Verizon Enterprise Center

Analysis & Reporting

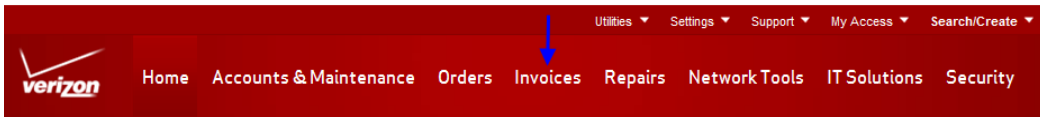
Wireless User Guide

Wireless Reports Tab Overview

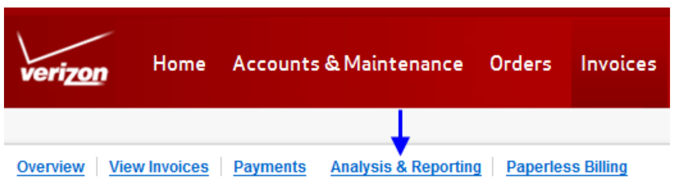
Accessing the Wireless Reports tab

To access your company's wireless reports:

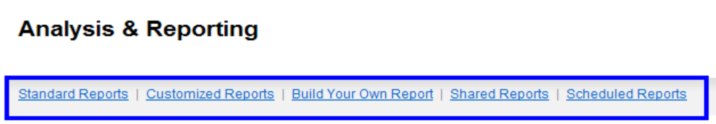
1. Click on the **Invoices** tab.



2. Go to the **Analysis & Reporting** page.



The **Wireless** tab contains five sub-tabs:



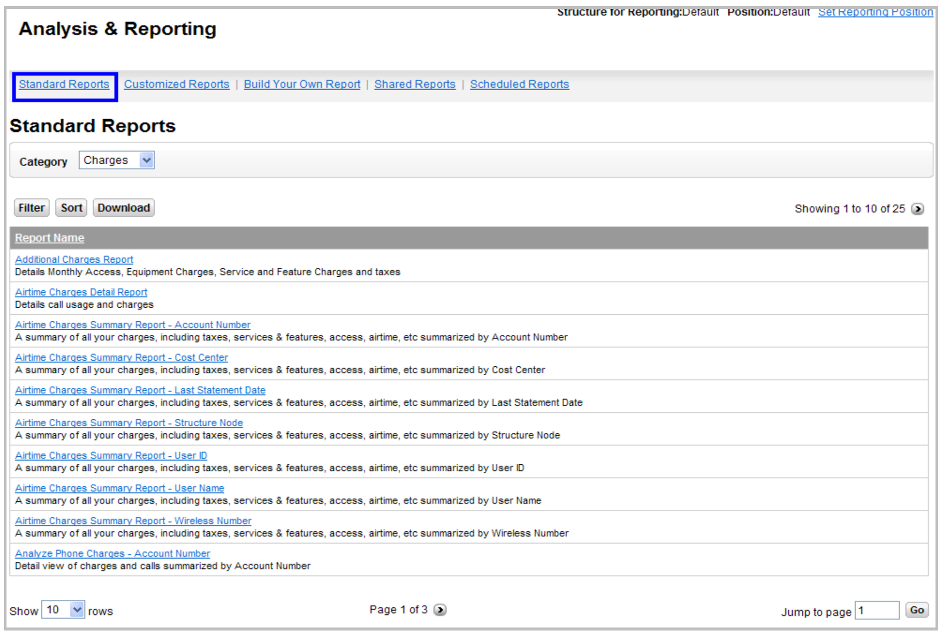
- Standard Reports
- Customized Reports

- Build Your Own Report
- Shared Reports
- Scheduled Reports

Standard Reports

Standard Reports are organized into the four categories below. Select one from the Categories dropdown to view all the reports under that category.

1. Charges – reports tied to charges
2. Usage – reports tied to usage
3. Other – reports that aren't directly tied to usage and charges (Company User Report, etc)
4. Integrated – reporting for other Verizon entities (Wireless, Telecom, and Business)



Charges Reports

These reports are available to all user roles except for the “**Buy**” role. Note: Standard Reports will only display information for wireless numbers that are currently active.

Available Charges Reports:

- **Additional Charges**: Details, sorted by mobile number, for Monthly Access, Equipment Charges, Service & Features Charges, and Taxes.
- **Airtime Charges Detail**: information related to call usage and charges only.
- **Airtime Charges Summary**: A summary of all your charges, including taxes, services & features, access, airtime, etc.
- **Analyze Phone Charges**: Phone usage details for all of your company’s wireless numbers. Details include airtime, charges, phone count, price plan code and description, phone status, billing date, account number, and total minutes allowed
- **Analyze Roaming Calls**: Total roaming charges (including associated airtime charges, roaming charges, and toll charges), taxes and surcharges, number of roaming calls, total roaming minutes, “from” city and state, “to” city and state, serving SID (home system of the mobile phone), call date, incoming/outgoing number, billing period, and call duration.
- **Top Ten Most Expensive Calls**: List of the top calls by cost

Usage Reports

Available Usage Reports:

- **20 Longest Calls:** Longest duration billed calls
- **Call Detail:** Voice call details for multiple wireless numbers displayed simultaneously summarized by Account Number, Wireless Number, Statement Date, Cost Center, User Name or Grand Total
- **Data Usage:** Data usage and charges.

- **Grand Total:** Comprehensive summary. Details total charges and total minutes
- **Mobile to Mobile:** Calls between Verizon Wireless voice devices
- **Monthly Usage:** Usage and charges for each wireless number, along with a grand total
- **Summary Usage:** Summarizes usage by wireless number
- **Top 20 Out of Network Calls:** Calls to non-Verizon Wireless devices
- **Unbilled Usage:** Current unbilled usage for the account

Other Reports

Available Other Reports:

- **Billing Structure:** how Verizon Wireless structures your organization
- **Company Users;** List of VEC users and their permissions within VEC
- **Customer Invoice Management**: Summary of charges information at the root level of the structure. The Level selected for reporting will include the selected folders and sub-folders (if applicable) within the report
- **De-Activated MTN:** Wireless numbers which have been deactivated
- **Device Report:** Comprehensive summary of devices and upgrade eligibility data
- **Global Summary**: Displays data based on the accounts and wireless numbers that received statements for the chosen period.
- **Memo Bill**: Account or Phone view of the Memo Bill that contains account specific charges, adjustments and taxes.
- **Memo Bill Status**: Displays status of Memo Bill distribution

- **Raw Data Download**: Export of all monthly statements delivered in a .zip file with 4 individual .txt files included that can be used with your company's internal system (e.g., Microsoft Excel or Access, etc).
- **Suspended MTN**: Suspended wireless numbers sorted by number, name, cost-center, or suspension date.
- **View Structure:** account and wireless numbers in a selected structure.

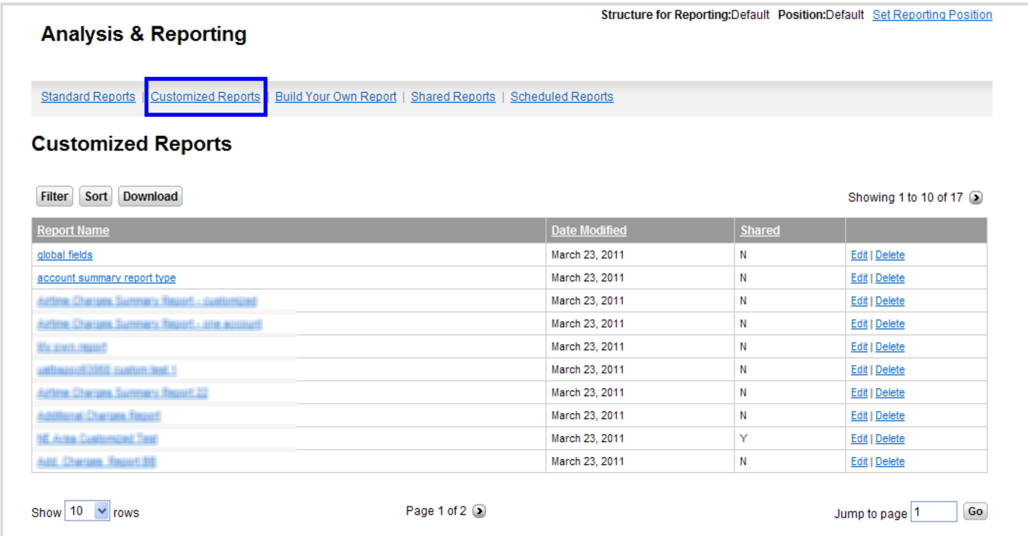
Integrated Reports

Available Integrated Reports:

- **Integrated Invoice Summary:** Current charges, outstanding balances, payments, adjustments, with total amount due across all selected accounts
- **Summary of Current Charges by Provider**: Summary across all selected accounts, with charges sorted by Verizon entity (Wireless, Telecom, Business), and other service provider, if applicable

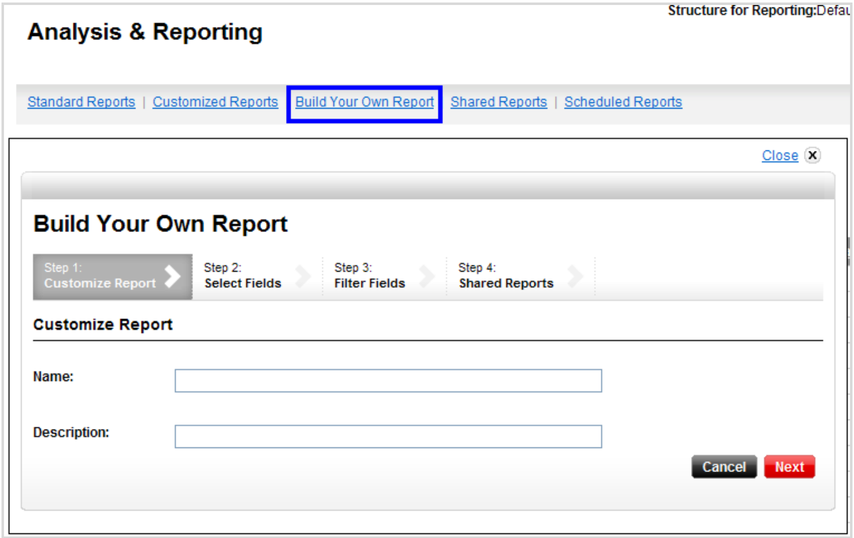
Customized Reports

The Customized Reports page contains any saved customized reports on your company's wireless accounts.



Build Your Own Report

The Build Your Own Report tab contains options for you to build a custom report. Refer to the **Create a customized report** section below for steps on creating a custom report.

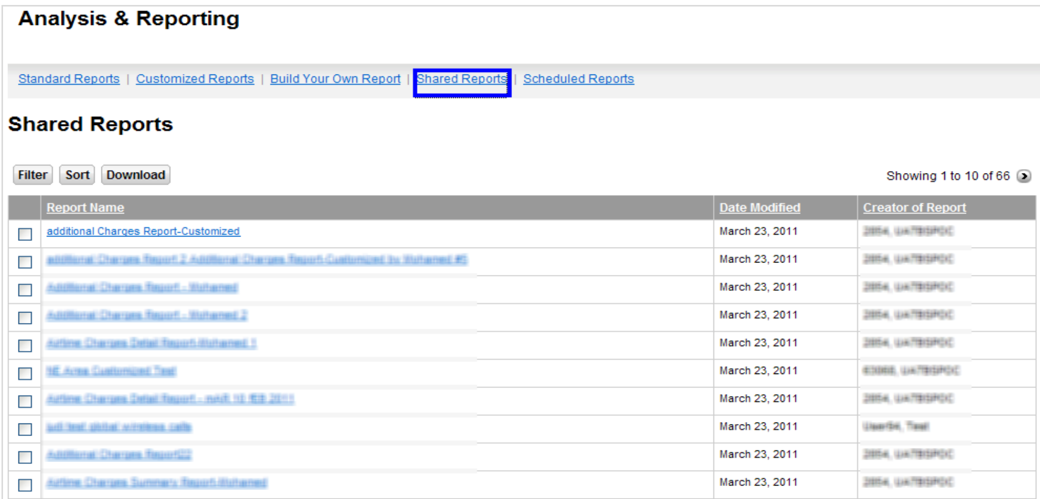


Available Wireless Reports to build by:

- Account Summary
- Overview of Lines
- Purchase Activity
- Usage and Charges Summary Detail
- Usage Details

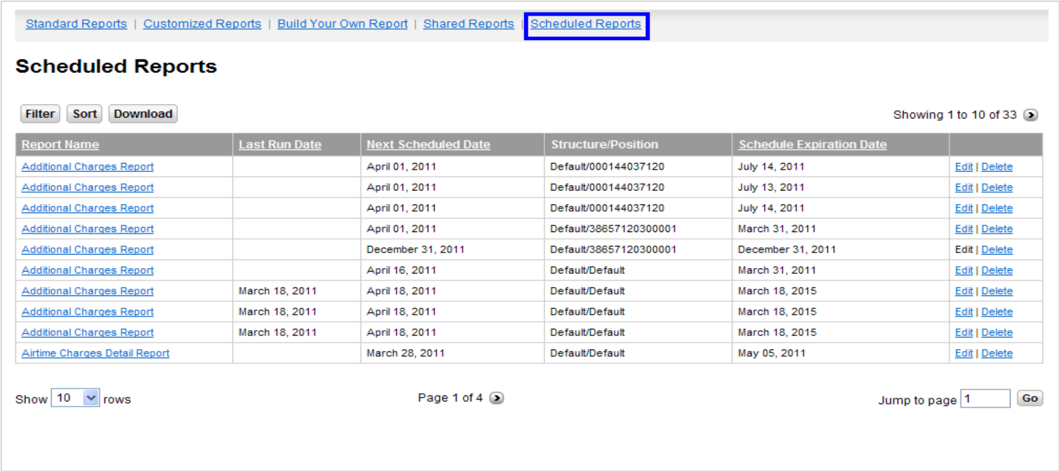
Shared Reports

The Shared Reports tab displays reports that have been set to share. You can also view the name of the user who created the report.



Scheduled Reports

The Scheduled Reports tab lists all reports that are scheduled to run. Here you can also view the structure type that each report is based on, and the date they expire.



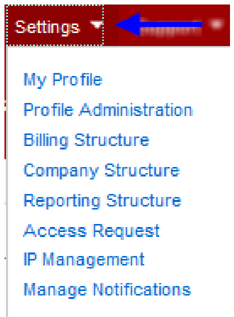
Report Name	Last Run Date	Next Scheduled Date	Structure/Position	Schedule Expiration Date	
Additional Charges Report		April 01, 2011	Default/000144037120	July 14, 2011	Edit | Delete
Additional Charges Report		April 01, 2011	Default/000144037120	July 13, 2011	Edit | Delete
Additional Charges Report		April 01, 2011	Default/000144037120	July 14, 2011	Edit | Delete
Additional Charges Report		April 01, 2011	Default/38657120300001	March 31, 2011	Edit | Delete
Additional Charges Report		December 31, 2011	Default/38657120300001	December 31, 2011	Edit | Delete
Additional Charges Report		April 16, 2011	Default/Default	March 31, 2011	Edit | Delete
Additional Charges Report	March 18, 2011	April 18, 2011	Default/Default	March 18, 2015	Edit | Delete
Additional Charges Report	March 18, 2011	April 18, 2011	Default/Default	March 18, 2015	Edit | Delete
Additional Charges Report	March 18, 2011	April 18, 2011	Default/Default	March 18, 2015	Edit | Delete
Airtime Charges Detail Report		March 28, 2011	Default/Default	May 05, 2011	Edit | Delete

Wireless Reporting How To's

Build a Reporting Structure

Create the structure

1. Click on the **Settings** tab.

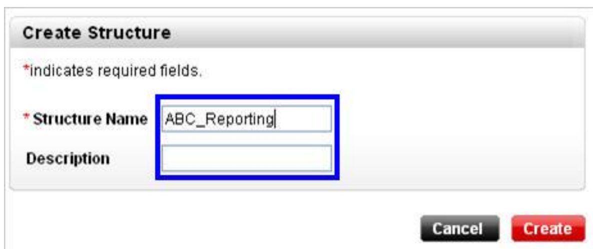


2. Go the **Reporting Structure** page.

3. Click on the **Admin** link.

4. Select **Create Structure** from the pop-up window.

5. Give the new structure a name and an optional description.

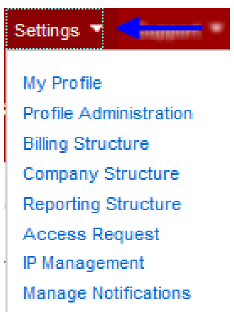


6. Click on the **Create** button.

7. The new structure will appear in the **Select Structure** dropdown.

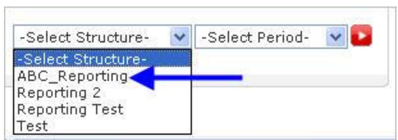
Add a folder

1. Click on the **Settings** tab.



2. Go the **Reporting Structure** page.

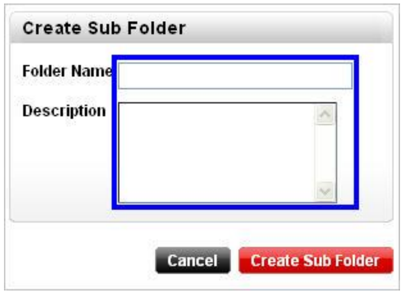
3. In the **Select Structure** dropdown, select the structure you want to create the new folder for.



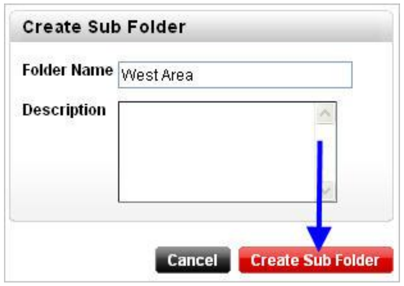
4. Choose a period from the **Select Period** dropdown, and click on the **red arrow button**. The reporting structure will display.

5. Click on the reporting structure name, and select **Create Sub-Folder** from the pop-up window.

6. **Give the new folder a name** and an optional description.



7. Click on the **Create Sub-Folder** button.



8. The new folder will appear in the structure. You have successfully added a folder to the reporting structure.

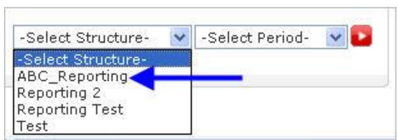
Assign wireless numbers

To add detail to the folders, you must populate the folders with the desired wireless numbers. There are two times when you would need to do this – when you first create the reporting structure, and when you activate a new wireless number.

1. Click on the **Settings** tab.

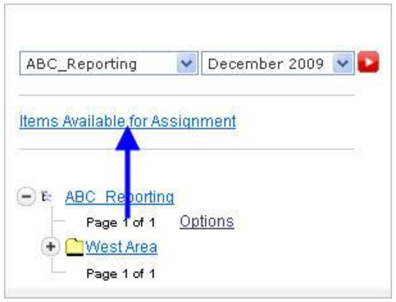
2. Go the **Reporting Structure** page.

3. In the **Select Structure** dropdown, select the structure you want to create the new folder for.

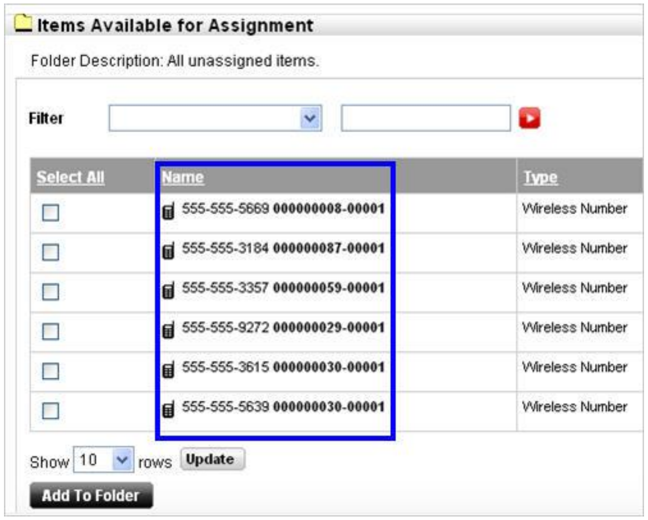


4. Choose a period from the “**Select Period**” dropdown, and click on the **red arrow button**.

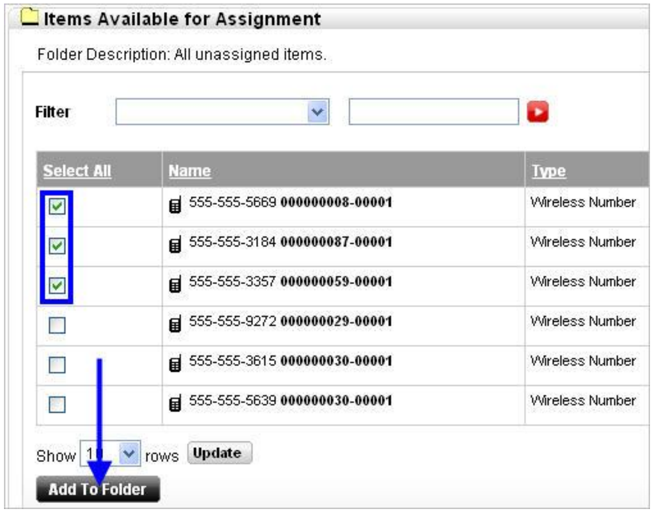
5. Click on the **Items available for assignment** link.



6. All of the numbers not already assigned to the reporting structure will display.



7. Check the box(es) next to the wireless number(s) you want to assign, and click on the **Add to Folder** button.



8. Select the folder where you want to add the wireless number(s), and click on the **Add to Folder** button.

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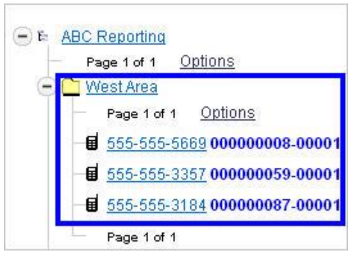
9. The numbers will appear in the selected folder when you open the structure.

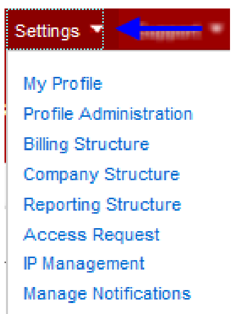


You have successfully assigned the wireless number(s) to a reporting structure.

Share with users

Sharing a reporting structure with a user will give them access to view and edit the structure.

1. Click on the **Settings** tab.



2. Go the **Reporting Structure** page.

3. In the **Select Structure** dropdown, select the structure you want to create the new folder for.

4. Choose a period from the **Select Period** dropdown, and click on the **red arrow button**.

5. **Check the box next to the folder(s)** you want to share, and click on the **Share with User** button.

6. **Check the box next to the user(s)** u want to give access to the reporting structure folder(s).

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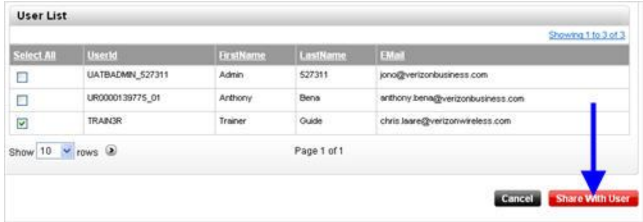
7. Click on the **Share with User** button. You have successfully shared the reporting structure.



Manage a Reporting Structure

Upload a Reporting Structure

If you already have a reporting structure in a .csv or .xml file, you can make the changes offline and import it into Verizon Enterprise Center. This is especially helpful if you have a large reporting structure. You can either create a new reporting structure or update an existing one.

Create a new upload file

Refer to this upload template < https://b2b.vzw.com/support/pdf/RS_upload_template.xls > when creating a new reporting structure upload file. Note: this template is a .XLS file; you will need to save the actual upload file as a .CSV file.

Notes:

- Maximum amount of wireless numbers is 1000
- File must be in .CSV or .XML format
- Maximum size for an upload is 2 MB
- An upload cannot be cancelled

Update an existing reporting structure file

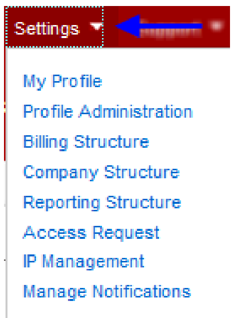
1. Download the existing reporting structure. See the "Download a reporting structure" section of this guide.

2. Make the necessary updates to the download file. Note: In order to overwrite the old structure, the old and new file names must remain identical.

3. Import the file according to the steps below.

To upload the file:

1. Click on the **Settings** tab.



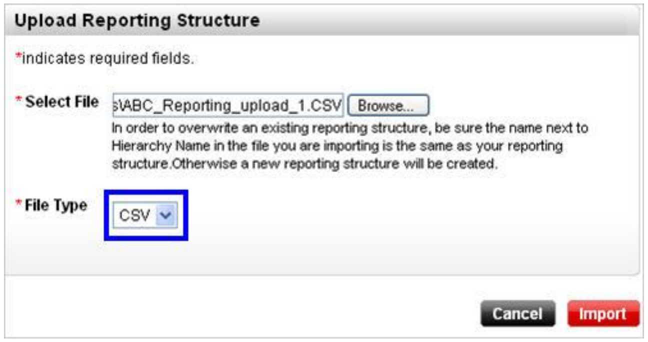
2. Go the **Reporting Structure** page.

3. Click on the **Admin** link.

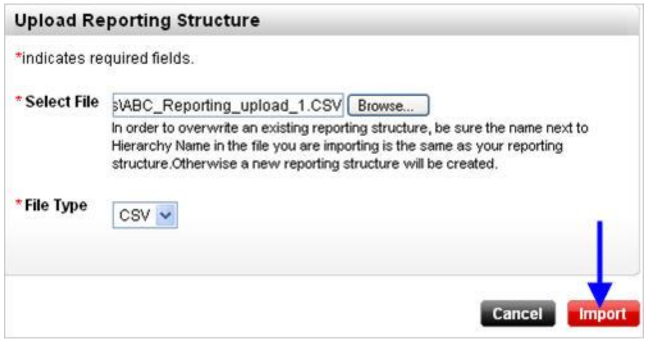
4. Select **Upload** from the pop-up window.

5. Click on the **Browse** button and select the file you want to upload.

6. Select the file type from the **File Type** dropdown.



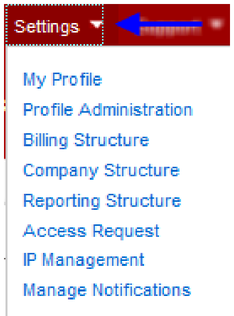
7. Click on the **Import** button.



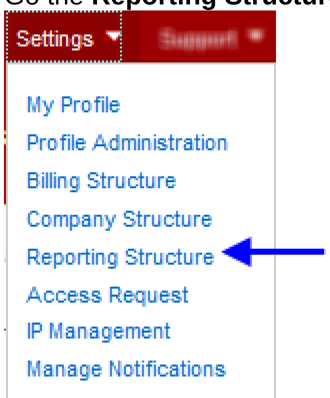
You have successfully uploaded a reporting structure.

Download a reporting structure

1. Click on the **Settings** tab.



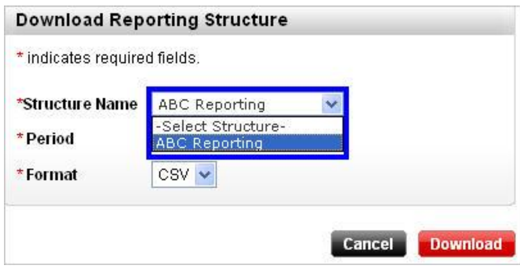
2. Go the **Reporting Structure** page.



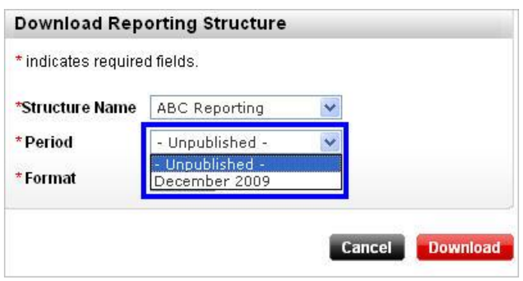
3. Click on the **Admin** link.

4. Select **Download** from the pop-up window.

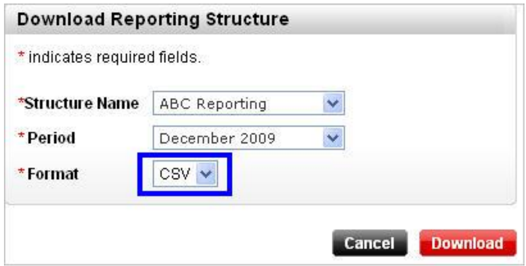
5. In the **Structure Name** dropdown, select the structure you want to download.



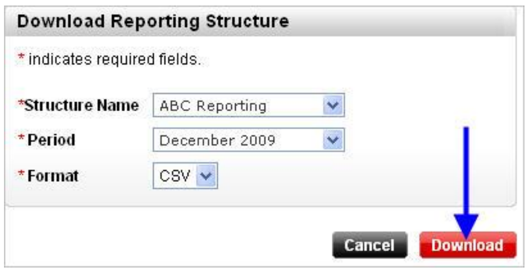
6. From the **Period** dropdown, select the month/year of the structure.



7. Select the format you want to download from the **Format** dropdown.



8. Click on the **Download** button and follow the prompts to save the file to your computer.

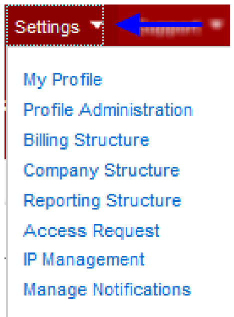


You have successfully downloaded a reporting structure.

Expire a reporting structure

Once you expire a reporting structure, data will no longer be collected based the structure. You will be able to run reports based on a reporting structure up until the time period it was expired.

1. Click on the **Settings** tab.

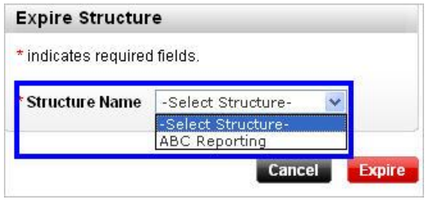


2. Go the **Reporting Structure** page.

3. Click on the **Admin** link.

4. Select **Expire** from the pop-up window.

5. In the **Structure Name** dropdown, select the structure you want to expire.



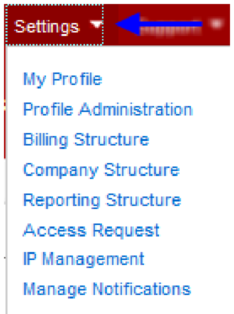
6. Click on the **Expire** button.

You have successfully expired the reporting structure.

Delete a reporting structure

Once you delete a reporting structure it is permanently gone and cannot be retrieved and reports cannot be run on it.

1. Click on the **Settings** tab.

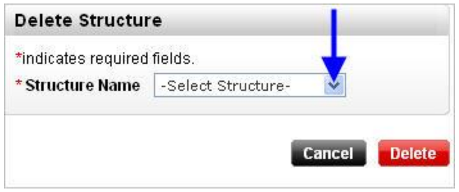


2. Go the **Reporting Structure** page.

3. Click on the **Admin** link.

4. Select **Delete** from the pop-up window.

5. In the **Structure Name** dropdown, select the structure you want to delete.



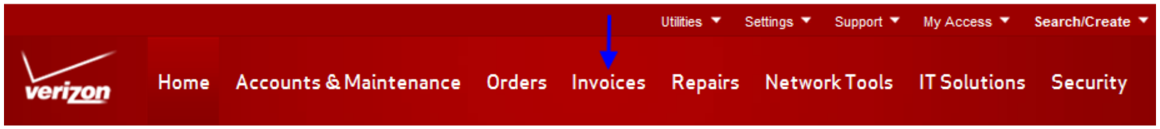
6. Click on the **Delete** button. You have successfully deleted the reporting structure.

Run Reports

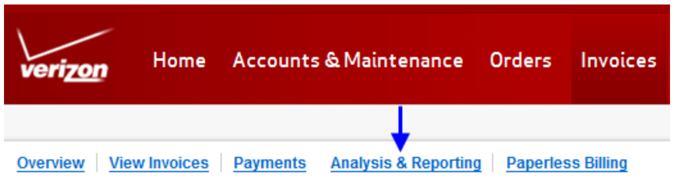
Before you run a report, you will need to set the reporting position. Your report will contain the data for the wireless numbers and accounts that are located within the position you set.

Set your reporting position

1. Click on the **Invoices** tab.

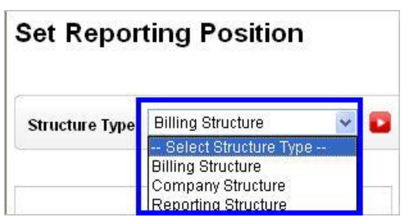


2. Go to the **Analysis & Reporting** page.



3. Click on the **Set Reporting Position** link.

4. From the **Structure Type** dropdown, select the type of structure you will use to run the report. You can choose from one of the following structures. Note: you must first create a company or reporting structure before you can run a report on one.



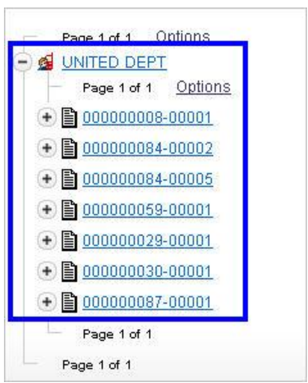
- Billing Structure – Wireless numbers are grouped based on the billing account they belong to; as they appear in your paper bill.

- Company Structure – Wireless numbers and accounts are grouped in a way that matches how your company's departments are organized. Note: you can only run reports on a company structure beginning the month that the structure was created.

- Reporting Structure – Custom structure that allows you to create new groups of wireless numbers without altering the billing or company structure. For example, you can run a report on a group of wireless numbers with the same device, allowance, memo bill distribution list, etc.

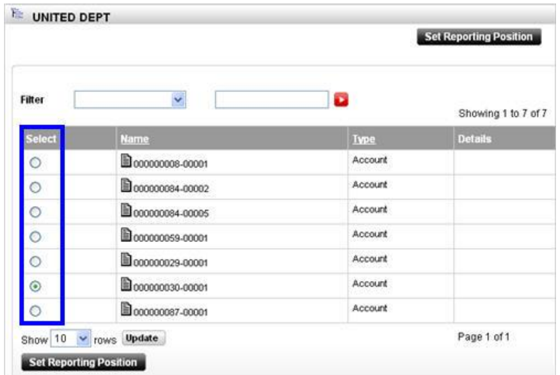
5. For this guide we will select a Billing Structure; click on the **red arrow button**.

6. Search through the structure by clicking on the "**+**" (plus sign) next to the accounts or folders until you find the desired position.

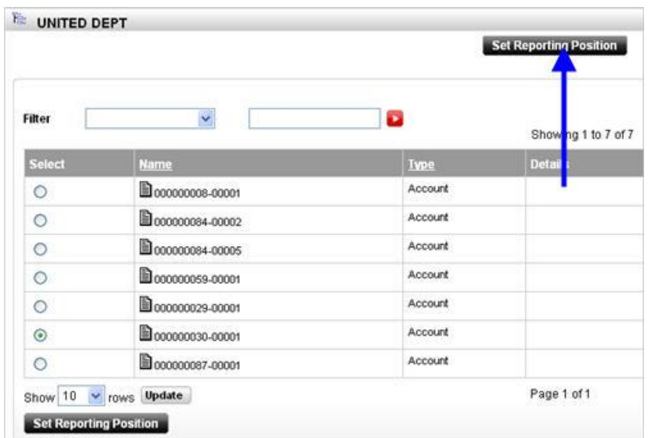


Note: with a Billing Structure, wireless numbers will be located in accounts. With Company and Reporting Structures, they will be located in folders.

7. Select the radio dial next to the desired position.



8. Click on the **Set Reporting Position** button.

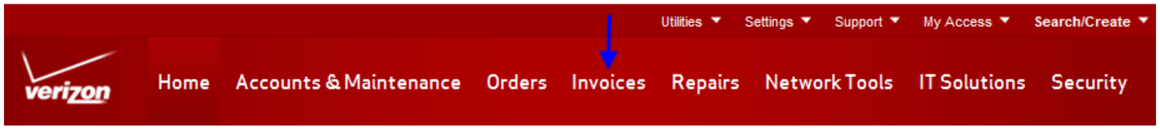


9. Confirm in the upper right-hand corner that the correct structure and position are set. You have successfully set the reporting position.

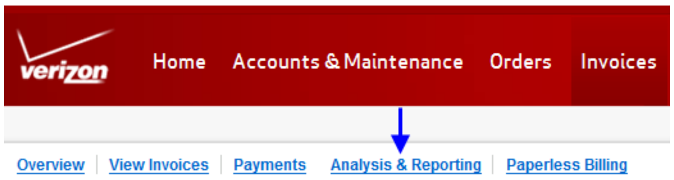
Once you have set the reporting position, you are ready to run a report.

Run Standard Reports

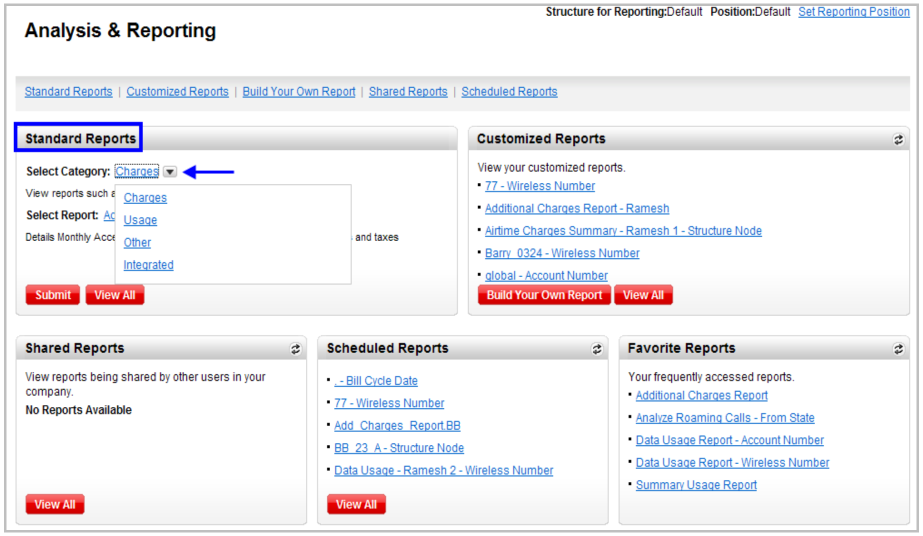
1. Click on the **Invoices** tab.



2. Go to the **Analysis & Reporting** page.

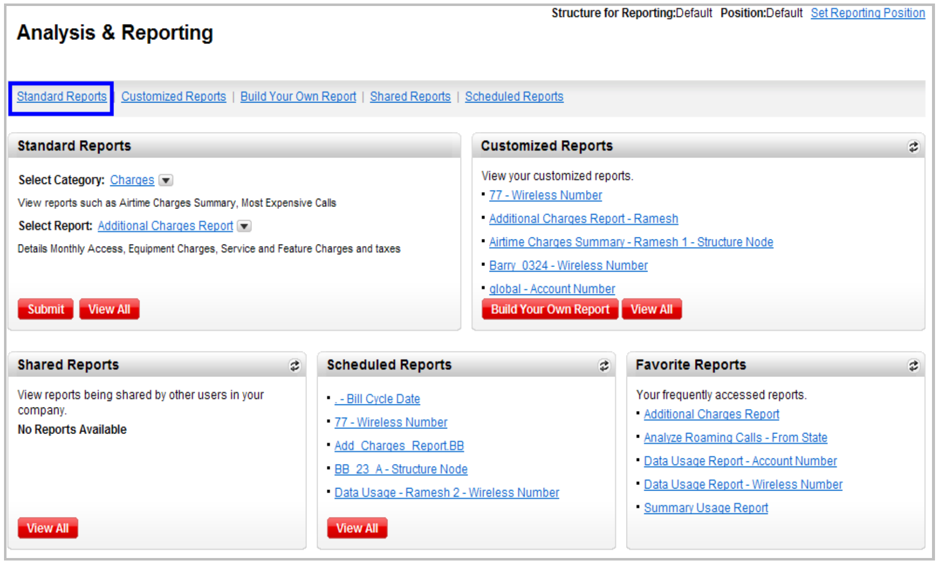


The Analysis & Reporting Overview page will appear with a pod for Standard Reports. Within the pod you can select the category by using the dropdown menu to display standard reports by Charges, Usage, Other or Integrated reports.

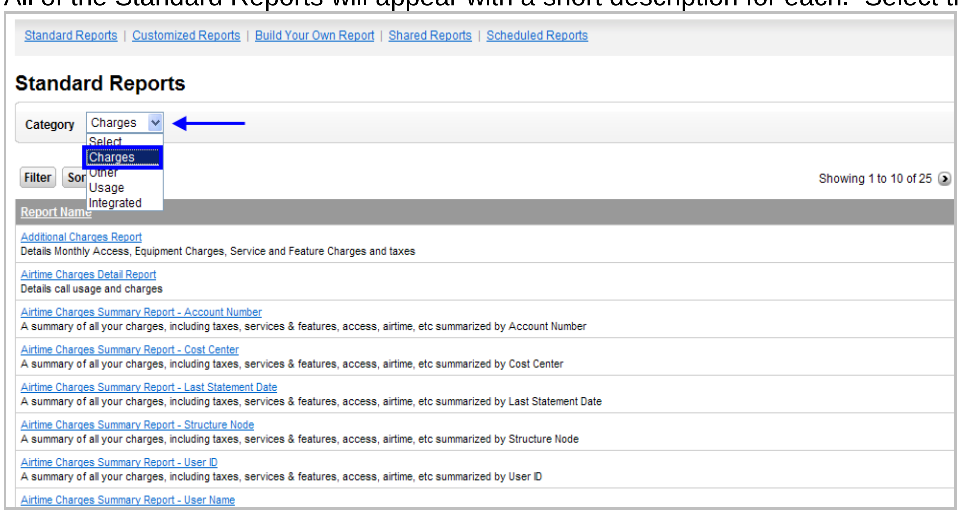


Run a Charges Report

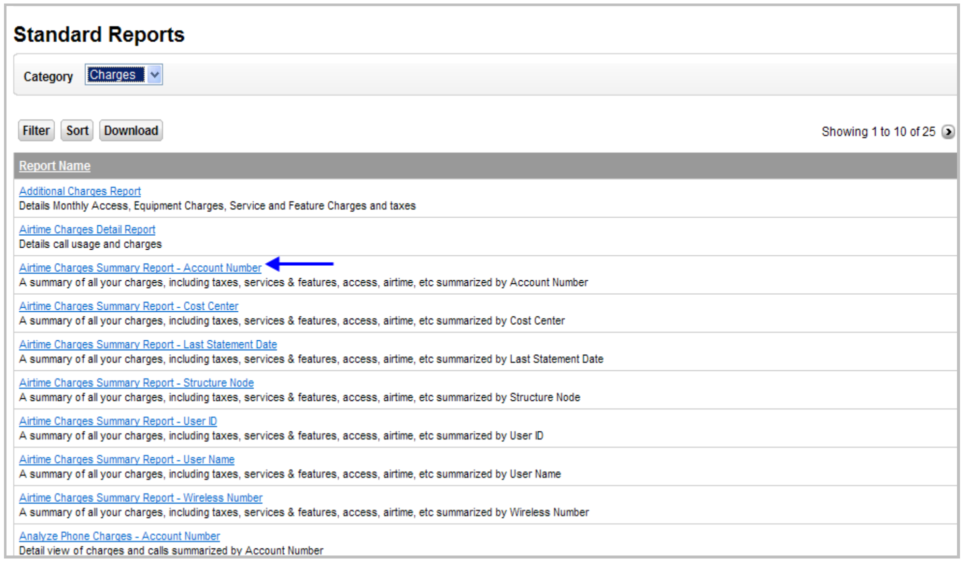
1. Select the Standard Reports tab to view all of the Standard Reports



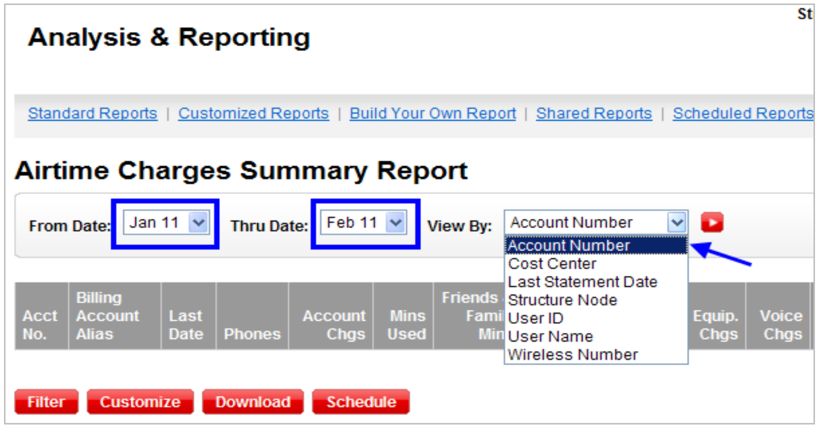
2. All of the Standard Reports will appear with a short description for each. Select the Charges category from the dropdown menu.



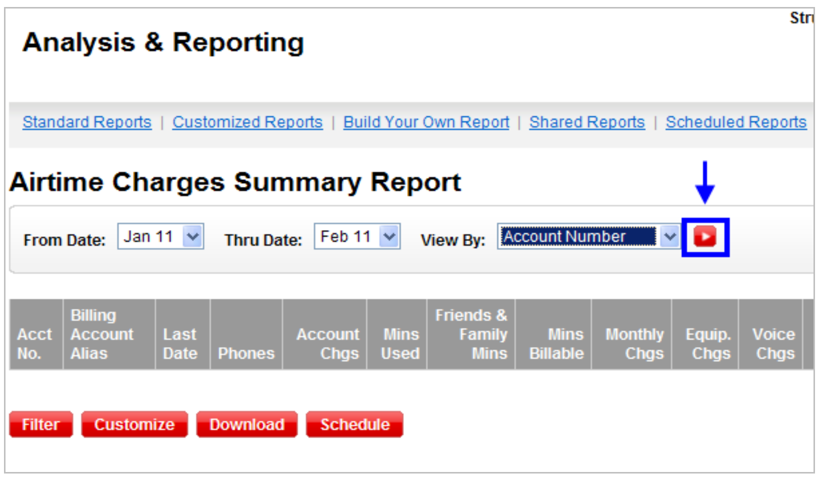
3. While on the “**Standard Reports**” tab, Charges category, click the desired report in the Report Name section. For this example we will select the “**Airtimes Charges Summary By Account**” report.



4. The report type will display. From here you will define the data period you want to see displayed along with an option to change how you view the data by. Change the period by selecting new dates in the “**From Date**” and/or “**Thru Date**” dropdowns. If desired, select the View By option from the dropdown menu.



5. When you have made your selections click the red arrow to run your report



6. Your data will display on the page. From here you have multiple options to help you manipulate your data as needed:

    a. Filter – limit the items in your data by specific criteria

b. Sort – sort by columns of your choice, OR click the column on the data page
c. Download – download your data into an excel file
d. Customize – add and remove columns of data from your standard report to create a custom report
e. Schedule – run the report on a recurring basis
f. Search – narrow down data by searching for unique criteria

Filter | Sort | Download | Customize | Schedule | Search

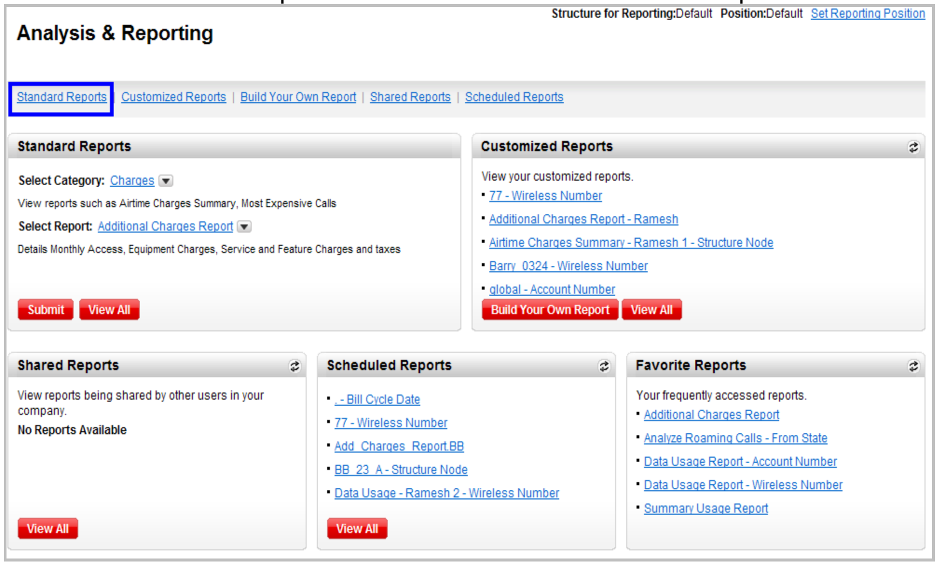
Showing 1 to 6 of 6

Acct No.	Billing Account Alias	Last Date	Phones	Account Chgs	Mins Used	Friends & Family mins ▲	Mins Billable	Monthly Chgs	Equip. Chgs	Voice Chgs	Messaging Chgs	Data Chgs	Roaming Chgs	Other Chgs & Credits	Taxes and Surchgs	C
Sorted By: Friends & Family mins Remove																
682580599-00001		02/15/2011	3,112	0.00	189	0	189	248,639.07	642.82	47.25	0.82	322.20	438.46	-966.93	177.70	249
386571203-00001		02/15/2011	2,164	0.00	585,722	0	1	133,124.41	1,040.00	275.80	3.29	62.04	2.49	12.50	26,793.44	161
386571203-00001		01/15/2011	1	0.00	1	0	0	-32.69	0.00	0.00	0.00	0.00	0.00	0.00	15.03	
286479238-00001		02/15/2011	422	428.47	481,380	0	201	45,921.81	2,095.63	403.80	738.71	50.21	346.89	15.00	4,330.29	54
286479238-00001		01/15/2011	3	0.00	177	0	0	-23.29	2.00	0.00	0.00	0.00	0.00	0.00	34.25	
882621814-00001		01/25/2011	13	0.00	10,435	340	0	619.33	0.00	0.00	2.40	0.00	0.00	0.00	44.26	
Total		**5,715**	**428.47**	**1,077,904**	**340**	**391**	**428,248.64**	**3,780.45**	**726.85**	**745.22**	**434.45**	**787.84**	**-939.43**	**31,394.97**	**465,607.46**	

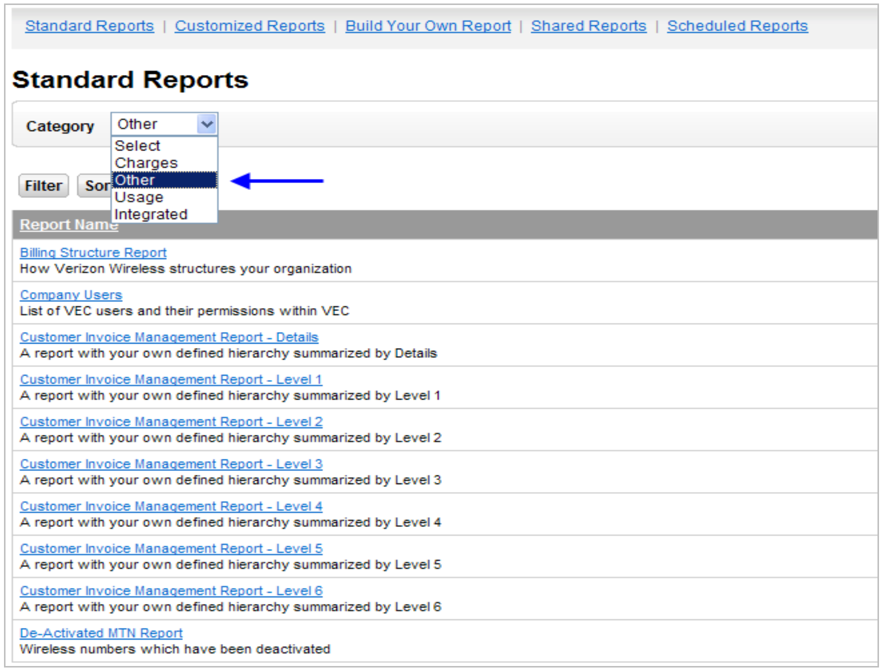
Run Other Reports

For this example we will run the "**Global Summary**" report. The Global Summary report displays data based on the accounts and wireless numbers that received statements for the chosen period. Note: This report will match the information contained in your Paper Bill.

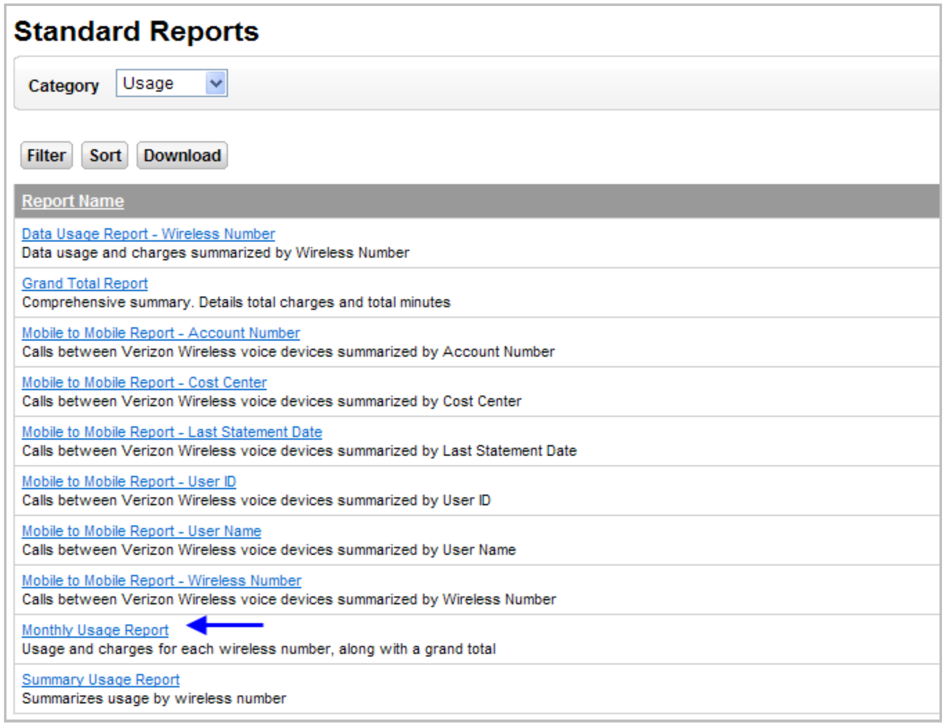
1. Select the Standard Reports tab to view all of the Standard Reports



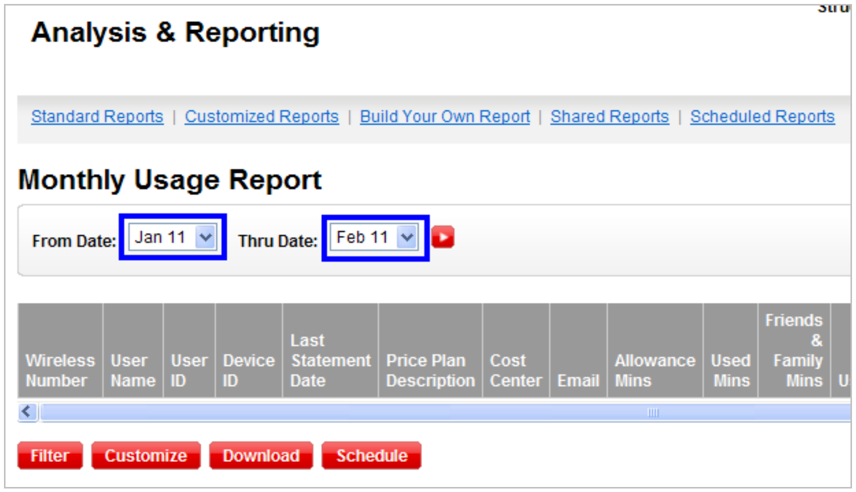
2. All of the Standard Reports will appear with a short description for each. Select the **Other** category from the dropdown menu.



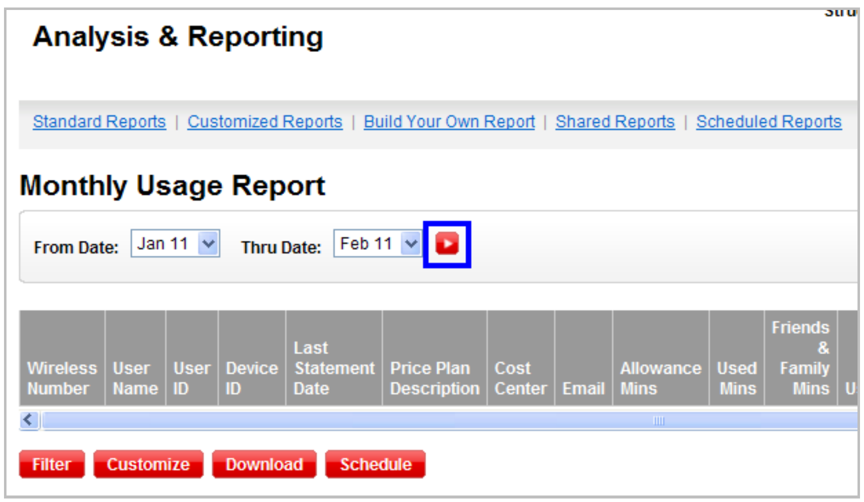
3. While on the “**Standard Reports**” tab, **Other** category, click the desired report in the Report Name section. For this example we will select the “**Monthly Usage** ” report.



4. The report type will display. From here you will define the data period you want to see displayed. Change the period by selecting new dates in the "**From Date**" and/or "**Thru Date**" dropdowns.

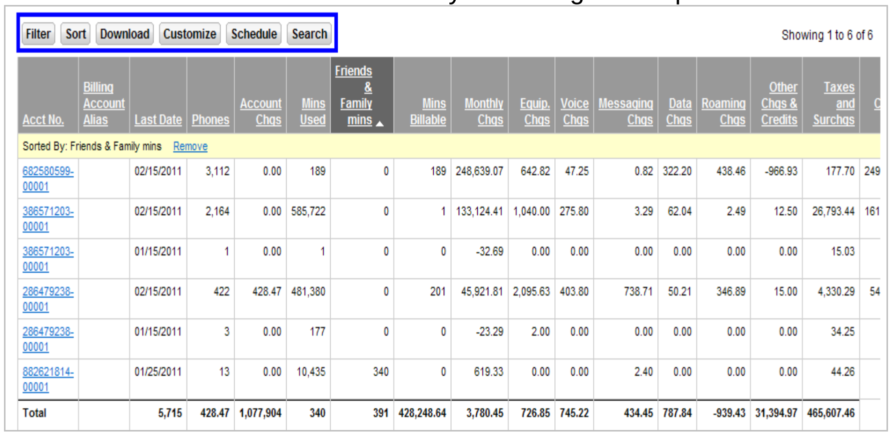


5. When you have made your selections click the red arrow to run your report



6. Your data will display on the page. From here you have multiple options to help you manipulate your data as needed:

    a. Filter – limit the items in your data by specific criteria
    b. Sort – sort by columns of your choice, OR click the column on the data page
    c. Download – download your data into an excel file
    d. Customize – add and remove columns of data from your standard report to create a custom report
    e. Schedule – run the report on a recurring basis
    f. Search – narrow down data by searching for unique criteria



Acct No.	Billing Account Alias	Last Date	Phones	Account Chgs	Mins Used	Friends & Family mins	Mins Billable	Monthly Chgs	Equip. Chgs	Voice Chgs	Messaging Chgs	Data Chgs	Roaming Chgs	Other Chgs & Credits	Taxes and Surchgs	C
Sorted By: Friends & Family mins Remove																
682580599-00001		02/15/2011	3,112	0.00	189	0	189	248,639.07	642.82	47.25	0.82	322.20	438.46	-966.93	177.70	249
386571203-00001		02/15/2011	2,164	0.00	585,722	0	1	133,124.41	1,040.00	275.80	3.29	62.04	2.49	12.50	26,793.44	161
386571203-00001		01/15/2011	1	0.00	1	0	0	-32.69	0.00	0.00	0.00	0.00	0.00	0.00	15.03	
286479238-00001		02/15/2011	422	428.47	481,380	0	201	45,921.81	2,095.63	403.80	738.71	50.21	346.89	15.00	4,330.29	54
286479238-00001		01/15/2011	3	0.00	177	0	0	-23.29	2.00	0.00	0.00	0.00	0.00	0.00	34.25	
882621814-00001		01/25/2011	13	0.00	10,435	340	0	619.33	0.00	0.00	2.40	0.00	0.00	0.00	44.26	
Total		**5,715**	**428.47**	**1,077,904**	**340**	**391**	**428,248.64**	**3,780.45**	**726.85**	**745.22**	**434.45**	**787.84**	**-939.43**	**31,394.97**	**465,607.46**	

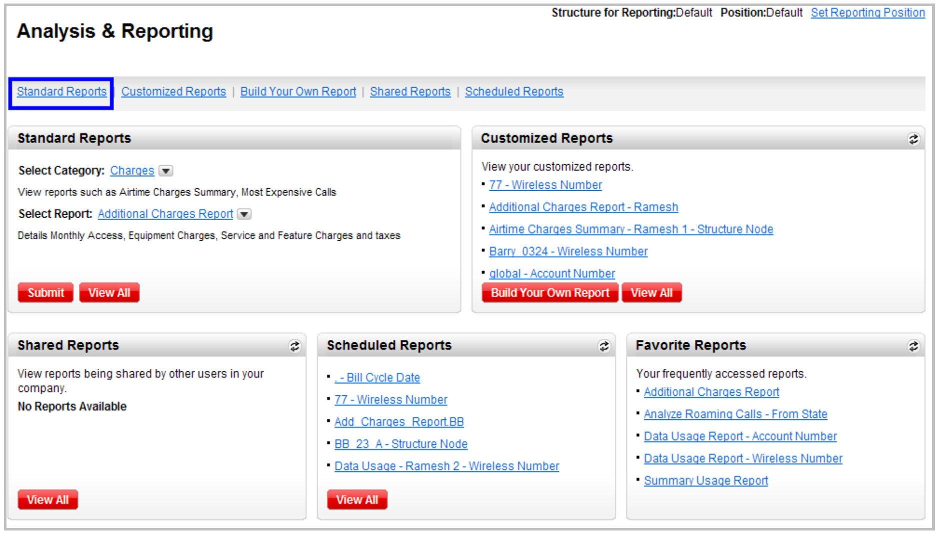
Note: for quick access to details on a number or account, click the hyperlink tied to the number

Run Usage Reports

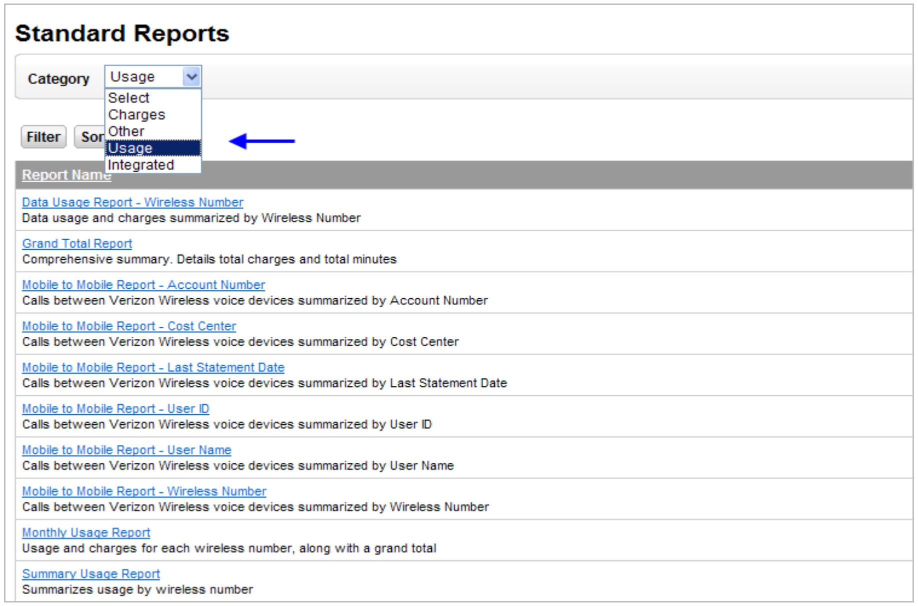
The following steps show how to run the "**20 Out of Network Calls**" Account Report. This is a useful report for determining who to add to your Friends & Family® for Business list.

To run a Usage Report

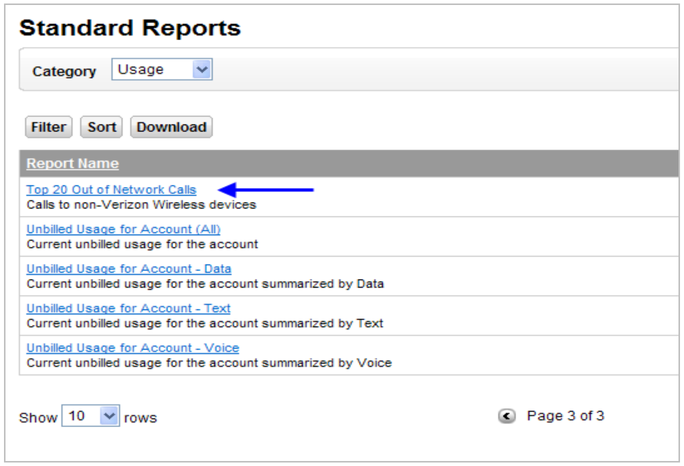
1. Select the Standard Reports tab to view all of the Standard Reports



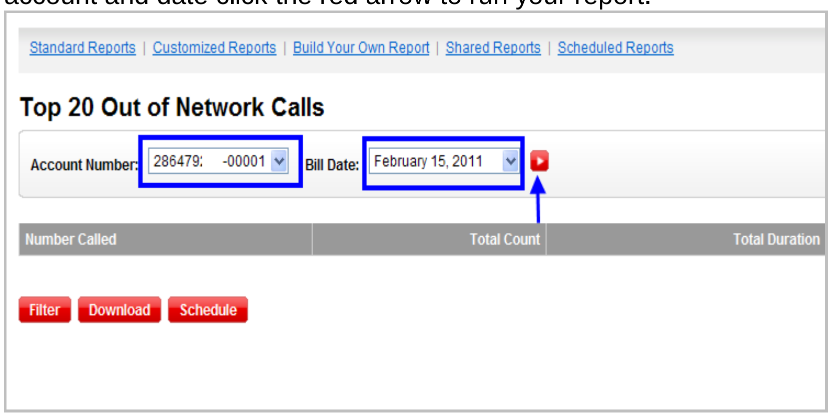
2. All of the Standard Reports will appear with a short description for each. Select the Usage category from the dropdown menu.



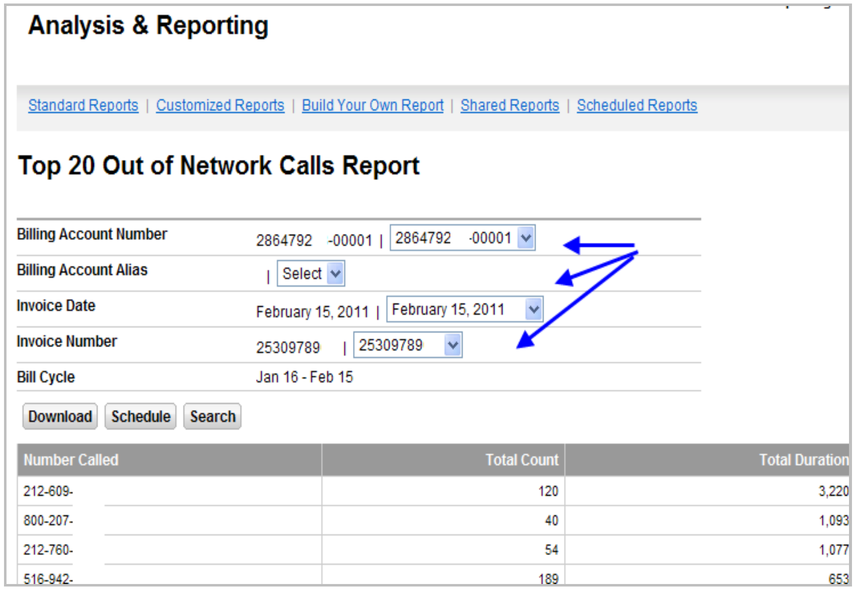
3. While on the "**Standard Reports**" tab, **Usage** category, click the desired report in the Report Name section. For this example we will select the "**20 Out of Network Calls**" report.



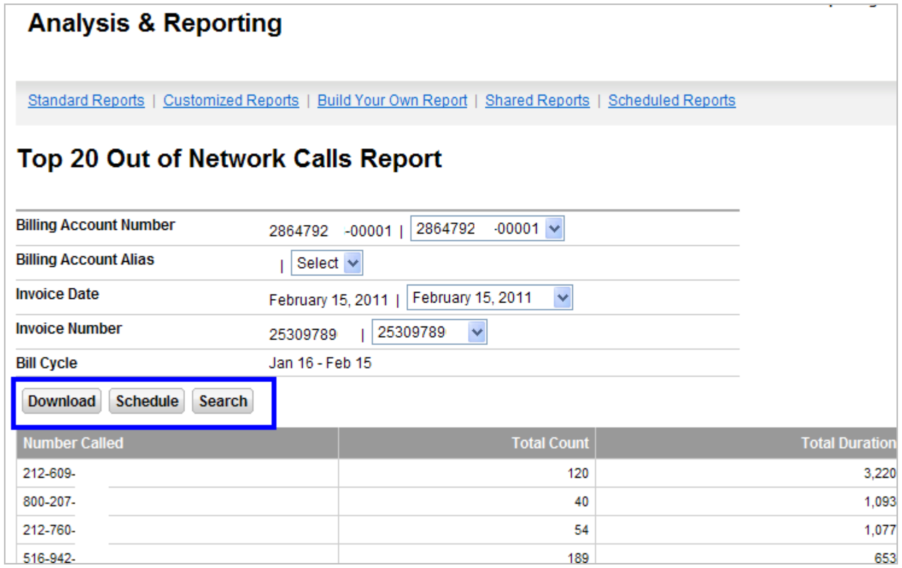
4. The report type will display. From here you will define the account and bill date you want to see displayed. Once you have selected the account and date click the red arrow to run your report.



5. The data for the Top 20 Out of Network Calls will display on the page. From here you can modify the account number you are viewing, the invoice number and date.



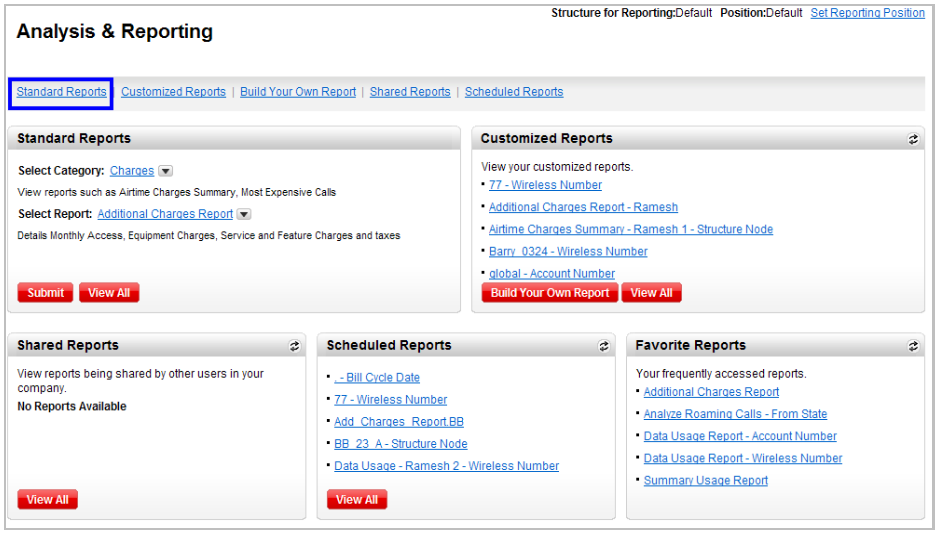
6. Click the download button if you would like to view the data in an excel format, search for unique criteria or schedule this report to run on a recurring basis.



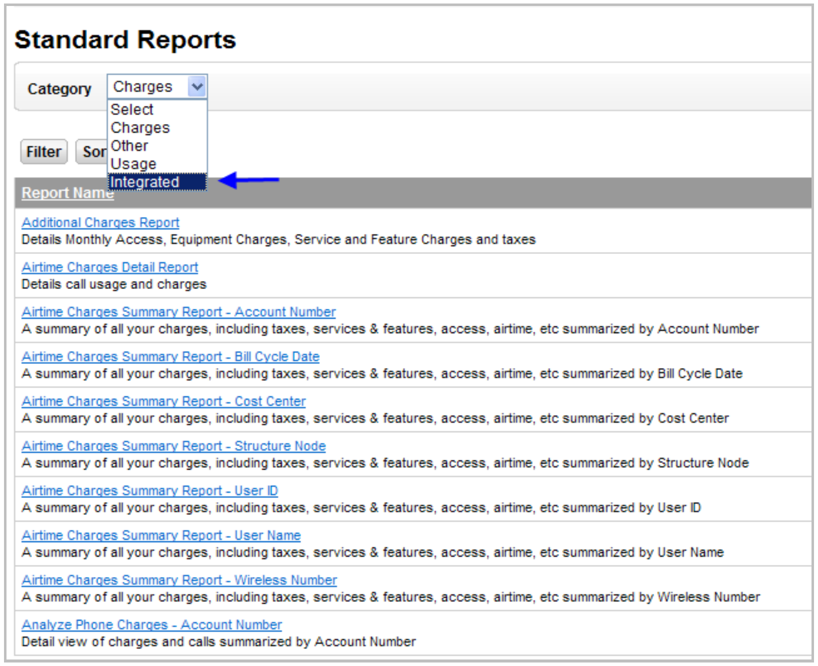
Run Integrated Reports

If you have combined services such as wireless, telecom or business in VEC this section will provide a consolidated view of reports for those accounts.

1. Select the **Standard Reports** tab to view all of the Standard Reports

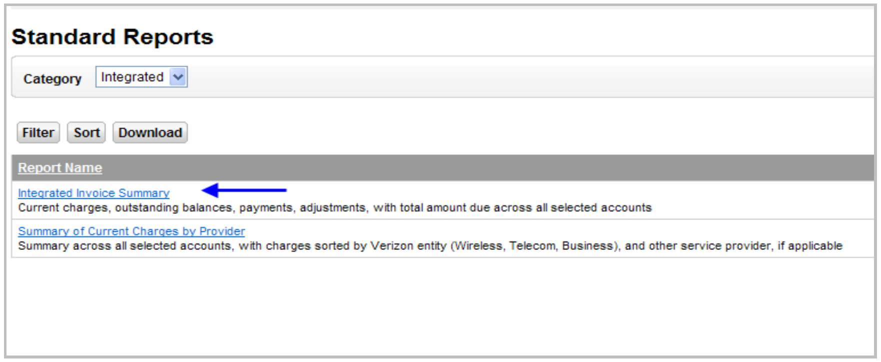


2. All of the Standard Reports will appear with a short description for each. Select the **Integrated** category from the dropdown menu.

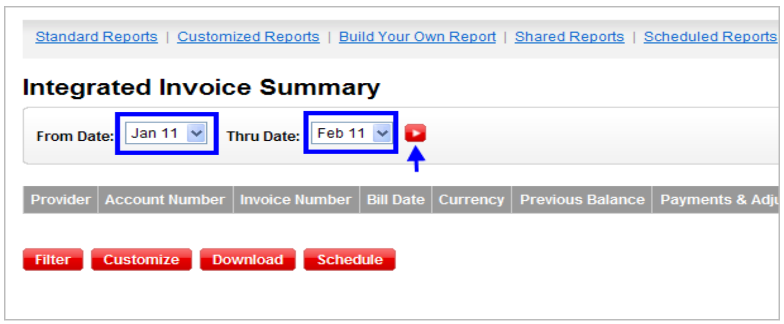


3. Click on the report you want to run. For this example we will run the “**Integrated Invoice Summary**” report.

verizon



4. Select the From and Thru Date then click the red arrow to run the report



5. Your data will display on the page. From here you have multiple options to help you manipulate your data as needed:

   a. Filter – limit the items in your data by specific criteria
   b. Sort – sort by columns of your choice, OR click the column on the data page
   c. Download – download your data into an excel file
   d. Customize – add and remove columns of data from your standard report to create a custom report
   e. Schedule – run the report on a recurring basis
   f. Search – narrow down data by searching for unique criteria

Acct No.	Billing Account Alias	Last Date	Phones	Account Chgs	Mins Used	Friends & Family mins	Mins Billable	Monthly Chgs	Equip. Chgs	Voice Chgs	Messaging Chgs	Data Chgs	Roaming Chgs	Other Chgs & Credits	Taxes and Surchgs	C
Sorted By: Friends & Family mins Remove																
682580599-00001		02/15/2011	3,112	0.00	189	0	189	248,639.07	642.82	47.25	0.82	322.20	438.46	-966.93	177.70	249
386571203-00001		02/15/2011	2,164	0.00	585,722	0	1	133,124.41	1,040.00	275.80	3.29	62.04	2.49	12.50	26,793.44	161
386571203-00001		01/15/2011	1	0.00	1	0	0	-32.69	0.00	0.00	0.00	0.00	0.00	0.00	15.03	
286479238-00001		02/15/2011	422	428.47	481,380	0	201	45,921.81	2,095.63	403.80	738.71	50.21	346.89	15.00	4,330.29	54
286479238-00001		01/15/2011	3	0.00	177	0	0	-23.29	2.00	0.00	0.00	0.00	0.00	0.00	34.25	
882621814-00001		01/25/2011	13	0.00	10,435	340	0	619.33	0.00	0.00	2.40	0.00	0.00	0.00	44.26	
Total		**5,715**	**428.47**	**1,077,904**	**340**	**391**	**428,248.64**	**3,780.45**	**726.85**	**745.22**	**434.45**	**787.84**	**-939.43**	**31,394.97**	**465,607.46**	

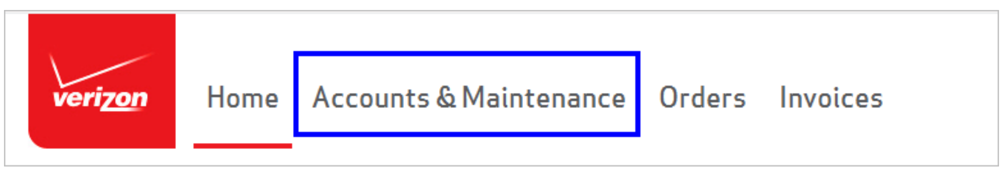
Note: for quick access to details on a number or account, click the hyperlink tied to the number.

Memo Bill Distribution

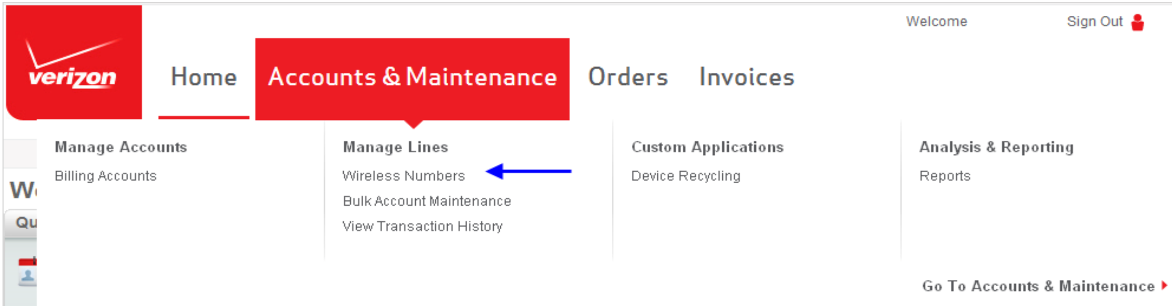
Note: A Memo Bill can only go out to users whose email address is loaded. Up to six email addresses can be loaded per wireless number.

To verify a company user's email address is loaded:

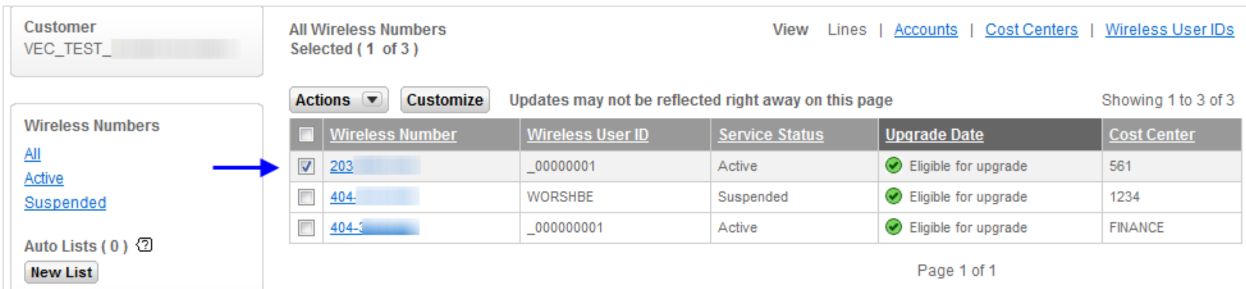
1. Click on the "**Accounts & Maintenance**" tab.



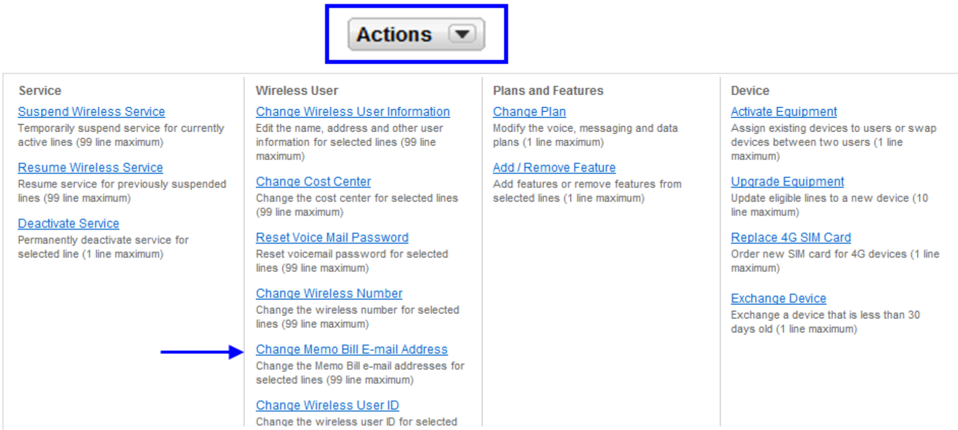
2. Go to the "**Manage Lines – Wireless Numbers**" page.



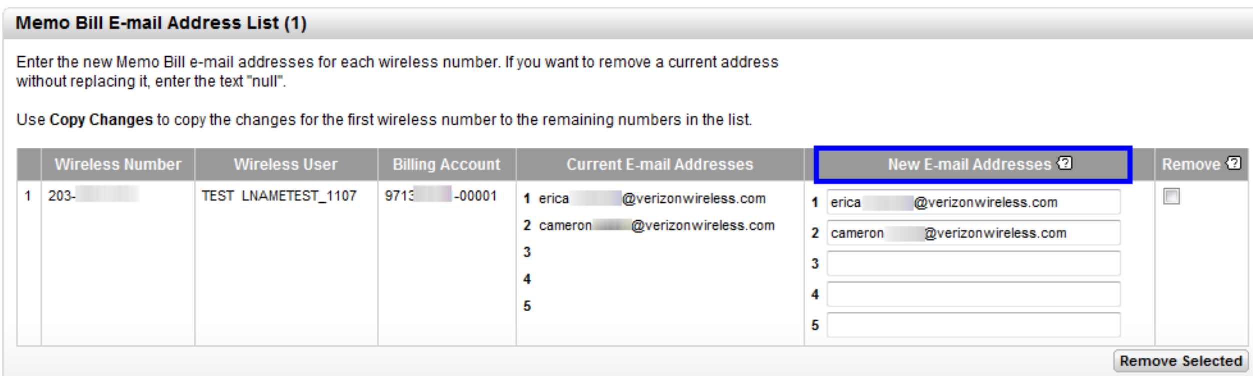
3. For the desired user, check the box next to the wireless number.



4. Go to the “**Actions**” menu and select “**Change Memo Bill Address**”

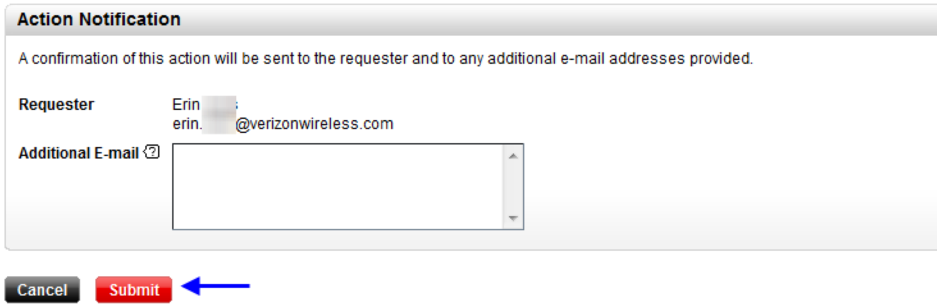


5. The existing E Mail Address on file is listed. You may also add up to five additional email addresses to the "**Memo Bill E-mail Addresses**" field. If a needed, enter a new E mail address in the appropriate field.



6. In the Action Notification section, the requestors e mail address is listed. The requestor will receive an e mail notice of the changes made along with any additional e mail addresses you may need to add in this section with any optional comments. Click Submit to complete your request.

verizon

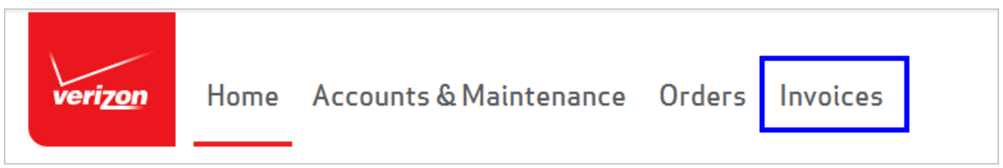


Generate a Memo Bill

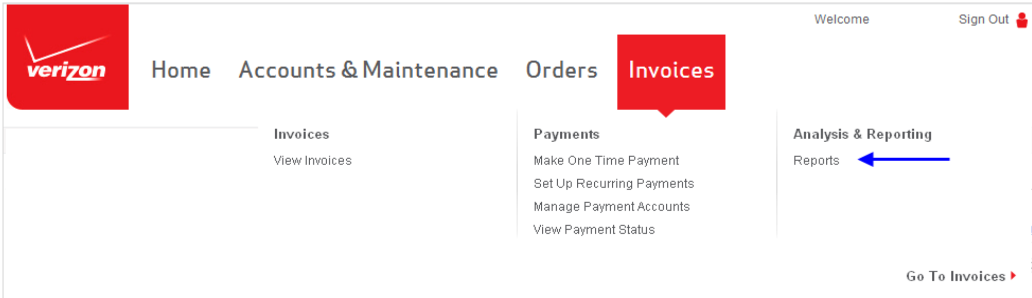
There are two ways to generate a Memo Bill request: mass distribution to all wireless numbers in your account or individual distribution.

To send a Memo Bill to all wireless numbers in the account:

1. Click on the “**Invoices**” tab.



2. Go to t “**Analysis & Reporting - Reports**” page.



3. Click on the "**Set Reporting Position**" link.

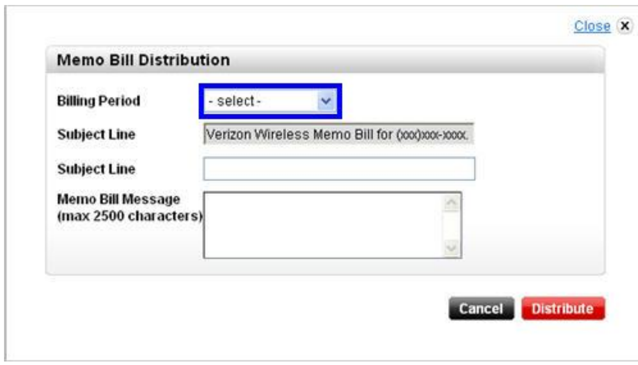
4. Make sure "**Billing Structure**" is selected in the "**Structure Type**" dropdown, and click on the **red arrow button**.

5. Open the structure by **clicking on the "+"** (plus sign) next to the structure name.

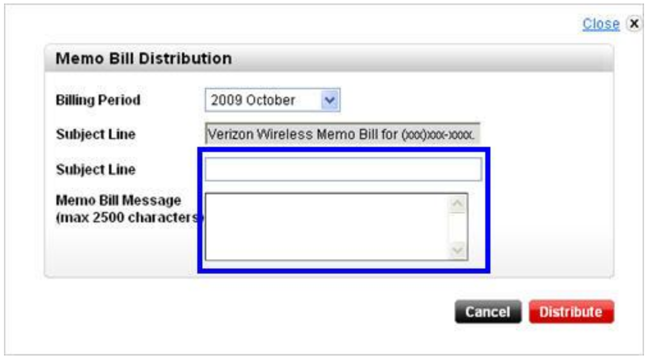
6. **Click on the desired account number**.

7. In the pop-up window, select “**Memo Bill Distribution**”.

8. Select a date from the “**Billing Period**” dropdown.



9. Enter the memo bill message, and an optional second subject line.

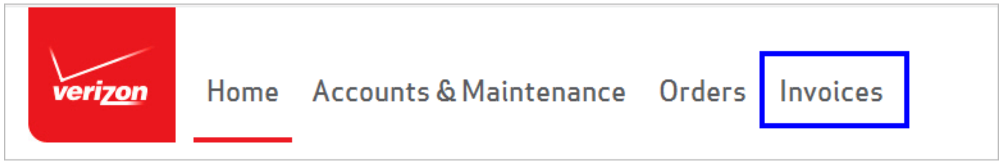


10. Click on the “**Distribute**” button.

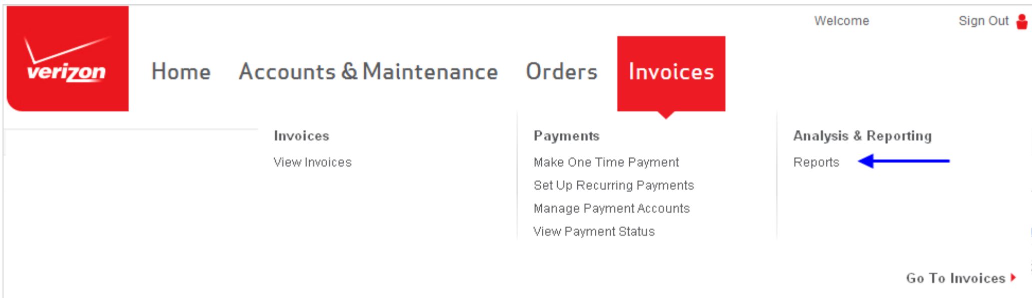
You have successfully distributed a Memo Bill to the entire account.

To send a Memo Bill to an individual wireless number

1. Click on the “**Invoices**” tab.



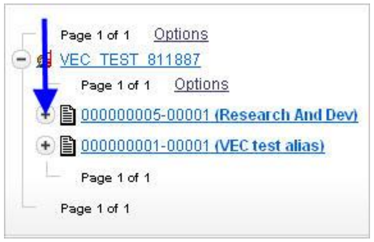
2. Go to the “**Analysis & Reporting**” page.



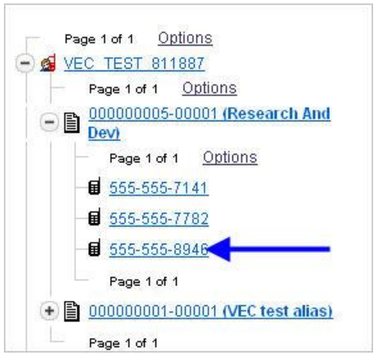
3. Click on the “**Set Reporting Position**” link.

4. Open the structure by **clicking on the “+”** (plus sign) next to the structure name.

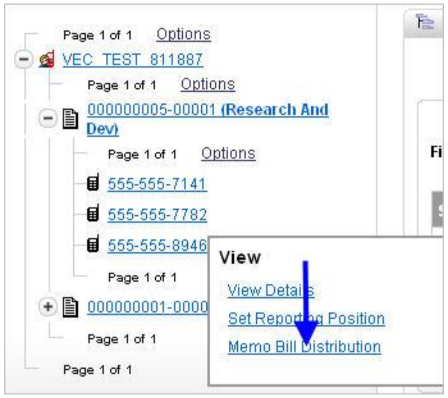
5. Open the account that contains the desired wireless number by **clicking on the "+"** (plus sign).



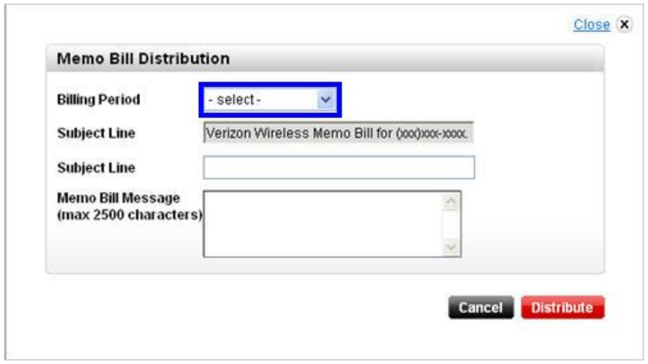
6. Click on the wireless number that will be receiving the memo bill.



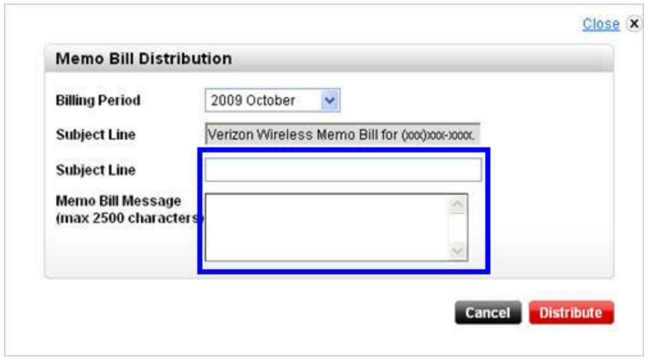
7. In the pop-up window, select "**Memo Bill Distribution**".



8. Select a date from the "**Billing Period**" dropdown.



9. Enter the memo bill message, and an optional second subject line.



10. Click on the "**Distribute**" button.

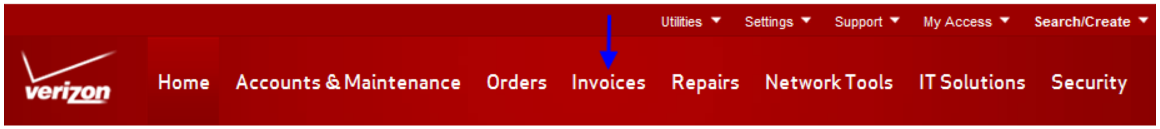
You have successfully distributed a Memo Bill to an individual wireless number.

Custom Reports

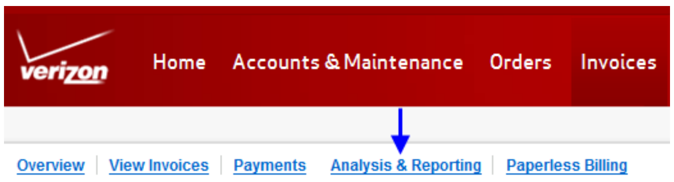
Create a custom report from a Standard Report

To create a custom report using pre-defined Standard Reports:

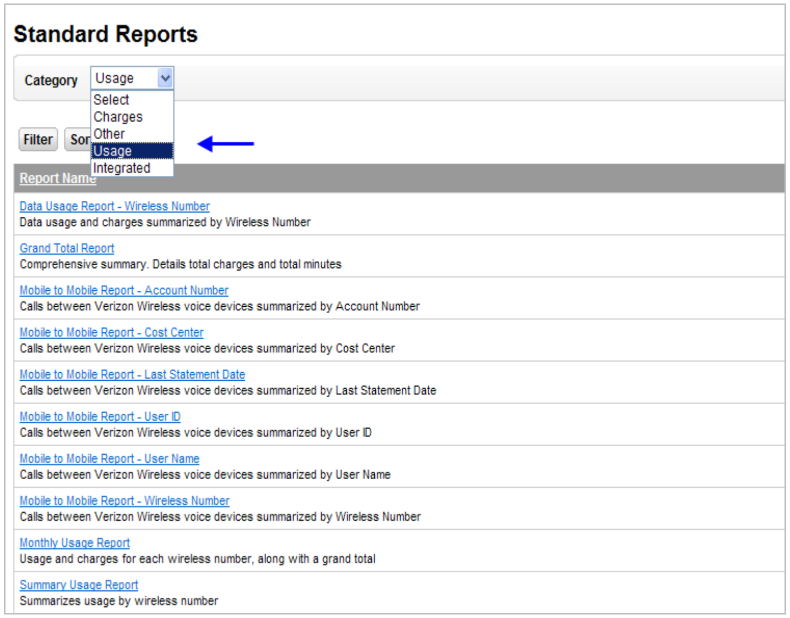
1. Click on the **Invoices** tab.



2. Go to the **Analysis & Reporting** page.

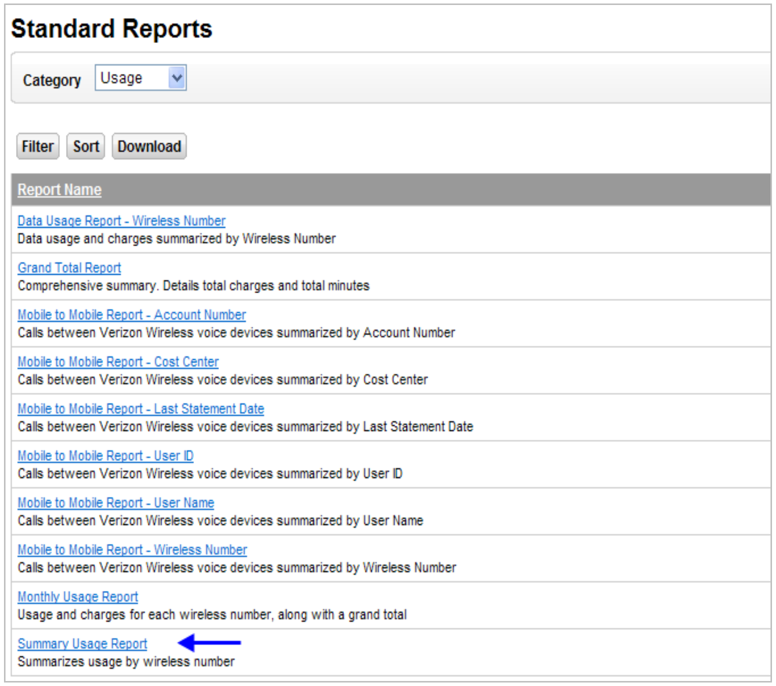


3. Select the Standard Reports category that contains the report you want to customize. For this example we will select the Usage category.

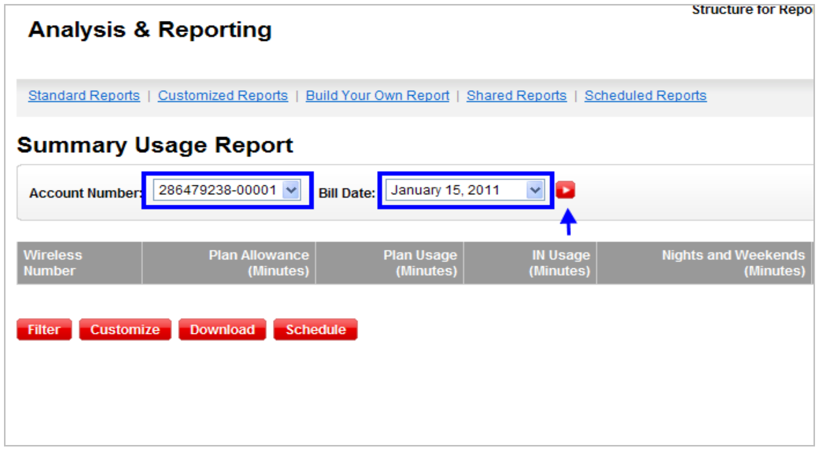


4. Click on the report name to access the report. For this example we will select the **Summary Usage** report.

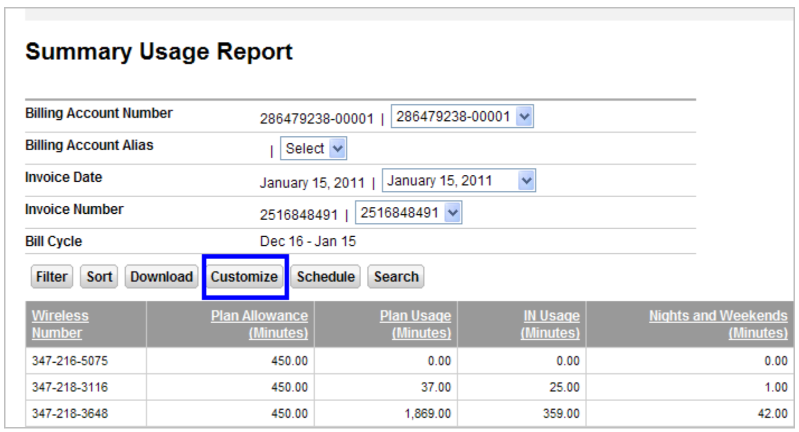
verizon



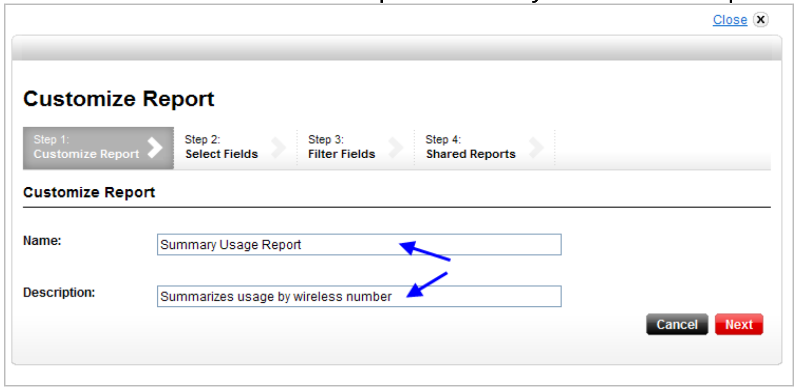
5. The Summary Usage Report page will appear. Now start to define your data BEFORE you Customize. Select the Account Number you wish to run your report on. Note: Accounts shown will be determined by your access and structure. Select the Bill Date and click the red arrow



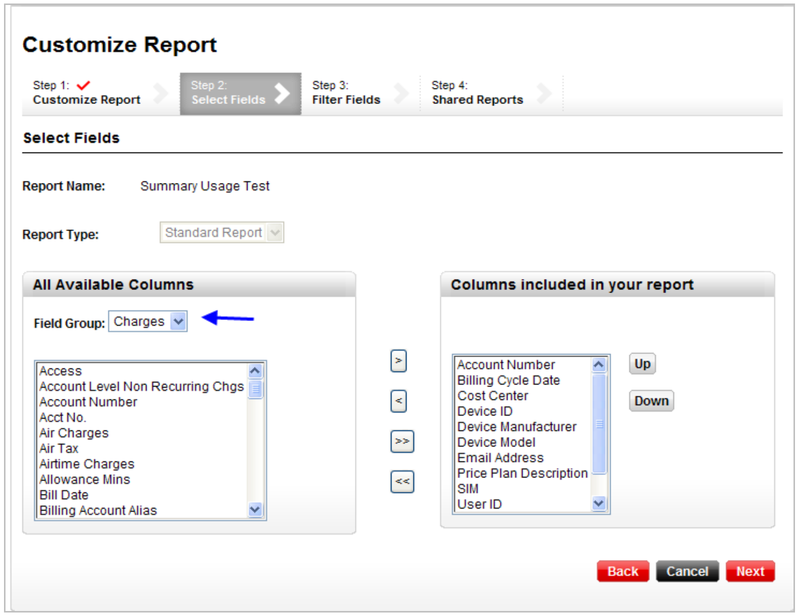
6. Your data will display on the page. Now click the **Customize** button



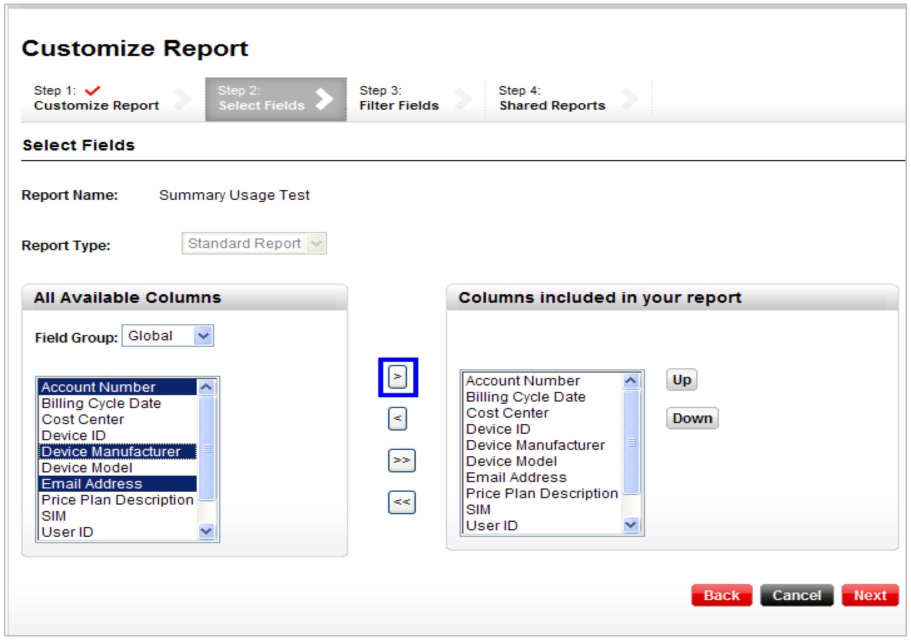
7. **Enter a name** for the custom report. You may also enter an optional description.



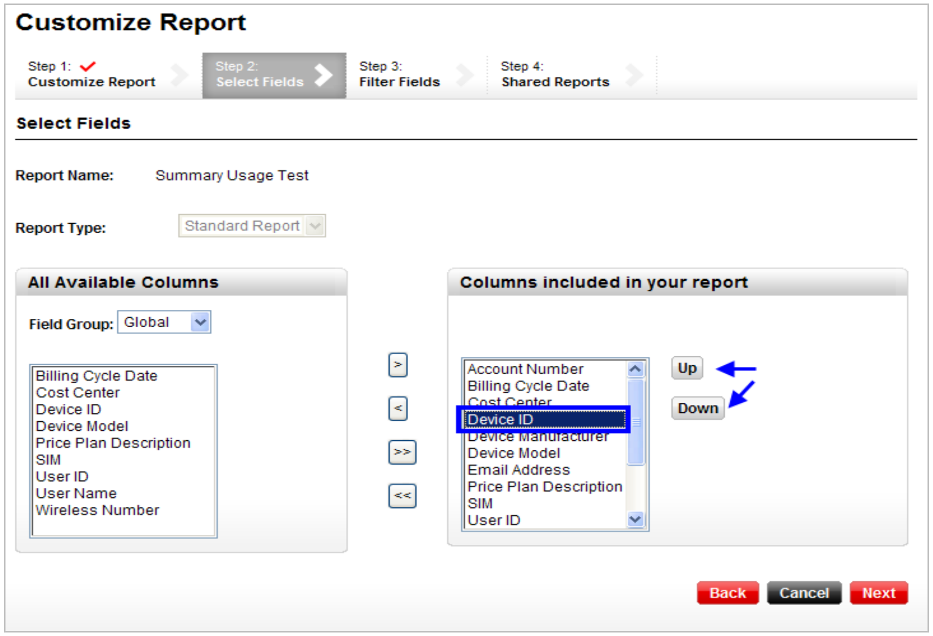
8. To select a different field group, expand the **Field Group** dropdown menu and select Charges, Usage or Other. The type of field group you choose will determine which columns display on your custom report.



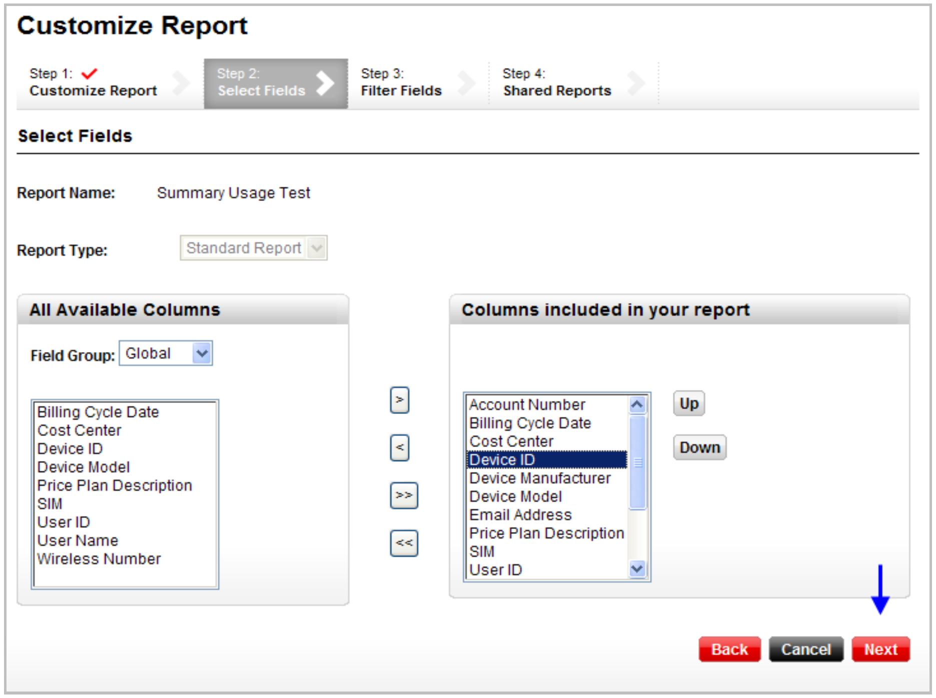
9. Highlight the columns you would like to add and hit the **>** button. If you want to add or remove all of the columns, select the **>>** / **<<** buttons. Note: you can add multiple fields by highlighting and holding the **CTRL** button.



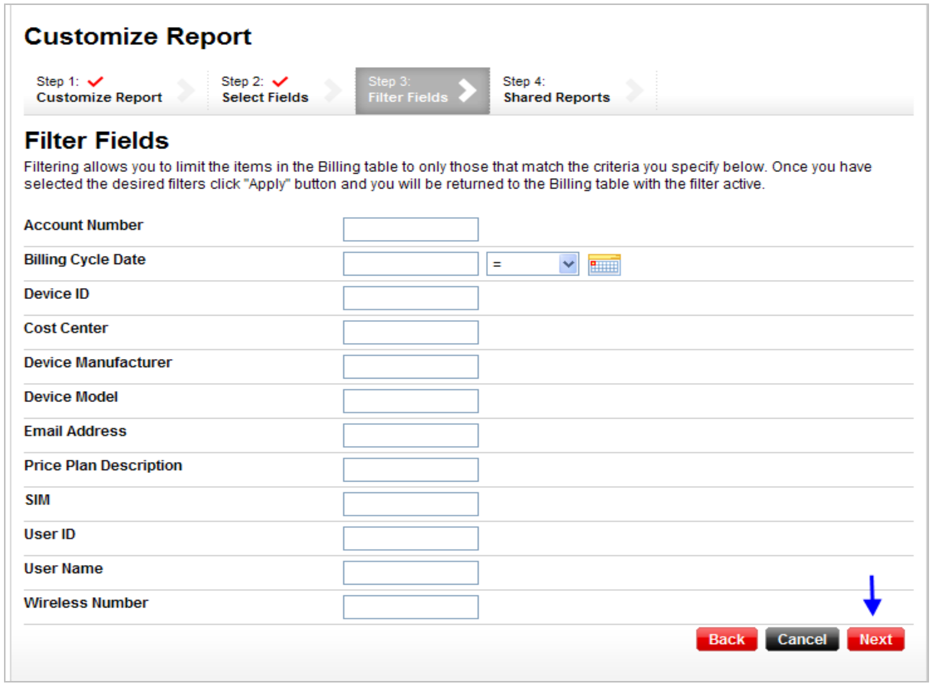
10. To move the order of the columns in your custom report, highlight the column and select **Up** or **Down**.



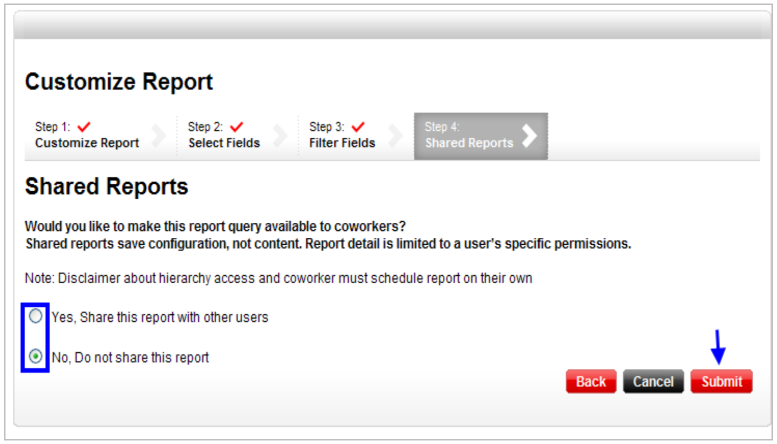
11. When finished creating your report, the order and the data select **Next**.



12. Enter in any specific criteria you would like to Filter your report by to bring back certain data in your report

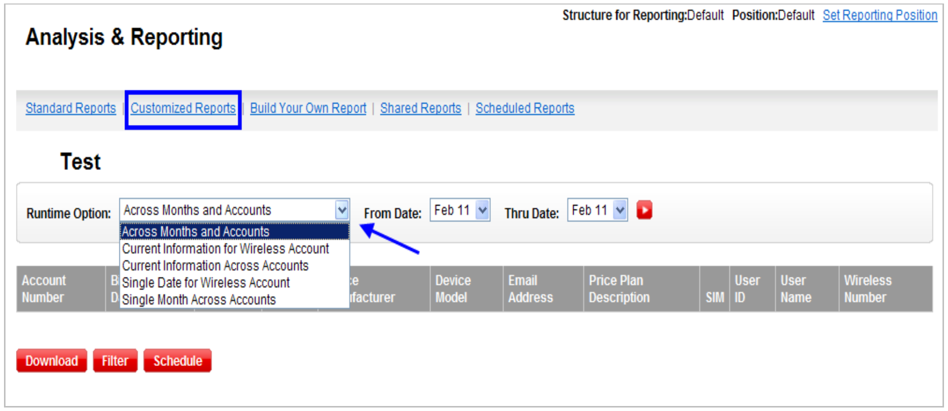


13. Indicate if you would like to share this report with other users within your company or keep it private for your view only. When you have made your selection click **Submit**.



Your report has now been created and saved. You can access your report in the **Customized Reports tab** or select a "Runtime Option" to apply to your custom report. Runtime options:

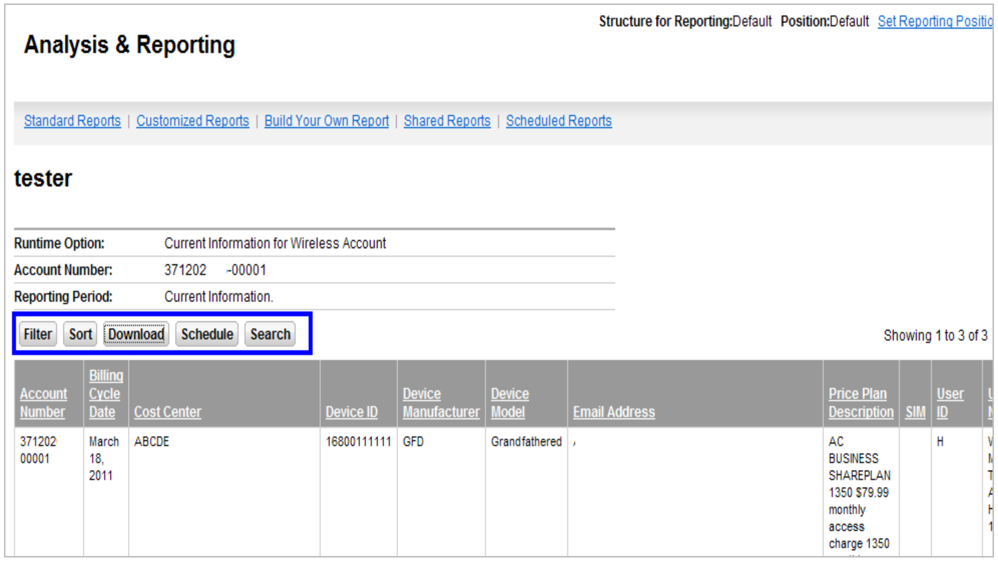
- Across Months and Accounts: All accounts + from / to months.
- Current Information for Wireless Accounts: Most recently available billing data for the selected account.
- Current Information Across Accounts: Most recently available billing data across account
- Single Date for Wireless Account: One date for selected account
- Single Month Across Accounts: One month for all the accounts in the selected reporting position.



Note: Depending on the type of report you select to create your custom report with, the runtime option may not be available.

6. Select a **Runtime Option** and click the red arrow. Your data will display on the page. From here you have multiple options to help you manipulate your data as needed:

- Filter – limit the items in your data by specific criteria
- Sort – sort by columns of your choice, OR click the column on the data page
- Download – download your data into an excel file
- Customize – add and remove columns of data from your standard report to create a custom report
- Schedule – run the report on a recurring basis
- Search – narrow down data by searching for unique criteria

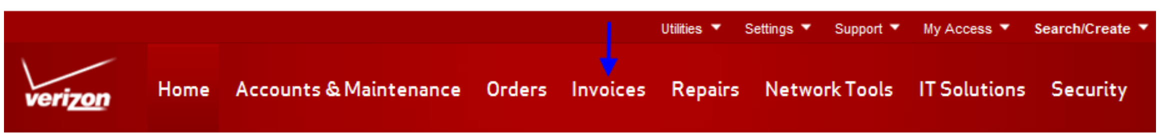


Custom Reports

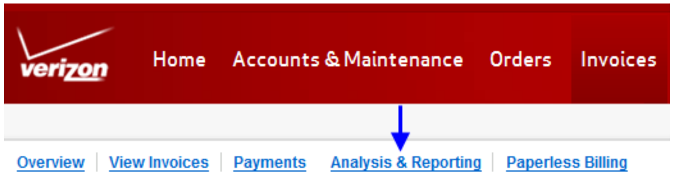
Build Your Own Custom Report from start to finish

To create a customized report from scratch:

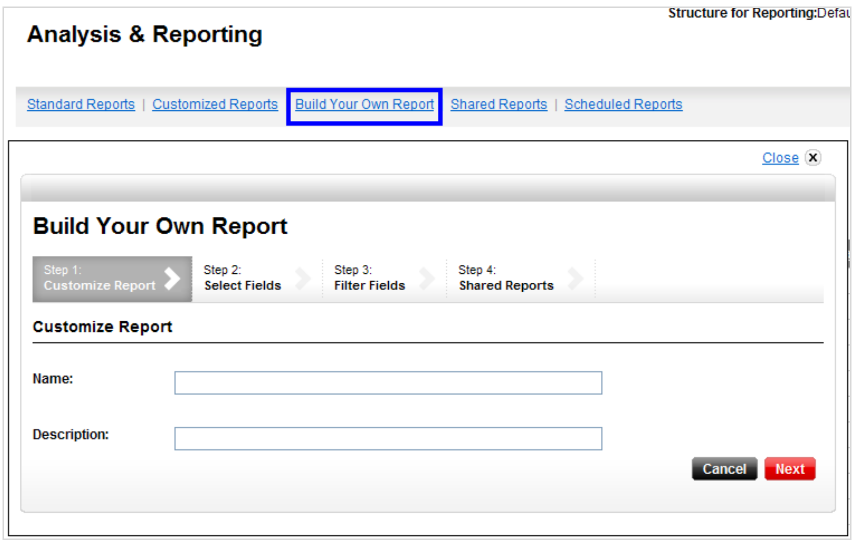
1. Click on the **Invoices** tab.



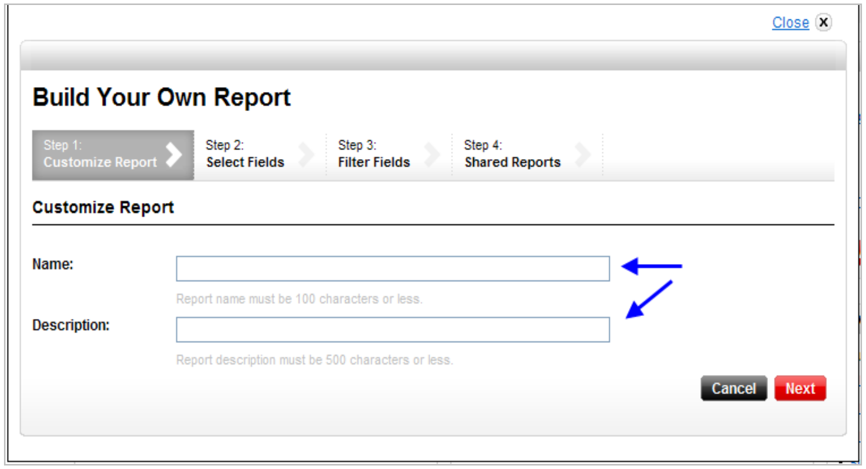
2. Go to the **Analysis & Reporting** page.



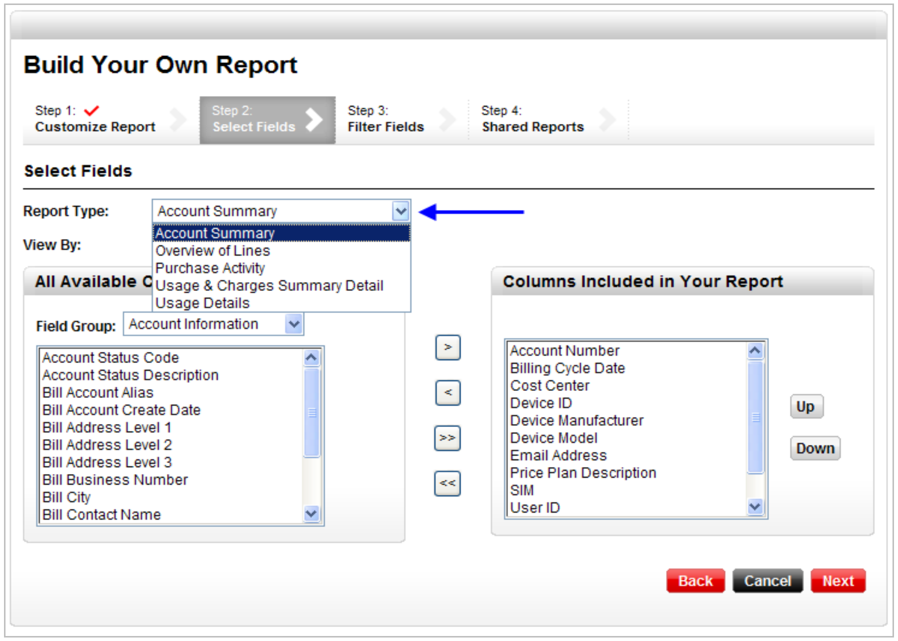
3. Click on the **Build Your Own Report** tab.



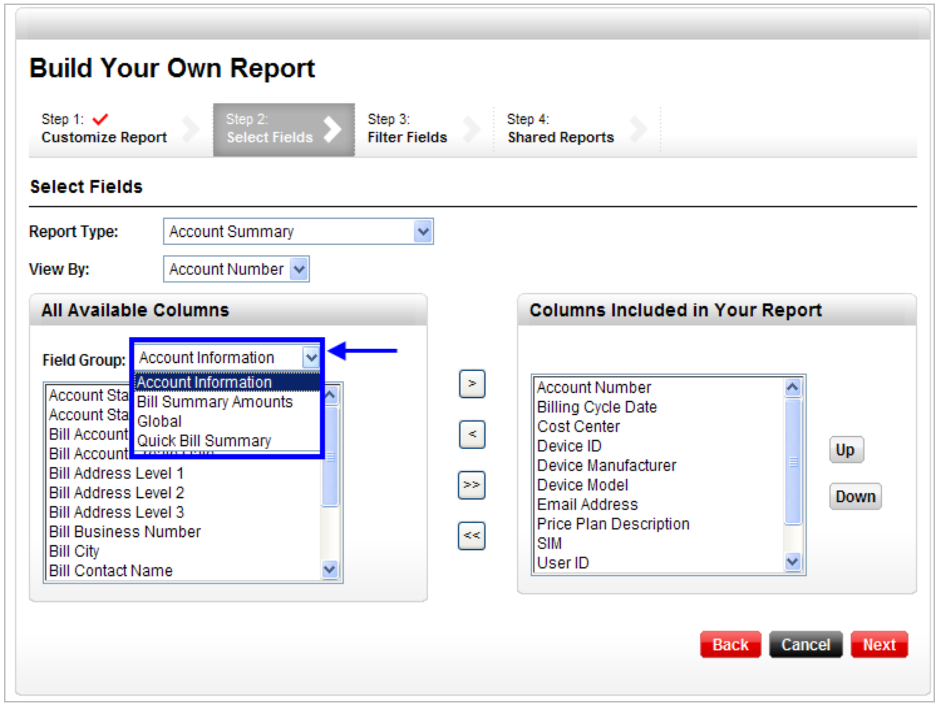
4. Give your report a unique name and description. A description is helpful but not required



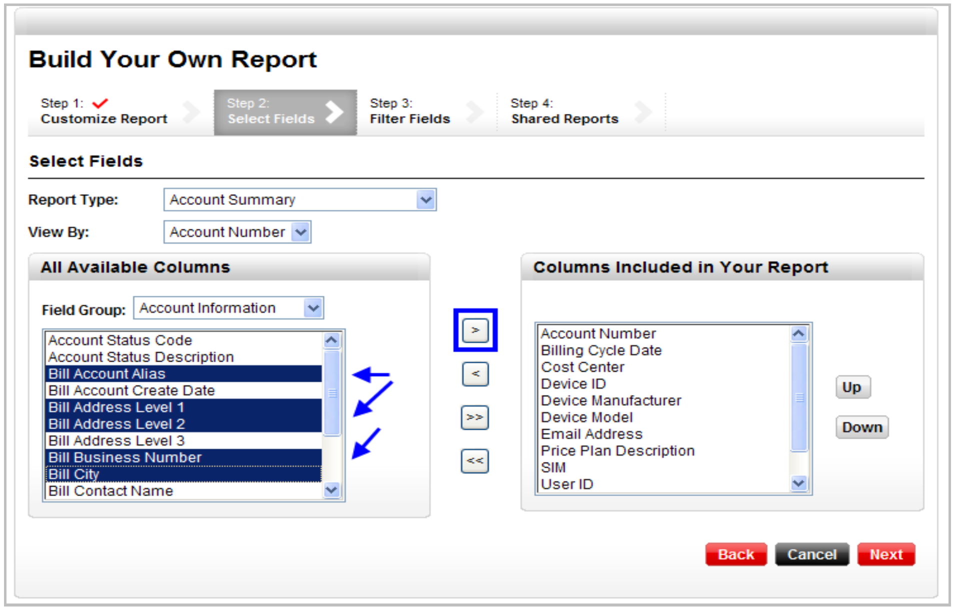
5. Start to build your report by selecting the fields. Be aware, the option you select in the **Report Type** dropdown will determine which options appear in the **View By** dropdown.



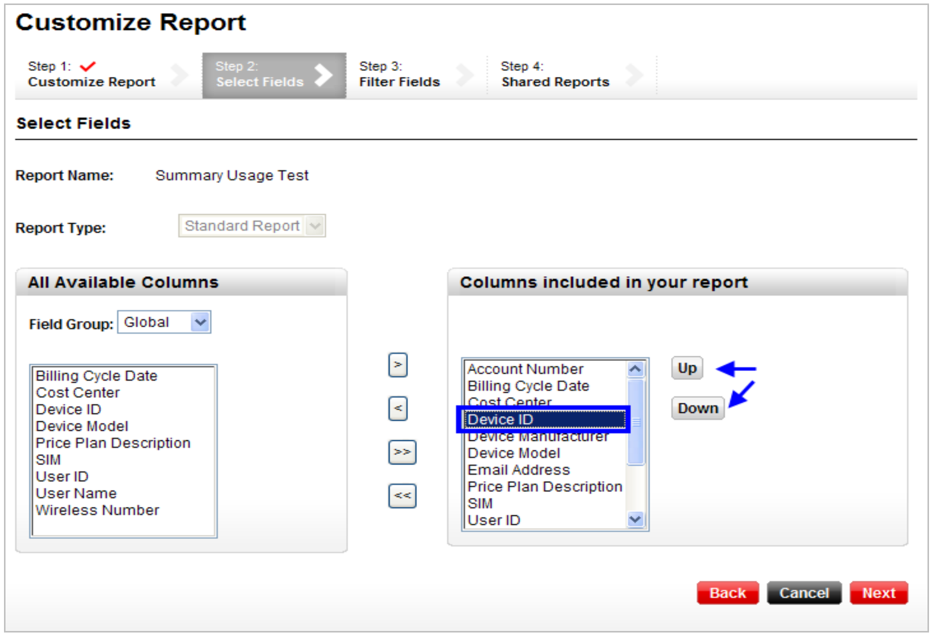
6. Once you've selected the report type and the View By options, the available columns will display on the left. Note: The **Field Group** menu groups the fields for easier sorting of available columns. You can select the group type to refresh the available columns that can be added to your report.



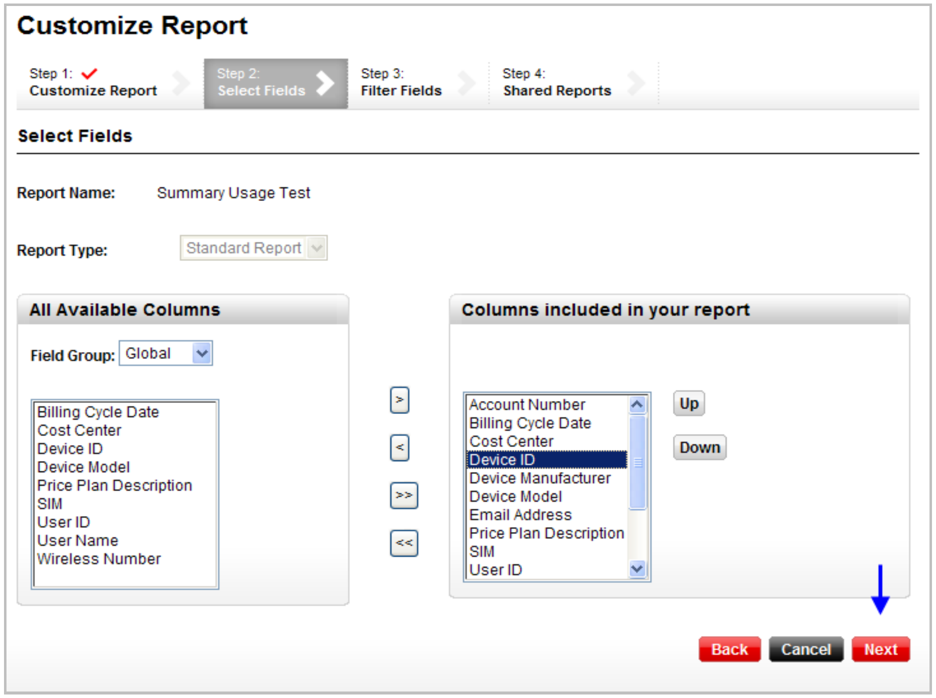
7. Highlight the columns you would like to add to your report. You can select multiple columns to add at once by holding the **CTRL** key. Click the **>** button to add.



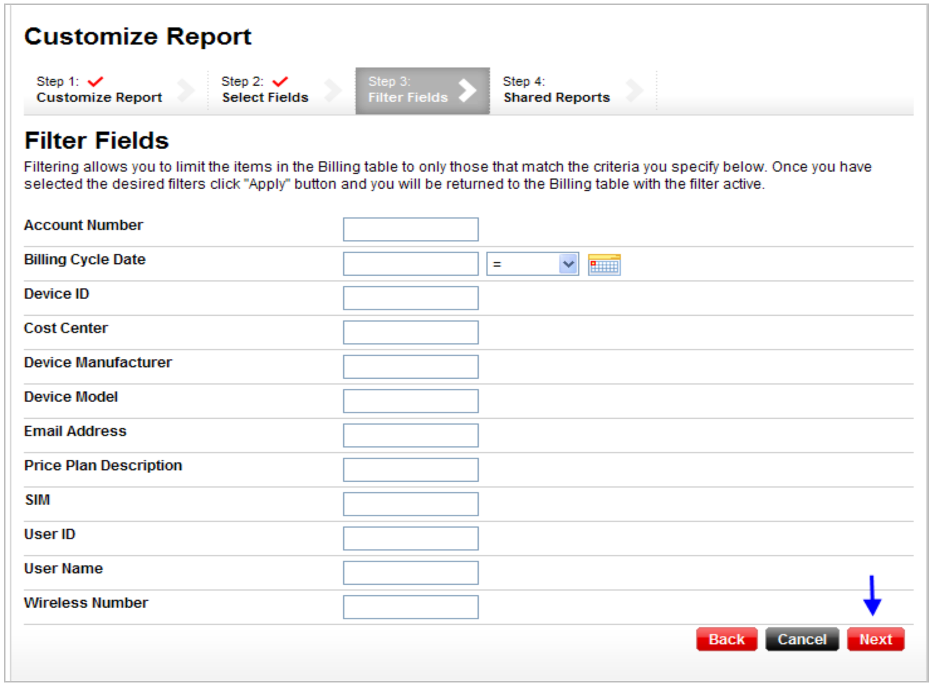
8. To move the order of the columns in your custom report, highlight the column and select **Up** or **Down**



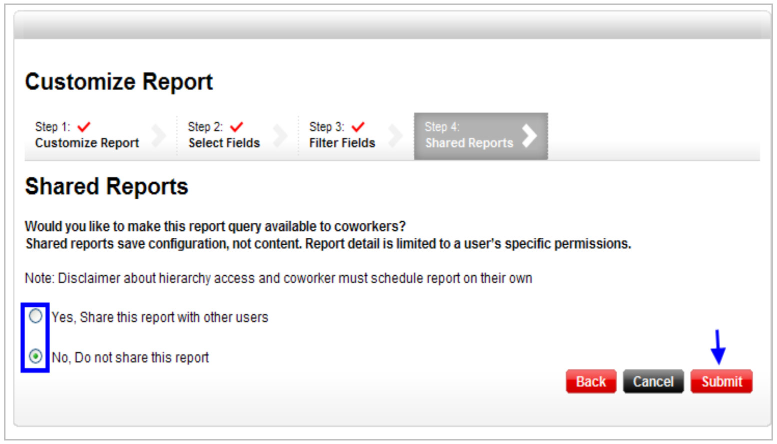
9. When finished creating your report, the order and the data select **Next**.



10. Enter in any specific criteria you would like to filter your report by to bring back certain data in your report.

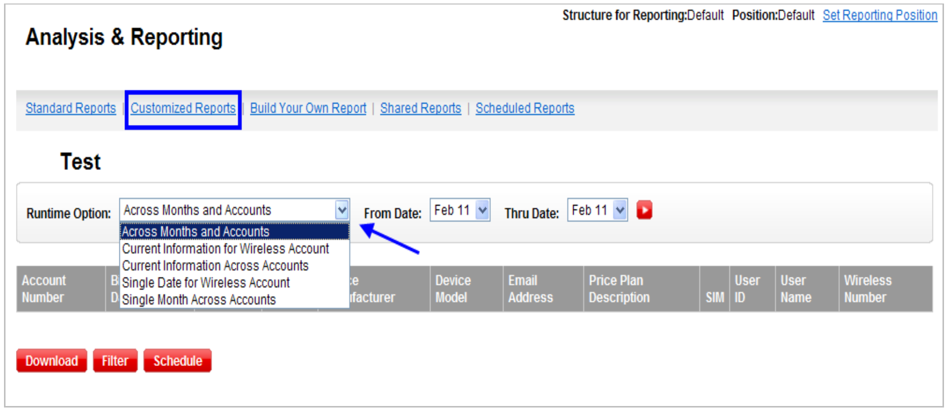


11. Indicate if you would like to share this report or keep it private for your view only. When you have made your selection click **Submit**.



12. Select a **Runtime Option** and click the red arrow. Your data will display on the page. From here you have multiple options to help you manipulate your data as needed:

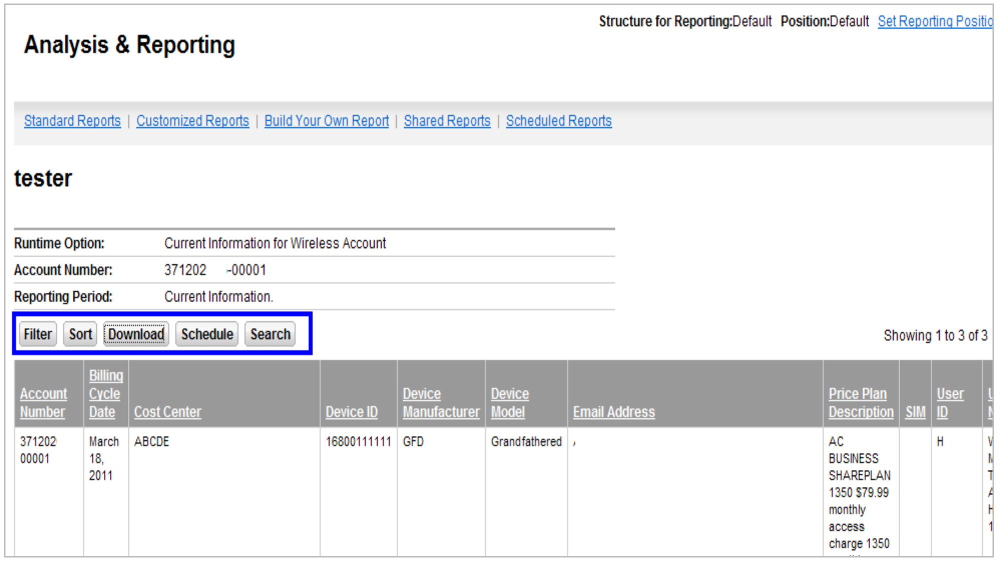
- Filter – limit the items in your data by specific criteria
- Sort – sort by columns of your choice, OR click the column on the data page
- Download – download your data into an excel file
- Customize – add and remove columns of data from your standard report to create a custom report
- Schedule – run the report on a recurring basis
- Search – narrow down data by searching for unique criteria



- **Note**: Depending on the type of report you select to create your custom report with, the runtime option may not be available.

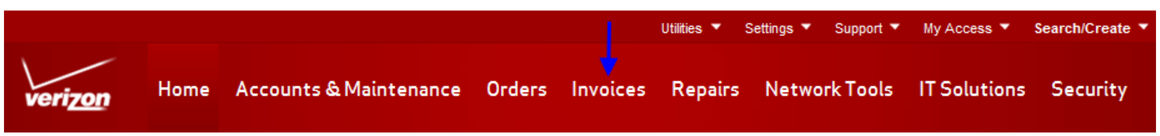
13. Select a “**Runtime Option**” and click the red arrow. Your data will display on the page. From here you have multiple options to help you manipulate your data as needed:

    g. Filter – limit the items in your data by specific criteria
    h. Sort – sort by columns of your choice, OR click the column on the data page
    i. Download – download your data into an excel file
    j. Customize – add and remove columns of data from your standard report to create a custom report
    k. Schedule – run the report on a recurring basis
    l. Search – narrow down data by searching for unique criteria

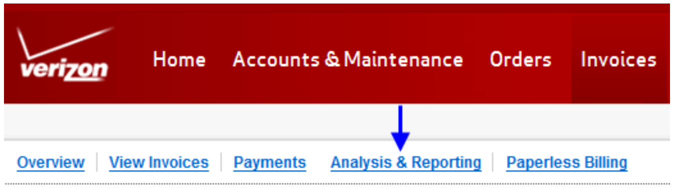


Retrieve a customized report

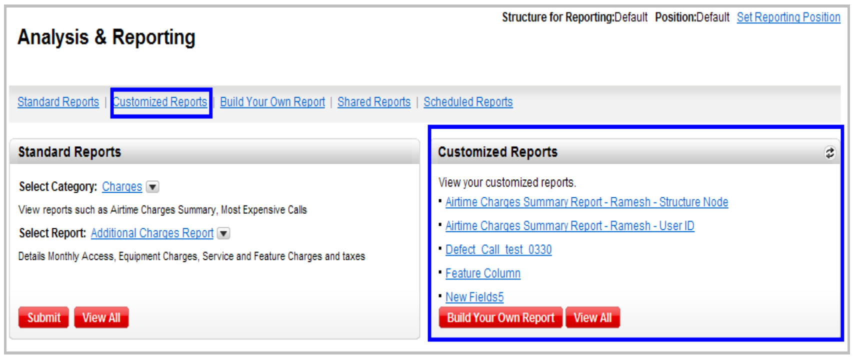
1. Click on the **Invoices** tab.



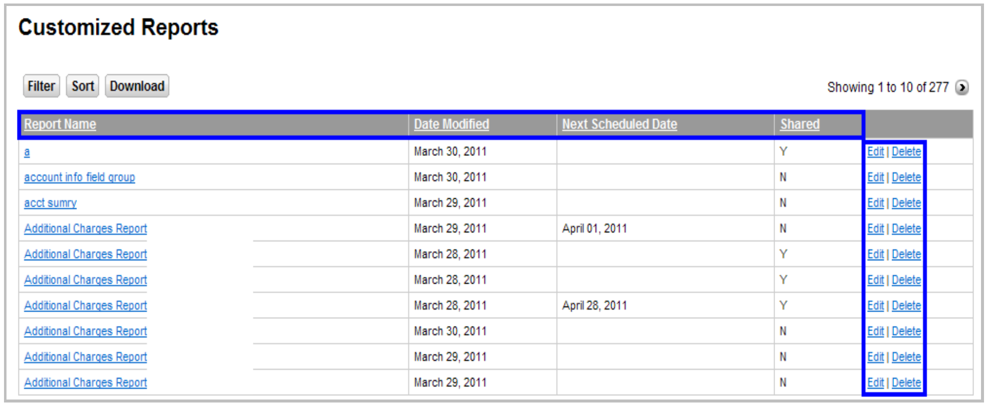
2. Go to the **Analysis & Reporting** page.



3. Go to the **User Customized Reports** tab or View All in the Customized Reports pod.



4. **A list of the customized reports will display**. From here you can view the next scheduled date (if applicable), the date modified, if it is a shared report and also edit or delete your reports.



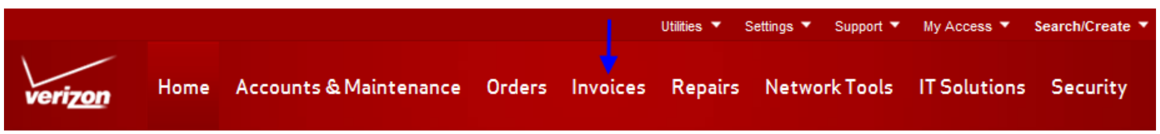
Customized Reports

Filter | Sort | Download — Showing 1 to 10 of 277

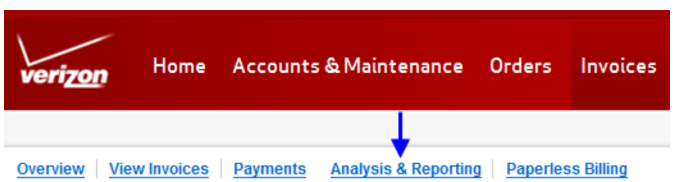
Report Name	Date Modified	Next Scheduled Date	Shared	
a	March 30, 2011		Y	Edit | Delete
account info field group	March 30, 2011		N	Edit | Delete
acct sumry	March 29, 2011		N	Edit | Delete
Additional Charges Report	March 29, 2011	April 01, 2011	N	Edit | Delete
Additional Charges Report	March 28, 2011		Y	Edit | Delete
Additional Charges Report	March 28, 2011		Y	Edit | Delete
Additional Charges Report	March 28, 2011	April 28, 2011	Y	Edit | Delete
Additional Charges Report	March 30, 2011		N	Edit | Delete
Additional Charges Report	March 29, 2011		N	Edit | Delete
Additional Charges Report	March 29, 2011		N	Edit | Delete

Share/Un-share a Report

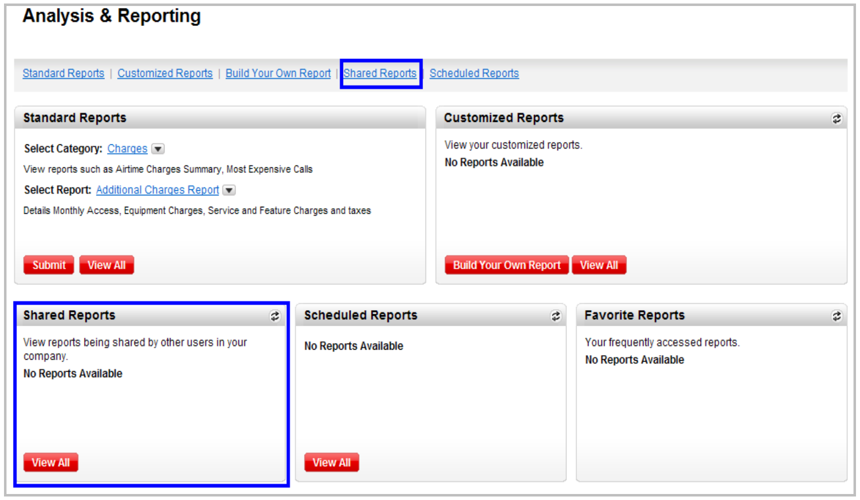
1. Click on the **Invoices** tab.



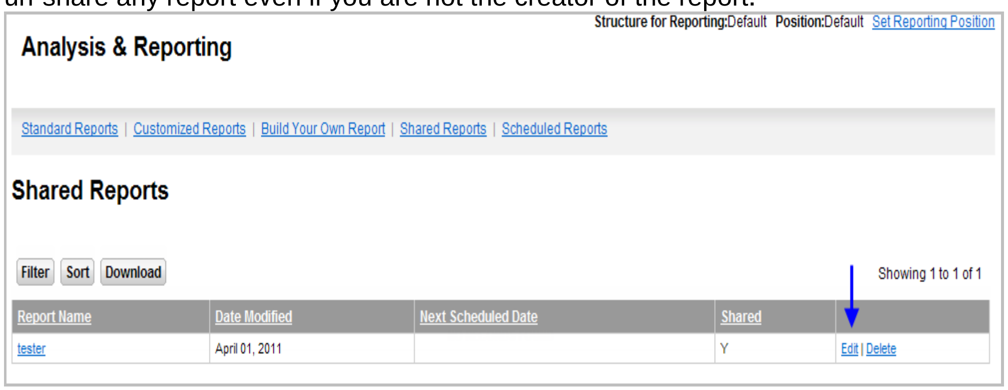
2. Go to the **Analysis & Reporting** page.



3. Go to the **Shared Reports** tab or View All in the Shared Reports pod.



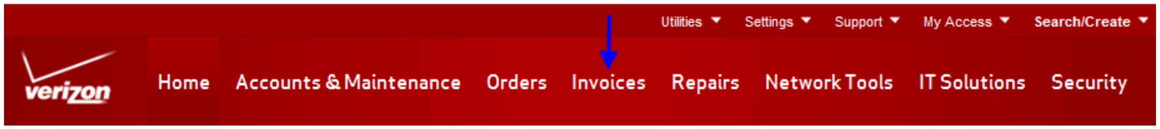
4. A list of Shared Reports will display. From here you can un-share by clicking **Edit**. Note: If you are the MYPOC on the account you can un-share any report even if you are not the creator of the report.



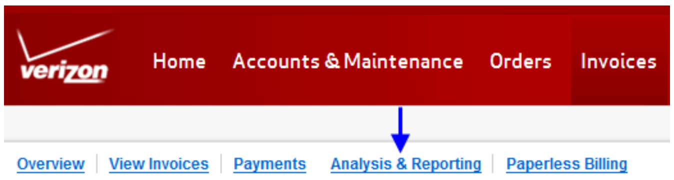
Schedule a Report

The Scheduled Reports tab allows you to view reports already scheduled. This section will show you how to schedule a report if it is not currently set to run.

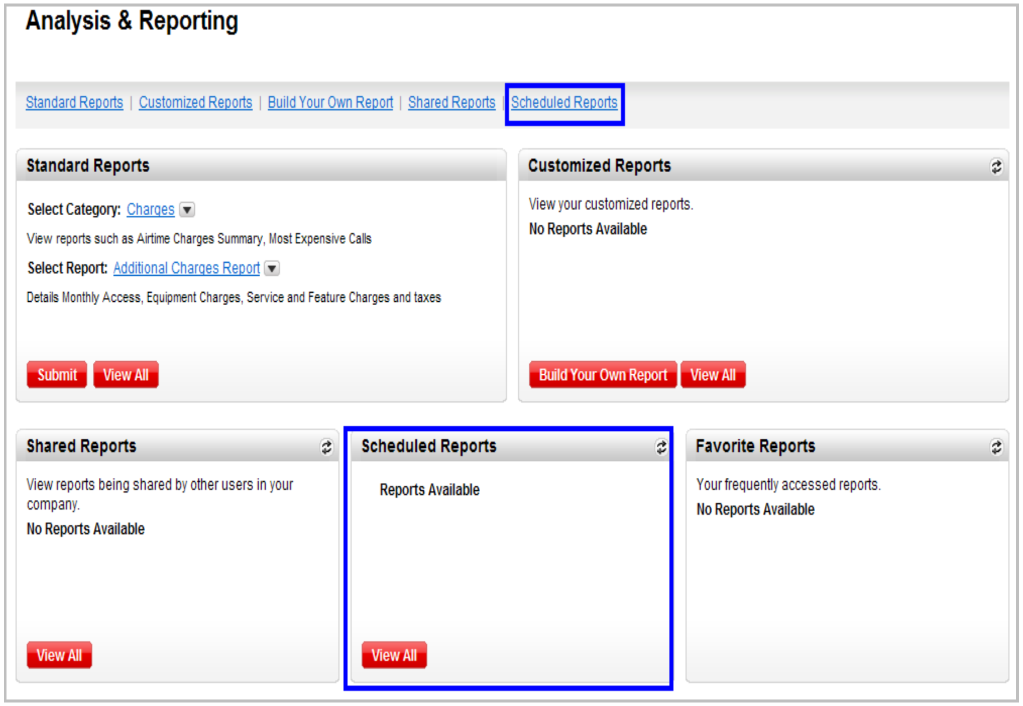
1. Click on the **Invoices** tab.



2. Go to the **Analysis & Reporting** page.

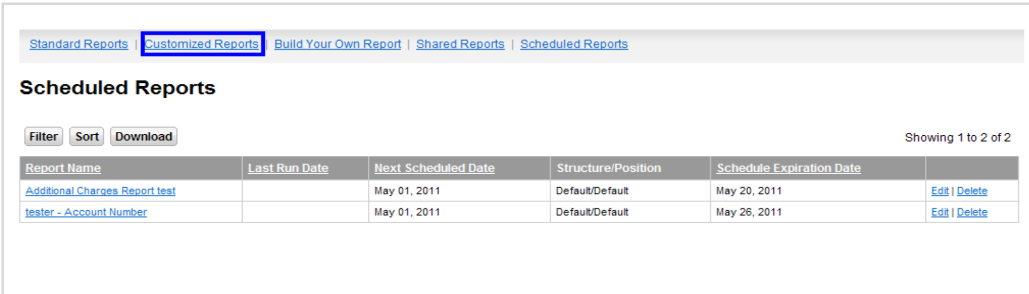


3. Go to the **Scheduled Reports** tab or click the **View All** button in the Scheduled Reports pod.

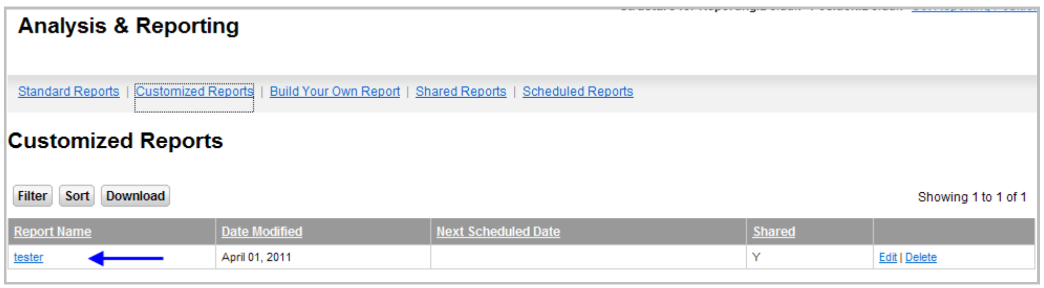


4. A list of scheduled reports will appear.

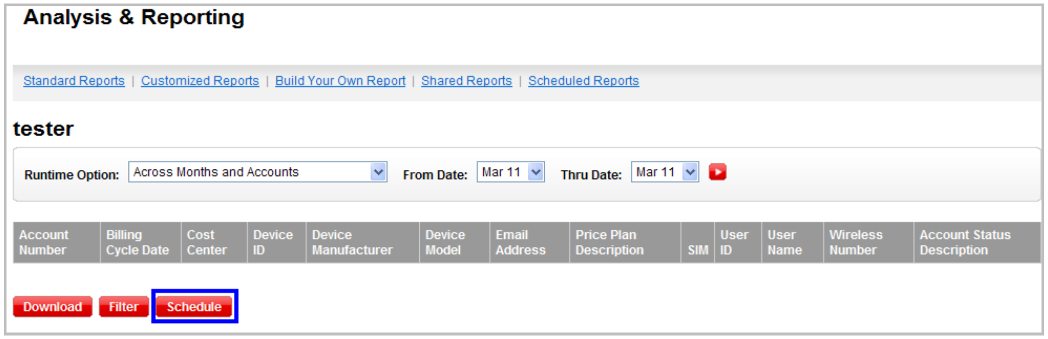
5. If you want so schedule a report that isn’t shown, click on the **Customized Reports** tab to locate the saved custom report you want to schedule.



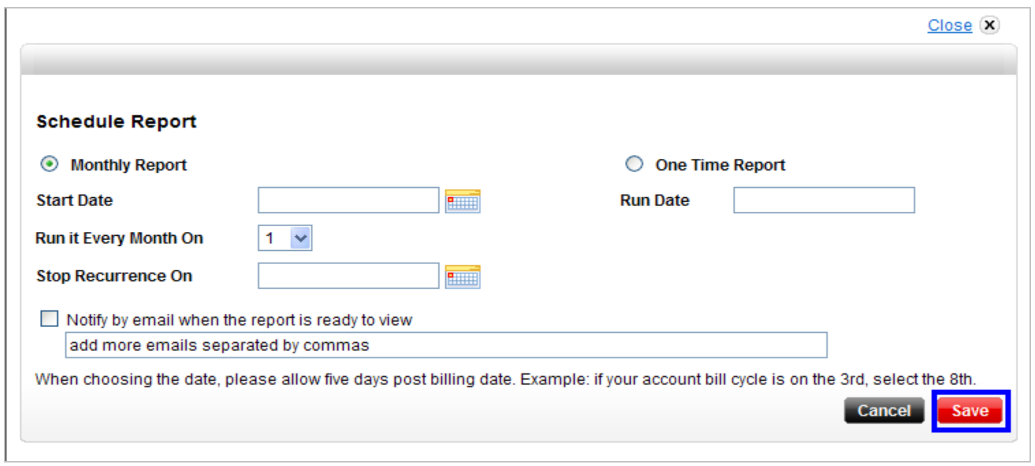
6. Click on the report you would like to schedule.



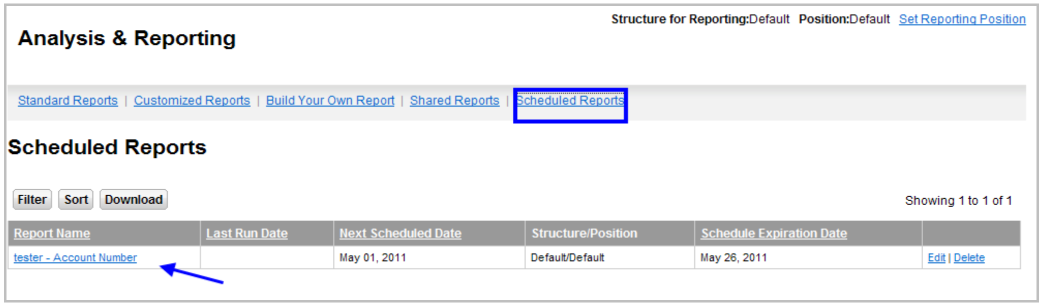
7. You are now in your custom report. Click the **Schedule** button.



8. Select the schedule you would like this report to run by. Add the e mail address you want to receive notice when the report is ready for viewing. When finished, click **Save.**



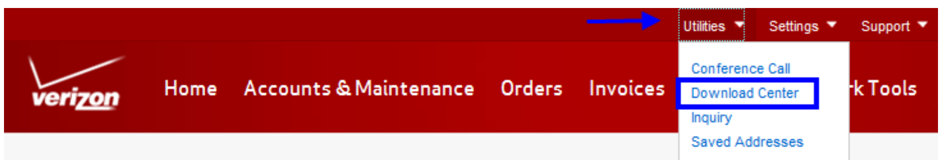
9. Your report has now been scheduled and will display in the scheduled reports tab.



Retrieve a deferred downloaded report

Some reports may be too large to download immediately. If the report is too large it will be downloaded to the Download Center in the Utilities menu. An email notification will go to the requestor when the report is available for viewing. To access the report:

1. Click on the **Utilities** link and select **Download Center**.



2. Click on the **Invoices Requested Downloads** link.

3. Your deferred downloaded report will display on this page for you to view.

Home / Invoices Requested Downloads

Invoices Requested Downloads

Download Center Links

- Requested Downloads

Filter | Sort | Download | Refresh

	Report Name	Functional Area	Description	Status	Size	Records	Date	Scheduled	Expiration date
	tester - Account Number		May 01, 2011		Default/Default		May 26, 2011		Edit | Delete

Select All | Delete Selected