Billing disputes

User guide

In 2008 we started to use TED (tell me, educate me, describe to me) to manage interactions with our customers and improve visibility of the billing disputes you log with us.

With TED you are now able to check on the status of your query or dispute at any time by referring to the web-based customer portal.

This document is designed as a basic training document for the TED customer portal.

Versioning

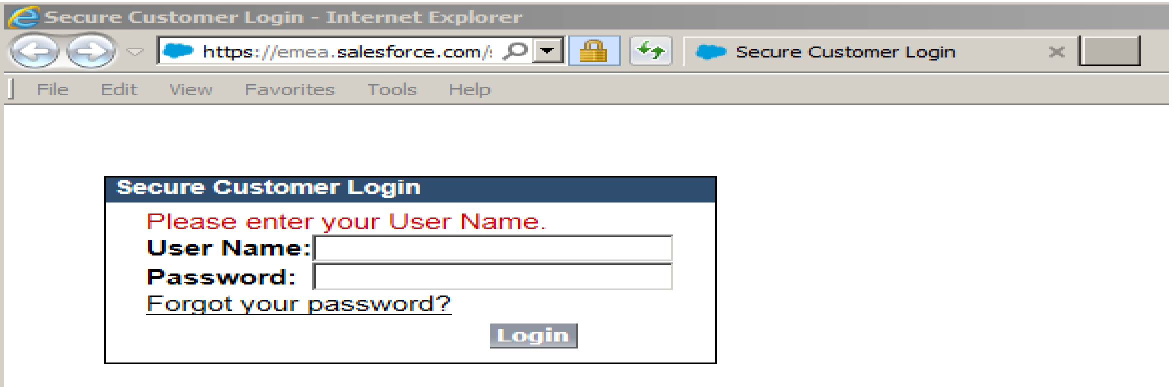
Version Number	Date	Page number(s)	Changes
1	Nov 2008		Initial version
2	Mar 2013		Move to single platform
3	**May 2017**		**Update for new Website**

Table of Contents

1.1 Logging into the TED customer portal

TED is a web-based portal. To log in, click here

This will display the following window:



Your user name will generally be your email address:
name.name@serviceprovider.co.nz (eg frank.grear@chorus.co.nz)

1.1.1 LOGINS TO THE PORTAL

All logins are managed by the billing team. All requests for logins should be directed in the first instance to implementation@chorus.co.nz

When you have been set-up as a new user you will receive an email giving you your login and initial password:

Subject: Your Telecom Wholesale Customer Portal username and password
Importance: High

Dear Jim,

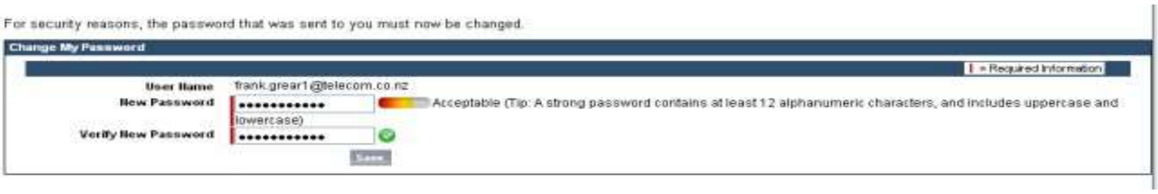
Your Telecom Wholesale Customer Portal login and password information is below.

Thank you,

Telecom Wholesale Customer Support

Username: frank.grear1@telecom.co.nz
Password: gJ217c

Enter the login and password as per the email and click the 'login' button. You will immediately be prompted to change the password:



When you have successfully changed your password you will be directed to the portal's home-page.

If you forget your password click on the 'forgot your password' hyperlink:

You will be presented with this screen. Enter your user name and click submit.

TED will reset your password and you will receive an automatic email with a new one:


Subject: Your new Telecom Wholesale Customer Portal password
Importance: High

Dear Jim,

Thank you for contacting customer support. Your new Customer Portal password can be found below.

Thank you,

Telecom Wholesale Customer Support

Username: grehani@astadia.com

Password: hzD73

You will be asked to change your password (as above).

Note: for security reasons, from time to time we'll reset your password and you will receive an email prompting you to change it.

1.2 Tabs and sidebar

This is a summary of what you'll see and use on the homepage:

1.2.1 TABS

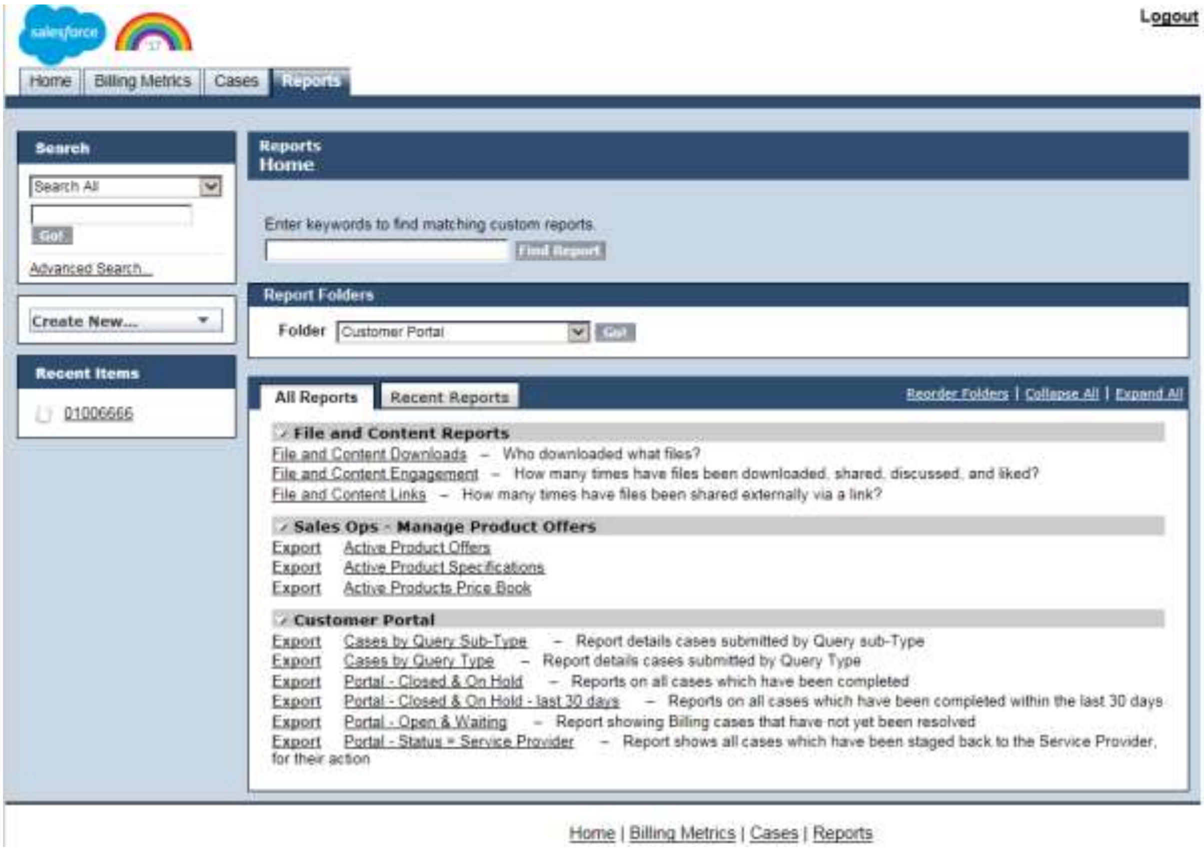
At the top of the screen there are four tabs that you'll use to navigate the site:

- Home
- Billing Metrics
- Cases
- Reports

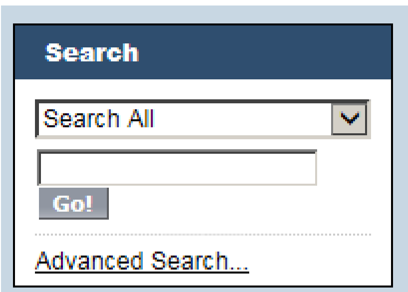
The ‘Billing Metrics’ screen looks like this:

The ‘Cases’ screen looks like this:

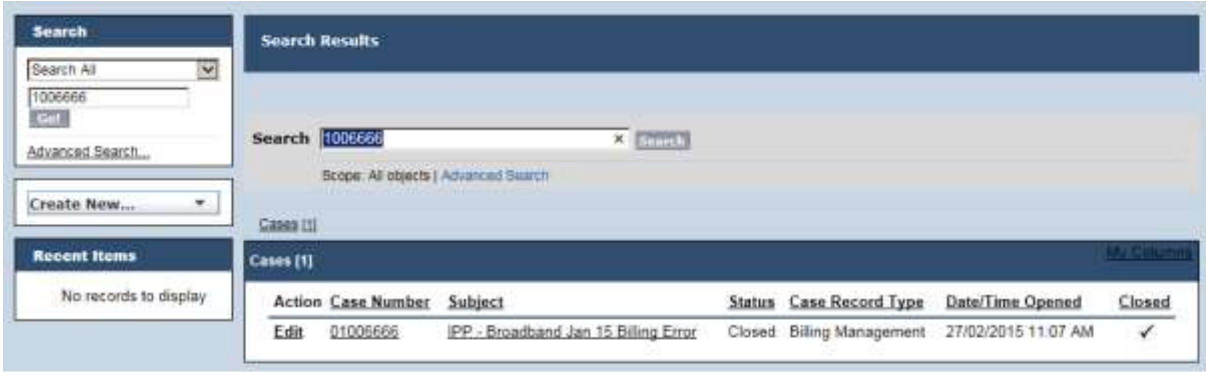
The ‘Reports’ screen looks like this:



1.2.2 SIDEBAR - SEARCH FUNCTION:



Basic search – type in a case number click the 'go' button to find your case:



In this example we searched for case number 1006666 and found the matching case.

To open the case simply click on either the case number or the subject.

Note 1 - The string must be at least two characters long.

Note 2 – There are two access levels in the Portal, and this governs what you can view:

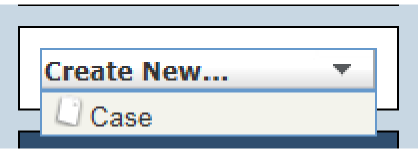
- Portal customer user – can ONLY view cases that you create
- Portal customer manager – can view ALL cases created by any Portal user in your company.

Advanced search – The advanced search facility enables you to search for a case based on a word or words in the subject line or in the case comments:

Entering the search key '2017' returns:

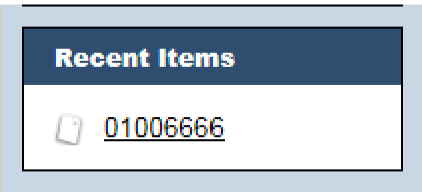
1.2.3 SIDEBAR – 'CREATE NEW' FUNCTION:

Click on the down arrow and this will present you with a quick link to create a new billing case.



1.2.4 SIDEBAR – 'RECENT ITEMS' FUNCTION:

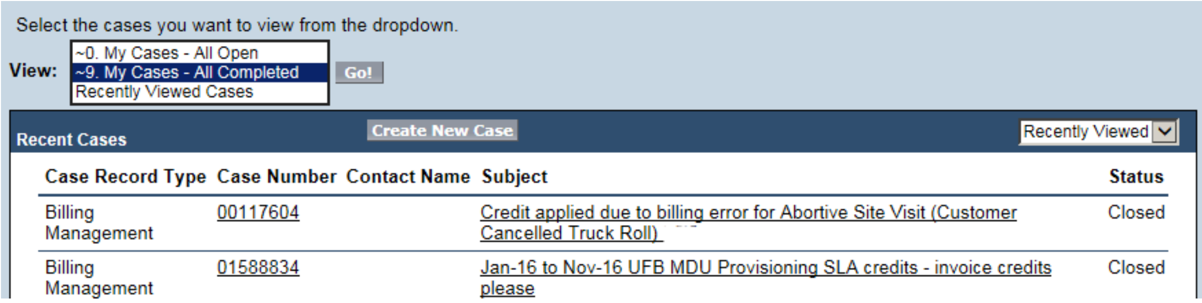
This lists the recent cases (maximum 10) that you have either created or viewed. Clicking on any one of the case numbers will take you straight to that case, where you can view or edit it as required.



1.3 Billing Metrics

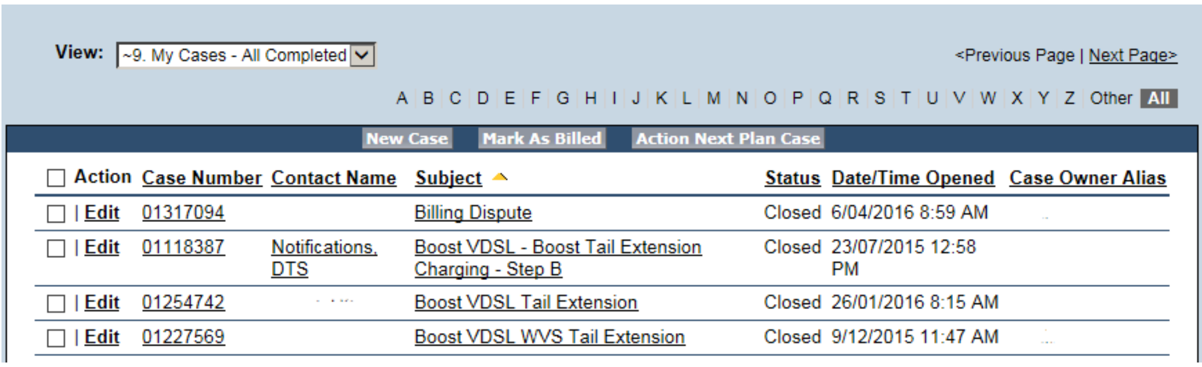
The Billing Metrics Tab shows a summary of the number of cases received, the average age, and the average time to close.

1.4 Cases



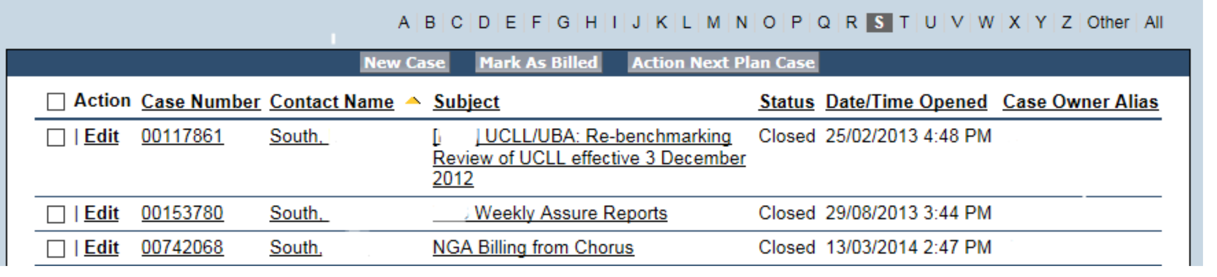
There are various ways that you use the Cases – Home page:

1. View:
    - My Cases – All Open: cases that you have created whose status is other than 'closed'
    - My Cases – All Completed: cases that you have created that have been completed.
    - Recently viewed – displays cases you've recently viewed, irrespective of status.
2. 'Create New Case' – click this button to create a new billing case



3. Headings: You can sort by any of the underlined headings. In the above view it is sorted by subject in ascending order (see the gold arrow). Change the sort by clicking on the appropriate heading.

- Each user has been set-up in the portal so that they can see all cases relating to their organisation, ie both those that they created and those created by other Portal users set-up under their organisation.
- To narrow-down the cases shown in window use the Alpha selector "S" for instance if you only wanted to view cases created by South (ie exclude all other cases) click on the 'S' of the alpha selector:



A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

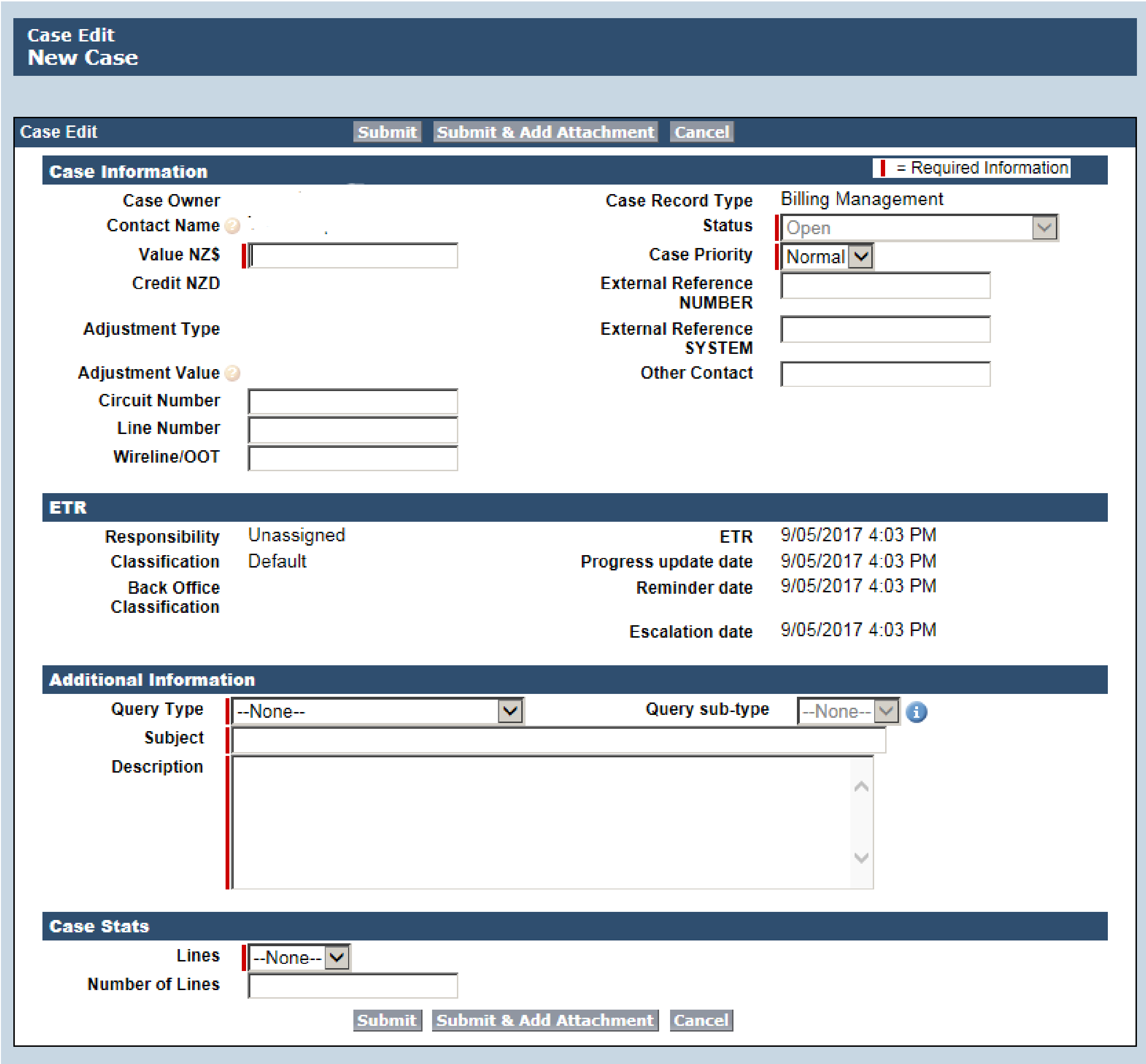
New Case | Mark As Billed | Action Next Plan Case

Action	Case Number	Contact Name	Subject	Status	Date/Time Opened	Case Owner Alias
Edit	00117861	South,	UCLL/UBA: Re-benchmarking Review of UCLL effective 3 December 2012	Closed	25/02/2013 4:48 PM	
Edit	00153780	South,	Weekly Assure Reports	Closed	29/08/2013 3:44 PM	
Edit	00742068	South,	NGA Billing from Chorus	Closed	13/03/2014 2:47 PM	

- Another use for this type of sort would be to narrow down the view to just 'Open' cases – sort the screen by status, then select 'O' (for open) and you will just see those cases with an open status.
- To return to the full view just click 'all' in the alpha selector.
- Click on any of the individual cases (either case number or subject) that you wish to view in more detail.

1.4.1 CREATE A NEW CASE:

Click on the 'Create New Case' button or use the 'Create New' from the sidebar.



- The case owner shows as your name (ie the person logged into the Portal)
- All fields marked with a red bar are mandatory fields - the case cannot be submitted unless these fields are completed.
- The status will always show as open when creating a case.
- Value – this is your estimate of the value of your dispute.
  - If the case is a query rather than a dispute please show 0 as the value
- External Reference Number – this is a free-text field that you can use in any way that you want. You may choose to use it for your own customer reference number.
- Other Contact – another Free-Text field that you can use if you wish.
- Query Type – select from one of the following options:
  - E-Bill
  - Other
  - Local Call Detail / Vision Report
  - Tools and Scheduling
  - Pricebook
- Query sub-type – this is a dependant pick list based upon the choice that you made in the query type selection box:

E-Bill	Broadband
	Voice Rentals
	Data
	Calling (inc NCA)
	Daily Call Report
	Data - Legacy
	L1 Copper
	Fibre
Local Call Detail / Vision Report	Local Call Detail Report
	Vision Report
Tools and Scheduling	Enhancement Suggestions
	Process Issue
	Super User Training Request
	System Issue

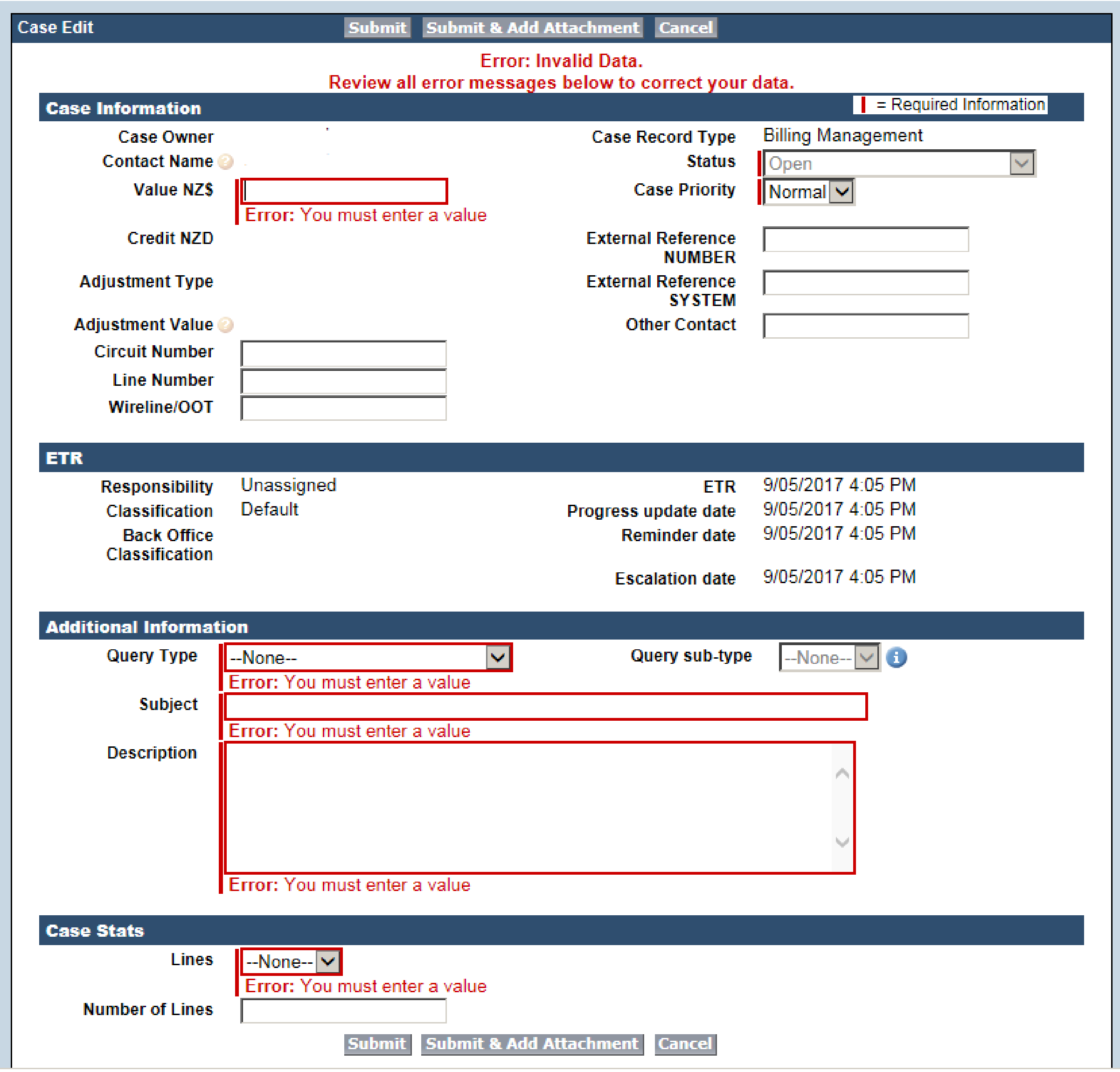
Pricebook	Pricebook query
	Log-on request

Note – over time additional values may be added to these pick-lists.

- Subject: free-text field - enter a one-line description of the nature of the query / dispute.
- Description: free-text field - a fully detailed description of the nature of the query / dispute. You're not constrained by space! The more detail that you can give the better able we will be to resolve the case in a timely manner.
- Lines: there are two options in the pick-list
    - 1 – 20
    - Over 20
    - If you select the 2nd option 'over 20' then the next field 'number of lines' becomes a mandatory field and you must indicate how many lines are included in the case.

Once all fields have been completed click the 'submit' button.

Submitting the case without one of the mandatory fields completed will result in an error message that indicates what the problem is:



Case Edit — Submit | Submit & Add Attachment | Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Case Information — = Required Information

Case Owner		Case Record Type	Billing Management
Contact Name		Status	Open
Value NZ$	Error: You must enter a value	Case Priority	Normal
Credit NZD		External Reference NUMBER	
Adjustment Type		External Reference SYSTEM	
Adjustment Value		Other Contact	
Circuit Number			
Line Number			
Wireline/OOT			

ETR

Responsibility	Unassigned	ETR	9/05/2017 4:05 PM
Classification	Default	Progress update date	9/05/2017 4:05 PM
Back Office Classification		Reminder date	9/05/2017 4:05 PM
		Escalation date	9/05/2017 4:05 PM

Additional Information

Query Type	--None-- Error: You must enter a value	Query sub-type	--None--
Subject	Error: You must enter a value		
Description	Error: You must enter a value		

Case Stats

Lines	--None-- Error: You must enter a value
Number of Lines	

Submit | Submit & Add Attachment | Cancel

Attachments – In exactly the same way that you can attach a file (eg a spreadsheet) to an email you can attach a file to a case:

Note – for storage capacity reasons we may remove the file from a case and store it separately – generally this will only be done once a case has been resolved and closed.

Case number - When you submit a case TED will automatically allocate it a unique reference number. This number can be used to revisit the case.

To view an existing case either select the particular case from the 'cases' home screen or enter the unique case number into the search section of the sidebar.

01006666

Printable View

« Back to List: Cases

Case Detail

Edit | Close Case | Clone

Case Owner	[Change]	Case Record Type	Billing Management
Case Number	01006666	Status	Closed
Contact Name		Case Priority	Normal
Value NZ$	$3	External Reference NUMBER	
Credit NZD		External Reference SYSTEM	
Adjustment Type	Credit	Other Contact	
Adjustment Value	$3.52		
Circuit Number			
Line Number			
Wireline/OOT			

ETR

Responsibility	Billing	ETR	11/03/2015 11:07 AM
Classification	Dispute	Progress update date	4/03/2015 11:07 AM
Back Office Classification	Chorus	Reminder date	9/03/2015 11:07 AM
		Escalation date	12/03/2015 11:07 AM

Additional Information

Query Type	E-Bill	Query sub-type	Broadband
Subject	IPP - Broadband Jan 15 Billing Error		
Description	As per the informer sent our earlier this month, an adjustment has been incorrectly processed twice on your account. This has now been credited.		

Case Stats

Lines		% Complete	0%
Number of Lines			
Lines Left	0		

System Information

Created By	27/02/2015 11:07 AM	Last Modified By	27/02/2015 11:34 AM

Edit | Close Case | Clone

Case Comments

Add Comment

No records to display

Attachments

Attach File

No records to display

Case History

Date	User	Action
27/02/2015 11:34 AM		Changed **Status** from Open to **Closed**.
		Closed.
27/02/2015 11:07 AM		Changed **Progress update date** from 4/03/2015 11:06 AM to **4/03/2015 11:07 AM**.
		Changed **ETR** from 11/03/2015 11:06 AM to **11/03/2015 11:07 AM**.
		Created.

Cases

New Case

No records to display

Cases (Decomposed Case)

New Case

No records to display

Always show me more records per related list

1

The case screen is divided into a number of different sections:

Case detail:

Case Detail	Edit	Close Case	Clone
Case Owner	[Change]	Case Record Type	Billing Management
Case Number	01006666	Status	Closed
Contact Name		Case Priority	Normal
Value NZ$	$3	External Reference NUMBER	
Credit NZD		External Reference SYSTEM	
Adjustment Type	Credit	Other Contact	
Adjustment Value	$3.52		
Circuit Number			
Line Number			
Wireline/OOT			

- The case owner shows as the 'queue' that this case has gone to within TED.
  - When the case was being created the case owner is shown as the name of the person who was creating the case.
  - When the case is submitted, TED automatically changes the case ownership, initially assigning the case to a queue.
  - When it is picked up from a queue by our billing specialist, they will change the ownership from the queue to their name. They will then generally retain ownership of the case through until resolution.
  - You'll always be able to see who is looking after your case.
- Note – the name of the person originally creating the case is maintained in the case record and shows on the main case screen as the Contact Name.
- Case number – the unique case reference number.
- Case record type – Will always show as Billing Management.

Additional Information:

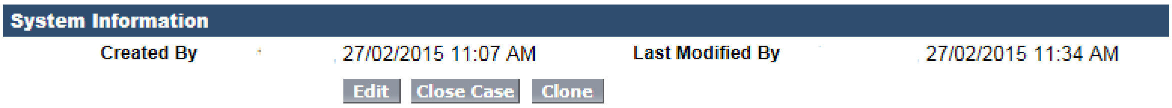
Additional Information			
Query Type	E-Bill	Query sub-type	Broadband
Subject	IPP - Broadband Jan 15 Billing Error		
Description	As per the informer sent our earlier this month, an adjustment has been incorrectly processed twice on your account. This has now been credited.		

- Query type and subtype – based upon what you originally entered when the case was submitted.
- Subject and description – this is what you originally entered when the case was submitted.

Case Stats:

- Lines – this is what you originally entered, based upon the pick-list (1 – 20, or over 20)
- Number of Lines – If 'over 20' was selected from the lines pick-list, this field will then show the actual number of lines.
  Lines left and % complete - This shows, for a multiple line case, how far advanced we are in dealing with it. As we work through a multiple line case we'll update it with how many lines we've completed. You will be able to see how we are progressing.

System Information:



This section shows who originally created the case, and when. (automatically time/date stamped). It also shows who last modified the case, and when.

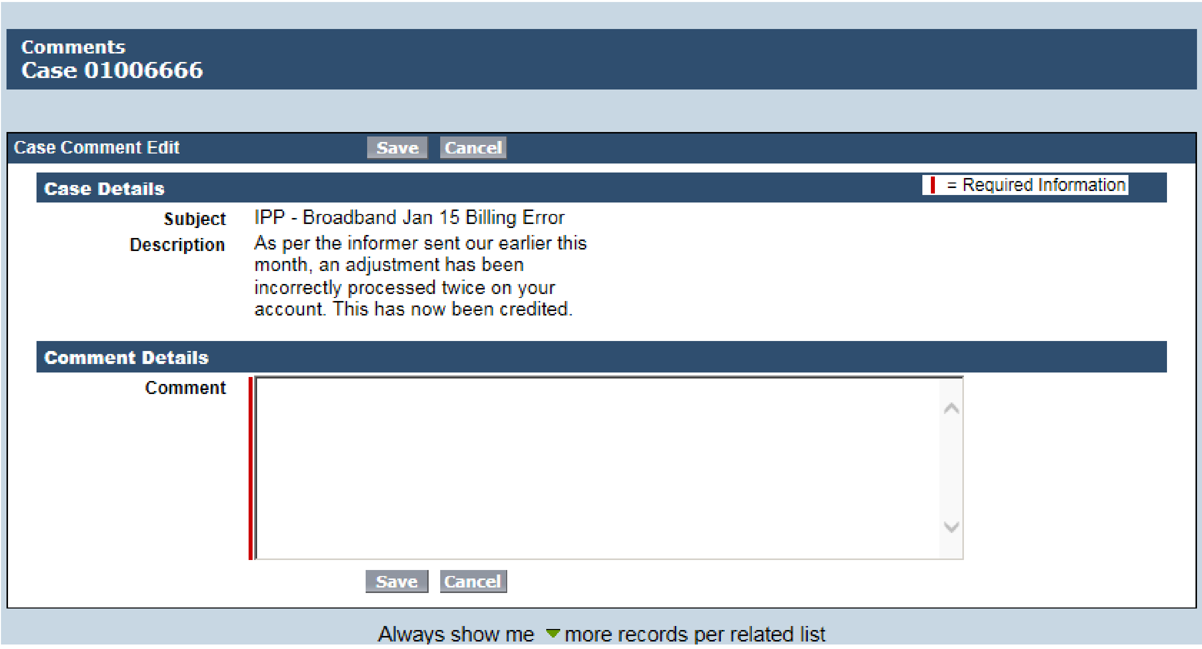
Case Comments:

- Whenever our billing specialist updates the case they will enter a comment.
- Each and every comment is date and time stamped.
- When the comment is entered TED will automatically send the case originator an email to advise them that the case has been updated

You can update the case by entering a comment.

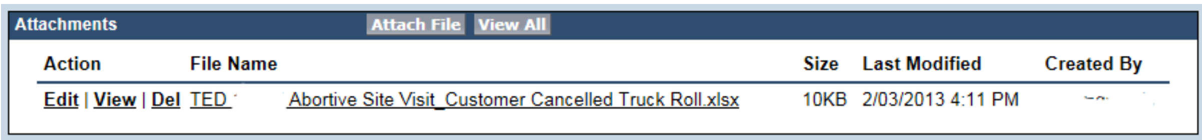
- Click on the 'case comment' button

The following screen will display:



- Enter your comments in the free-text comment box and click 'save' to submit.
- Our billing specialist will be alerted to the update and will review your comments
- For convenience, the subject and description of the case and any previous comments, are displayed on this screen.
- All comments are date and time stamped.
- Once added, a comment cannot be altered or deleted except under exceptional circumstances by our billing system administrator.

Attachments:



Any files for the case will show in the attachments section of the case. To attach another file click the 'attach file' button.

To view an attached file, click the 'View All' button:

View All Attachments

Cancel

File Name	TED Abortive Site Visit_Customer Cancelled Truck Roll.xlsx
Size	10KB
Ownership	
View	View file
Last Modified	2/03/2013 4:11 PM

To open the specific attachment click on the 'View file' hyperlink and the file will be downloaded from TED.

Case history:

Changes to the case that are not covered under case comments are recorded (and date / time stamped) under the case history section:

Case History

Date	User	Action
27/02/2015 11:34 AM		Changed **Status** from Open to **Closed**.
		Closed.
27/02/2015 11:07 AM		Changed **Progress update date** from 4/03/2015 11:06 AM to **4/03/2015 11:07 AM**.
		Changed **ETR** from 11/03/2015 11:06 AM to **11/03/2015 11:07 AM**.
		Created.

This will show:

- When the case was created, and by whom.
- Whenever the status has been changed (eg from open to on hold).
- When the case was pick-up from a queue and ownership transferred to a billing specialist.

Portal cases created by Chorus

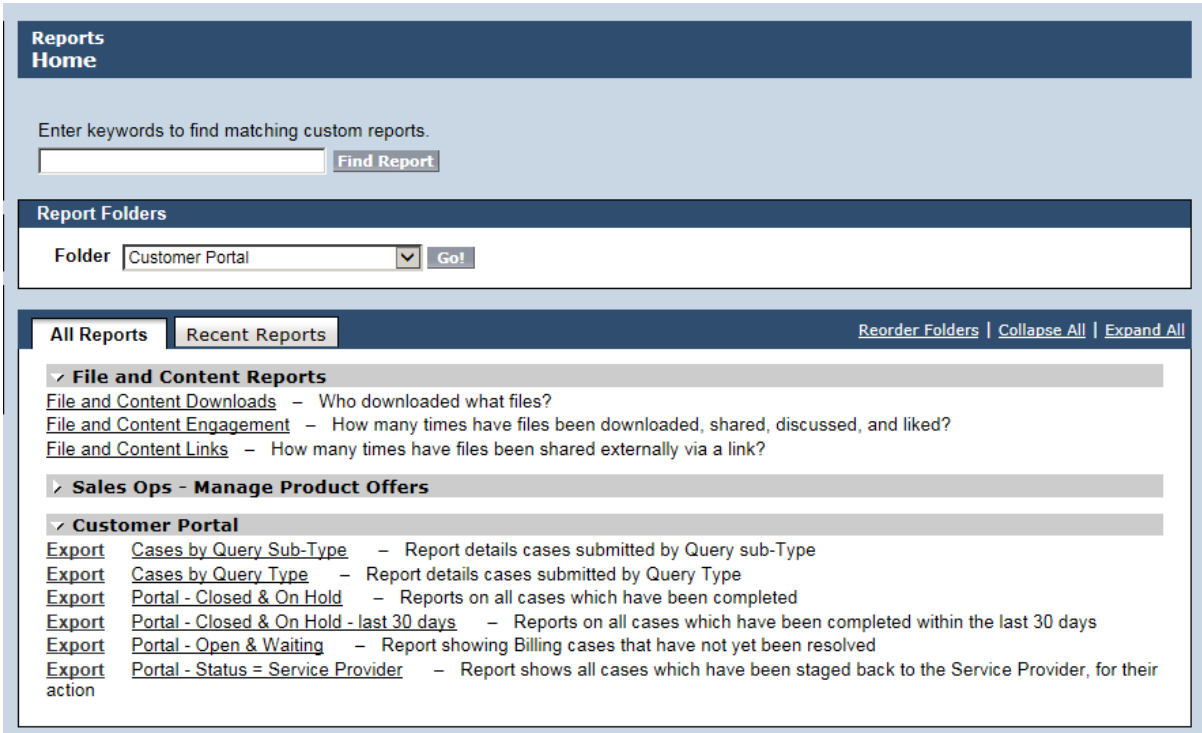
There may be times when our billing specialist will create a case in TED and also make it available to you via the portal.

For these cases, both the system information and the case history sections of the case screen will show the billing specialist's name under 'created by'. An example of when we might do this is:

- You've sent in a large, multiple line dispute that actually covers a number of different areas. We'll break down the dispute into a number of smaller disputes, each one covering a distinct area. We'll then resolve each one separately, feeding information back to you as we go, rather than try and resolve the whole case in one go.

1.5 Reports

The fourth tab gives you access to a basic reporting facility.



The system contains a number of pre-defined reports that let you view your cases.

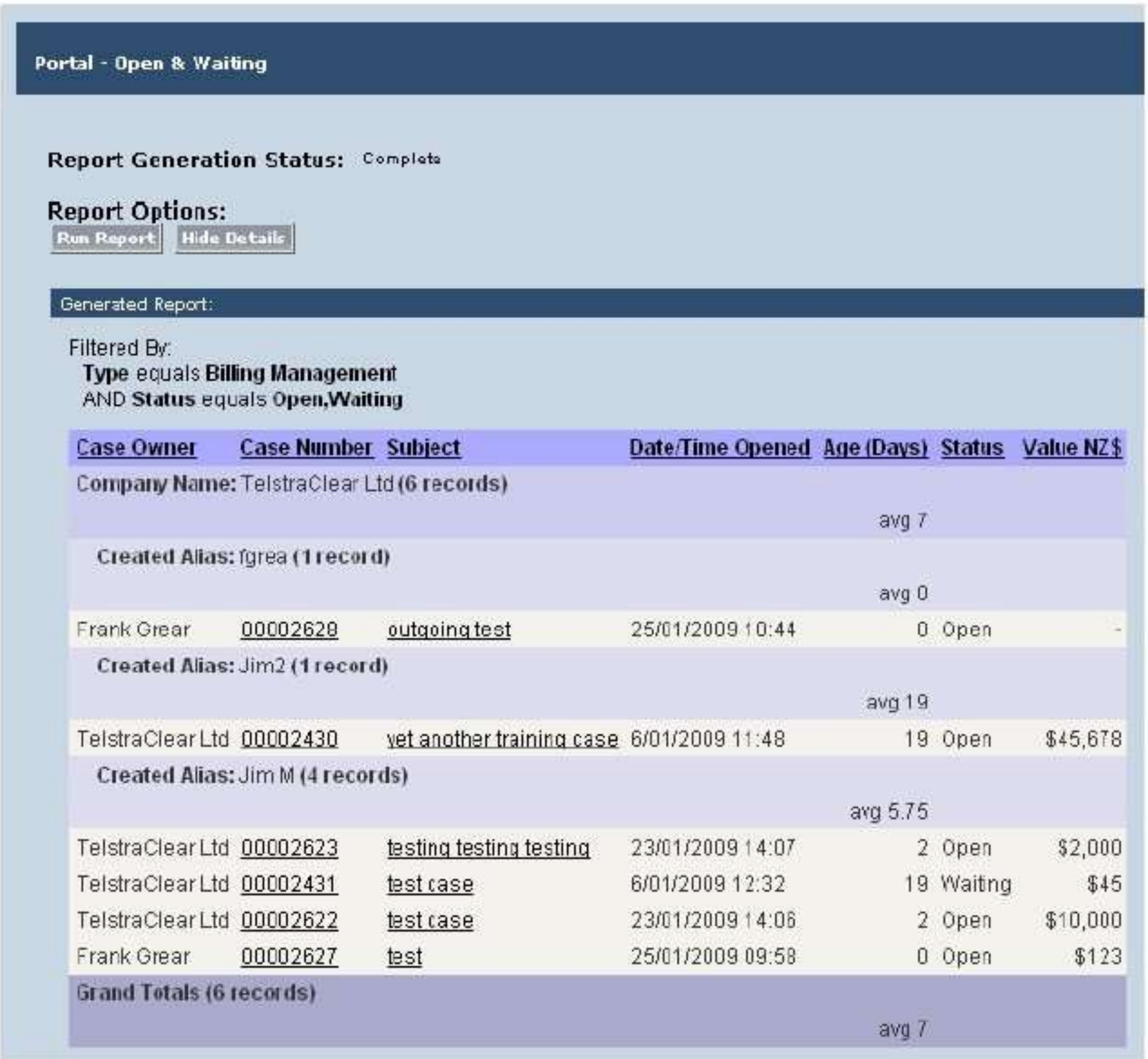
File and Content Reports will allow you to see:

- File and Content Downloads: who has downloaded a file,
- File and Content Engagement: how many times, and
- File and Content Links: if the file has been shared

Customer Portal reports are 6 reports based around the status of cases:

- Cases by Sub-Type
- Cases by Query Type
- Closed and On Hold
- Closed and On Hold – last 30 days
- Open and waiting
- Status = Service Provider

To run a particular report, simply click on the report hyperlink:



Portal - Open & Waiting

Report Generation Status: Complete

Report Options:

Run Report Hide Details

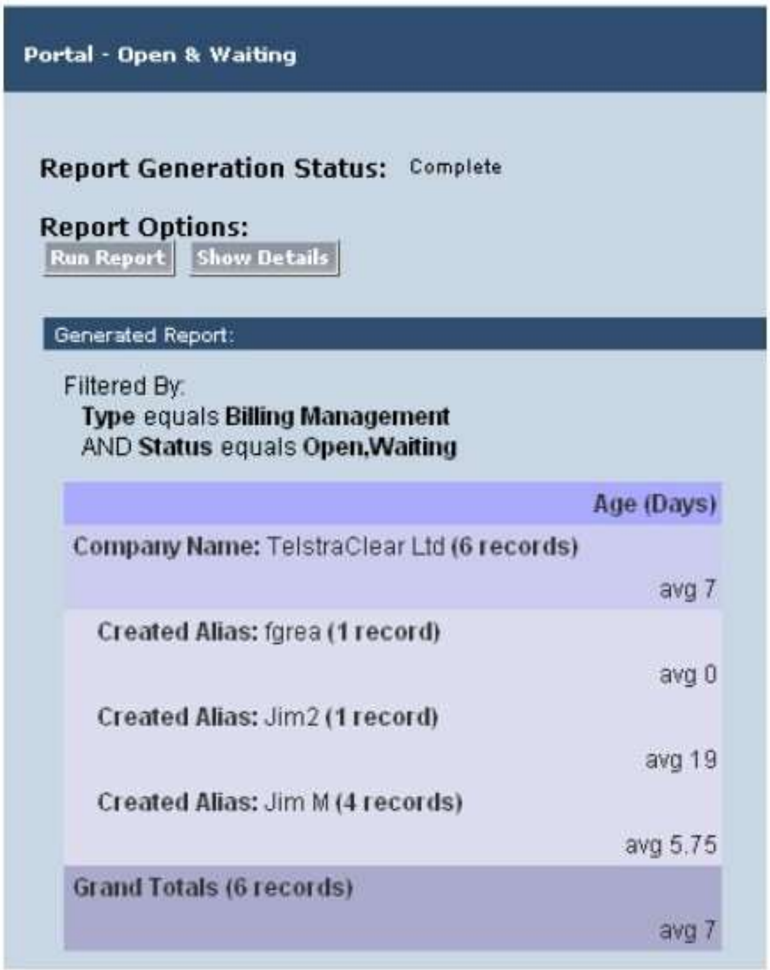
Generated Report:

Filtered By:
Type equals **Billing Management**
AND **Status** equals **Open,Waiting**

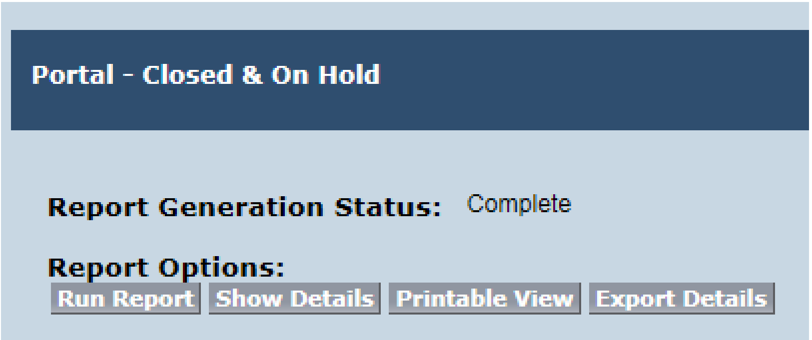
Case Owner	Case Number	Subject	Date/Time Opened	Age (Days)	Status	Value NZ$
Company Name: TelstraClear Ltd **(6 records)**						
				avg 7		
Created Alias: fgrea **(1 record)**						
				avg 0		
Frank Grear	00002628	outgoing test	25/01/2009 10:44	0	Open	-
Created Alias: Jim2 **(1 record)**						
				avg 19		
TelstraClear Ltd	00002430	yet another training case	6/01/2009 11:48	19	Open	$45,678
Created Alias: Jim M **(4 records)**						
				avg 5.75		
TelstraClear Ltd	00002623	testing testing testing	23/01/2009 14:07	2	Open	$2,000
TelstraClear Ltd	00002431	test case	6/01/2009 12:32	19	Waitng	$45
TelstraClear Ltd	00002622	test case	23/01/2009 14:06	2	Open	$10,000
Frank Grear	00002627	test	25/01/2009 09:58	0	Open	$123
Grand Totals (6 records)						
				avg 7		

This report, which shows all unresolved cases, is split by the alias of the person creating the report and shows the average age of each report, summarising this by alias with an overall summary for you.

To hide the details of the report and just get a summary total click the 'hide details' button:



To export the details of the report to a CSV or XLS format, click the 'export details' button. To print the report, click the 'printable view' button.



Note: You cannot design and run your own reports. All reports are controlled from within TED. If there is a something that you would like to see in a report please contact chorus_billing@chorus.co.nz and we will see what we can do.