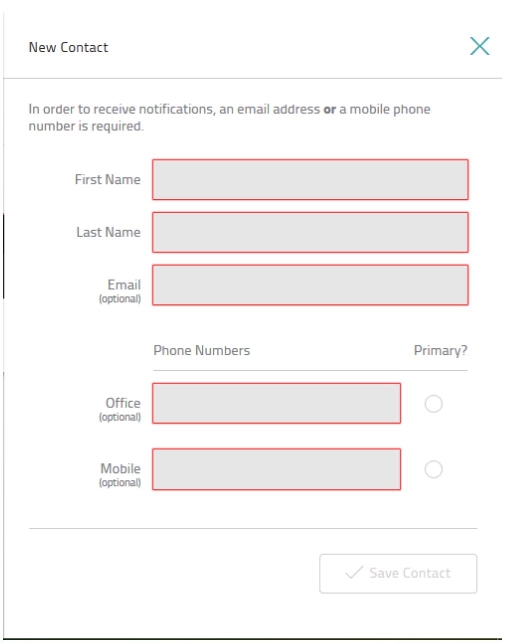
[Click here for a demo on Contacts & Notifications]



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 with 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

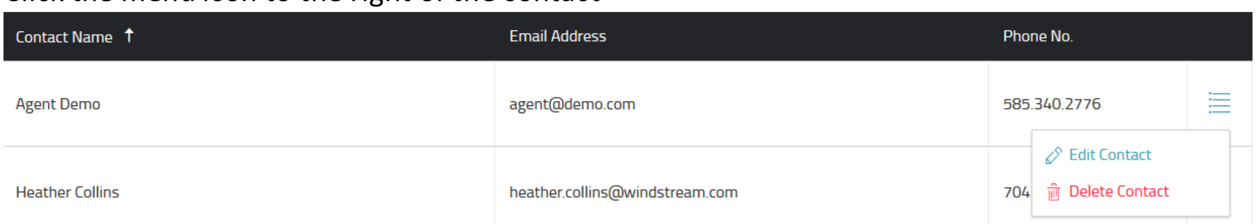


2. Fill out the required fields
   a. First Name

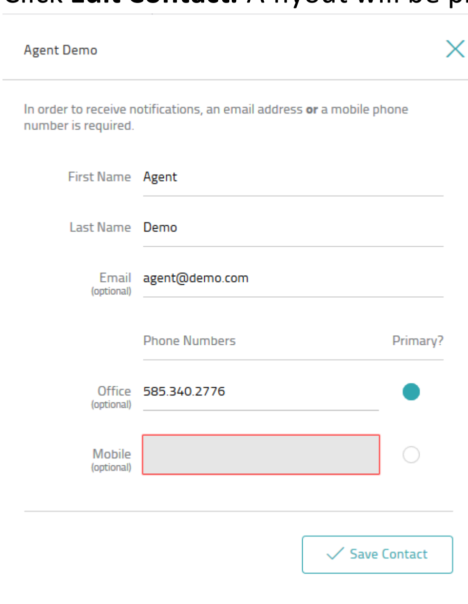
   b. Last Name
   c. Email
   d. Office Phone
   e. Mobile Phone
3. Select one number as primary
4. Click **Save Changes**
5. A popup will confirm you want to save changes. Click **Yes**.
6. Contact will be saved, and a confirmation will be displayed on the bottom right of screen

EDIT AN EXISTING CONTACT

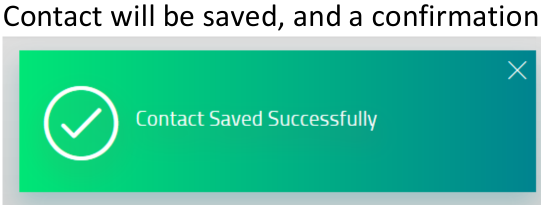
1. Click the menu icon to the right of the contact



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

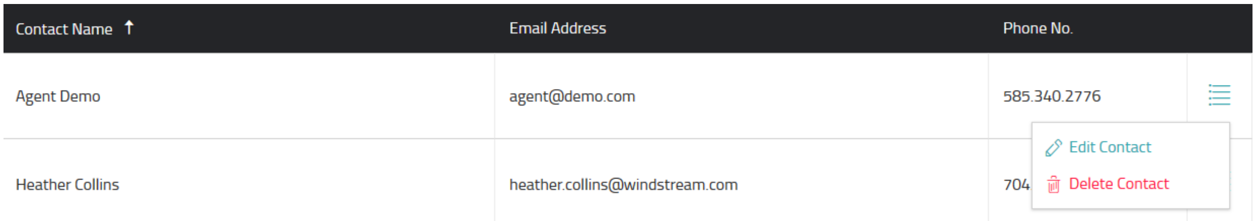


3. Make any edits necessary
4. Click **Save Changes**
5. Contact will be saved, and a confirmation will be displayed at the bottom of the screen

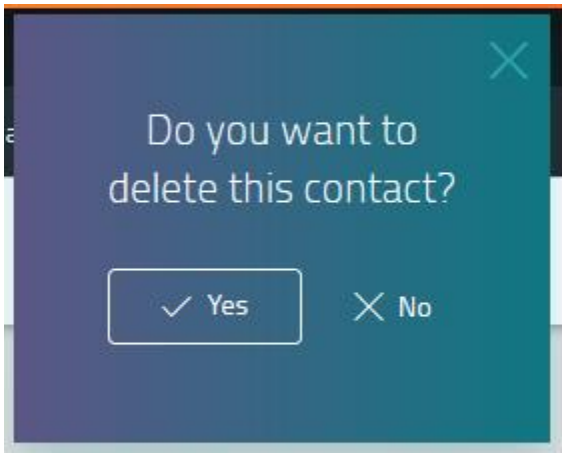


DELETE A CONTACT

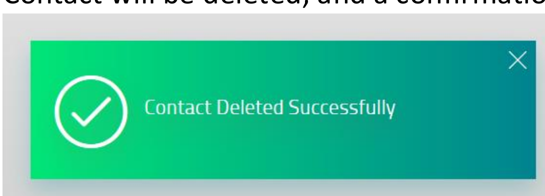
1. Click the menu icon to the right of the contact



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

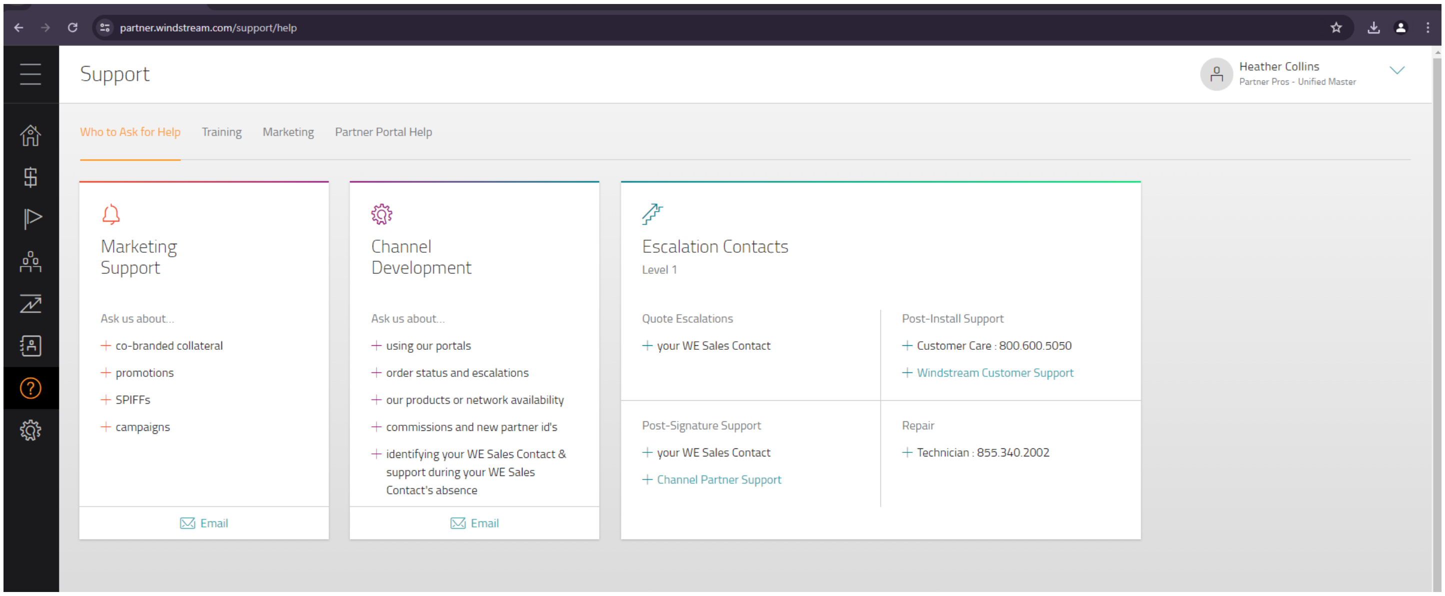


4. Contact will be deleted, and a confirmation will appear at the bottom of the screen

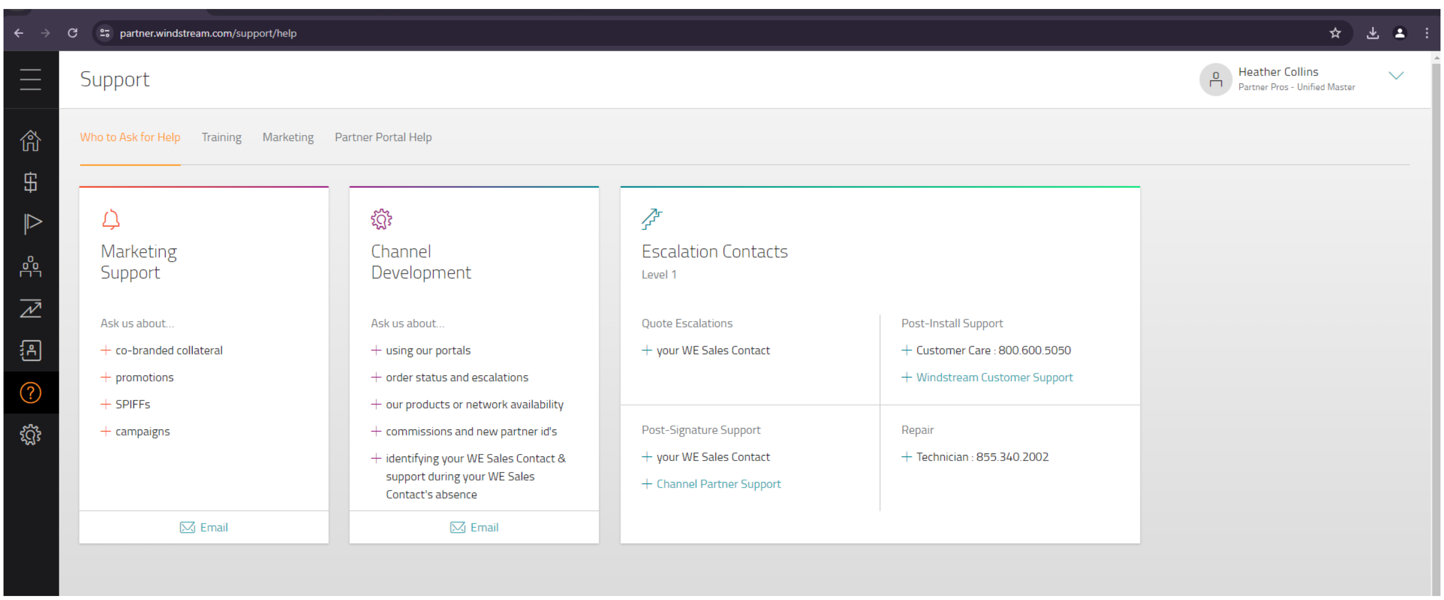


SUPPORT

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



WHO TO ASK FOR HELP

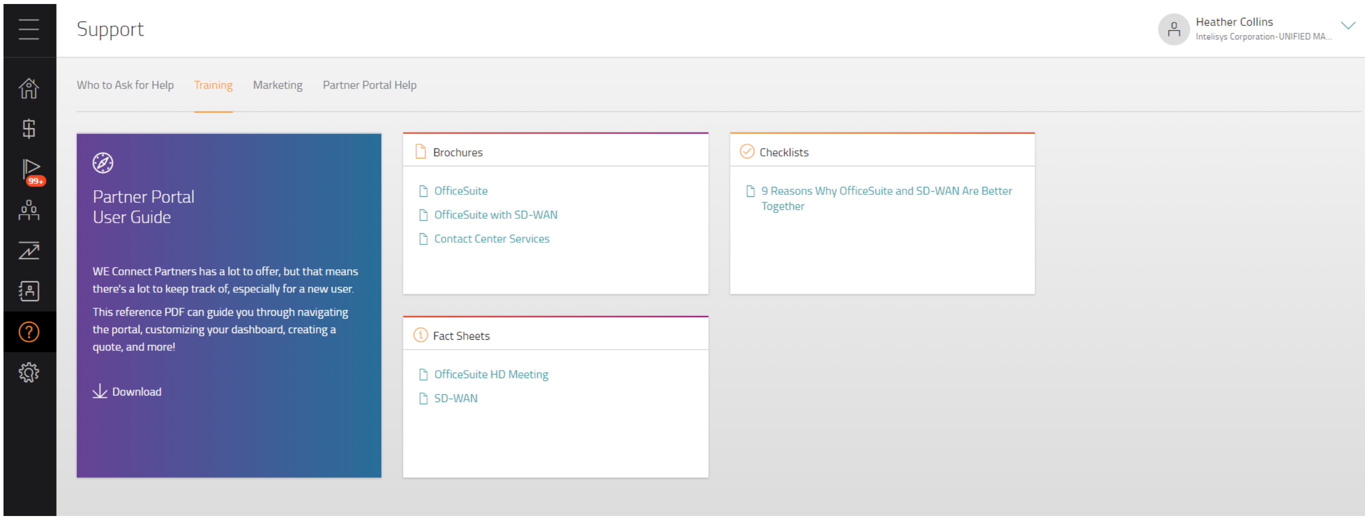


The Who to Ask for Help tab shows different resources that can be contacted depending on what information the user is looking for. Resources shown are:

- Marketing – co-branded collateral & support for promotions, spiffs, and campaigns
- Channel Development – portal support, orders status, products or network availability, commissions or new partner IDs, support for Sales Contact info/absence
- Escalation Contact – shows level 1 escalation paths

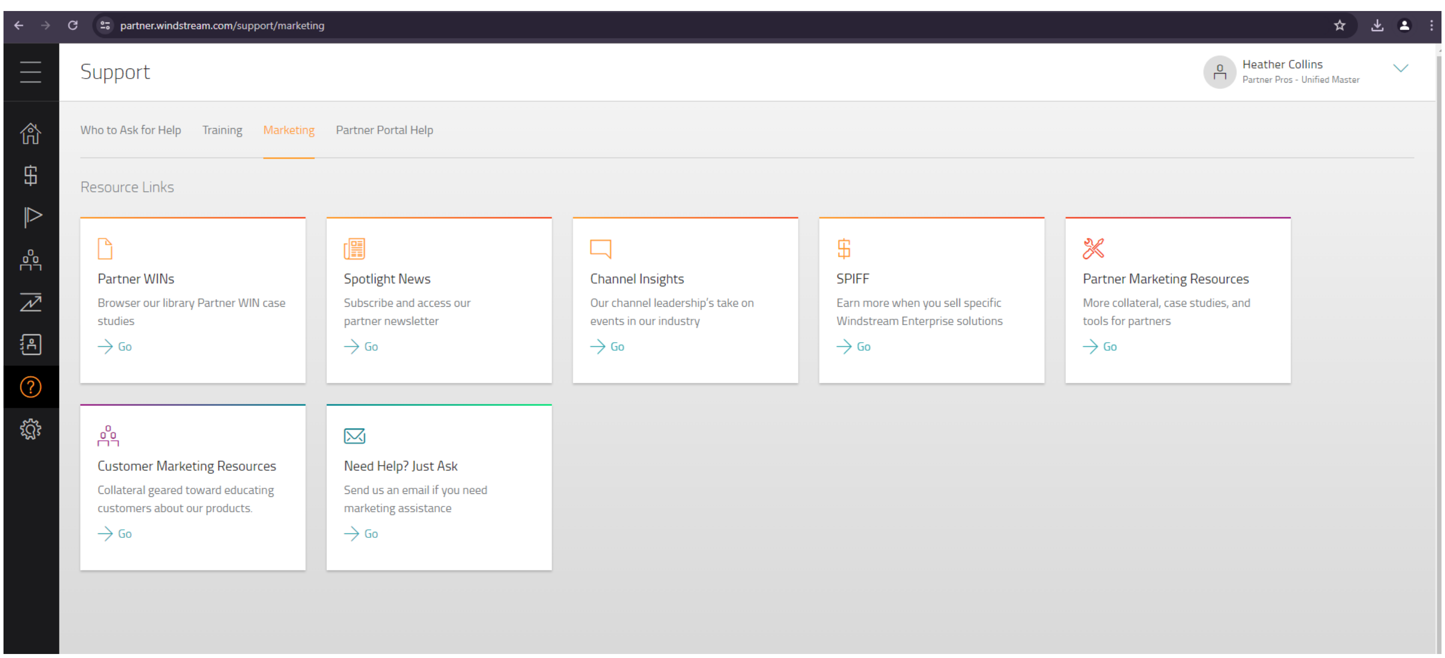
TRAINING

The Training tab offers information on assorted topics specifically for the Partner User. These resources are not intended for customer use. The OfficeSuite Training tile will be removed in June 2024.



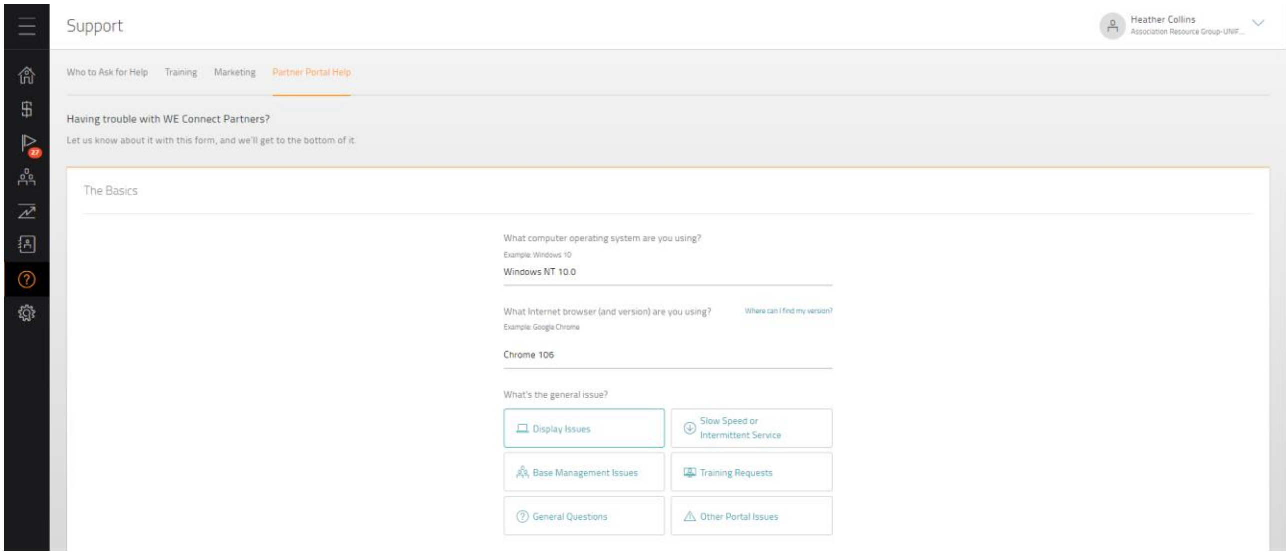
MARKETING

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

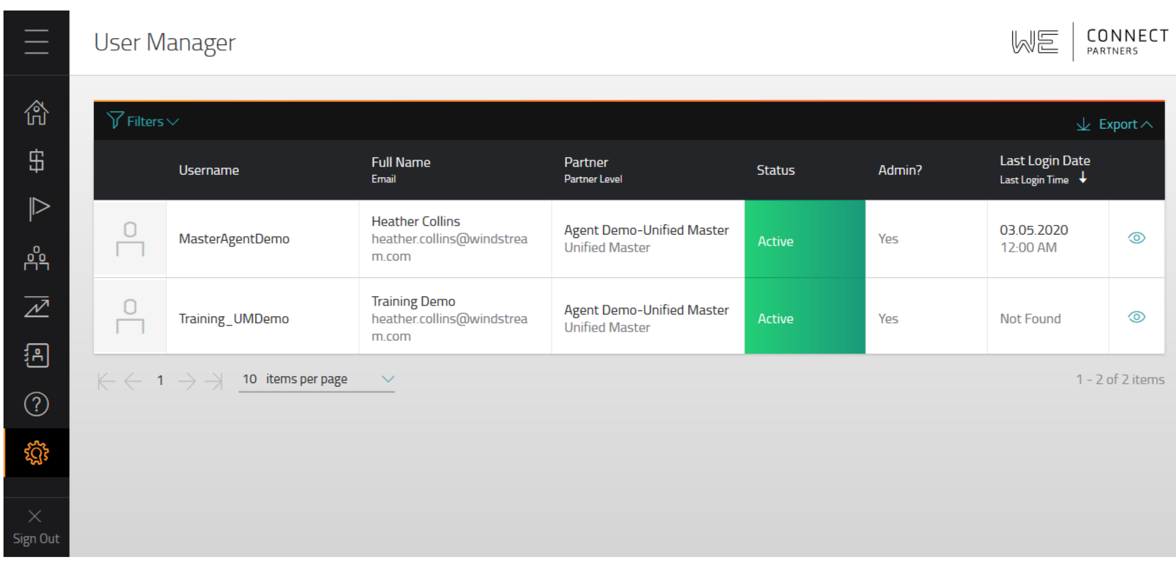
The Partner Portal Help screen allows the user to submit portal issues, questions, or training requests. Issues are sent to the Channel Development team to review and triage. The team will then coach the user, submit tickets to IT, or set up training. Users should provide as much information as possible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



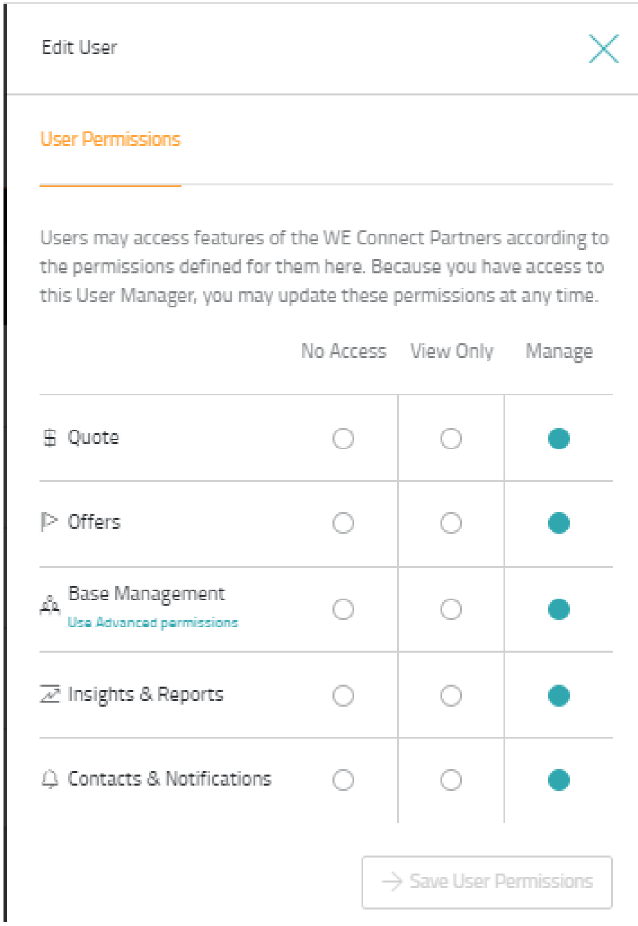
USER MANAGER

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.


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
Offers
Base Management
Use Advanced permissions
Insights & Reports
Contacts & Notifications
Save User Permissions