



C L E A R R A T E

# Clear Rate Customer BillCenter Portal

<https://clearrate.billcenter.net/>

# BillCenter Portal Overview - Summary



The BillCenter dashboard has several tabs for accessing data easily. Upon login, the Summary tab will display and you can view the **Invoice Summary** section.

## Invoice Summary Section

- Make a Payment
- View Payment History
- Amount Due and Due Date
- Current Account Balance

Summary | Create | View & Pay Bills | Account Details | Reports | Settings

Summary > (2809492) Erin Knight

### Invoice Summary

This account is not enrolled in Autopay.

<b>\$71.28</b> DUE ON 2/7/2024	<b>\$71.28</b> ACCOUNT BALANCE
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Make a Payment | view payment history

# BillCenter Portal Overview - Summary



Also in the summary section you can view the following in the **Account Summary** section.

## Account Summary Section

- **Open Tickets** - number of open repair tickets
- **Invoices** – number of invoices created
- **Accounts** – number of accounts such as related locations with separate accounts.
- **Services** – number of services on this account.
- **Open Orders** – number of orders related to this account

The screenshot displays the BillCenter portal interface. At the top, there is a navigation bar with options: Summary, Create, View & Pay Bills, Account Details, Reports, and Settings. Below this, the user's account information is shown: Summary > (2809492) Erin Knight.

The main content area is divided into two sections. The top section is titled "Invoice Summary" and contains the text "This account is not enrolled in Autopay." Below this, there are two columns of financial data: a due amount of \$71.28 (due on 2/7/2024) and an account balance of \$71.28. A button labeled "Make a Payment" is visible, along with a link to "view payment history".

The bottom section is titled "Account Summary" and features a "Hyperlinks" box. This box is connected by arrows to five circular callouts, each representing a different metric: 0 Open Tickets, 62 Invoices, 1 Accounts, 1 Services, and 2 Open Orders.

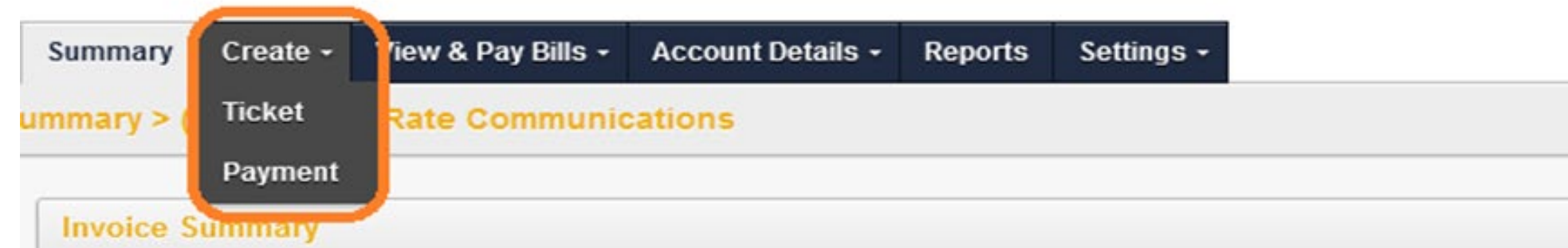
# Billcenter Portal - Main Menu Options



Click on the Create, View & Pay Bills and Account Details tabs to view the following:

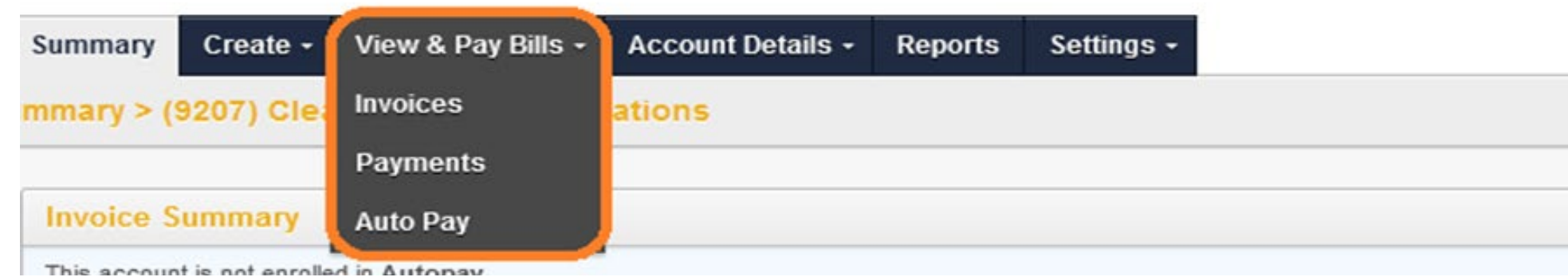
## Create

- **Ticket** – Create a new repair ticket
- **Payment** – Make a payment



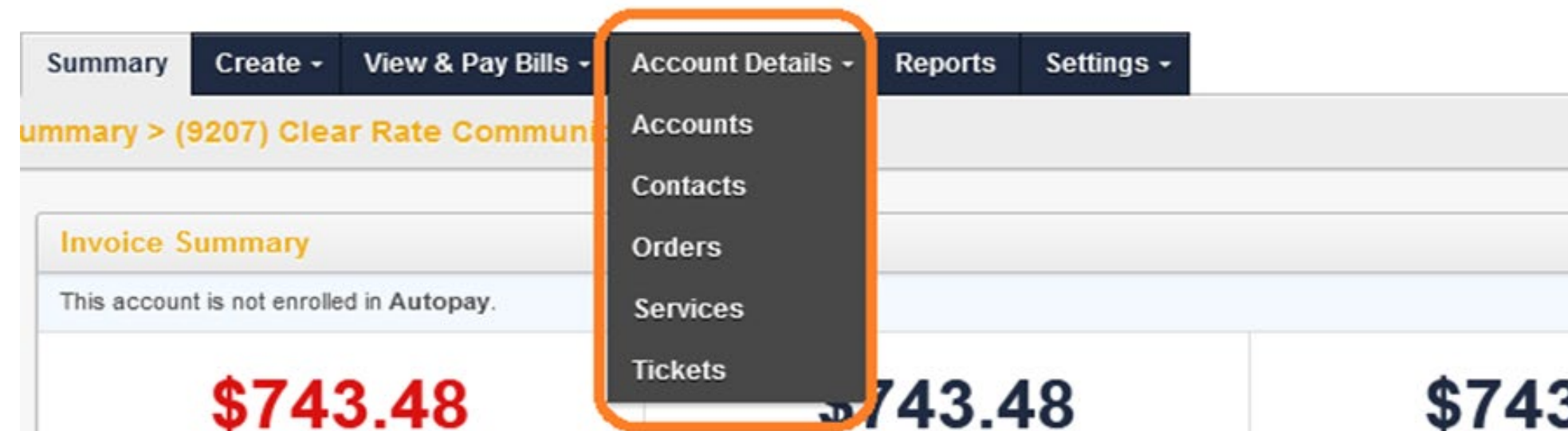
## View & Pay Bills

- **Invoices** – Review all invoices
- **Payments** – Review and make payments
- **Auto Pay** – Enroll in or Remove Auto Pay



## Account Details

- **Accounts** – Review related accounts
- **Contacts** – Add, edit or remove contact information
- **Orders** – Review all orders placed on this account
- **Services** – Review all services on this account
- **Tickets** – Review or create a ticket on this account



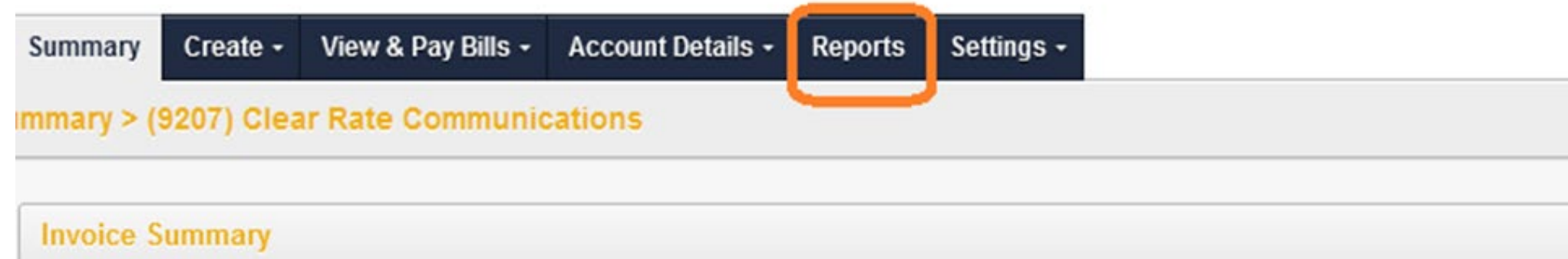
# BillCenter Portal - Main Menu Options



Click on the Reports and Settings tabs to view the following:

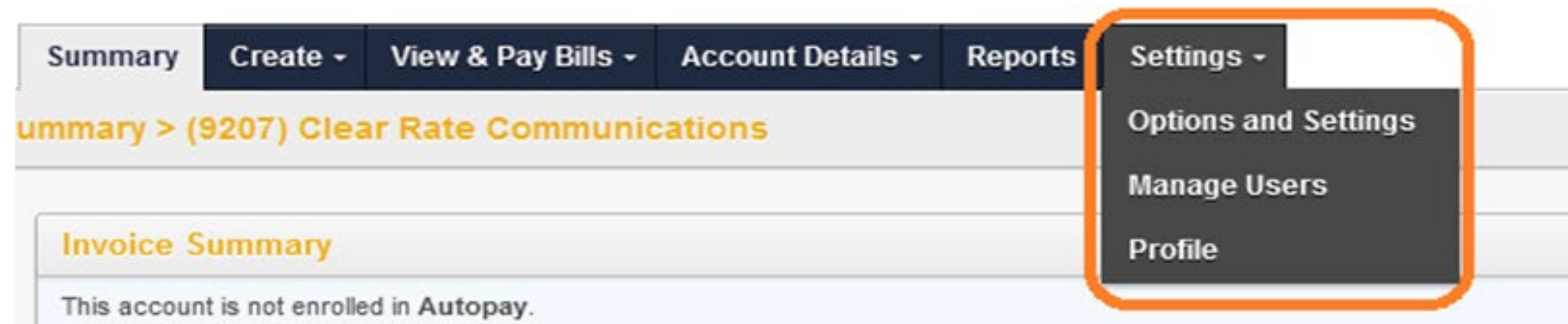
## Reports

- Review or pull usage reports



## Settings

- **Options and Settings** – Enroll in auto pay, edit billing email address, update billing notifications and edit billing address
- **Manage Users** – Add or edit active bill center users
- **Profile** – Update or reset user password



# View & Pay Bills - Invoices



Summary Create - View & Pay Bills - Account Details - Reports Settings -

Summary > (2809492) Invoices

Payments

Invoice Summary Auto Pay

This account is not enrolled in Autopay.

After you click on the **Invoices** tab, click on the **Charges Overview** and the **Charges by Service** tabs for more details.

INVOICE	ACCOUNT	CREATED DATE	DUE DATE	MRC	ADJUSTMENTS	USAGE	OTHER	TAXES & SURCHARGES	TOTAL
174993	(2809492*) Erin Knight	10/1/2018	10/20/2018	\$69.99	\$0.00	\$28.54	\$30.33	\$2.15	\$131.01

Charge Overview Charges By Service

**Invoice Details**

Usage - Wireless Data Usage	\$28.54
Galaxy S6	\$10.83
Taxes	\$2.15
Wireless Service - SmartBundle 1.5GB 4G ...	\$19.50
<b>// Total Charges</b>	<b>\$131.01</b>

**Usage Details**

Usage - Wireless Data Usage	\$28.54
<b>Total Usage</b>	<b>\$28.54</b>

For more details of usage on this Invoice, please run a Usage Report.

INVOICE	ACCOUNT	CREATED DATE	DUE DATE	MRC	ADJUSTMENTS	USAGE	OTHER	TAXES & SURCHARGES	TOTAL
174993	(2809492*) Erin Knight	10/1/2018	10/20/2018	\$69.99	\$0.00	\$28.54	\$30.33	\$2.15	\$131.01

Charge Overview **Charges By Service**

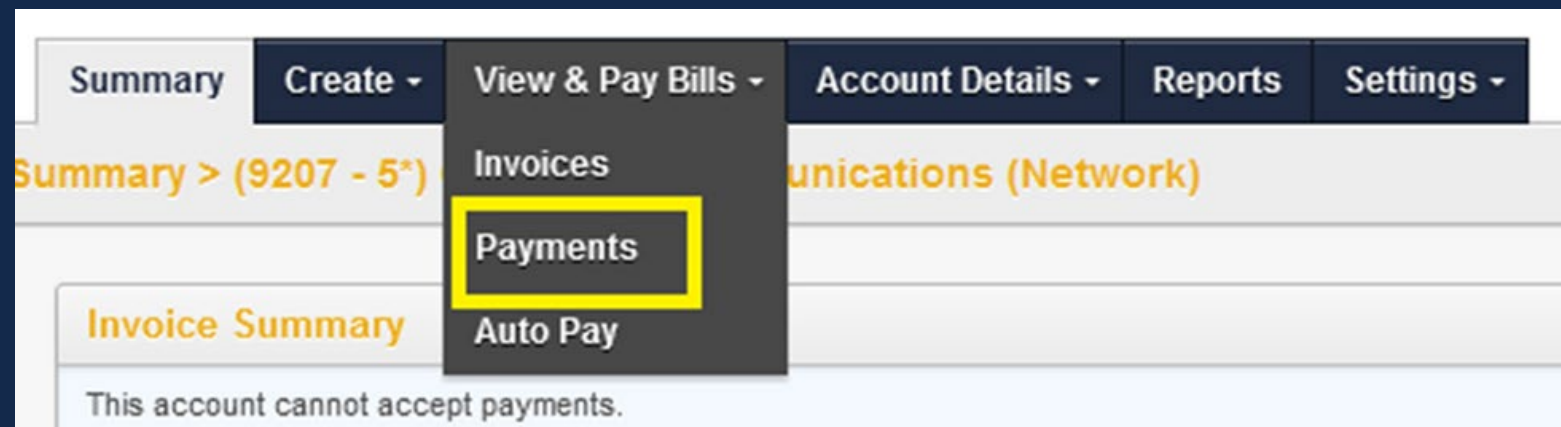
Export

SERVICE	PACKAGE	ACCOUNT	ADJUSTMENTS	MRC	USAGE	OTHER	TAXES & SURCHARGES	TOTAL
7345368776	-	(2809492) - Erin Knight	\$0.00	\$69.99	\$28.54	\$30.33	\$2.15	\$131.01

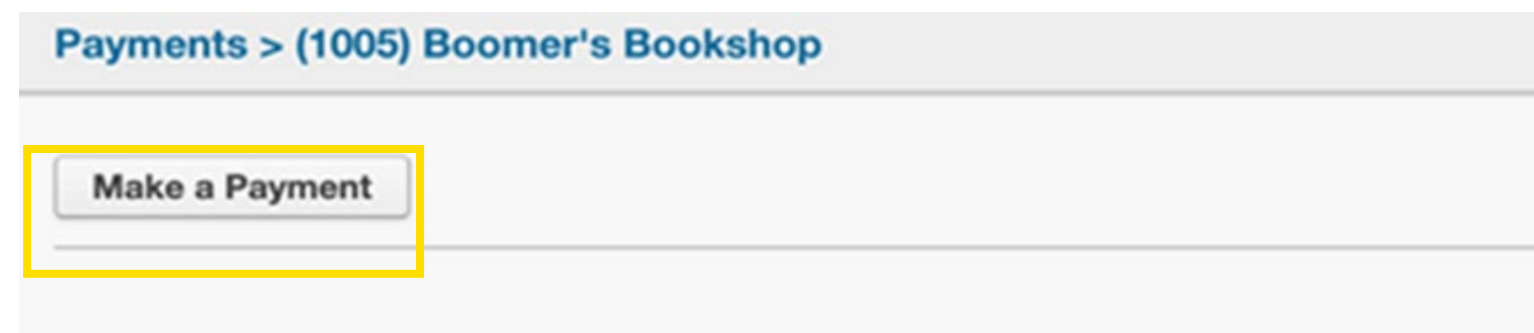
# View & Pay Bills - Payments



Click on the Payments page to view all previously received payments.



At the top of the page, there is a **Make a Payment** button that navigates to the payment information collector.



On the far right of the same table is a **Download** button. This will automatically download a copy of the payment receipt.

Export:

Filter Results:

1 2

AMOUNT	ACCOUNT	REFERENCE	PAYMENT METHOD	DATE RECEIVED	
\$338.71	(9207) Clear Rate Communications	2	Employee Credit	12/19/2023	<input type="button" value="Download"/>
\$943.25	(9207) Clear Rate Communications	2	Employee Credit	11/17/2023	<input type="button" value="Download"/>

# View & Pay Bills – Payments cont'd



After you click **Make a Payment** you will be presented with the following screen and dropdowns.

- Complete all required fields such as **Method, Amount, Credit Card** details etc.
- By default, any payment made will apply to the oldest balance on the account.

Add Payment > (1005) Boomer's Bookshop

Submit Payment

Your amount due: \$8,320.20 - Due by 3/24/2023





Method  
Credit Card

Amount  
\$ 8,320.20

Save Payment Information for Future Transactions

Apply to Bill  
- Select Bill -

Name on Card

Card Number  
    

Edit

Exp. Date  
01 2023

- After payment information is entered, scroll down to the **Billing Address** section. There is an option to **Override the Billing Address**. If the box is checked, the page will load and offer text fields to change the company & address information.

**Billing Address**

Override Billing Address

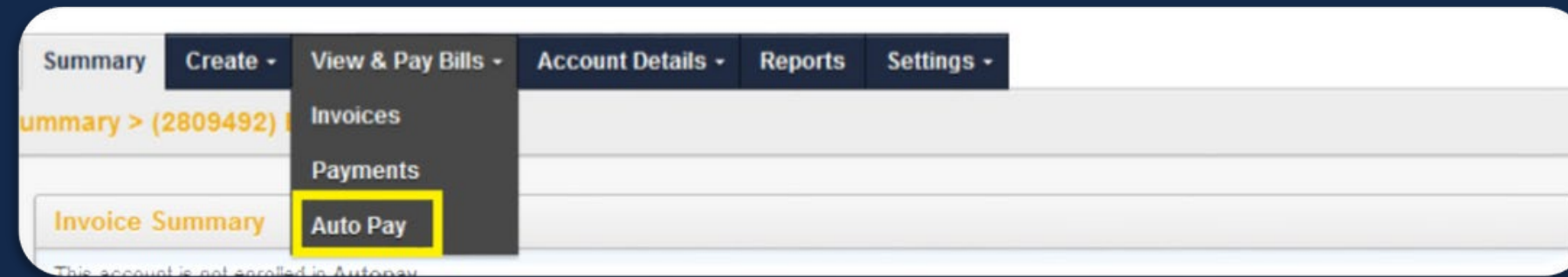
*Use Customer's Billing Address*

Boomer's Bookshop  
3340 Peachtree Rd NE  
Ste 2850  
Atlanta, GA 30326-1027



# View & Pay Bills - Auto Pay

Click on the Auto Pay link to initially set up automatic payments, edit or remove existing payments



When all of the information has been entered, use the **Enroll in Auto Pay** button at the top of the page.

Auto Pay > (1005) Boomer's Bookshop

Enroll in Auto Pay Remove Auto Pay

Edit Auto Pay

Payment Day:

Due Date ▾

Payment Method

Method

Credit Card ▾

Name on Card

If there are no existing payment arrangements, the **Remove Auto Pay** button will be greyed out, like the example shown to the right.

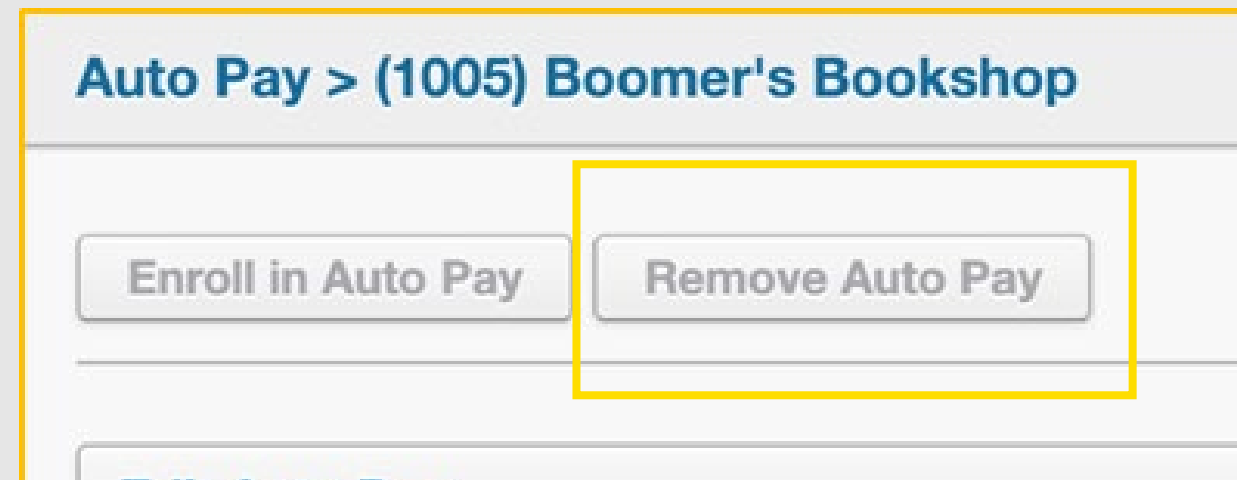
# View & Pay Bills - Auto Pay cont'd



## Removing a Payment Method

If an existing payment profile is selected on the **Auto Pay** page and the logged in user has the appropriate permissions, the **Remove Auto Pay** button would be available for use.

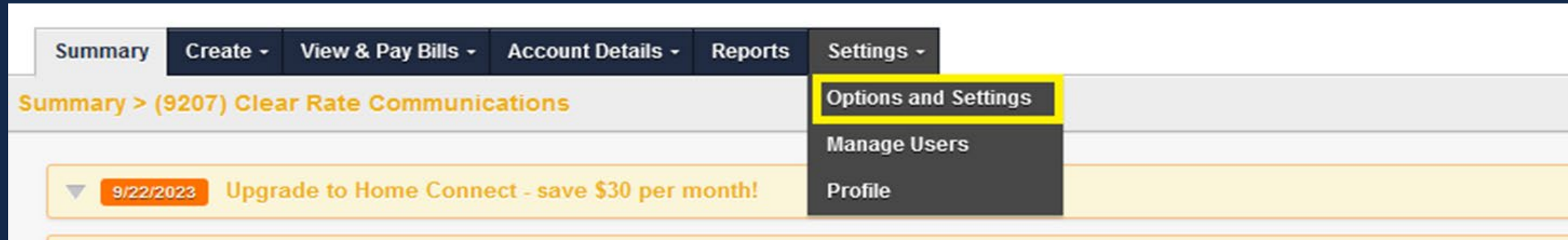
Clicking the button deletes the payment configuration.



Note: Payment methods are only stored for **Auto Pay**, not one-time payments.

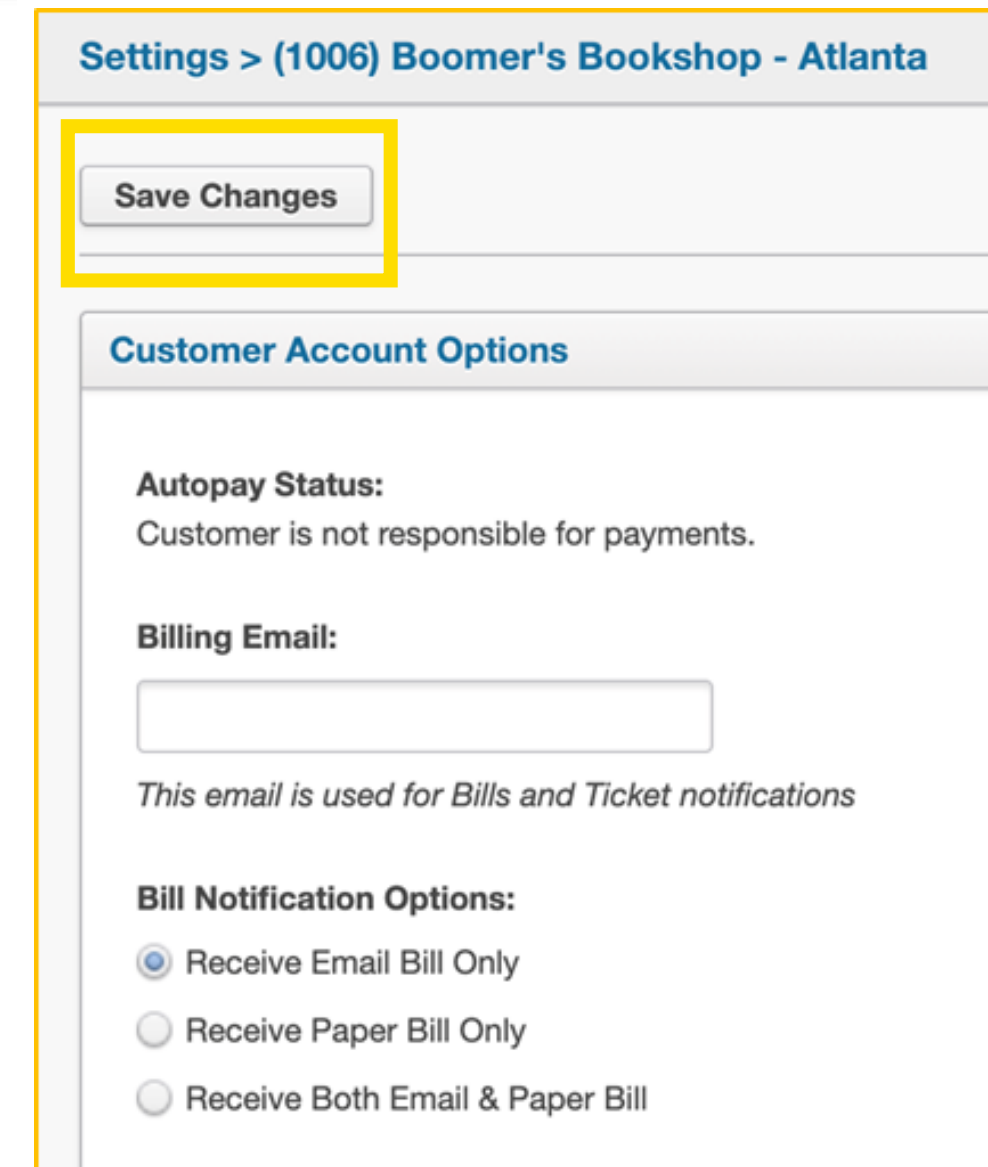
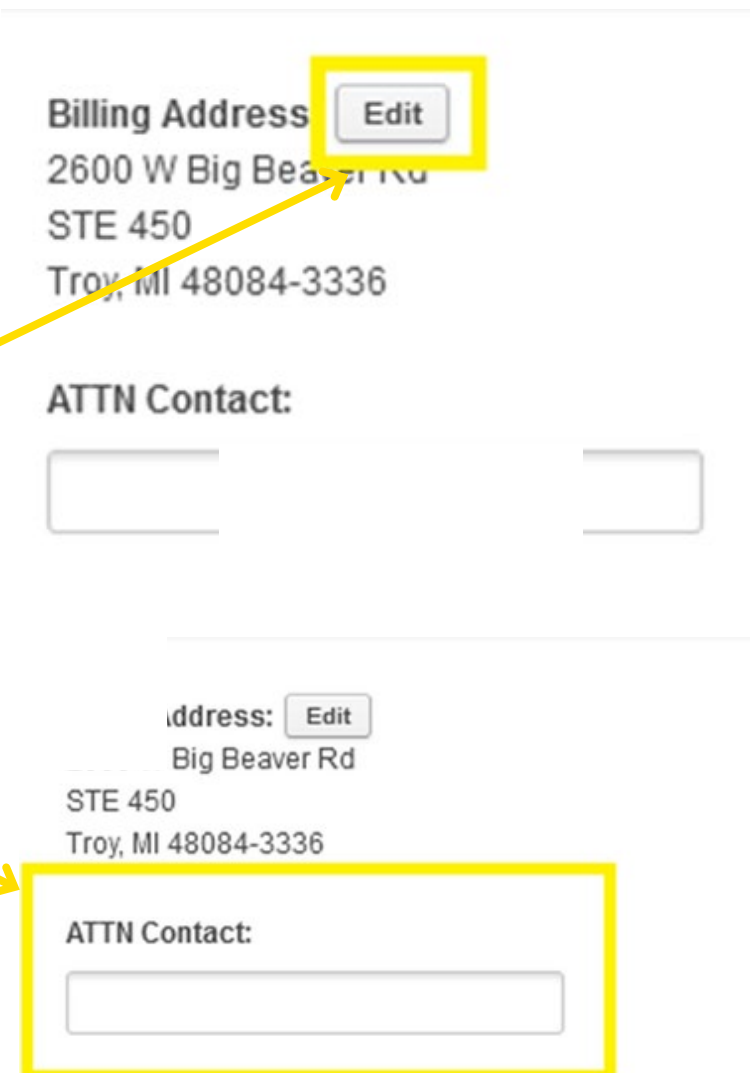
# Settings – Options & Settings

Click on the Settings tab to view and make changes to **Settings & Options**.



Customer Account Options can be confirmed or modified on this page.

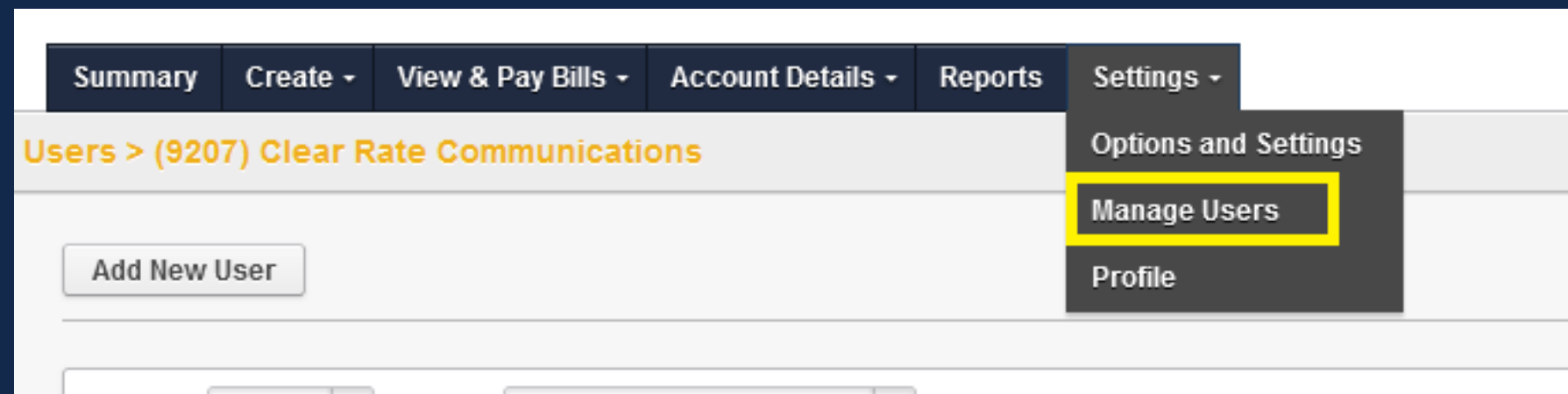
- On the right side, the **Billing Address** is listed for confirmation, but it can also be updated here using the Edit button.
- In the same section, an **ATTN Contact** can be entered for bill delivery
- If changes have been made to the information on this page, be sure to click the **Save Changes** button before leaving this screen.



# Settings – Manage Users

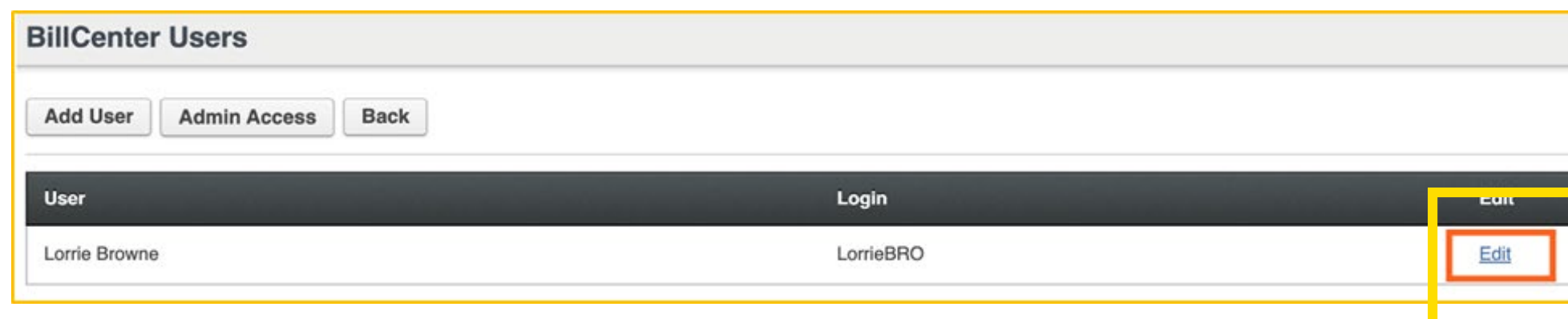


Click on the **Manage Users** tab to view or update user information.



## Remove or Edit Users

From the list of users, click the **Edit** link to view the User detail.

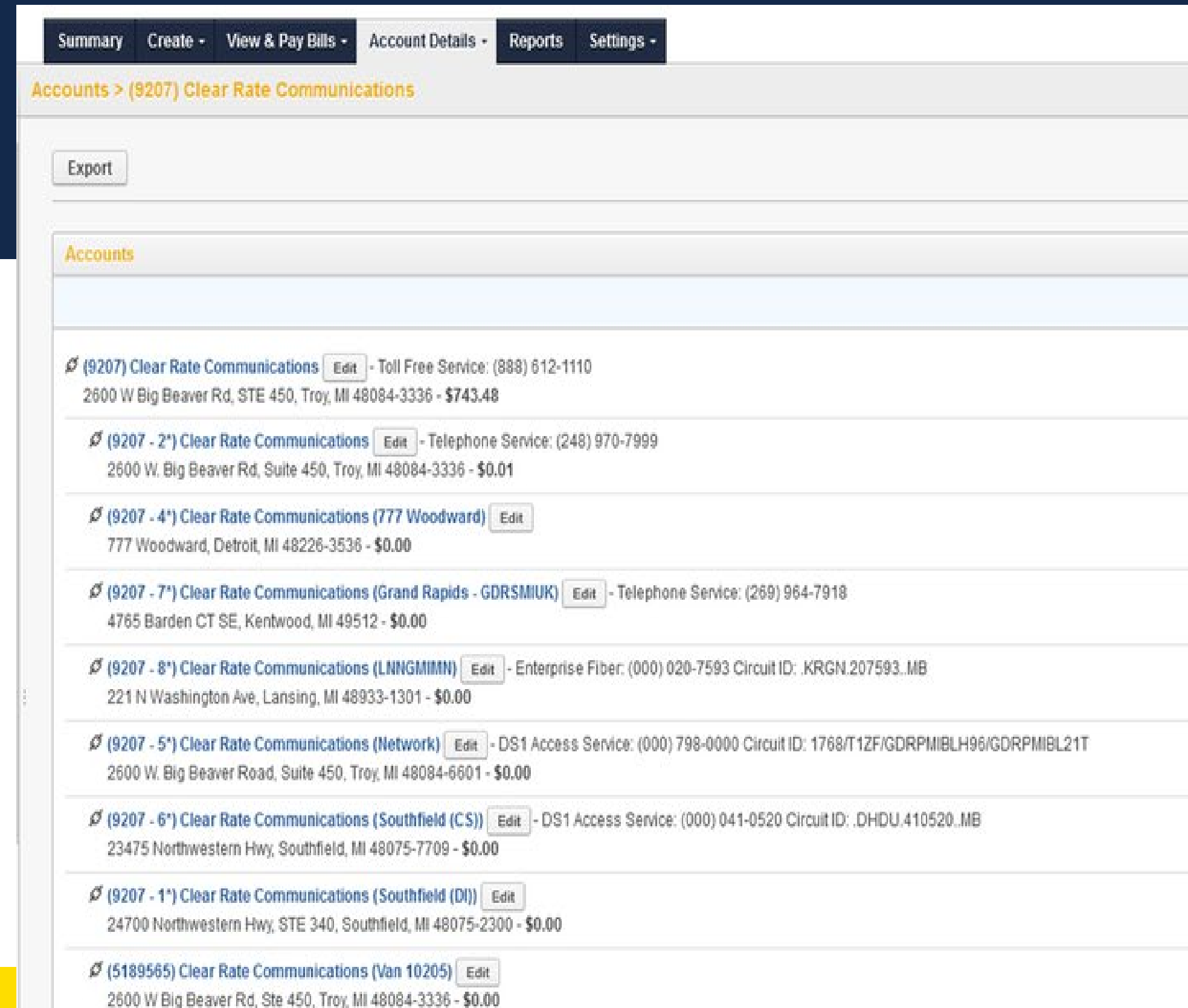
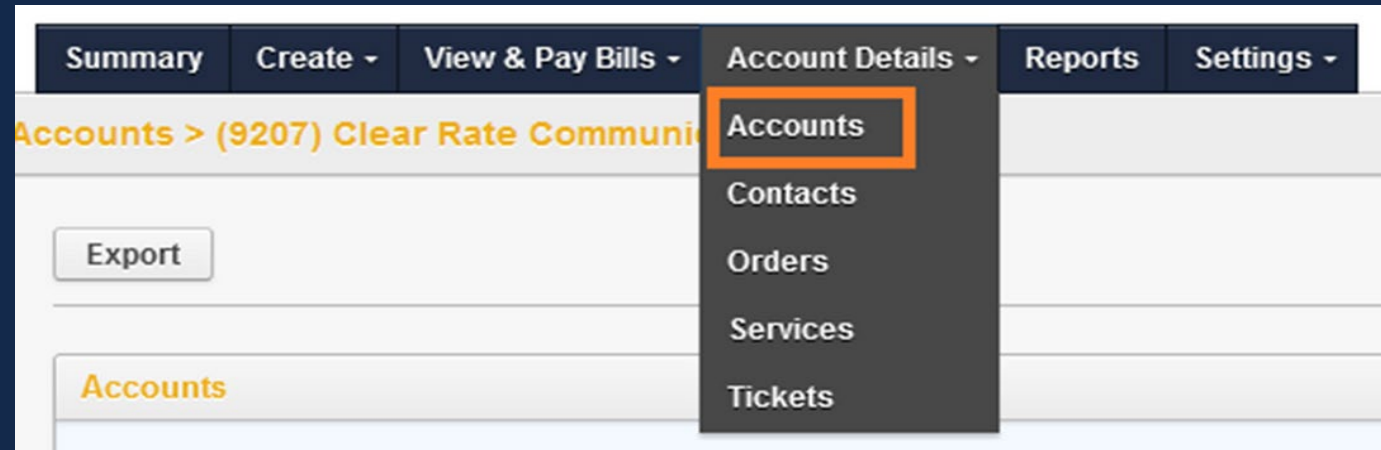


The Edit User page can be used to modify the available fields shown on the right



# Account Details – Accounts

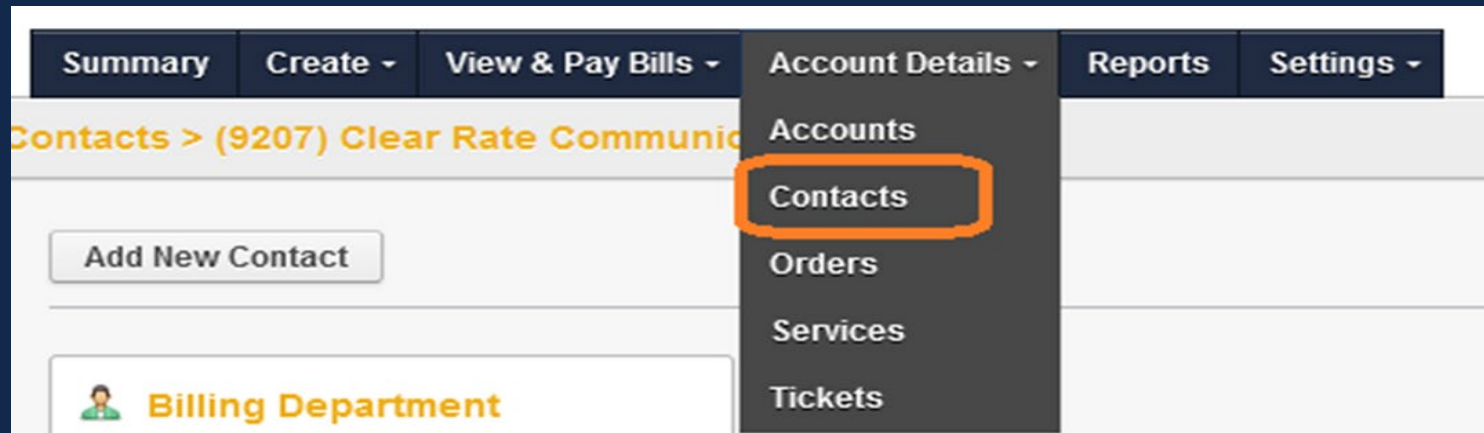
Click on the Accounts tab



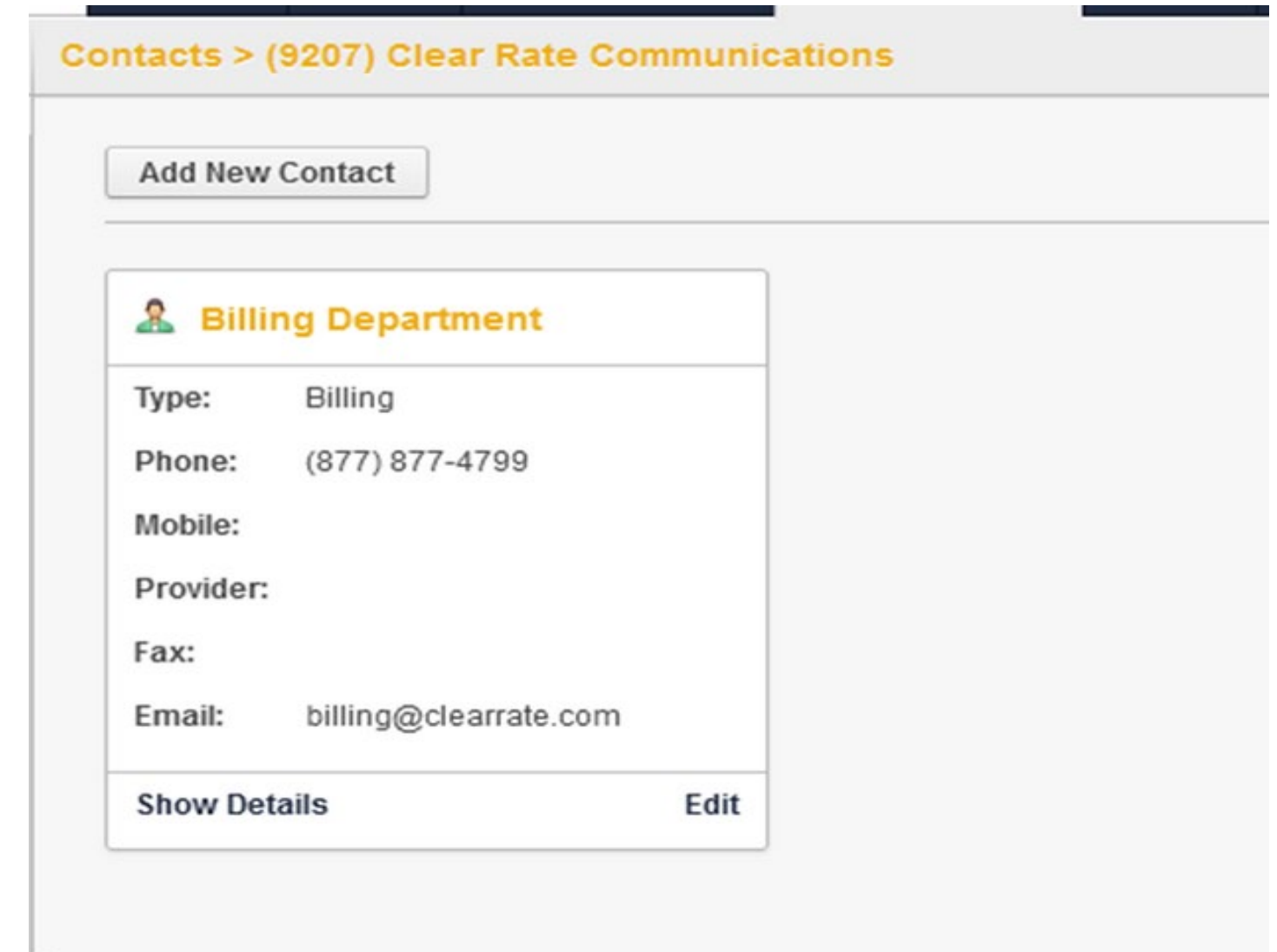
View a list of all related accounts  
Including Account #, Name and Address

# Account Details – Contacts

Click on the Contacts tab



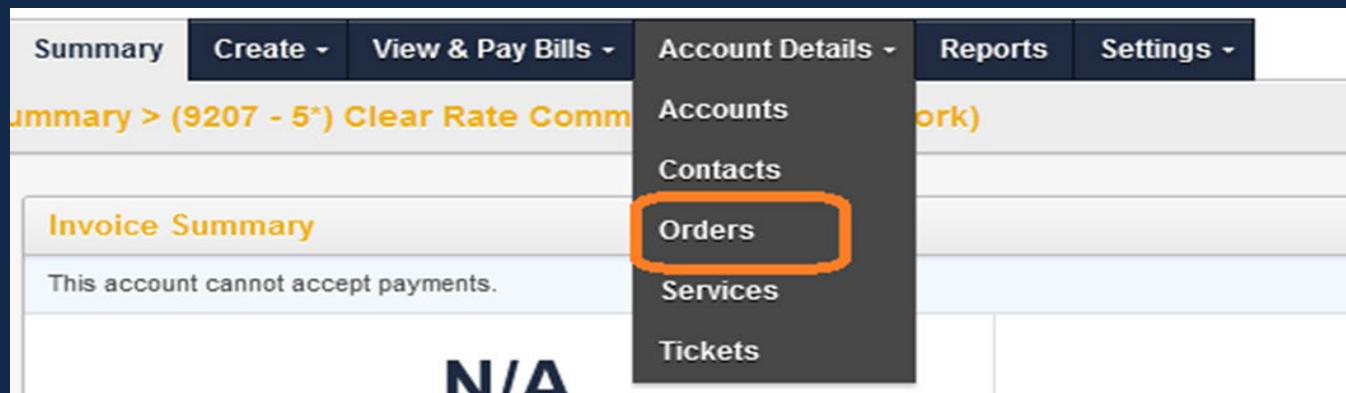
View & add contact information such as Contact Name, Type of Contact, Phone Number, Mobile Number, Fax Number and Email Address



# Account Details – Orders



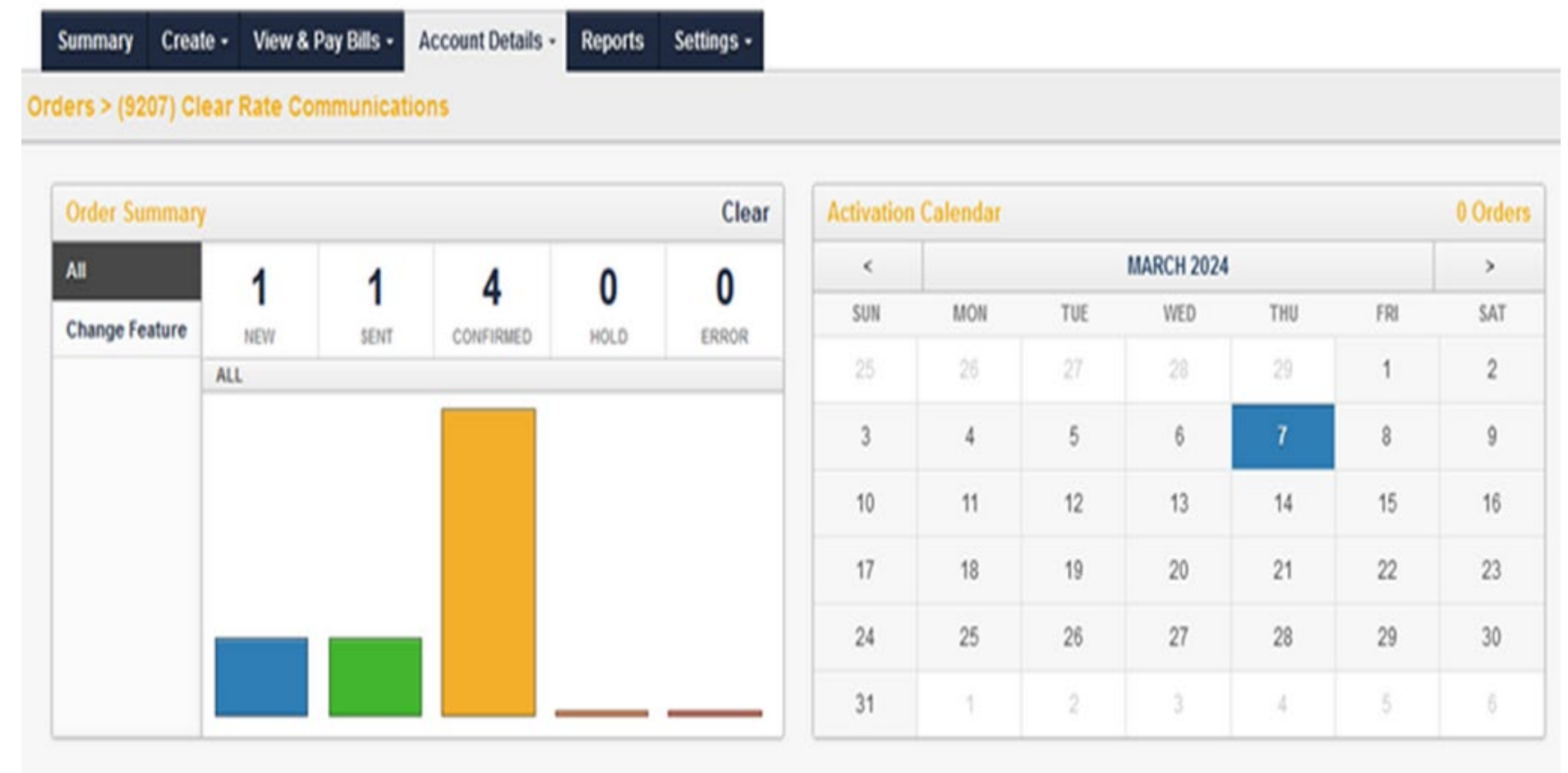
Click on the Orders tab



## Order Summary

At the top of the Orders tab you'll see the following.

- **NEW** = Order created, but not yet processed.
- **SENT** = Order is in process.
- **CONFIRMED** = Order has a scheduled and confirmed due date.
- **HOLD** = Order created, but on hold and pending resolution.
- **ERROR** = Reject received and is being worked



# Account Details - Orders cont'd



At the bottom of the Orders page, you will see a list of your orders. You can do the following:

- Export list of orders
- Filter Results (partial or keywords are allowed)
- Click on any order for further details (see next slide)

The screenshot shows the 'Orders' page interface. At the top left, there is an 'Export' button with a download icon. At the top right, there is a 'Filter Results' input field with 'Filter' and 'Clear' buttons. Below these are pagination controls showing '1 2 3 4 5 6'. The main part of the page is a table with the following columns: PON, ACCOUNT, PARENT, STATUS, TYPE, FOC DATE, CREATED, and SERVICE TYPE. The table contains 14 rows of order data.

PON	ACCOUNT	PARENT	STATUS	TYPE	FOC DATE	CREATED	SERVICE TYPE
EK2809492CF-20	(2809492) Erin Knight		CANCELED	CHANGE_FEATURE	6/21/2023	6/21/2023 7:31 AM CST	Wireless Service
XX2809492S-3	(2809492) Erin Knight		CANCELED	DENY		6/10/2023 1:52 PM CST	Wireless Service
EK2809492N-51	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:53 PM CST	Telephone Service
EK2809492N-50	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:53 PM CST	Telephone Service
EK2809492N-49	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:41 PM CST	Telephone Service
EK2809492N-48	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:41 PM CST	Telephone Service
EK2809492N-47	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:37 PM CST	Telephone Service
EK2809492N-46	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:37 PM CST	Telephone Service
EK2809492N-45	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:35 PM CST	Telephone Service
EK2809492N-44	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:35 PM CST	Telephone Service
EK2809492N-43	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:35 PM CST	Telephone Service
EK2809492N-42	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:34 PM CST	Telephone Service
EK2809492N-41	(2809492) Erin Knight		CANCELED	NEW	6/7/2023	6/7/2023 12:34 PM CST	Telephone Service



# Account Details - Orders cont'd



See below for details you will see for each order.

- Click on the **History** tab to review orders, provide questions or comments and customer updates.

Summary Create View & Pay Bills Account Details Reports Settings

Order Details > (9207) Clear Rate Communications Welcome Erin (Impersonating Clear Rate) - Logout

Back to Orders

### Order Details

Order **KS9207N-2** Updated: 1/10/2024 12:00 PM CDT

Status: COMPLETE  
Due: 1/10/2024  
Type: New  
Provider: ClearRate  
Service Type: Toll Free Service

Created: 1/10/2024 11:59 AM CDT  
Created By: Kevin Stein  
Assigned To: Kevin Stein  
kstein@clearrate.com  
kstein@clearrate.com

### Address Information

<b>Service</b> 2600 W Big Beaver Rd STE 450 Troy, MI 48084-3336	<b>Billing</b> 2600 W Big Beaver Rd STE 450 Troy, MI 48084-3336	<b>Listing</b> 2600 W Big Beaver Rd STE 450 Troy, MI 48084-3336	<b>Shipping</b> 2600 W Big Beaver Rd STE 450 Troy, MI 48084-3336
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### Account Information

Account: (9207) Clear Rate Communications  
BTN: Toll Free Service Telephone Number: (888) 612-1110  
Contact Name:  
Contact Number:  
End User Name:  
Email:  
Forwarding #:  
Appointment Time: DEFAULT

Services 1 Notes History

DATE	PON	STATUS	REP	VERSION	REVISION	STATUS NOTE
1/10/2024 12:00 PM CDT	KS9207N-2	COMPLETE	Kevin Stein	0	NONE	Manual status change.
1/10/2024 11:59 AM CDT	KS9207N-2	NEW	Kevin Stein	0	NONE	



# Account Details – Services

Click on the Services tab

The screenshot shows a navigation menu for 'Account Details' with the following items: Accounts, Contacts, Orders, **Services** (highlighted with a yellow box), and Tickets. Below the menu, the 'Invoice Summary' section displays a balance of \$743.48. The main content area shows a balance of \$743.48 with a minus sign and another \$743.48.

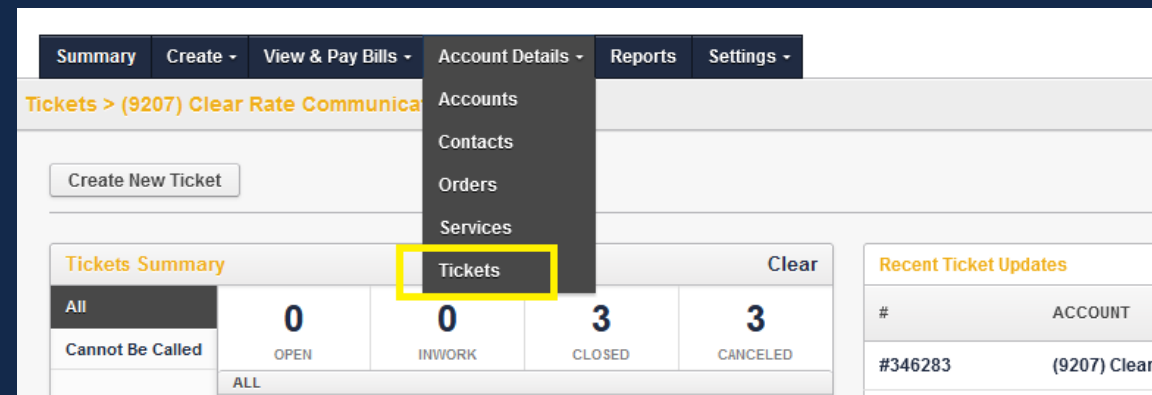
View all locations and services at each location, detailed cost and products delivered on each service type.

The screenshot shows the 'Services' page for '(9207 - 5\*) Clear Rate Communications (Network)'. It includes an 'Export' button, a 'Show: All Non-Disconnected' dropdown, and a search bar. A sidebar on the left lists service types: All (226), DS1 Access Service (200), DS3 Access Service (2), and Enterprise Fiber (24). The main table displays service details for two circuit IDs.

SERVICE	ACCOUNT	DETAILS	STATUS
▼ Circuit ID: 440692951	(9207 - 5*) Clear Rate Communications (Network)	Type:  DS1 Access Service Package:  6696 Clear Rate DS1 Access Pac... Charges: \$0.00	<b>ACTIVE</b> 11/6/2023
▼ Circuit ID: 440692660	(9207 - 5*) Clear Rate Communications (Network)	Type:  DS1 Access Service Package:  6696 Clear Rate DS1 Access Pac... Charges: \$0.00	<b>ACTIVE</b> 11/6/2023

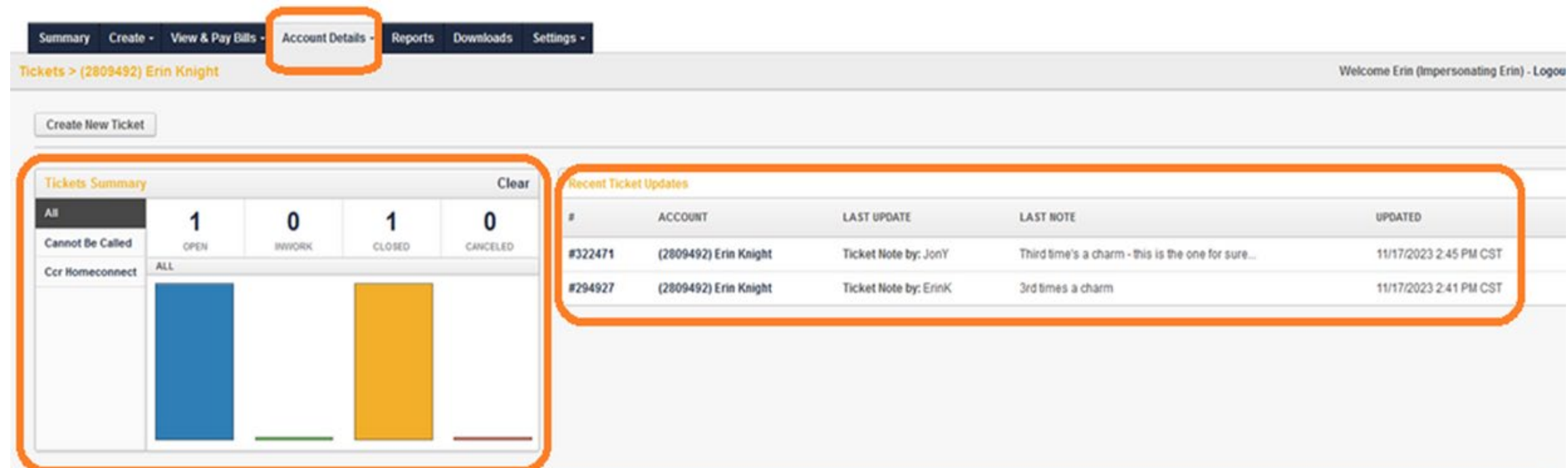
# Account Details – Tickets

Click on the Tickets tab



## Tickets Summary

- **OPEN** = Ticket created, but not yet worked.
- **INWORK** = Ticket review is in process.
- **CLOSED** = Ticket completed and/or resolved
- **CANCELLED** = No issue found or cancelled by the customer



The **Tickets** tab shows all tickets created along with status, on this account.

**Recent Tickets Updates** includes ticket information, last note made and the date/time of the last update.

# Account Details – Tickets cont'd



At the bottom of the Tickets page, you will see a list of your tickets. You can do the following:

- Export list of orders
- Filter Results (partial or keywords are allowed)

The screenshot displays the 'Tickets' interface. At the top, there are filters for 'Status' and 'Type', both set to 'All'. Below the filters are 'Export' options and a 'Filter Results' search box. A table lists tickets with columns for #, ACCOUNT, LAST UPDATE, LAST NOTE, STATUS, CUSTOM STATUS, TICKET TYPE, TICKET STEP, DATE CREATED, DATE UPDATED, SERVICE TYPE, DATE DUE, and ASSIGNEE. The third ticket, #343777, is highlighted with a yellow arrow. To the right, a detailed view of this ticket is shown, including 'Service Details', 'Contact' information, 'Assignee' (Riley Henderson), and a 'Messages' section with a 'Reply to Ticket' button. A yellow arrow points to the 'Messages' tab, and another points to the 'Reply to Ticket' button.

#	ACCOUNT	LAST UPDATE	LAST NOTE	STATUS	CUSTOM STATUS	TICKET TYPE	TICKET STEP	DATE CREATED	DATE UPDATED	SERVICE TYPE	DATE DUE	ASSIGNEE
#346283	(9207) Clear Rate Communications			CLOSED	Open	Cannot Be Called		12/13/2023 2:19 PM CDT	12/15/2023 10:40 AM CDT	DS1 Access Service		Riley Henderson
#344462	(9207) Clear Rate Communications			CLOSED	- Select -	Cannot Be Called		11/11/2023 11:11 AM CDT				
#343777	(9207) Clear Rate Communications			CLOSED	Cleared	Cannot Be Called		10/11/2023 10:11 AM CDT				

**Service Details**

Account: (9207) Clear Rate Communications  
Service: TN : 000550919 -  
Package: N/A  
Provider: ClearRate  
Status: ACTIVE

**Contact**

Contact Name: TBD  
CC:  
Mobile Number:

**Assignee**

Assigned To: Riley Henderson  
Email: rhenderson@clearrate.com

**Additional Information**

There are no additional fields for this ticket or ticket type.

**Messages** | Attachments

Browse... No files selected. or Drag files to upload

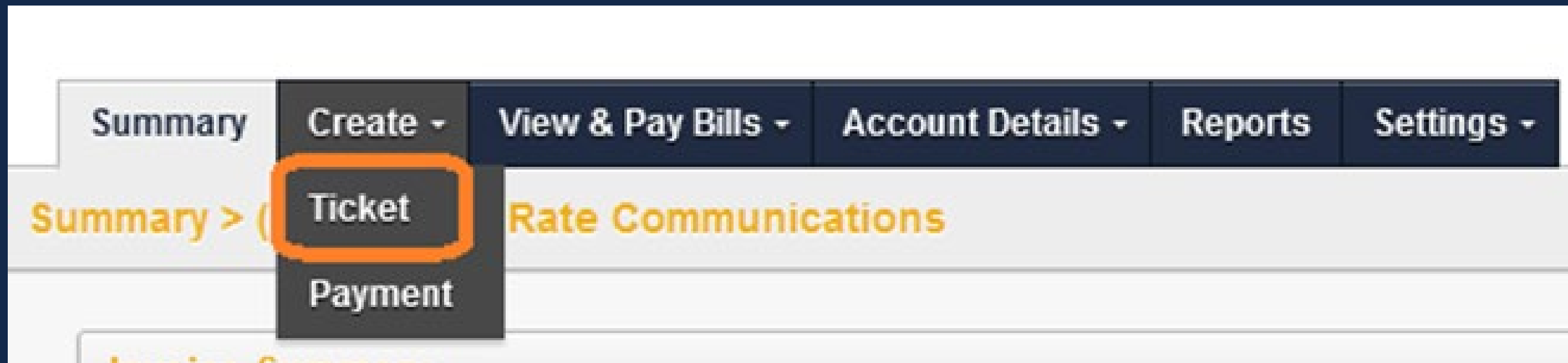
Reply to Ticket

- Click on any ticket for further details
- **Messages** – Click on this tab to ask questions, make comments and provide updates. Click **Reply to Ticket** to submit responses.



# Create - Ticket

To create a repair click on **Ticket**, in the Create tab on the main menu.



# Create – Ticket (Fill in the details per instructions below)



**Submit Ticket** **Cancel** → When all information has been completed, click **Submit Ticket** at the top of the page.

**General Information** **Additional Information**

**Service:**  
-- None --

**Priority:**  
- Select -

**Type:**  
-- Select Type --

**Description:**  
B I HTML

**Primary Ticket Contacts**  
Customer Contact:

**Contact Name:**  
Joe Smith

**Contact Number:**  
248-556-4500

**Contact Mobile Number:**  
248-555-1212

**Contact Email:**  
service@clearrate.com

**Attachments:** **Add More**  
**Browse...** No file selected.

Select the **Service** or **Phone Number** related to the trouble being reported

Under Priority select **Open**

Select the ticket **Type** that best describes the issue being reported.

Enter a **Description** reporting the trouble this service is having. The more detail provided, the more quickly and efficiently issues can be resolved.

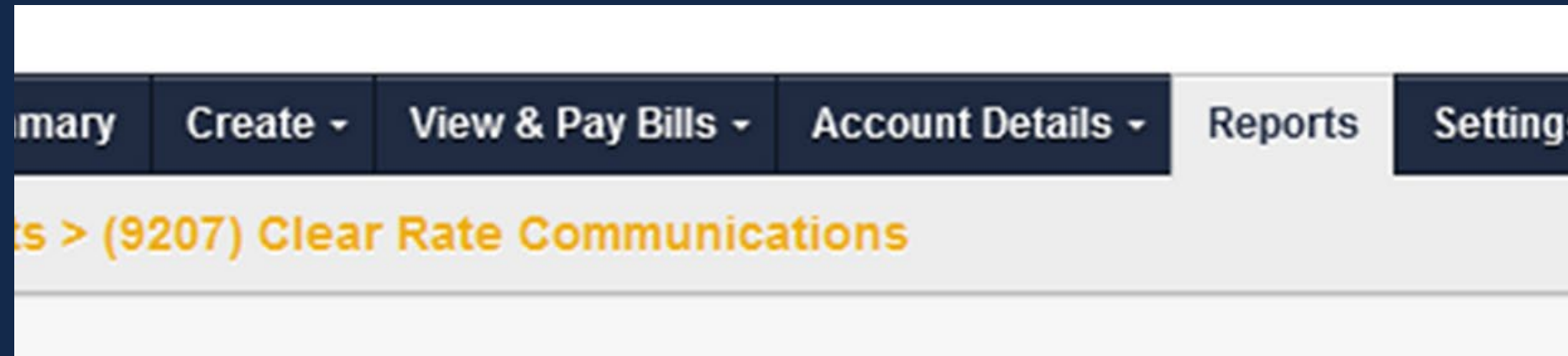
Confirm the **Contact Name**, **Contact Number** and **Contact Email** is accurate

You can **attach** a **file**, **test result** or any **other supporting documents** related to the issue being reported  
Attachments larger than 100MB may have a negative impact on the system performance or fail to upload

# Reports



Click on the Reports tab



Reports table populates with the **Shared Reports** as configured by the BillCenter owner. View any of the Shared Reports.

Shared Reports	
<b>BillCenter Reports</b>	
Frequent Callers (Toll Free)	(1144) - View most frequently called 800 numbers for one statement
Frequently Dialed Numbers	(1143) - View most frequently called TNs for one statement
International Call Details	(1136) - View details for international calls on one statement
Local Usage by TN	(1137) - View subtotal amounts for local calling by each TN on one statement
Summary by Time of Day	(1142) - View usage by time of day on one statement
Usage by Telephone Number	(1140) - View subtotal amounts by TN for one statement

# Bill Center Reports - Limitations



- Standard BillCenter users are not given the ability to create and run custom reports.
- BillCenter reports are limited to 50,000 entries per report. Increasing the table row limit may have a negative impact on system performance.
- Large reports generated through BillCenter (like usage reports) can overly tax the system



Log in to Bill Center and Get Started!



<https://clearrate.billcenter.net/>