

# WE Connect Partners Portal

Version 2.9  
January 2025

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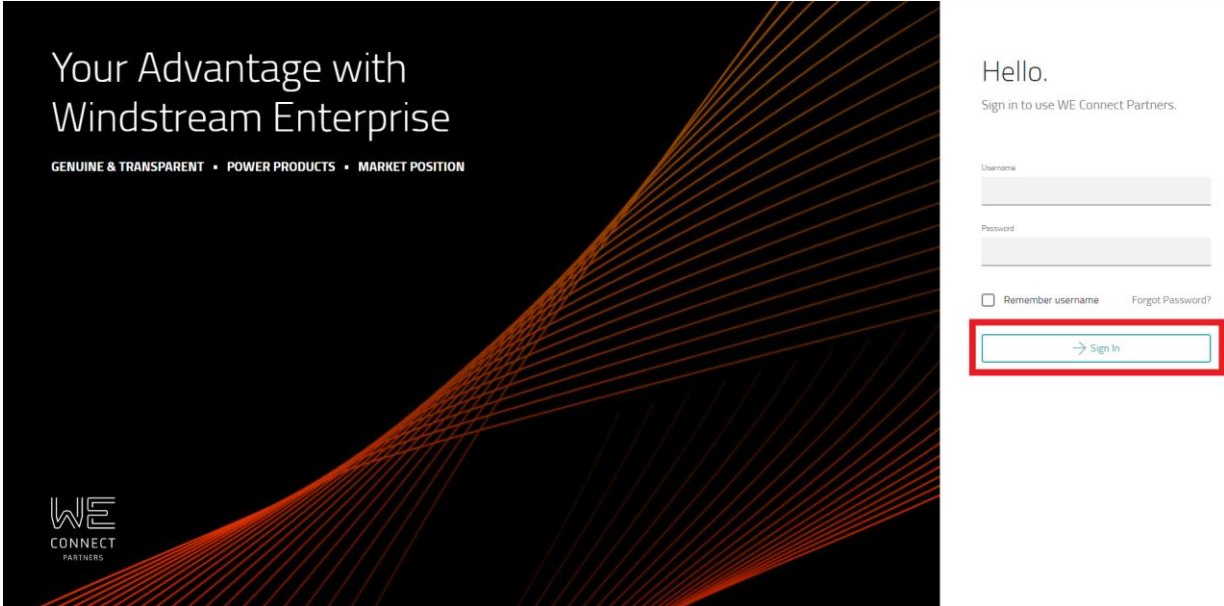
# HOW TO USE THIS GUIDE

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**.

## CPNI Agreement

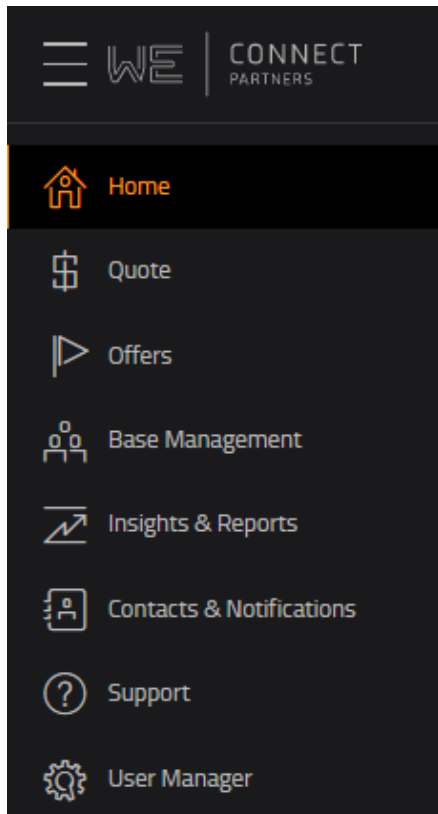
[Letter](#)[FAQ](#)

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](#)[X 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

Heather Collins

My Profile Hierarchy

**User Info**

Add Avatar

First Name: Heather

Last Name: Collins

Email: heather.collins@windstream.com

Phone (optional): 456.778.9797

Mobile (optional): 704.814.2901

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

**Password Preferences**

Reset My Password Now

How often should we prompt you to reset your password?

☐ Once every 90 days

☐ Once every 180 days

☐ Once every year

☒ Never

It is more secure to change your password often.

**Identities**

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

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

☐ Partner Pros - Unified Master

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

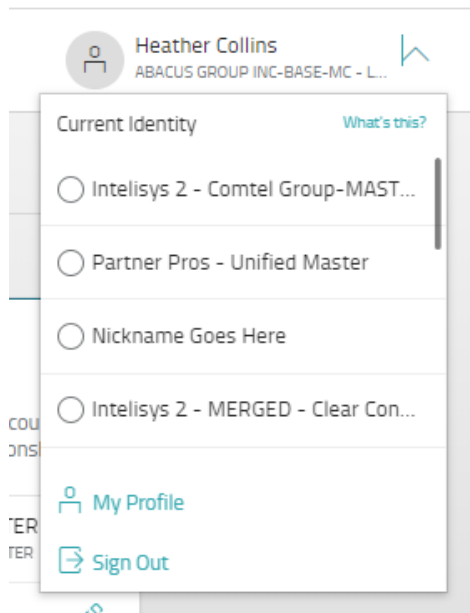
Make Selected Default

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

Save Changes

## OVERVIEW

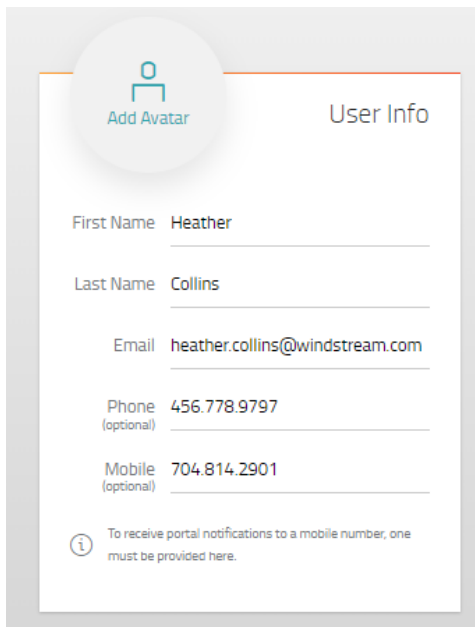
My Profile enables a user to manage their user information, password preferences and identities. The page can be accessed from the dropdown at the top right of the screen.



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## USER INFO

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

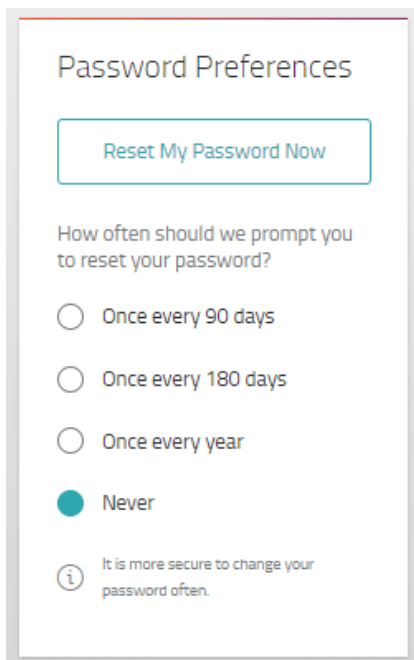


The User Info widget is a light gray rectangular box. At the top left is a circular avatar placeholder with a blue person icon and the text "Add Avatar". To its right is the title "User Info". Below the title are five input fields: "First Name" with the value "Heather", "Last Name" with "Collins", "Email"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

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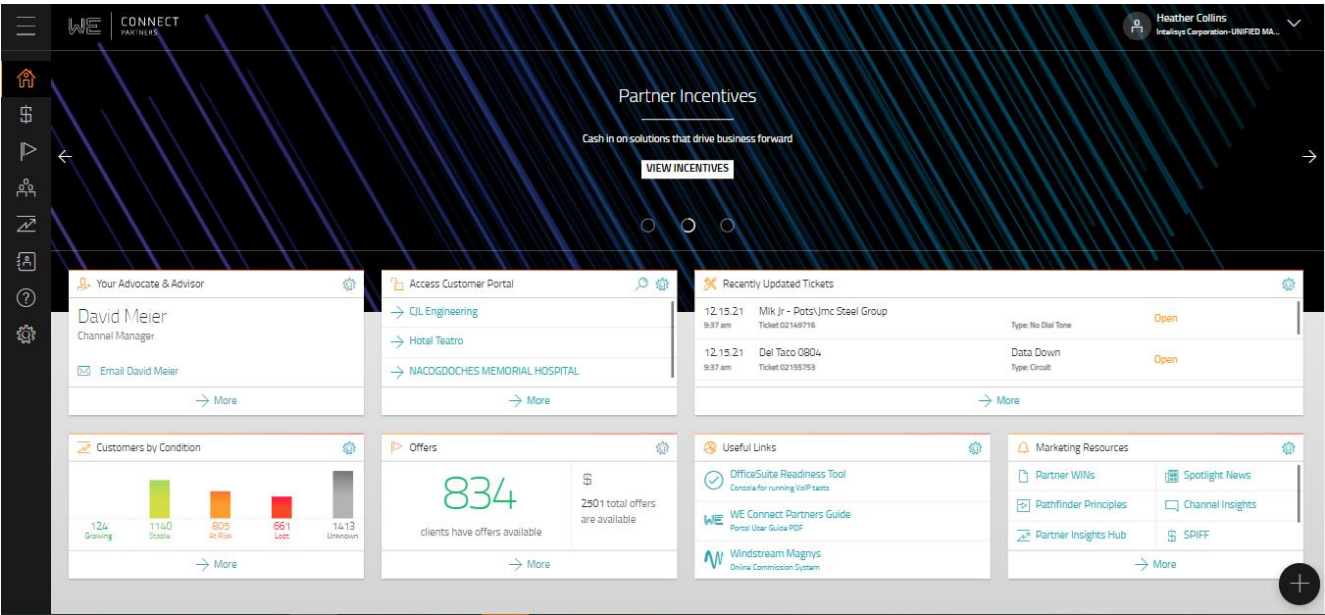
## PASSWORD PREFERENCES

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

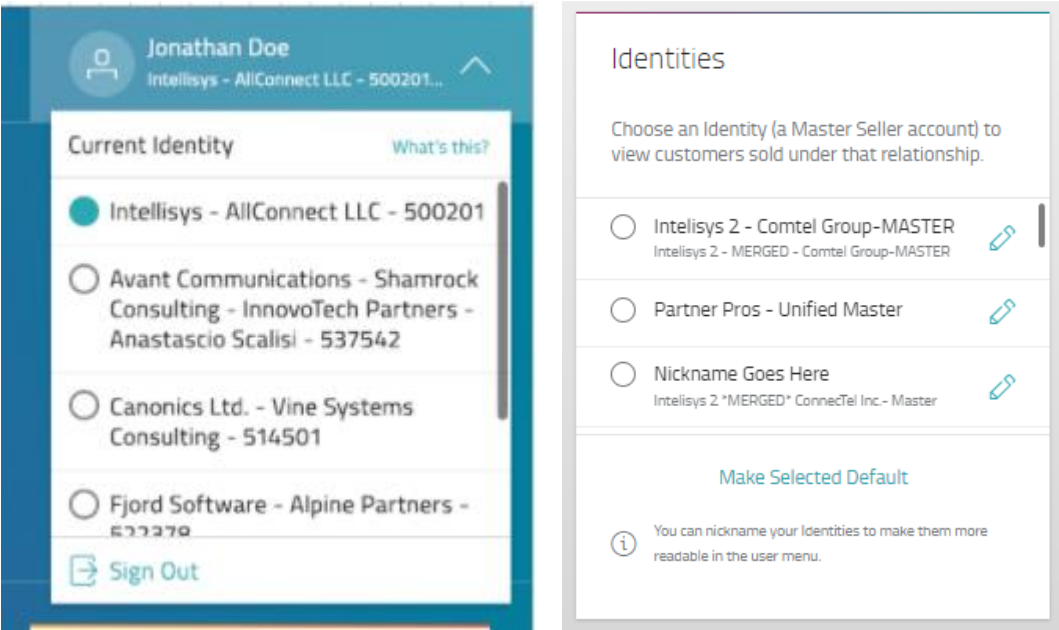


The Password Preferences widget is a light gray rectangular box. At the top is the title "Password Preferences". Below the title is a button labeled "Reset My Password Now". Underneath is the question "How often should we prompt you to reset your password?". There are four radio button options: "Once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

## USER IDENTITY



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

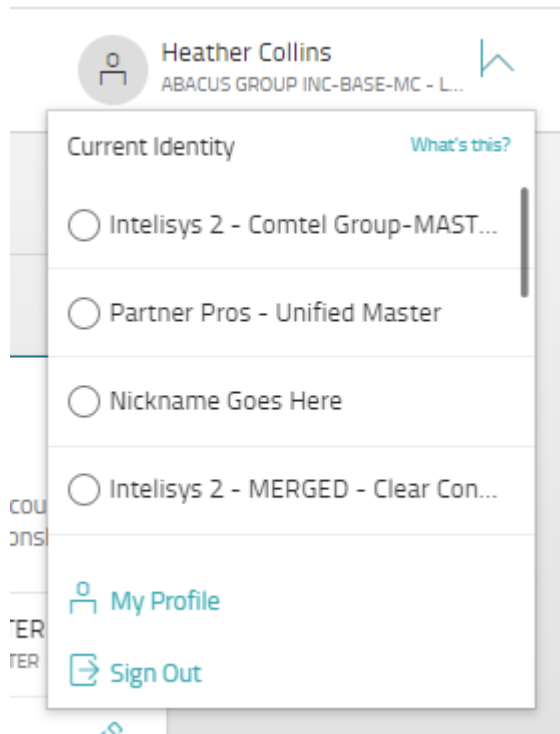


## CHANGING IDENTITIES

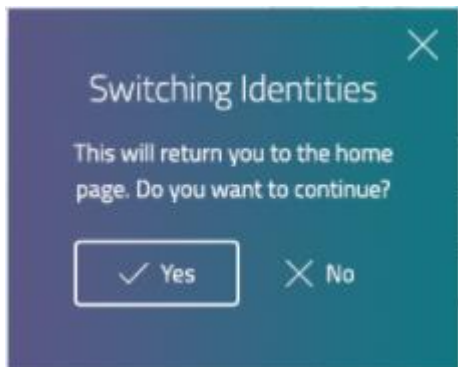
Users can change identities two ways: via the corner dropdown or the My Profile page.

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

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



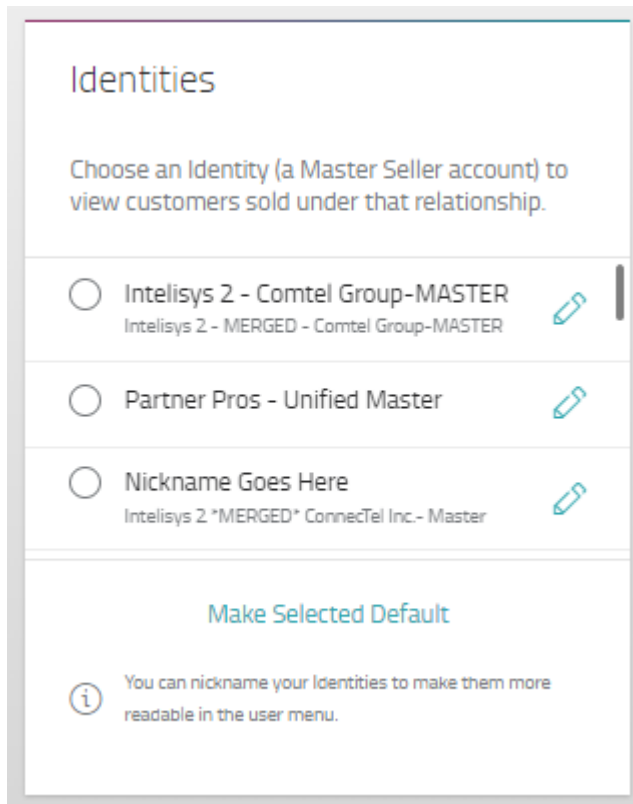
2. Portal shows an alert for confirmation.



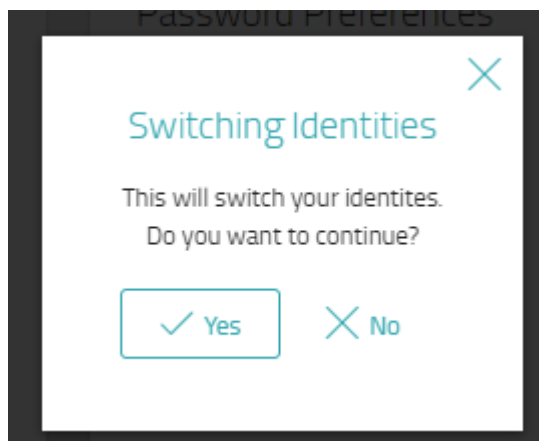
3. Click Yes. The portal resets to the home screen with new Identity loaded.

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

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



2. Portal shows an alert for confirmation



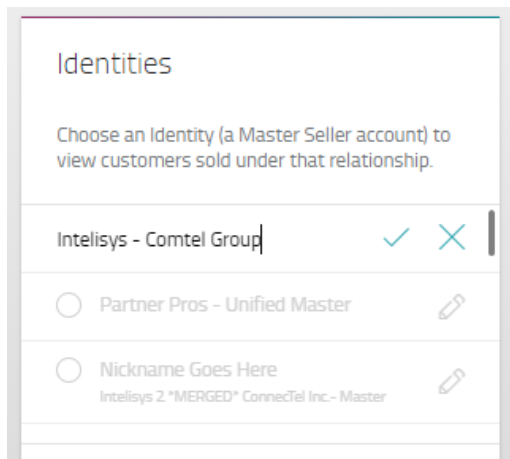
3. Click Yes. The portal resets to the homes screen with new Identity loaded

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## 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

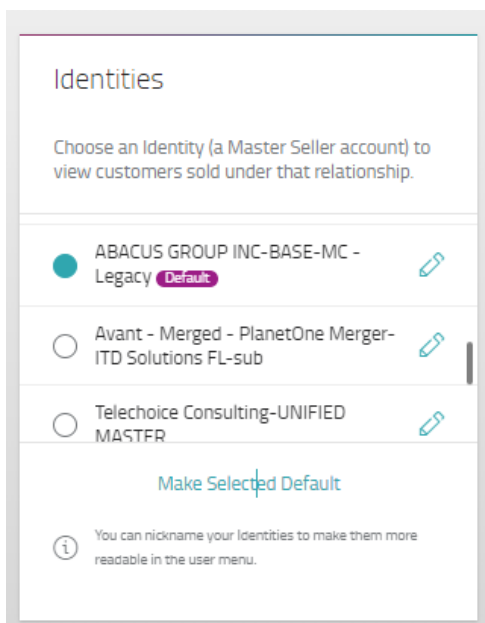


3. Click the checkmark

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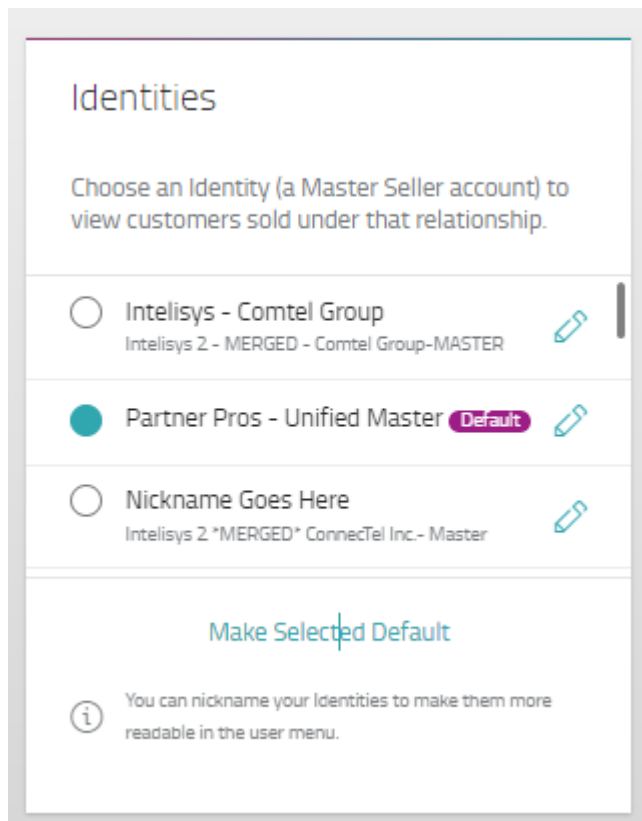
## SETTING DEFAULT IDENTITY

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.



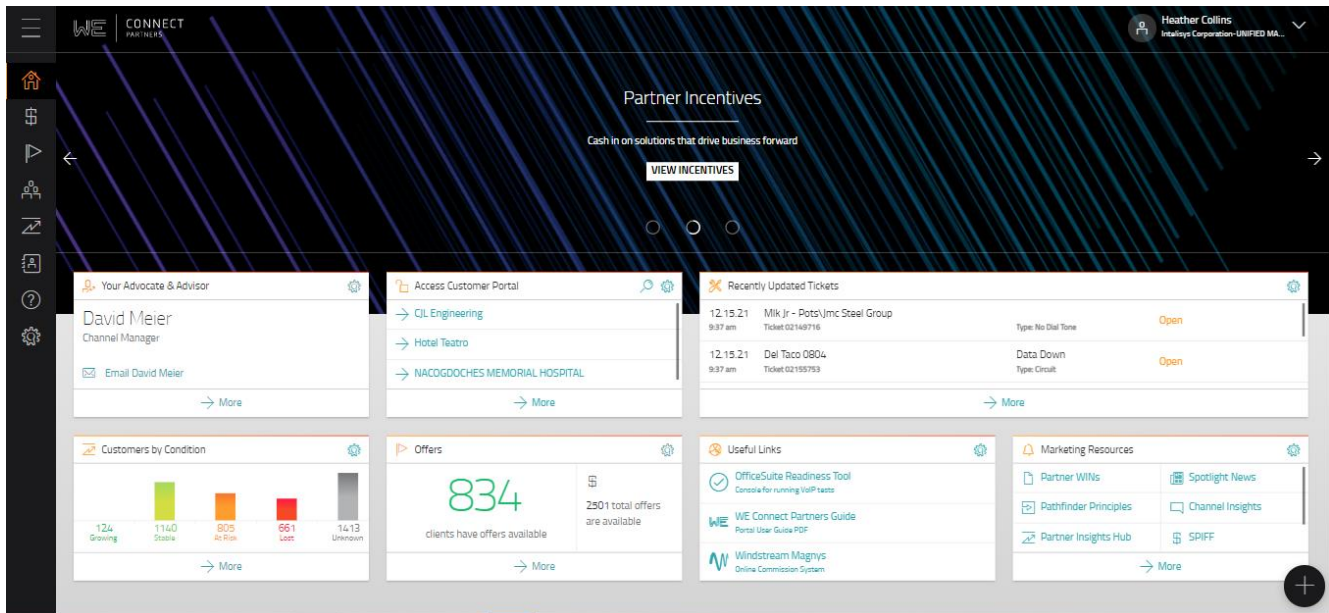
To change the selected default

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](#)

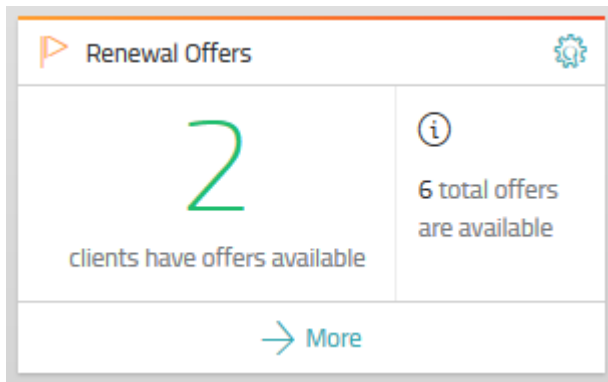
The Home screen shows a rotating banner with links to SPIFF information and the Channel Partner website.

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.

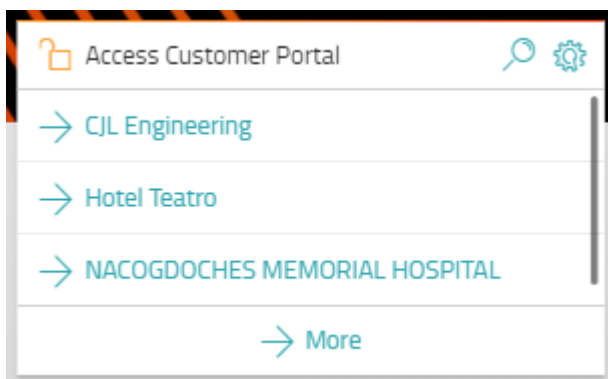
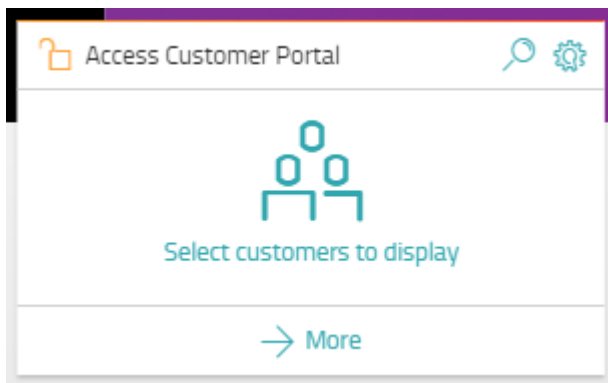
## WIDGETS

The current widgets available are:

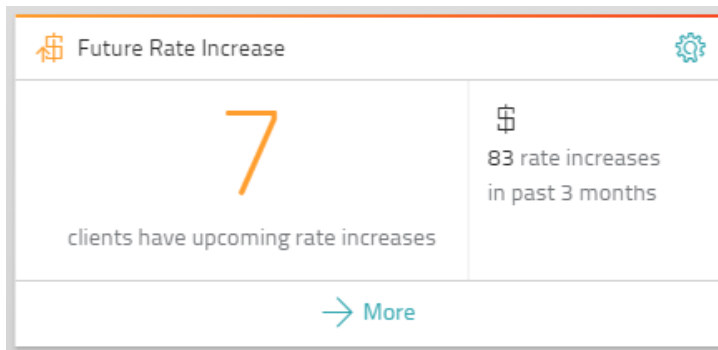
**Renewal Offers** – shows the number of customers in the user’s base with renewal offers along with the total number of offers available across the entire base. Clicking **More** navigates the user to the Offers page



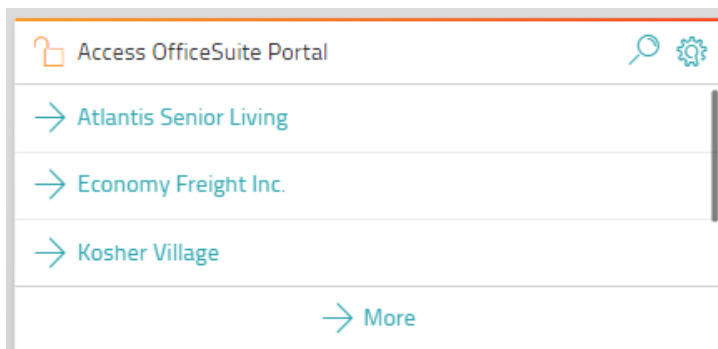
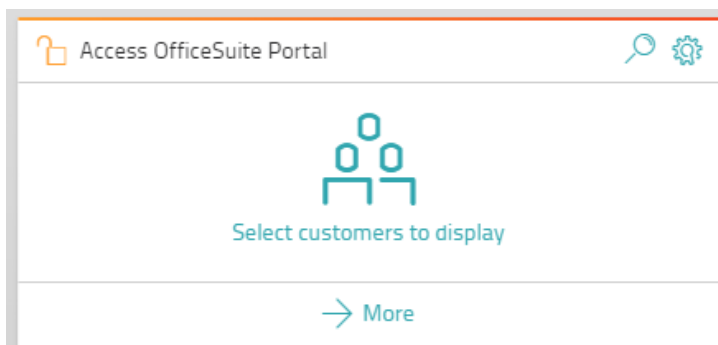
**Access Customer Portal** – users can choose up to 5 customers to show in the widget for click through access to WE Connect. Access must already be approved. Clicking **More** navigates the user to the Accounts dashboard



**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

Recently Updated Tickets			
01.10.20 6:18 pm	322720 , AGENT - AGENT DEMO Ticket INC000042806084	Static/Noise Type: Voice	Closed
12.15.19 11:22 pm	322720 , AGENT - AGENT DEMO Ticket INC000042598036	Connection Up - Can't Bro... Type: Circuit	Closed
<a href="#">→ More</a>			

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

Marketing Resources	
 Partner WINS	
 Spotlight News	
 Channel Insights	
<a href="#">→ More</a>	

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

Useful Links	
 OfficeSuite Readiness Tool Console for running VoIP tests	
 WE Connect Partners Guide Portal User Guide PDF	
 Windstream Magnys Online Commission System	

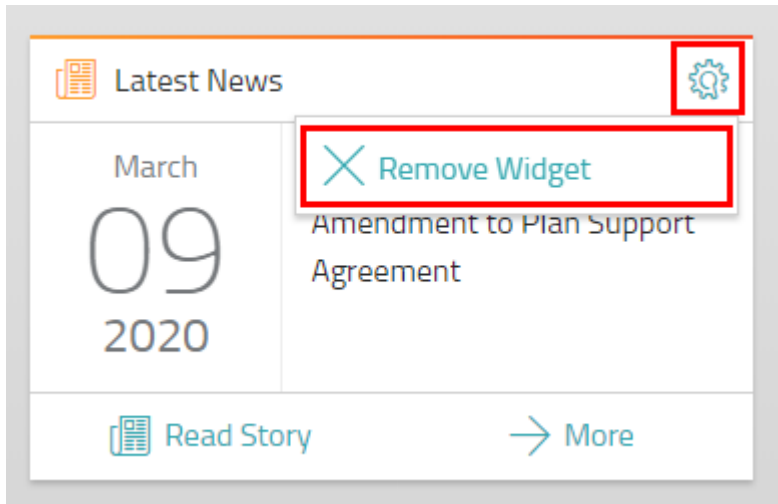
**Latest News** – shows the latest news article. Users can click “Read Story” to open the news link or click “More” to show a feed of recent Windstream news.

Latest News	
March <b>03</b> 2020	Windstream Enterprise to Demonstrate Benefits of High-Quality Medical Imaging at HIMSS20
<a href="#">Read Story</a>	<a href="#">→ More</a>

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## 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.

**ONE Partner Program by Windstream Enterprise**

[Learn more](#)

#### Access Customer Portal

- CL Engineering
- Hotel Teatro
- NACOGDOCHES MEMORIAL HOSPITAL
- More

#### Recently Updated Tickets

04/08/24 03:52 pm	Eoeea-Dcr-159-Harold Parker State Forest ... Ticket 04668001	Type:	Open
04/08/24 03:48 pm	Eoeea-Dcr-354-Tolland State Forest Hq Wies... Ticket 04667892	Proactive 4g Wireless Circuit Type Circuit	Open

→ More

#### Offers

362

clients have offers available

1086

total offers are available

→ More

#### Useful Links

- OfficeSuite Readiness Tool  
Console for running VoIP tests
- WE Connect Partners Guide  
Portal User Guide PDF
- Windstream Magisys  
Online Customer System

#### Marketing Resources

- Partner WNs
- Spotlight News
- Channel Insights
- More

#### My Profile

Intelisy Corporation-UNIFIED MASTER

67357126  
456-778-5797  
heather.collins@windstream.com

Show Partner Hierarchy

#### Your WE Sales Contact

OPEN 00094429-SCM Reports to R...

Channel Manager

Email OPEN 00094429-SCM Reports to Ronnie Beer

→ More

#### Latest News

March 22 2024

Construction Concludes for Fiber Internet Pilot-Project in Beaver County

Read Story → More

#### Future Rate Increase

94

483 rate increases in past 3 months

clients have upcoming rate increases

→ More

#### Access OfficeSuite Portal

- CHURCH ON THE MOVE
- Control Design
- FINANCIAL NORTHEASTERN
- More

Customize Widgets

Showing 10 of 10

Find Widgets

Recently Updated Tickets

A list of last 5 updated tickets. Links to Tickets

Remove

Marketing Resources

A list of links and documents that Windstream's partners may find useful.

Remove

Offers

Displays count of clients having offers and a count of total number of offers.

Remove

Latest News

Displays the latest news on the board.

Remove

Useful Links

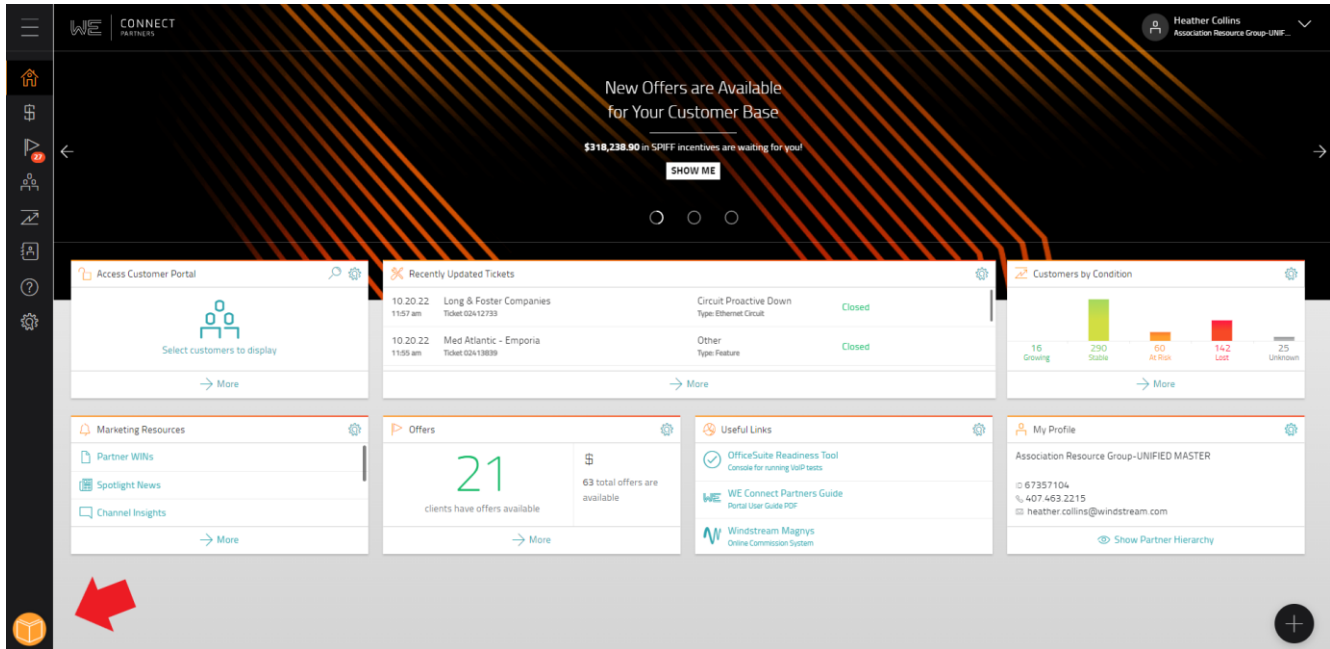
Displays important links for

My Profile

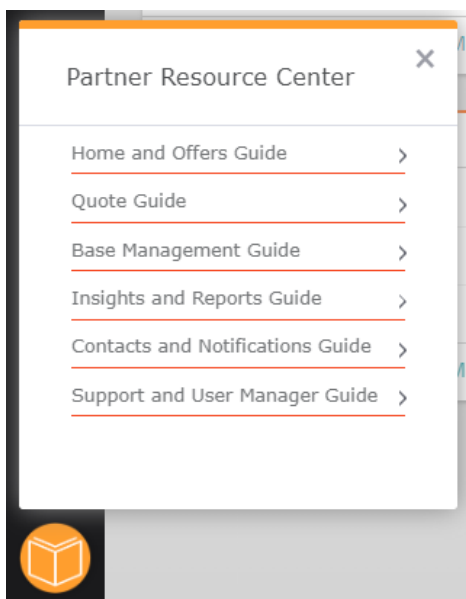
Displays the profile

## 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.

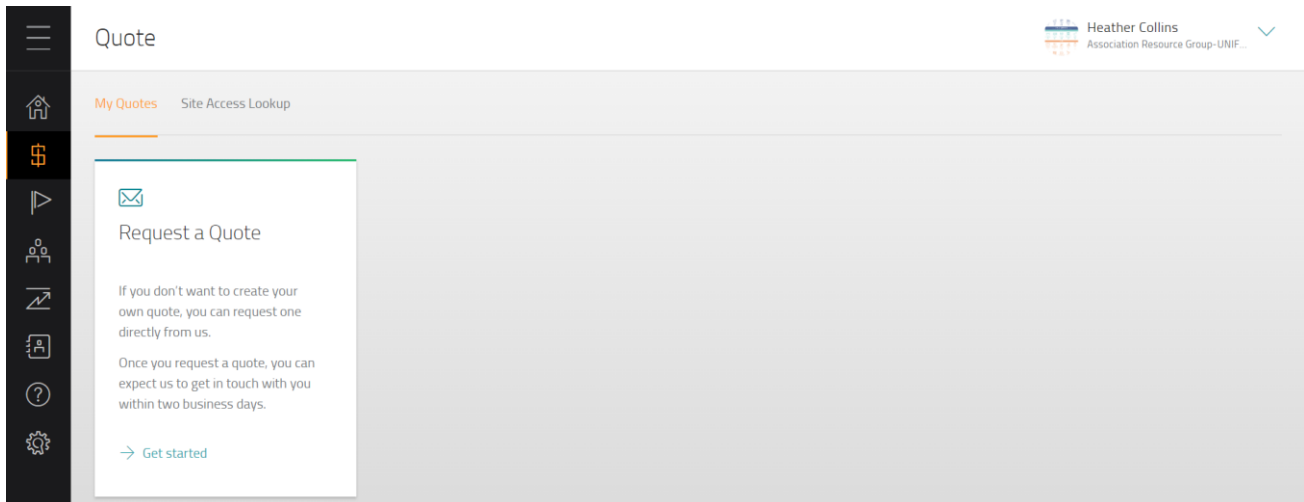


When the Resource Center is open, users can access information & guides for any area of the portal. There are walk-throughs for the most used pages giving lots of details about what is contained in each grid and what the information means to the user.



## 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

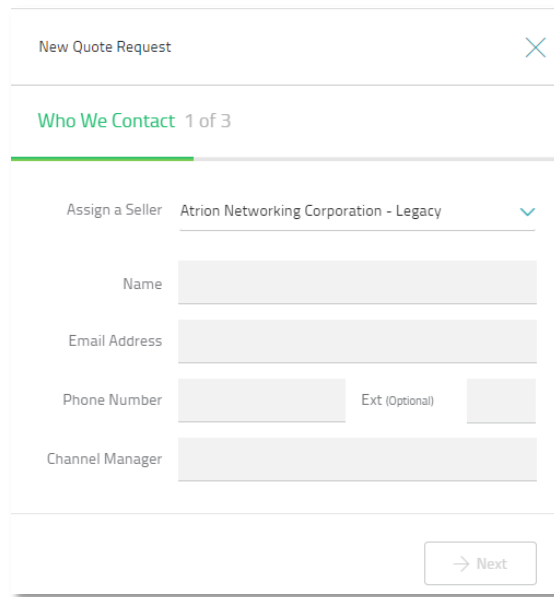
Using the Request a Quote button at the top of the My Quotes screen allows the user to submit a request for a **new logo** quote. This form replaces and digitizes the email that Partners are used to sending.

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

A screenshot showing the 'Request a Quote' flyout form on the right side of the screen. The form is titled 'New Quote Request' and has a close button (X). It is divided into three sections: 'Who We Contact: 1 of 3' (active), 'Assign a Seller', and 'Name'. The 'Who We Contact' section contains fields for 'Name', 'Email Address', 'Phone Number' (with an 'Ext (optional)' field), and 'Channel Manager'. The 'Assign a Seller' section has a dropdown menu currently showing 'Glacier Communications-Feliks Kilasi-53...'. At the bottom right of the form is a 'Next' button.

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

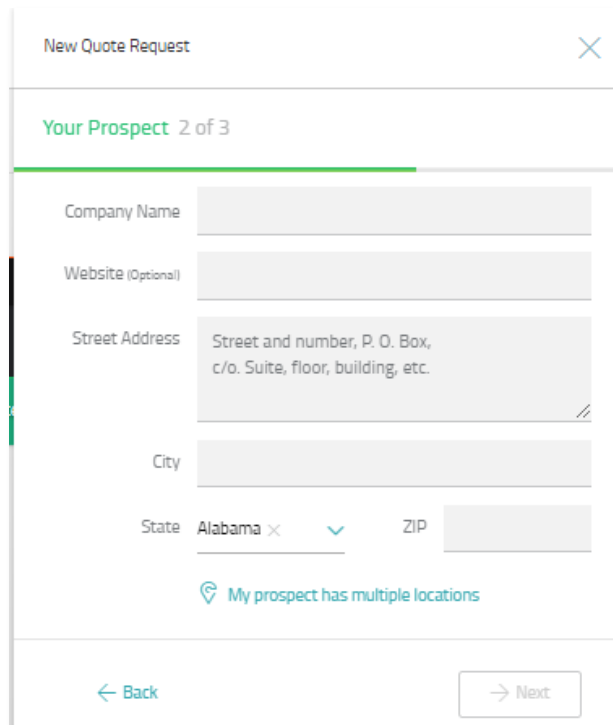
- Channel Manager (required)



A screenshot of a web form titled "New Quote Request" with a close button (X) in the top right corner. The form is on the "Who We Contact 1 of 3" step, indicated by a green progress bar. The form contains the following fields: "Assign a Seller" (a dropdown menu showing "Atrion Networking Corporation - Legacy" with a downward arrow), "Name" (a text input field), "Email Address" (a text input field), "Phone Number" (a text input field) and "Ext (Optional)" (a smaller text input field), and "Channel Manager" (a text input field). At the bottom right, there is a button labeled "→ Next".

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

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

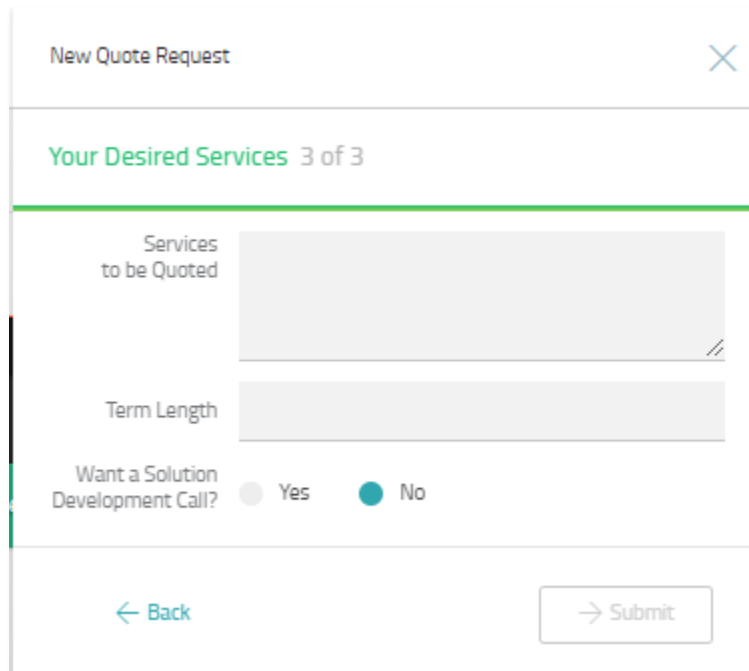


A screenshot of a web form titled "New Quote Request" with a close button (X) in the top right corner. The form is on the "Your Prospect 2 of 3" step, indicated by a green progress bar. The form contains the following fields: "Company Name" (a text input field), "Website (Optional)" (a text input field), "Street Address" (a text input field with placeholder text: "Street and number, P. O. Box, c/o. Suite, floor, building, etc."), "City" (a text input field), "State" (a dropdown menu showing "Alabama" with a close button (X) and a downward arrow), and "ZIP" (a text input field). Below the "State" dropdown, there is a link with a location pin icon that says "My prospect has multiple locations". At the bottom left, there is a button labeled "← Back", and at the bottom right, there is a button labeled "→ Next".

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

3. Your Desired Services: enter data into the following fields:

- Services to be Quoted (required)
- Term Length (required)
- Would you like a Solution Development call?



The screenshot shows a web form titled "New Quote Request" with a close button (X) in the top right corner. Below the title is a section header "Your Desired Services 3 of 3". The form contains three input fields: "Services to be Quoted" (a large text area), "Term Length" (a text field), and "Want a Solution Development Call?" (a radio button selection). The "No" radio button is selected. At the bottom, there are two buttons: "← Back" and "→ Submit".

New Quote Request

Your Desired Services 3 of 3

Services to be Quoted

Term Length

Want a Solution Development Call? ☐ Yes ☒ No

← Back → Submit

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.

The screenshot shows the 'Quote' section of the Windstream Connect Partners portal. The 'Site Access Lookup' tab is active. The form is titled 'Find Site' and contains the following fields and options:

- Street Address 1 (text input)
- Street Address 2 (Optional) (text input)
- Room (Optional) (text input)
- Floor (Optional) (text input)
- Building (Optional) (text input)
- City (text input)
- State: Alabama (dropdown)
- ZIP Code (text input)
- Country: USA (dropdown)
- Include Broadband (checked checkbox)
- Include Cable (checked checkbox)
- Include Cellular Broadband (checked checkbox)
- Minimum Speed: 128 Kbps (dropdown)
- Maximum Speed: 10,000 Mbps (dropdown)
- Submit button

On the right, there is an 'About Site Access Lookup' section with a disclaimer: 'Use this tool to determine if Windstream facilities are available at a given location. Results shown here are for Access Services only and do not constitute a quote or an offer for service.'

To use the tool:

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

The screenshot shows the results of the Site Access Lookup tool. The 'My Quotes' section is active, and the 'Site Access Lookup' tab is selected. The results are displayed under the heading 'Site Found'.

Site Found  
1939 STEEPLECHASE DR  
ROCK HILL, SC, 29732

[Change Address](#)

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

[Viewing 1 / 2 / 3 Year Terms](#) [Export PDF](#)

Site Info	Products Available	Lit / Near Buildings
Rate Center	ROCK HILL	
OCN Name	COMPORIUM, INC.	
CSWC	RCHLSCXB	
NPA / NXX	803/323	
Cable Provider		
Loop Length	24943.5	
LATA	422	

5. Click Products Available

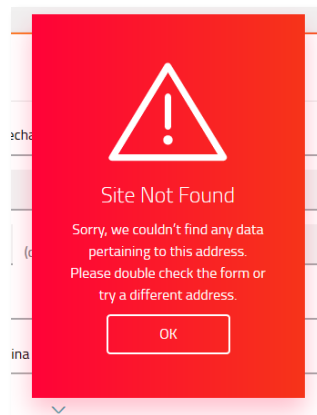
- a. Product – the access product available
- b. Voice Required? - is voice required to have this access
- c. Confidence Color – depicts how likely it is that this service is available

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.

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

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

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

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

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

Offer Details

?

✕

**Credit Amount:** single, one-time credit of \$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

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

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

Send Offer
?
X

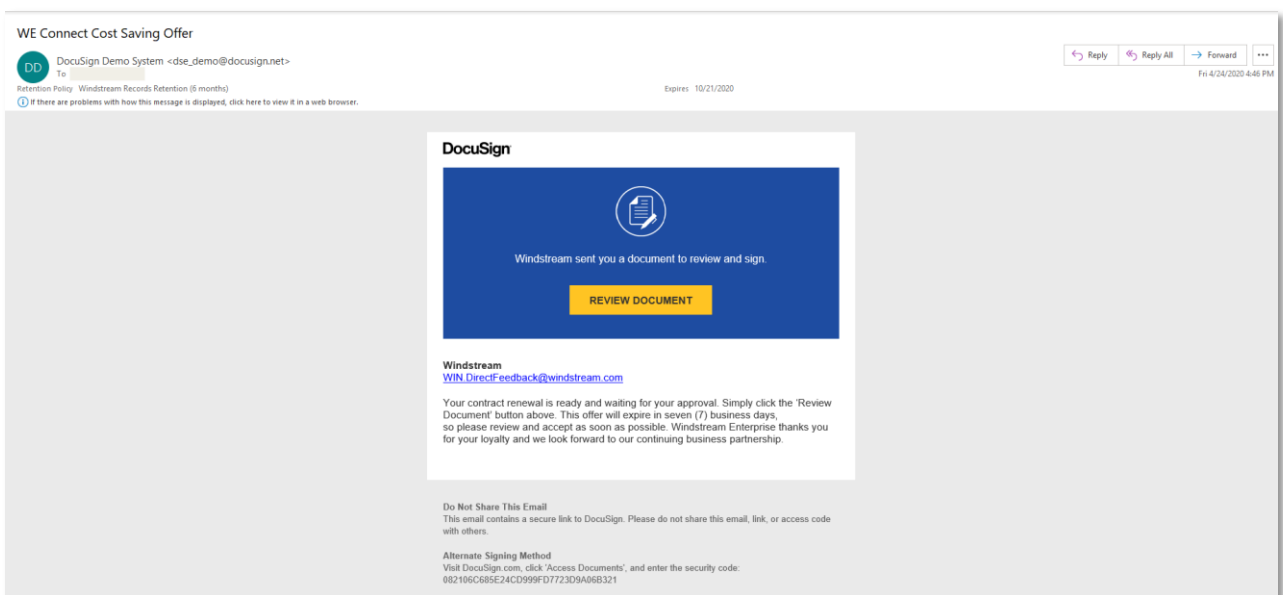
Earn up to **\$1,749.07 SPIFF** when you renew this account for **36 months** with a **\$5,247.22 customer credit**

Customer Name
Customer Email
Message (optional)

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

Send

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



Please Review & Act on These Documents

Windstream  
Windstream

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

[View More](#)

Please review the documents below.

**CONTINUE** **OTHER ACTIONS ▾**


The Agreement shall be deemed amended as follows:

1. The Customer has one or more portions of Service(s) scheduled to become out of term or are currently out of term, and due to this state, WIN has or may be scheduled to remove any discounts and recurring credits in place and move the Customer to a month-to-month term with an increase above tariffed base rates. In exchange for a new forty-eight (48) months renewal ("Renewal Term"), WIN agrees to leave pricing for the Service(s) as it was during the January, 2018 billing cycle. Any one-time credits on the bill during the stated month will be removed if applicable. Historic billing can be viewed online via the Customer Portal.
2. In consideration of this Renewal Term, WIN will give the Customer one (1) credit(s) of \$95.65.41 to be applied to the Customer's first bill month(s) after implementation of this renewal. The credit amount will be distributed across the below account(s) based on the Service(s) in each account.
3. This Renewal Term and price adjustment applies to all the billing account number(s) listed below. All accounts will be updated to a continuous contract end date regardless of current individual current contract end dates.  
Account Number(s): 2467434
4. If Customer terminates the Agreement after commencement of the Renewal Term for any reason other than for cause, Customer shall incur liability for early termination as set forth in the Agreement, as well as the full amount of the applicable credit(s).

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

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

Customer: RADIO FREE ASIA Address:

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

Windstream Acceptance: Print Name/Title Date

Confidential and Proprietary  
Rev Date: October 2019

DocuSign

Change Language - English (US) Terms Of Use & Privacy Copyright © 2020 DocuSign Inc. | 10/18

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

**CONTINUE** **OTHER ACTIONS ▾**

Finish Later

Print & Sign

Assign to Someone Else

Decline to Sign

Help & Support [↗](#)

About DocuSign [↗](#)

View History

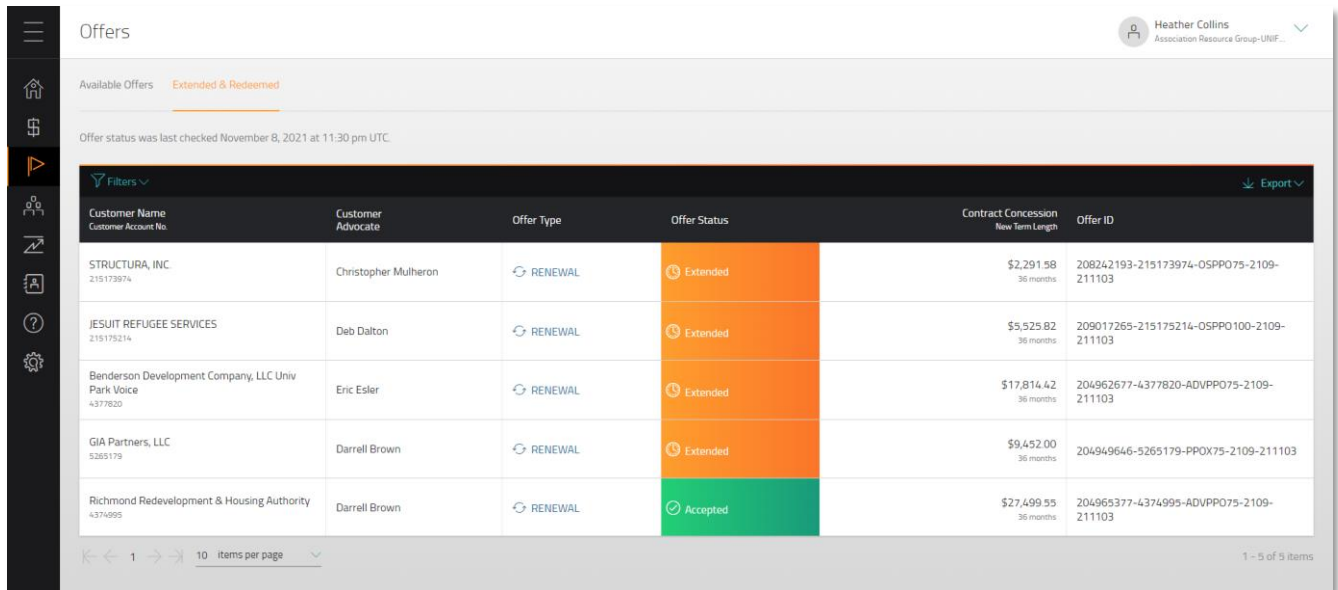
View Certificate (PDF) [↗](#)

Session Information

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

## EXTENDED & REDEEMED OFFERS

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



The screenshot shows the 'Offers' screen with the 'Extended & Redeemed' tab selected. The table lists five offers, all of which are 'RENEWAL' type and have an 'Extended' status, except for the last one which is 'Accepted'. The table columns are: Customer Name, Customer Advocate, Offer Type, Offer Status, Contract Concession, and Offer ID. The 'Offer Status' column uses color coding: orange for 'Extended' and green for 'Accepted'.

Customer Name Customer Account No.	Customer Advocate	Offer Type	Offer Status	Contract Concession New Term Length	Offer ID
STRUCTURA, INC. 215173974	Christopher Mulheron	RENEWAL	Extended	\$2,291.98 36 months	208242193-215173974-OSPP075-2109-211103
JESUIT REFUGEE SERVICES 215175214	Deb Dalton	RENEWAL	Extended	\$5,525.82 36 months	209017265-215175214-OSPP0100-2109-211103
Benderson Development Company, LLC Univ Park Voice 4377820	Eric Esler	RENEWAL	Extended	\$17,814.42 36 months	204962677-4377820-ADVPP075-2109-211103
GIA Partners, LLC 5265179	Darrell Brown	RENEWAL	Extended	\$9,452.00 36 months	2049646-5265179-PPOX75-2109-211103
Richmond Redevelopment & Housing Authority 4374999	Darrell Brown	RENEWAL	Accepted	\$27,499.55 36 months	204965377-4374999-ADVPP075-2109-211103

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

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

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

Custom Offer Request

×

Who we contact? 1 of 3

Assigned Partner

ARG-Merged-GLOBAL NETWORK SERVICES, INC-Agent-17616

- Legacy

Customer Contact Name

Heather Collins

Customer Contact Email

Heather.collins@windstream.com

→ Next

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

Custom Offer Request

Your Customer 2 of 3

Customer Name Spartans Rock, LLC DBA Hilton Garden Inn

Account Numbers Select

☐ Select All

Search

☐ 208159288

☐ 2369900

☐ 5818157

Back

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.

Custom Offer Request

Your Desired Offer 3 of 3

New Requested Term 36 months

Requested Concession/Credit

Customer/Partner Split

☒ 100/0
☐ 50/50
☐ 75/25

Rate Lock Addendum Needed?

☐ Yes
☒ No

Reasoning/Additional Notes

Back

Submit

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



Success!

Your customer COT Offer request has been submitted!

Thank you for submitting your request. Here's what happens next:

- **Review:** Our Channel team will carefully review your submission.
- **Communication:** If we need any more details, we'll be in touch.
- **Approval:** Once everything is in order, we'll submit your request for approval.
- **Finalization:** After approval, we'll send you the new offer paperwork.

We appreciate your partnership and look forward to continuing to serve your needs!

OK

## BASE MANAGEMENT - ACCOUNTS

Base Management

Accounts Orders Trouble Tickets

Customer access status was last checked January 16, 2025 at 5:00 am UTC.

Filters Search Accounts... Export

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status ↑	Contract Exp. Date	MBR
Hospital And Health Assoc Of Pa Main Rate Inc	Intelisys 2 -Merged- Associates Inc-18477052_000 - Legacy	Channel Development	Access Approved	05.09.2025	
John Fabick Tractor Co - Fenton Mpls Main	Intelisys -Merged-Worldnet Solutions Inc.-18481113_000 - Legacy	Channel Development	Access Approved	06.30.2018	
Delmar Gardens West Main	Intelisys - Worldnet Solutions - 540083	Bryan Tipton	Access Approved	10.02.2027	
Southeastern Construction Main	Intelisys Communications Inc-Donald Ready-500577 - Legacy	Channel Development	Access Approved	02.25.2025	\$2,714.89

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

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

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

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

- Customer Name & Account Number
- Seller Name & ID
- 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 Accounts
- Upcoming Rate Increase
- Offers Available
- Decomm Eligible

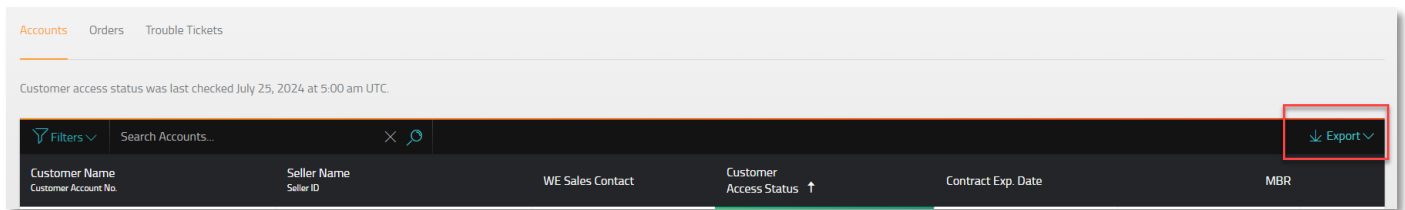
Search by keyword or Company Account Name

## EXPORT BASE LIST

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

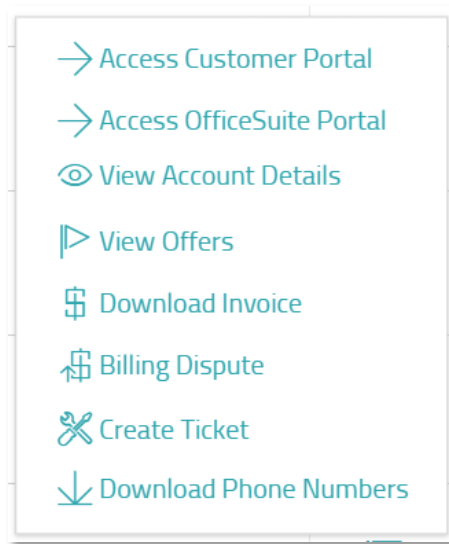
- Customer Name
- Service Location Account Number
- Service Location Name
- Service Address
- Service Status
- Billing Status
- Contract Expiration Date
- Auto Renew Status
- Current MBR
- Last Rate Increase Date
- Future Rate Increase Date
- WE Sales Contact
- Assigned Partner Seller Name
- Assigned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



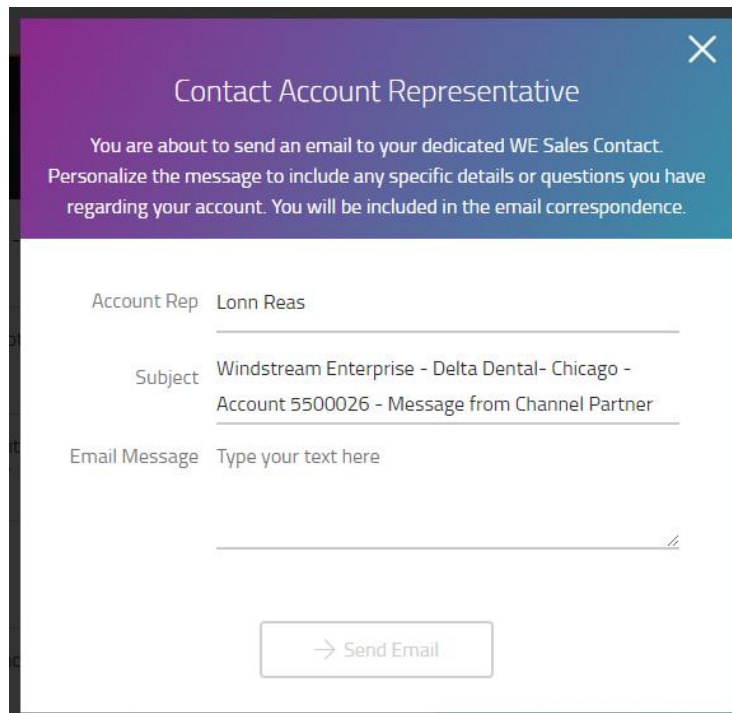
- Access Customer Portal – routes user to the customer’s account in WE Connect (see [Customer Portal Access](#) for more details)
- View Account Details – fly out window with more detailed information about that customer location
- View Offers – popup modal to show the user any predefined renewal offers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



The image shows a 'Contact Account Representative' pop-up window. It has a purple header with a close button (X) in the top right corner. Below the header, there is a message: 'You are about to send an email to your dedicated WE Sales Contact. Personalize the message to include any specific details or questions you have regarding your account. You will be included in the email correspondence.' The form contains three fields: 'Account Rep' with the value 'Lonn Reas', 'Subject' with the value 'Windstream Enterprise - Delta Dental- Chicago - Account 5500026 - Message from Channel Partner', and 'Email Message' with the placeholder text 'Type your text here'. At the bottom, there is a button labeled '→ Send Email'.

Contact Account Representative

You are about to send an email to your dedicated WE Sales Contact. Personalize the message to include any specific details or questions you have regarding your account. You will be included in the email correspondence.

Account Rep Lonn Reas

Subject Windstream Enterprise - Delta Dental- Chicago - Account 5500026 - Message from Channel Partner

Email Message Type your text here

→ Send Email

---

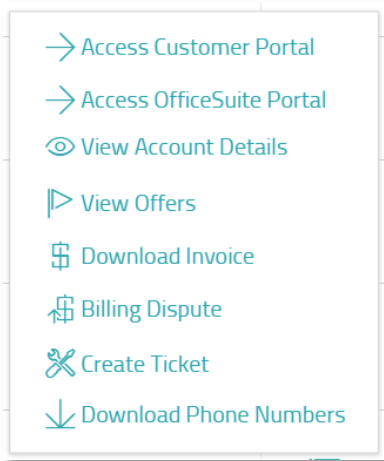
## CUSTOMER PORTAL ACCESS

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.

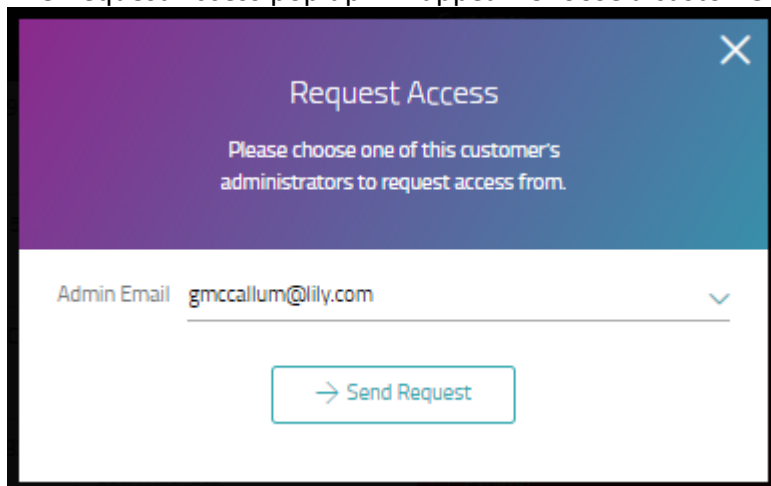
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### REQUESTING CUSTOMER ACCESS

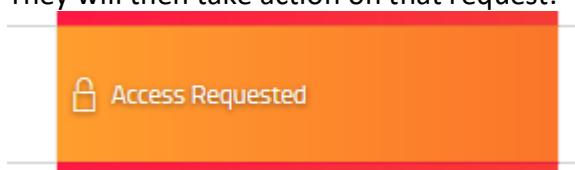
1. Click the Menu icon and Access Customer Portal



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

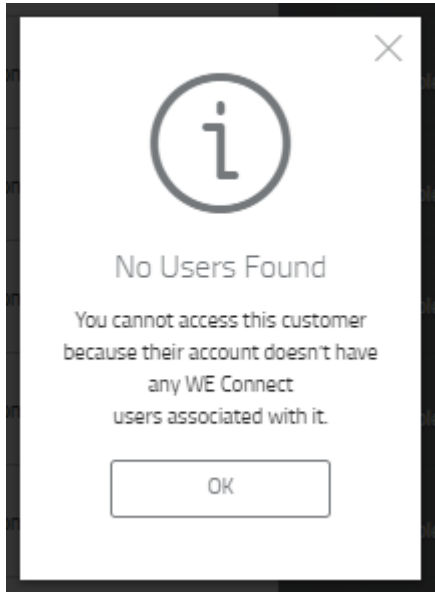


3. The Customer Access Status field for that Customer will turn orange with a status of "Access Requested". The admin selected will receive an email notifying them of the user's request. They will then take action on that request.



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

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

Base Management

Heather Collins

Sandler Partners-IT Management ...

Accounts

Orders

Trouble Tickets

Customer access status was last checked May 3, 2024 at 5:00 am UTC.

Filters

Search Accounts...

Export

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status ↑	Contract Exp. Date	MBR
Mas - Huntsville <span>Main</span> <span>Offers</span>	Sandler Partners-It Management & ...	Brian Klein	Access Approved	12.19.2025	\$1,382.28
Mississippi Senior Care-Ms <span>Main</span> <span>Offers</span>	Sandler Partners-It Management & ...	Bryan Tipton	Access Approved	04.07.2026	
Core Cycle & Outdoor <span>Main</span>	Sandler Partners-It Management & ...	Customer Care	Access Approved	12.30.2023	
Central Southern Construction <span>Main</span> <span>Offers</span>	Sandler Partners-It Management & ...	Customer Care	Access Approved	01.04.2022	

→ Access Customer Portal

→ Access OfficeSuite Portal

View Account Details

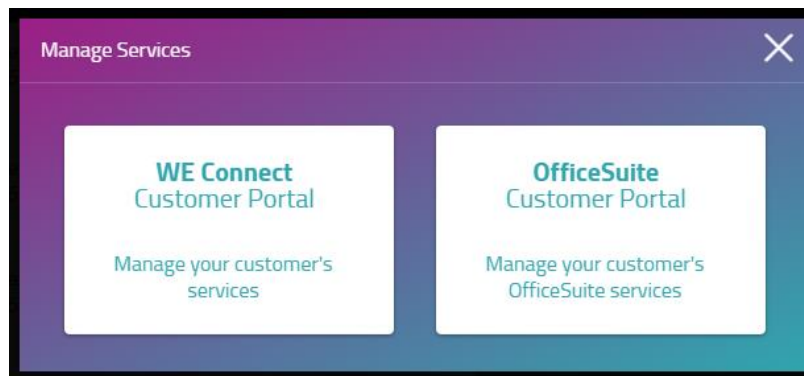
View Offers

Download Invoice

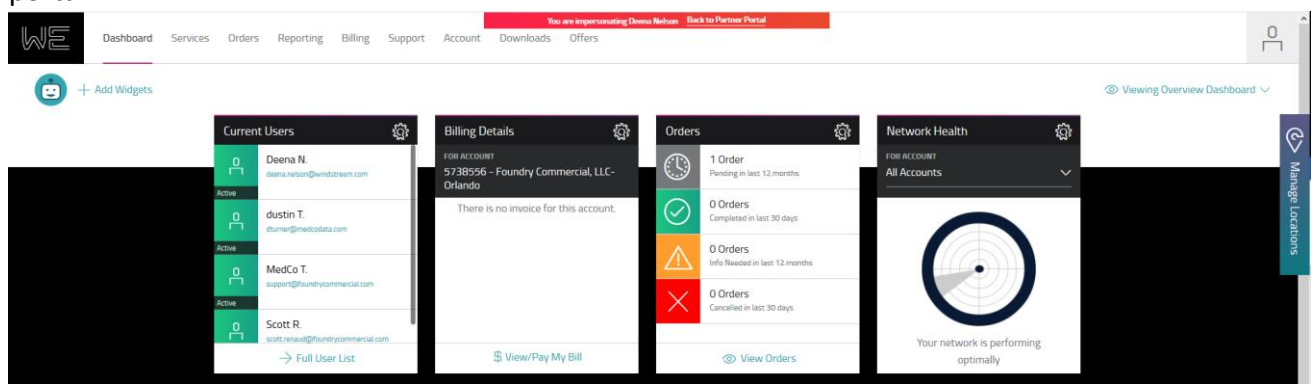
Create Ticket

Download Phone Numbers

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



- 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



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

## Via the Accounts Grid Location Menu

Base Management

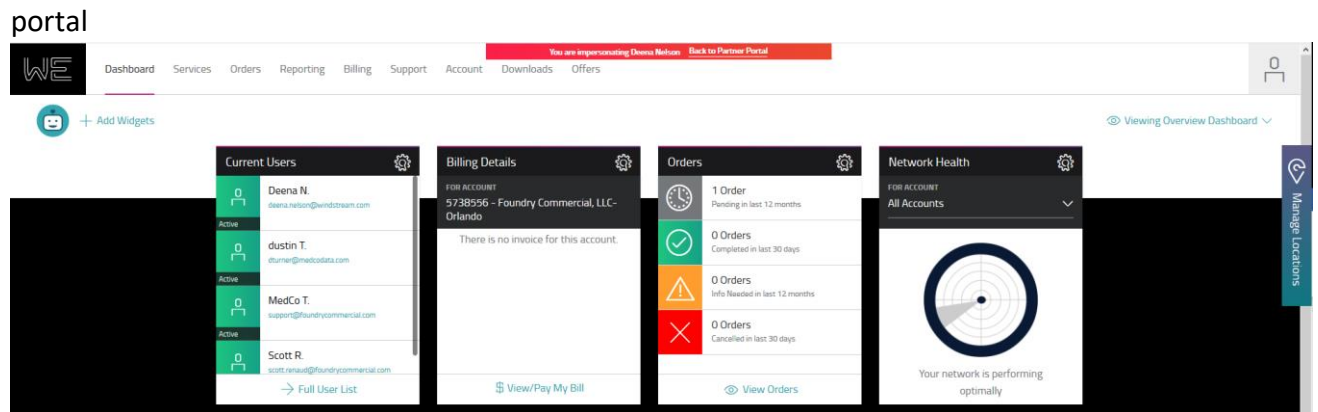
Accounts Orders Trouble Tickets

Customer access status was last checked May 3, 2024 at 5:00 am UTC.

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status	Contract Exp. Date	MBR
Mas - Huntsville Main Offers	Sandler Partners-It Management & ...	Brian Klein	Access Approved	12.19.2025	\$1,382.28
Mississippi Senior Care-Ms Main Offers	Sandler Partners-It Management & ...	Bryan Tipton	Access Approved	04.07.2026	
Core Cycle & Outdoor Main	Sandler Partners-It Management & ...	Customer Care	Access Approved	12.30.2023	
Central Southern Construction Main Offers	Sandler Partners-It Management & ...	Customer Care	Access Approved	01.04.2022	

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

- Find that Customer on the Accounts tab
- Click the location Menu icon
- Click **Access Customer Portal**
- 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



- 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

Base Management

Accounts Orders Trouble Tickets

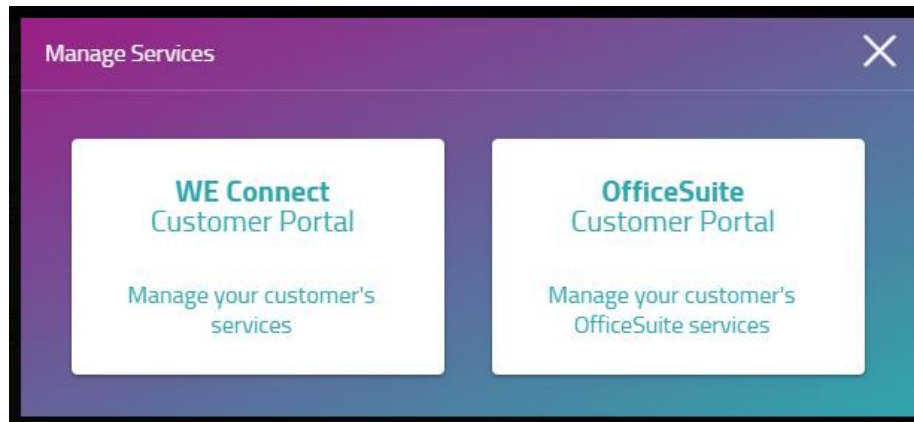
Customer access status was last checked May 3, 2024 at 5:00 am UTC.

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status ↑	Contract Exp. Date	MBR
Mas - Huntsville Main Offers	Sandler Partners-It Management &	Brian Klein	Access Approved	12.19.2025	\$1,382.28
Mississippi Senior Care-Ms Main Offers	Sandler Partners-It Management &	Bryan Tipton	Access Approved	04.07.2026	
Core Cycle & Outdoor Main	Sandler Partners-It Management &	Customer Care	Access Approved	12.30.2023	
Central Southern Construction Main Offers	Sandler Partners-It Management &	Customer Care	Access Approved	01.04.2022	

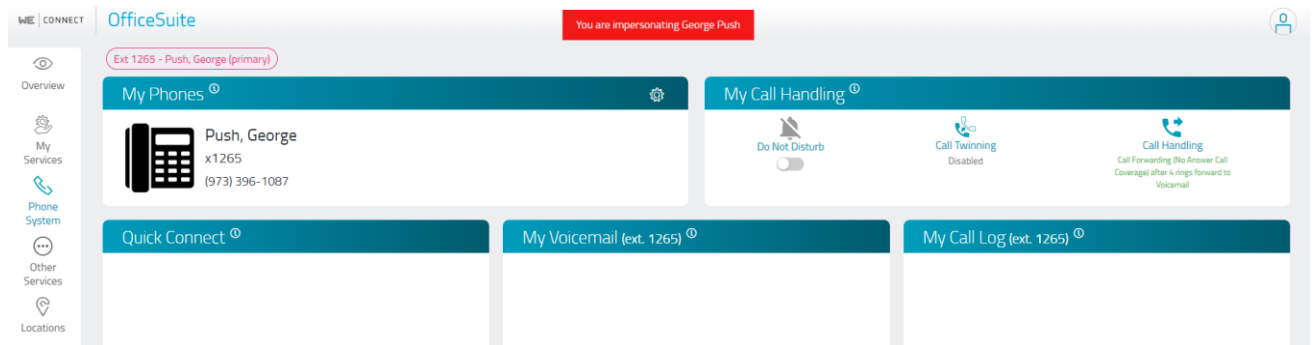
Export

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

- Find that Customer on the Accounts tab
- Click the green Customer Access Status cell in the grid
- 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

Base Management

Accounts Orders Trouble Tickets

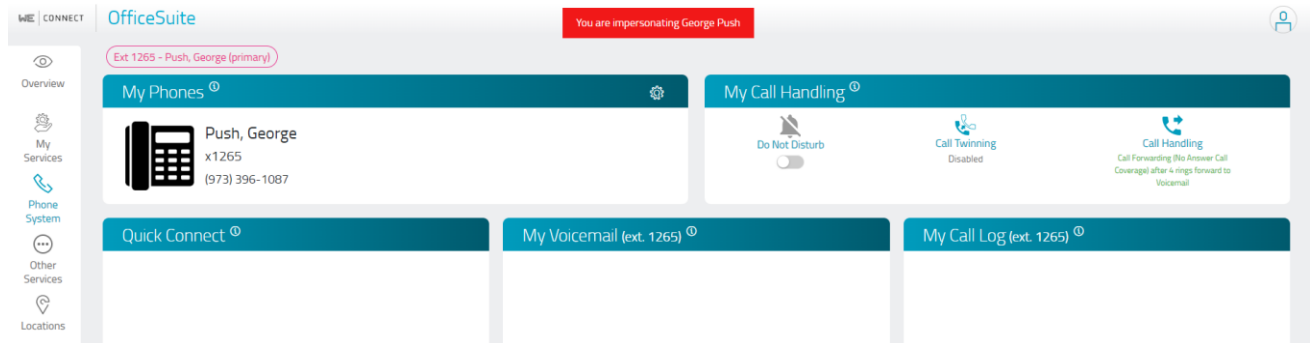
Customer access status was last checked May 3, 2024 at 5:00 am UTC.

Customer Name Customer Account No.	Seller Name Seller ID	WE Sales Contact	Customer Access Status ↑	Contract Exp. Date	MBR
Mas - Huntsville <span>Main</span> <span>Offers</span>	Sandler Partners-It Management & ...	Brian Klein	Access Approved	12.19.2025	\$1,382.28
Mississippi Senior Care-Ms <span>Main</span> <span>Offers</span>	Sandler Partners-It Management & ...	Bryan Tipton	Access Approved	04.07.2026	
Core Cycle & Outdoor <span>Main</span>	Sandler Partners-It Management & ...	Customer Care	Access Approved	12.30.2023	
Central Southern Construction <span>Main</span> <span>Offers</span>	Sandler Partners-It Management & ...	Customer Care	Access Approved	01.04.2022	

- Access Customer Portal
- Access OfficeSuite Portal
- 🔍 View Account Details
- 📄 Download Invoice
- 🎫 Create Ticket
- 📞 Download Phone Numbers

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

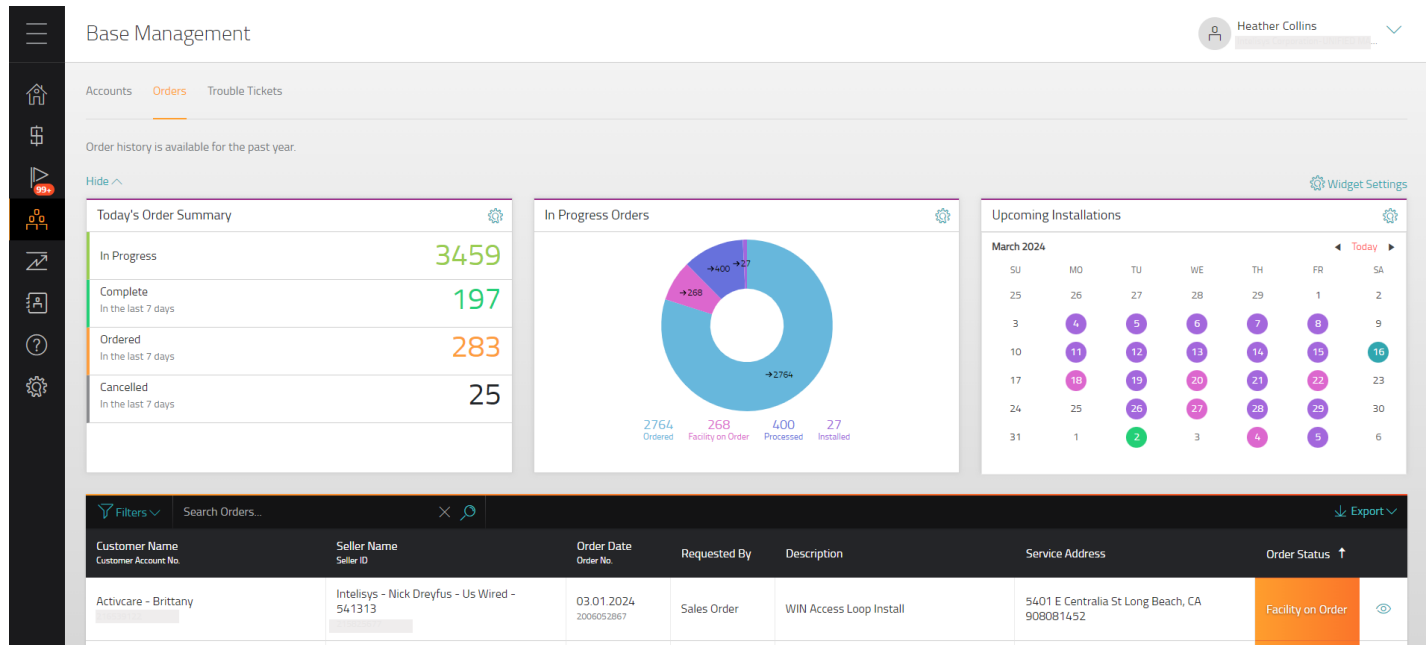
4. A new tab will open and the user will be automatically redirected to the OfficeSuite Portal. During access, there will be a red banner at the top of the screen calling out that the user is impersonating a specific Customer user.



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

## BASE MANAGEMENT - ORDERS

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



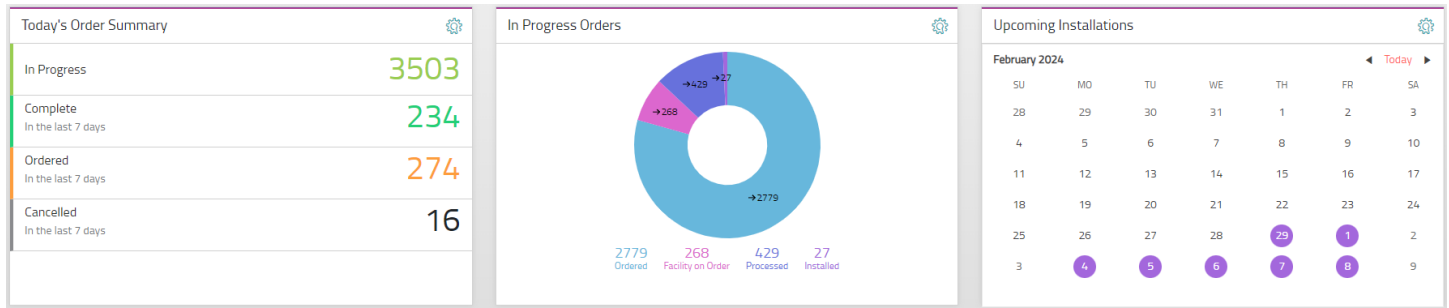
Orders associated to Customer accounts owned by the user will show on the Orders tab. The information shown here will be dependent on the user who is logged in. For example: a Seller level user will only see accounts associated to their Seller ID, a Unified Master level user will see accounts associated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



### Order Widgets Settings

Show Widgets For

☒ All Order Widgets
 ☐ Selected Order Widgets

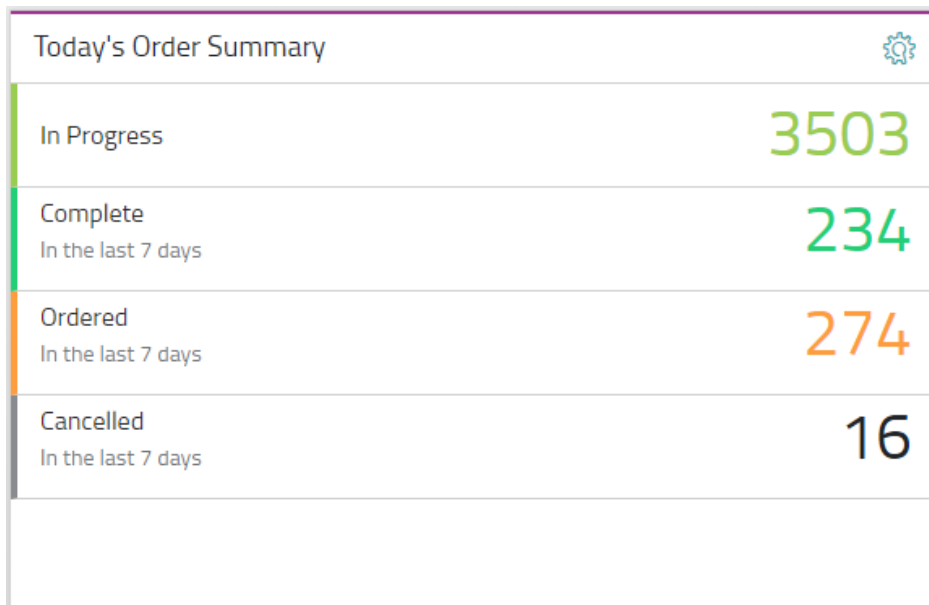
Click on the widget to select or unselect it.

Available	Selected
<input type="text"/> Search by name	<input type="text"/> Search by name
Today's Order Summary	
In Progress Orders	
Upcoming Installations	

☒ Assign all widgets
 ☐ Unassign all widgets

→ Save

## 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

Today's Order Summary - Settings

Status To Display

☒ In Progress ☒ Completed ☒ Ordered ☐ Cancelled ☒ On Hold

Order Summary Period

☐ Today ☒ Past 7 days ☐ Past 30 days ☐ Past 60 days ☐ Past 90 days

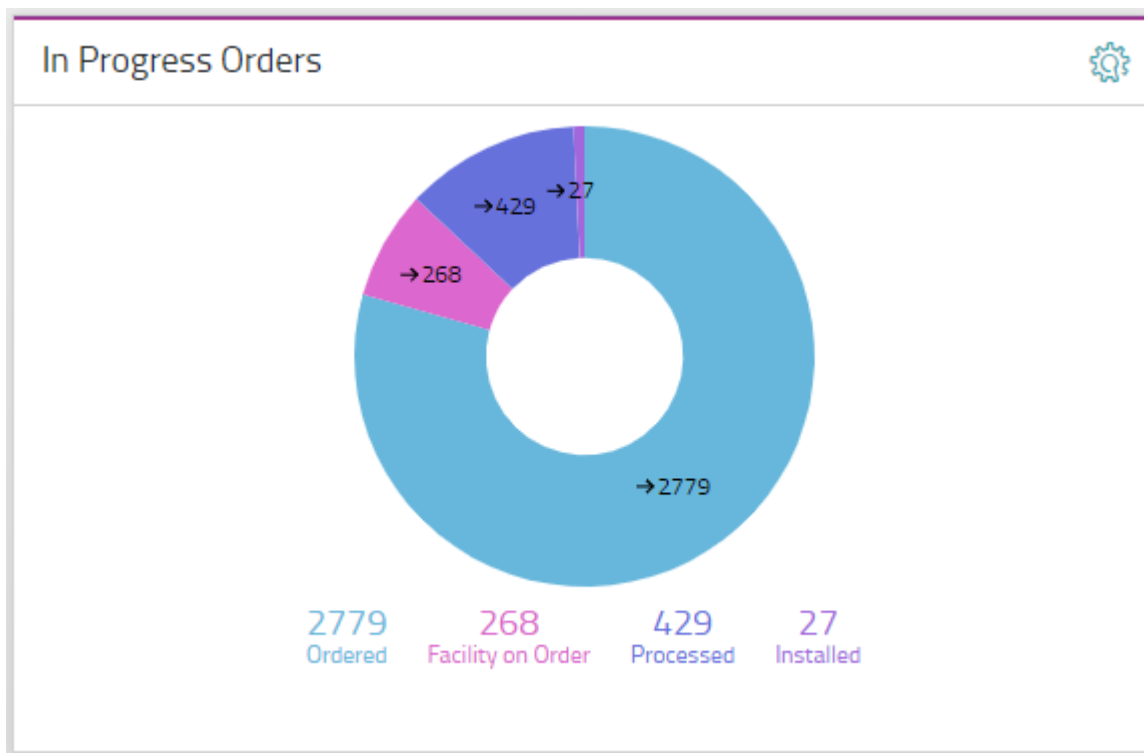
☐ Custom

☒ Make this my default display

✓ Save

---

## IN PROGRESS ORDERS WIDGET



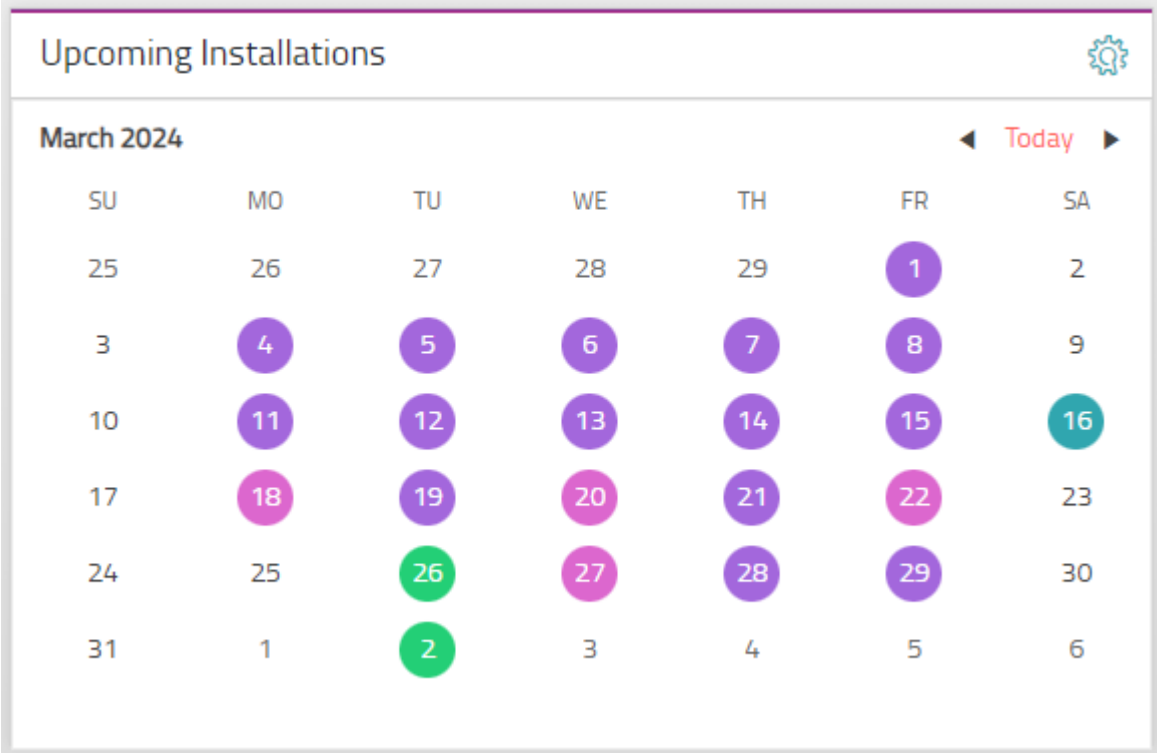
The In Progress Orders widget breaks down all orders currently In Progress by where they are in the order process. The orders are categorized by the Order Status Milestones:

- 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.

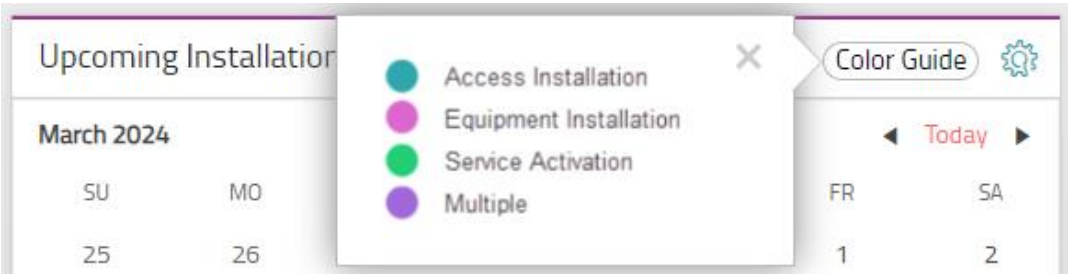
UPCOMING INSTALLATIONS WIDGET



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

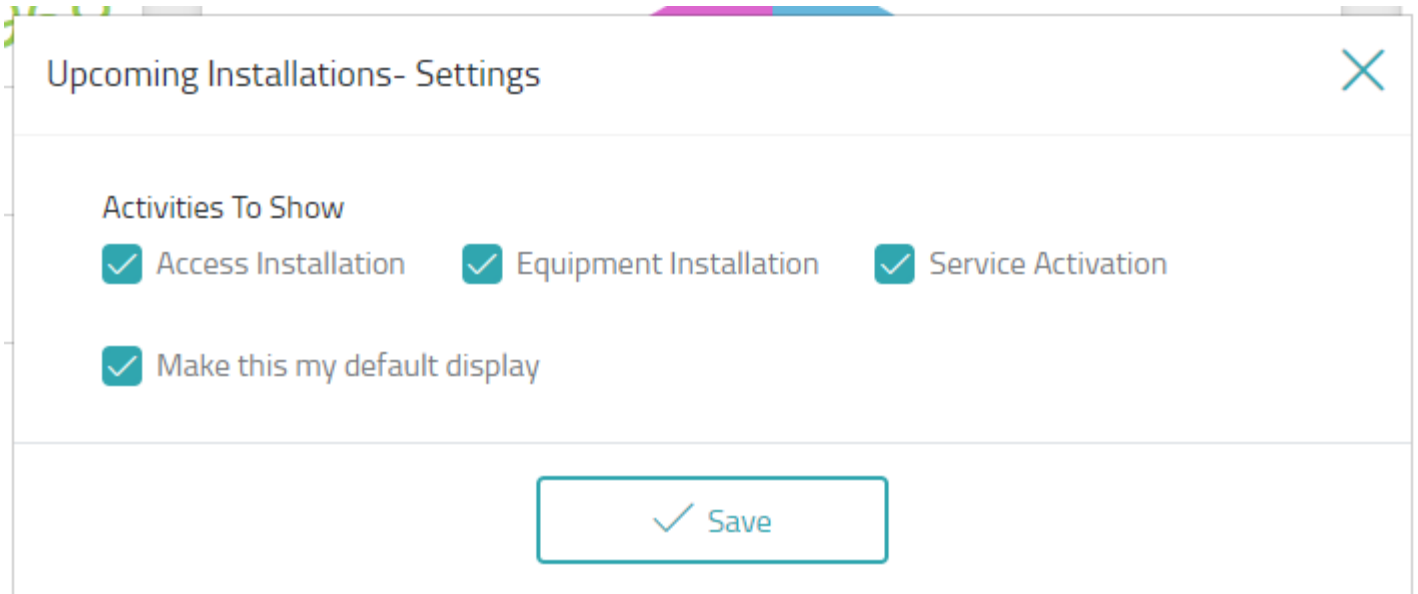
The COLOR GUIDE provides a key to what colors denote which event. On days where there are more than one installation and/or activation events occurring, it will be denoted as *Multiple*.



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



Upcoming Installations- Settings

Activities To Show

☒ Access Installation ☒ Equipment Installation ☒ Service Activation

☒ Make this my default display

✓ Save

## 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.

Order 8483295

X

Association Resource Group - NextWave  
Pending

OrderedProcessedFacility on OrderInstalledActivatedCompleted

Account No. .... [REDACTED]

Account Name ..... Mariner – El Paso North 7141

Installation Address ..... 1000 Andrew Bean Town Mountain Dr., Ste 100, Dallas, Texas, TX 75224

Creation Date ..... 11.02.2021

Completion Date ..... n/a

Coordinator Name .... Kor, Hazkiel

Coordinator Phone .... 2015237511

Cordinator Email .... Hazkiel.Kor@windstream.com

Critical DatesServicesFacilities

Critical TaskTarget DateCompleted

Order Created11.02.2021

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

Filters

Search Orders...

Master Partners

All

Sub Partners

All

Seller Partners

All

Customer Name

Seller Name

Order Date

MM/DD/YY...

to

MM/DD/YY...

Requested By

Service Address

Customer Account No.

Seller ID

Order No.

Order Type

Order Status

All Statuses

Clear Filters


Apply Filters


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

[Accounts](#)
[Orders](#)
[Trouble Tickets](#)
[Partners](#)

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Order history is available for the past year.


Filters


Export

Customer Name Customer Account No.	Seller Name Seller Id	Channel Advocate	Order No.	Order Date	Order Type	Order Status
---------------------------------------	--------------------------	------------------	-----------	------------	------------	--------------

## TROUBLE TICKETS

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

Filters

Export

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	

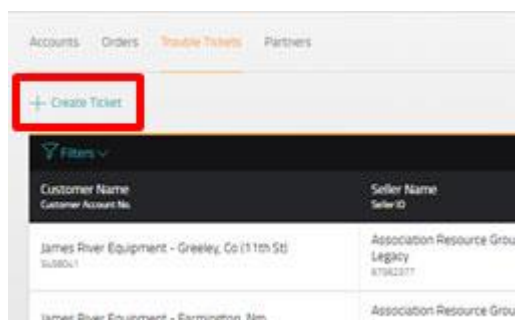
Tickets associated to Customer accounts owned by the user will show on the Trouble Tickets tab. The following columns will populate:

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

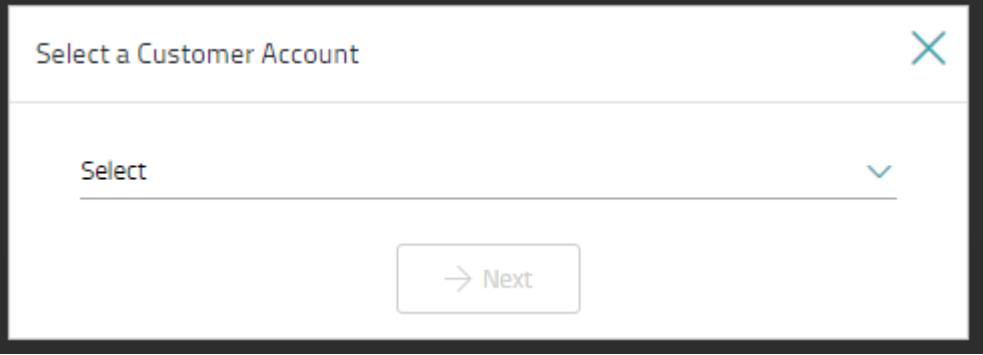
## CREATE TICKET

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.

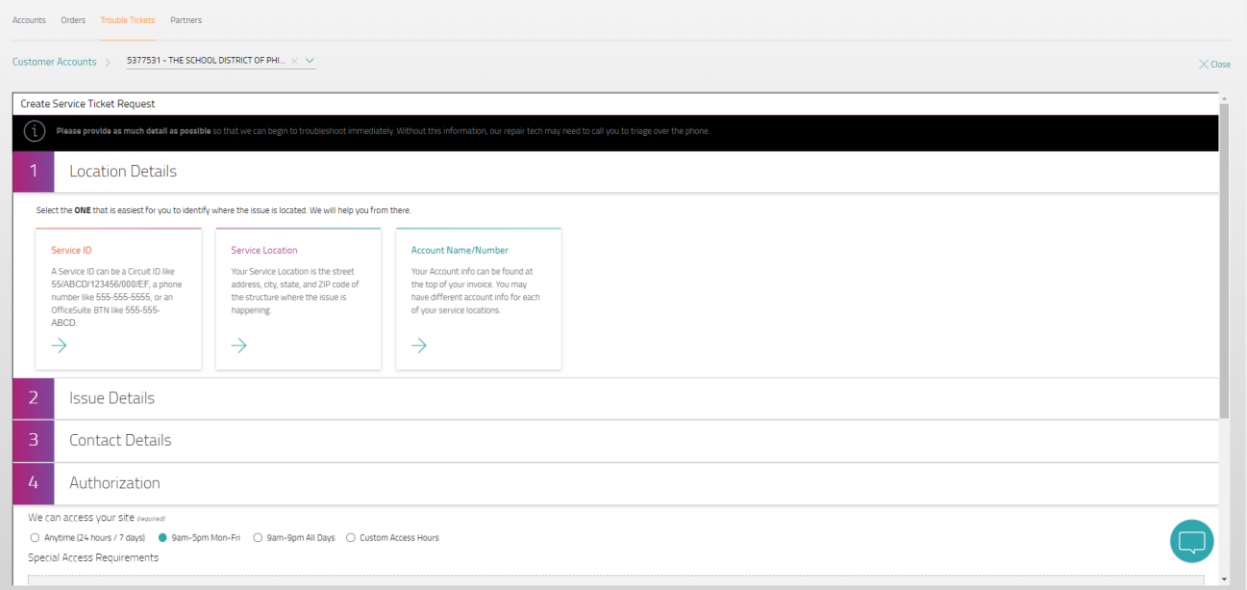
1. Click “+Create Ticket”



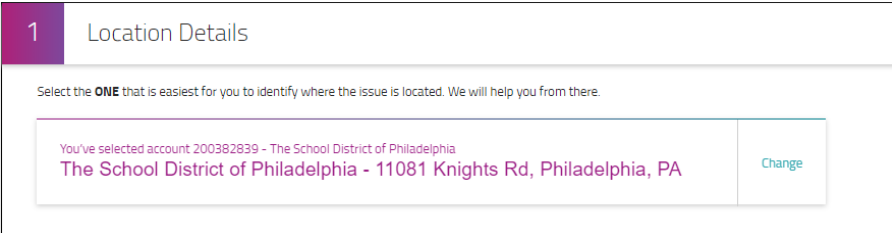
2. Select the customer from the drop down and click **Next**.



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

**2** Issue Details

 Search for keywords that describe your issue...

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

**Voice & Unified Communications**  
Includes Conference Calling

<input type="radio"/> Allworx Products	<input type="radio"/> Line Tagging
<input type="radio"/> Poor Call Quality	<input type="radio"/> Network / Circuit Trouble
<input type="radio"/> Feature Not Working	<input type="radio"/> SD-WAN (Voice)
<input type="radio"/> Can't Make Calls	<input type="radio"/> No Dial Tone
<input type="radio"/> Can't Receive Calls	<input type="radio"/> UCaaS (Repair)
<input type="radio"/> Router Configuration Request	<input type="radio"/> UCaaS (Change)
<input type="radio"/> Monitoring Request	<input type="radio"/> Wireless Data Backup
<input type="radio"/> Information Request	

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

**3** Contact Details

Primary Contact *(required)*

Joe Barisa

Joe Barisa

215.400.5010

jib@philasd.org

Site Contact *(required)*

☒ Use primary contact

Joe Barisa

Joe Barisa

215.400.5010

jib@philasd.org

After Hours Contact *(optional)*

Select

- d. Authorization to access the site if needed

**4** Authorization

We can access your site *(required)*

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

Special Access Requirements

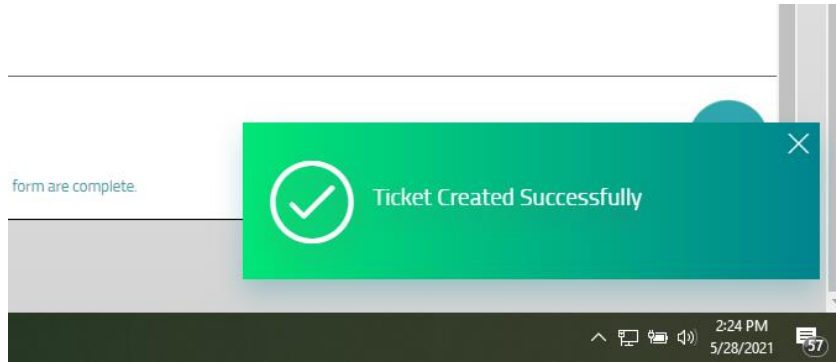
Do you authorize us to perform testing that may temporarily take down your service?

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

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

☐ Yes ☒ No

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



## TICKET DETAILS

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

02273018

Resolved

PROBLEM REPORTED: No Dial Tone

CREATED DATE: 02/03/2022 11:13 AM

LAST UPDATED DATE: 03/03/2022 12:44 PM

SERVICE IMPACTED: No Dial Tone

⌂ Your Repair Team >

Service Information

Account Name

Thales USA

Account Number

204874331

Customer Reference Id

DF232323

Service Location

2733 CRYSTAL DR, ARLINGTON, VA 22202-3584

Issue Details

Service Impacted

No Dial Tone

Customer Reported Severity

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

Your Repair Team

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

Escalation Desk

Support Hours: 24/7

866.260.1615 (option 2)

Escalations Sr. Manager

Support Hours: 8-5 M-F

866.260.1615 (option 3)

Sr. Director – Greg Hodgson

Support Hours: 8-5 M-F

585.340.8286

SVP – Elizabeth Orth

Support Hours: 8-5 M-F

866.780.0702

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

Update Ticket

Ticket ID

INC000042123197

Voice ID

2514346620

Action

Add Notes

Memo

Add Notes

Confirm problem resolved

Report problem persists

Cancel Ticket

Submit

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

Filters ^

Export

Master Partners
All

Sub Partners
All

Sellers
All

Customer Name

Customer Account No.

Ticket No.

Ticket Status
All Statuses

Latest Update
from MM/DD/Y... to MM/DD/Y...

Service Type

Service No.

Reported Problem

Service Address

Clear Filters

Apply Filters

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

Accounts
Orders
Trouble Tickets
Partners

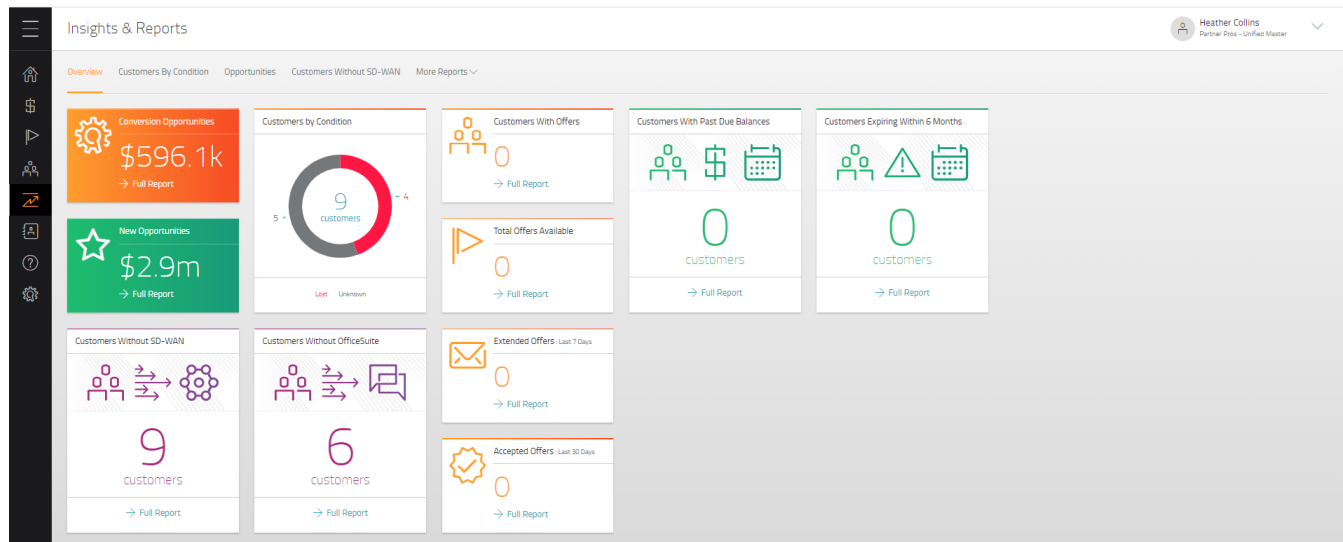
Customer Name	Seller Name	Ticket No.	Ticket Status	Service Type	Reported Problem	Service Address
Customer Account No.	Seller ID		Latest Update	Service No.		

Filters

Export

## INSIGHTS & REPORTS

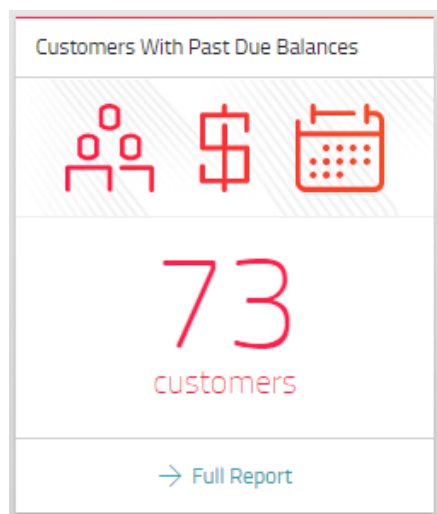
[Click here for a demo on Insights & Reports](#)



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.

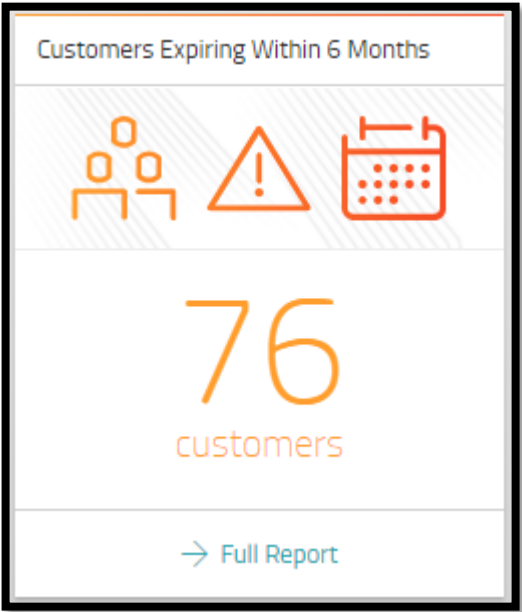
### CUSTOMERS WITH PAST DUE BALANCES

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

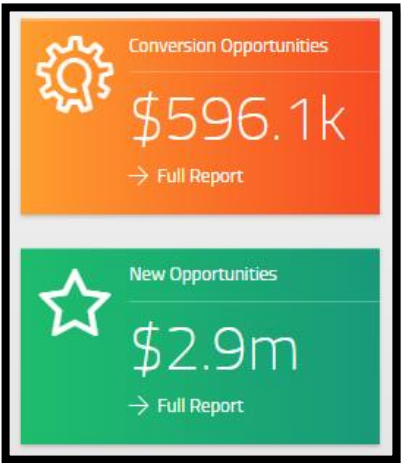
The Customers Expiring Within 6 Months insights show the user how many customers within their base have contracts expiring in the next 6 months. Clicking through takes the user to the Accounts tab with the grid filtered to show only those customers in the widget.



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## OPPORTUNITIES

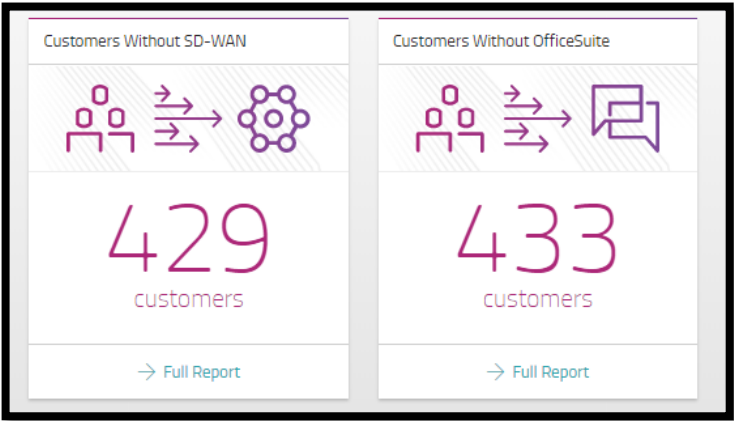
The Opportunities insight shows how much revenue in the user’s funnel is associated to New, Upsell, Renewals, & Conversions. Windstream recently changed how we bucket opportunities (collapsed down to 4 types) so any opportunities with the old types will show under the category of “Other”. Clicking on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



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## 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.



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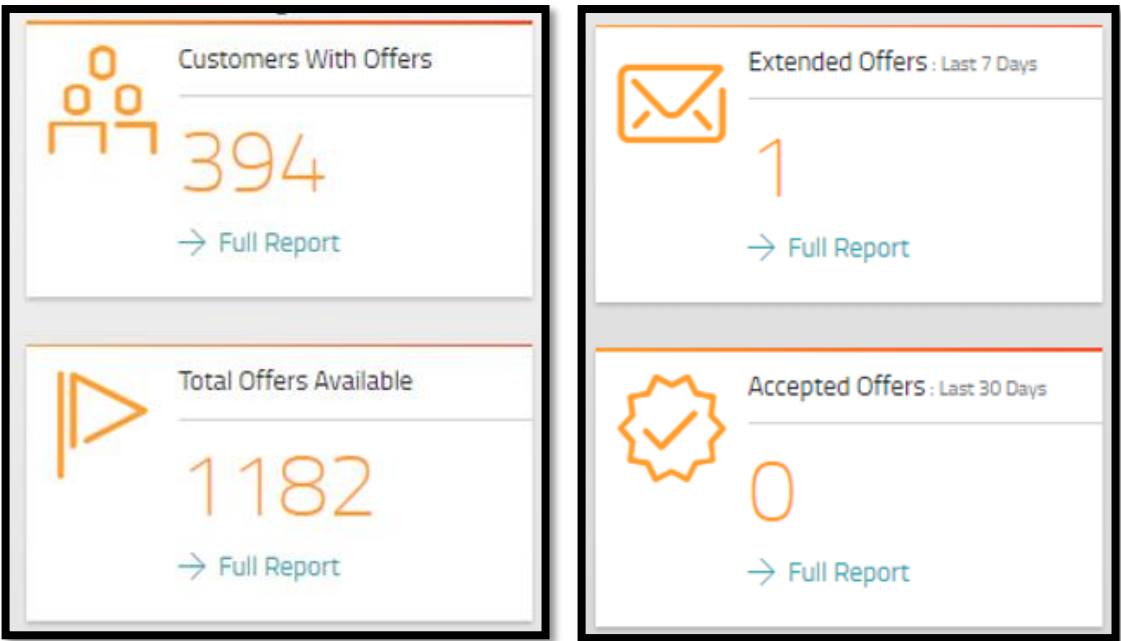
### OFFERS WIDGETS

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

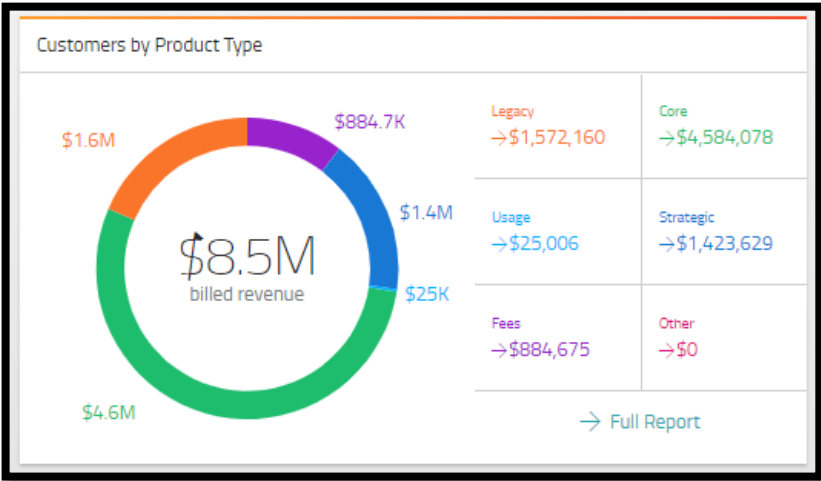
Accepted Offers – the number of accepted offers in the last 30 days



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### 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](#)

Contacts & Notifications

WE CONNECT PARTNERS

Contacts Notifications

+ New Contact

Filters Export

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

10 items per page 1 - 2 of 2 items

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

New Contact

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

First Name

Last Name

Email (optional)

Phone Numbers Primary?

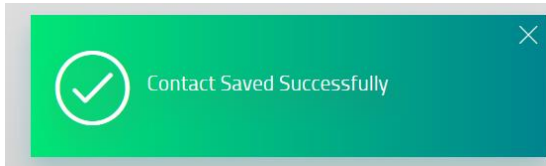
Office (optional)

Mobile (optional)

Save Contact

2. Fill out the required fields
  - a. First Name

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



## EDIT AN EXISTING CONTACT

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

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

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

Agent Demo
✕

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

First Name

Agent

Last Name

Demo

Email (optional)

agent@demo.com

Phone Numbers

Primary?

Office (optional)

585.340.2776

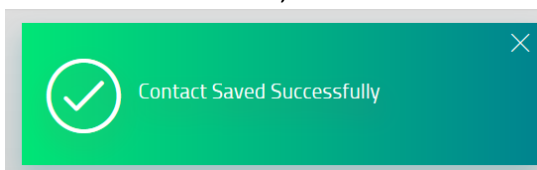
☒

Mobile (optional)

☐

✓ Save Contact

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

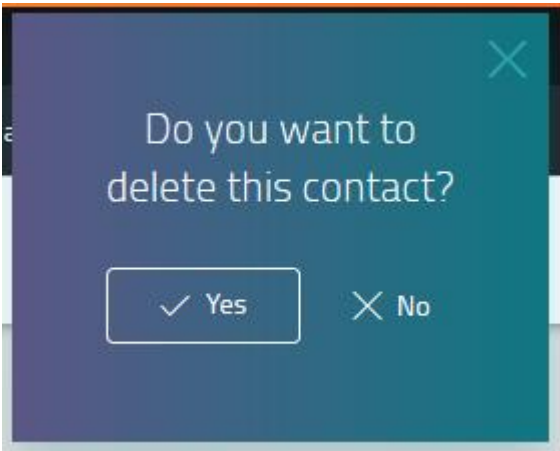


# DELETE A CONTACT

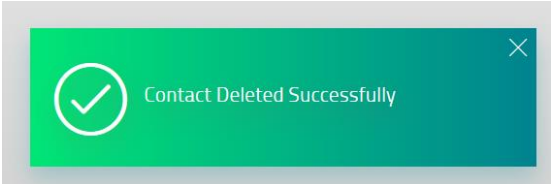
- 1. Click the menu icon to the right of the contact

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

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

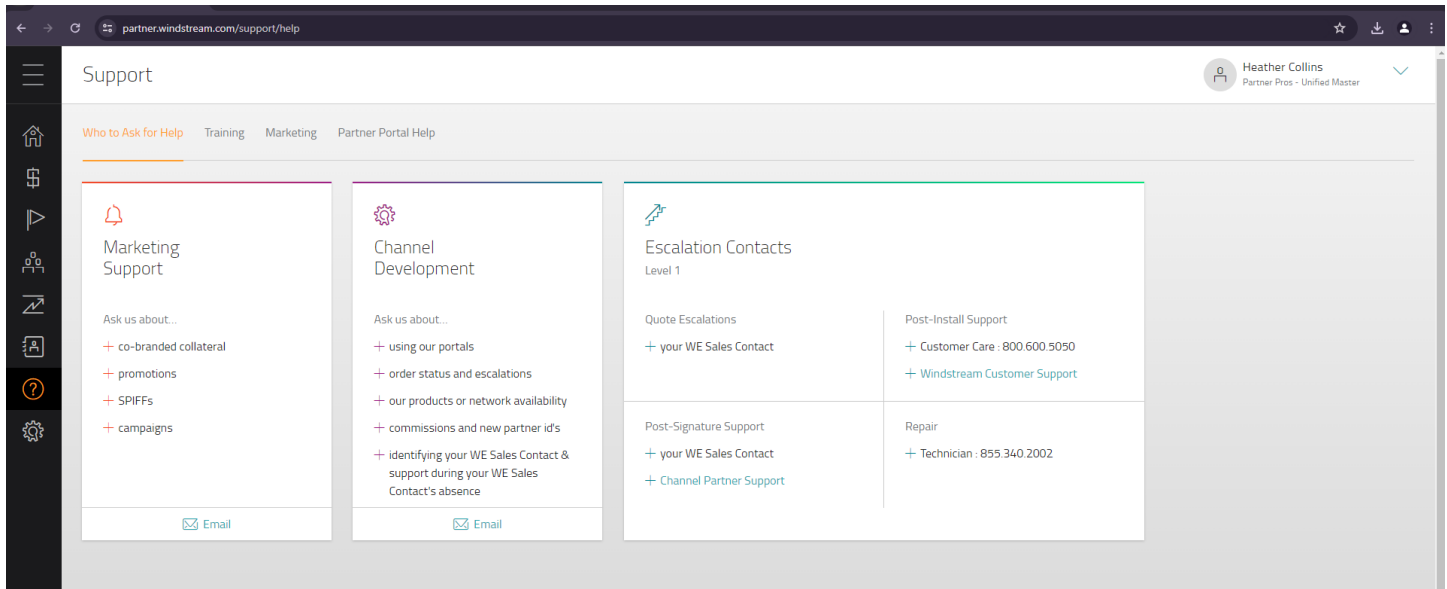


- 4. Contact will be deleted, and a confirmation will appear at the bottom of the screen

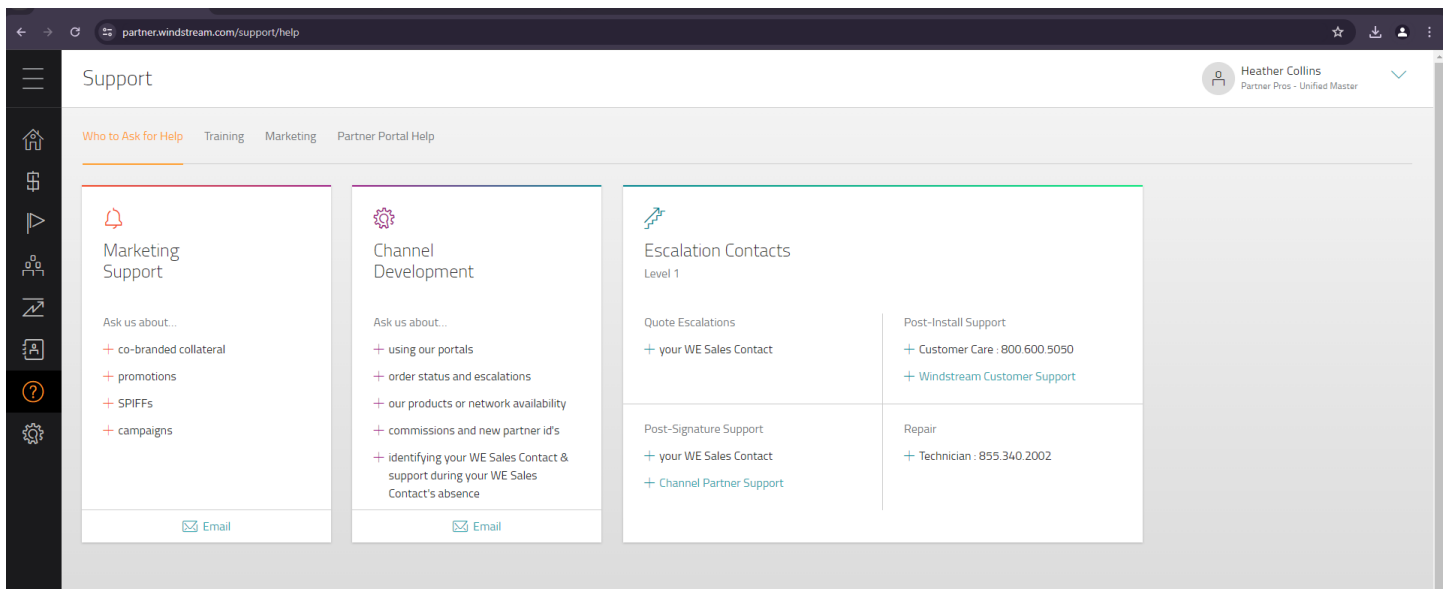


## SUPPORT

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



## WHO TO ASK FOR HELP



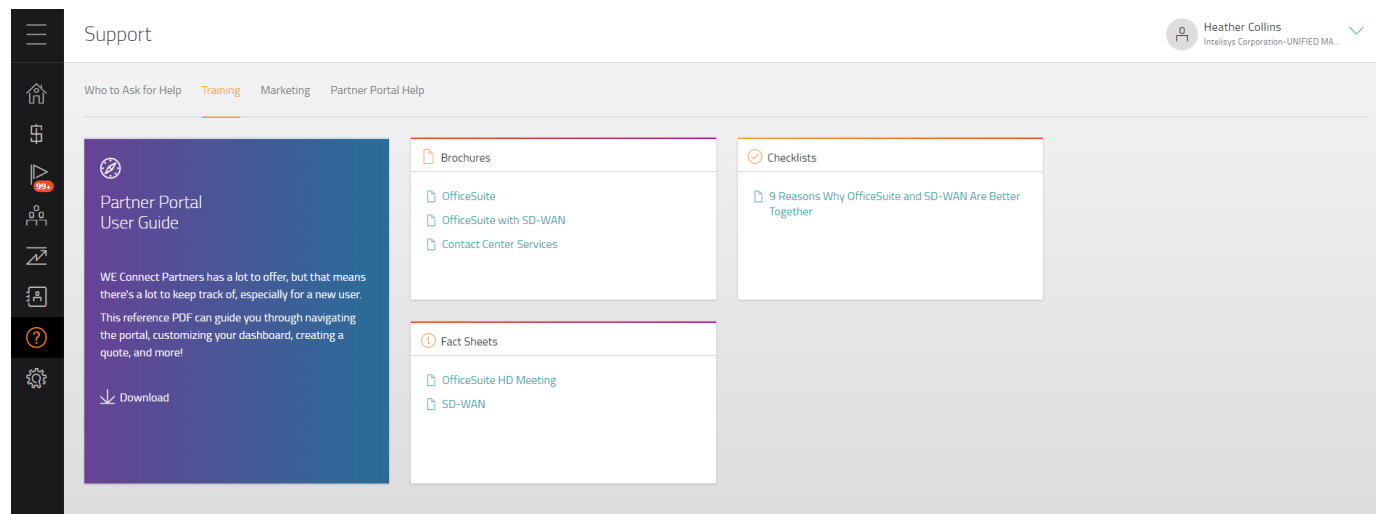
The Who to Ask for Help tab shows different resources that can be contacted depending on what information the user is looking for. Resources shown are:

- 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

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## TRAINING

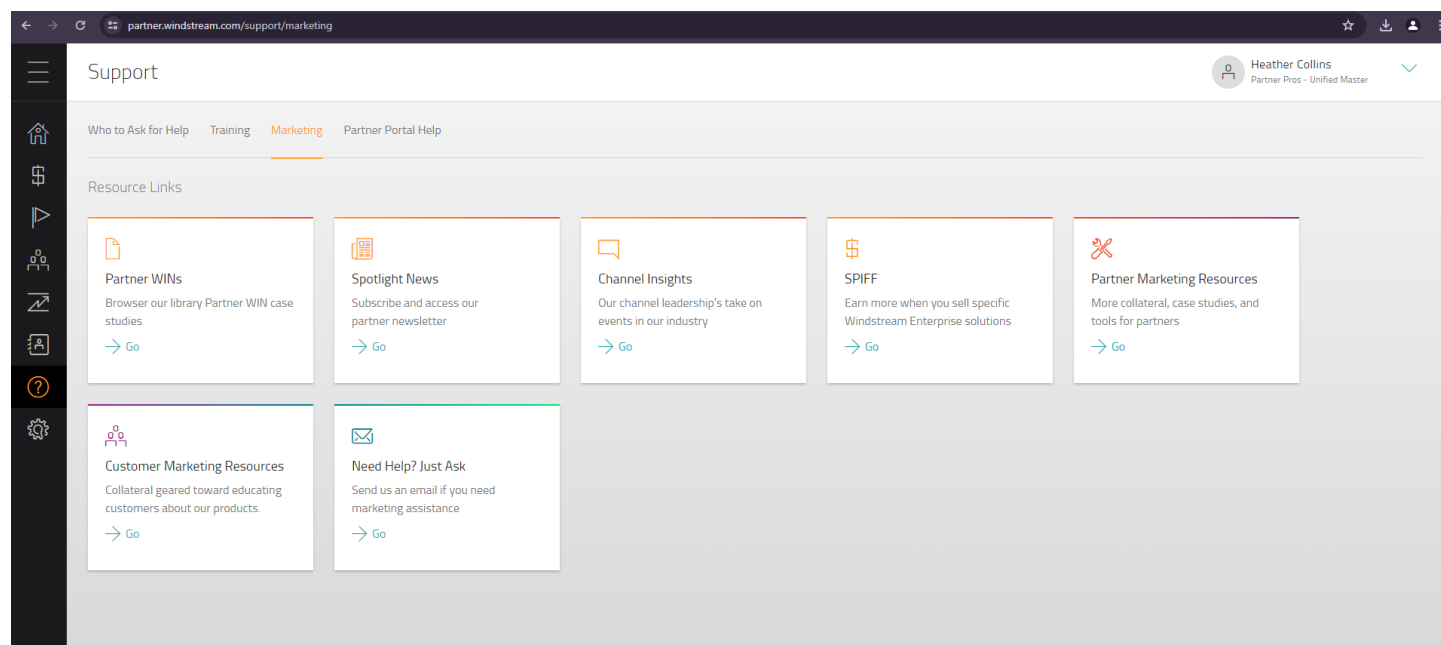
The Training tab offers information on assorted topics specifically for the Partner User. These resources are not intended for customer use. The OfficeSuite Training tile will be removed in June 2024.



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## 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.



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## 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.

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

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.



### User Permissions

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

No Access View Only Manage

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

→ Save User Permissions