CBIS®

PROBILLER℠

Order Entry & Customer Care

Instructor Guide

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Cincinnati Bell Information Systems, Inc.
600 Vine Street
Cincinnati, OH 45201

ProBiller/Summit Order Entry & Customer Care

Course Description

Objectives

Upon completion of this course, the student should:

- Understand order entry terminology and concepts
- Navigate through the graphical user interface (GUI)
- Know how to enter and edit account information
- Differentiate between a business and a residential account
- Understand how to assign services, components, attributes, and charges
- Understand account hierarchies and be able to manipulate hierarchies
- Be able to make changes to accounts, hierarchies, and services
- Understand ProBiller's customer care capabilities
- Access customer information and make adjustments

Course Description

This course provides hands-on experience using the ProBiller service order processing and customer care sub-systems. Students are given the information necessary to understand how to enter and change account information, establish and edit account hierarchies, order services, and make adjustments.

Target Audience

ProBiller end users

Prerequisites

Introduction to ProBiller

Topics

- Introduction to service order processing and customer care
- Concepts and terminology
- Graphical User Interface (GUI)
- Account basics
- Entering account information
- Establishing account hierarchies
- Entering account address and contact information
- Entering remittance information
- Ordering services

- Disconnecting an account
- Validating orders
- Making adjustments

Duration

Two days

Introduction

Welcome to the ProBiller Order Entry & Customer Care Workshop. In this Instructor Guide, you will find the following information:

- Course description
- ProBiller course matrix
- Description of the materials required to deliver the course
- Instructor checklist
- Instructor tips
- Setup instructions
- Explanation of the course overheads
- Course evaluation form

ProBiller Course Matrix

The following table lists all of the courses offered by CBIS in its ProBiller training series.

Course	Prerequisite	Course Length
Introduction to ProBiller	None	1 day
Order Entry	Introduction to ProBiller	2 days
Table Maintenance	Introduction to ProBiller	2 days
Service and Tariff Definition	Introduction to ProBiller	2 days
Traffic Processing	Introduction to ProBiller	2 days
Billing	Introduction to ProBiller	2 days
Online Development	Introduction to ProBiller	2 days
Batch Development	Introduction to ProBiller	2 days

Course Materials

The ProBiller Order Entry & Customer Care Workshop consists of the following materials:

For the instructor:

- A PowerPoint slide presentation, located in:
  L:\Doc&Trn\Summit V 3.1\Training\Order Entry\Slides

- The student guide located in:
  L:\Doc&Trn\Summit V 3.1\Training\Order Entry\Student Guide

- The instructor guide located in:
  L:\Doc&Trn\Summit V #.1\Training\Order Entry\Instructor Guide

For each student:

- A workstation, properly configured to complete exercises, if required

- A hard copy of the student guide

Instructor Checklist

Use the checklist below to ensure that you are prepared to conduct this course:

Name tents/tags	___________
Coffee, tea, soft drinks and snacks	___________
Reproduce student materials	___________
Arrange for room setup	___________
Flipcharts	___________
Overhead projector	___________
Electronic copy of PowerPoint presentation or overheads	___________
Overhead Projector or other projection equipment	___________
Markers	___________

Computer Setup Instructions

Each student should have a workstation on which student exercises can be performed. These workstations should be equipped with the following:

- Windows 95 or NT
- Minimum 32 megabytes of memory
- User ID and password
- Order Entry software

Before class begins, ensure that each computer is properly configured and operational.

Review each exercise you plan to use during the course.

Instructor Tips (Tips for effective training)

Preparation

- Review course materials well before teaching. Ensure that the classroom workstations have the necessary network connections and software.

Getting Started

- Introduce yourself
- Have students introduce themselves
- Always give a verbal outline of the day's activities
- Provide restroom and telephone information
- Review the objectives of the course
- If a class lasts more than one day, do the following at the beginning of each day:
  - Welcome students back
  - Review the previous day's activities
  - Provide an overview of the day's activities

Questions & Answers

Be aware of how loudly/softly students speak when they ask questions. Use the following tactics to ensure that everyone hears questions:

- Repeat questions so that everyone can hear—especially when the questions come from soft-spoken students. Repeating questions also helps to make everyone feel a part of the discussion. Remember that students sitting toward the front of the class often cannot be heard by those in the back of the room. Use judgment when deciding which questions to repeat. There's no need to repeat a question from a clear-voiced student sitting in the back of the room.
- Ask students to speak up so that everyone can hear.
- When asking students questions during class, give them time to respond before helping out. Don't be afraid of "silence." If you're sure that the question was clear, it's okay to wait fifteen to thirty seconds for students to respond.
- Use short, pointed questions during slide presentations to keep students attentive and involved—and to get them to participate in the instruction. For example, before introducing the UNIX editors used by ProBiller developers, ask a question such as, "Who can tell the group what *vi* or *Pico* is?" The goal should be to make students participants of the learning process whenever possible.
- Don't be afraid to pose questions to specific students from time to time. When students see that you'll be doing this during presentations or other teaching activities, it causes them to perk up and stay alert, since they know that they could be called upon at any time. It's too easy for students to "relax" during presentations.
- Use questions to get a reading on your students' knowledge base (and, again, to keep their attention). For instance, if you say, "Our version control tool is SoureSafe," you might follow up quickly with the question, "How many of you have used it before?" You can use such questions to find a student with a lot of knowledge about a particular topic, and then get him or her in on the teaching. This livens things up and keeps attention levels high by shifting focus to a different speaker.

Speaking

- Stand up—except during those times when you need to sit at the terminal to walk students through an exercise.

- Speak slowly and clearly, and try not to rush through the material. Remember that the concepts you are presenting are often completely new to students. It takes a while for the material to sink in.
- Try not to let your voice trail off at the ends of sentences.
- Vary the pitch and intonation of your voice.
- Watch those filler words—such as *okay, um, like*. They can easily become distracting.

Slide Shows

- During a slide show, make sure you address the topic or topics presented on each slide.
- If at all possible, try to do more than merely read from slides; add further information about each slide topic.

Other Instructional Media

- Try to use a variety of media during the course (i.e., Call Manager CD-ROM, Post-it notes, flip charts, white boards).

Measuring Retention

- If you're unsure of whether students have understood a concept, ask an impromptu question that will allow them to illustrate their understanding.
- Bring students in on your presentations as much as possible by asking them questions that test their understanding of topics presented. Take every opportunity to give small quizzes. For instance, if you've just gone over dialog naming conventions, ask them what they think the Account Search dialog would be named.

Presence

- When possible, walk around and use hand and arm gestures while teaching. Movement helps to keep students attentive. Walking among students, where appropriate, is also a good tactic for retaining attentiveness.

Conducting Demos

When conducting online demonstrations, try to follow these guidelines:

- Arrange for a stand-up instructor PC; if at all possible, avoid sitting down.
- Before you begin, make sure everyone can see the screen clearly. If not, arrange seating or lighting differently.
- Always narrate what steps you're taking on the PC; it's very important that you not get caught up in what you're doing on the PC so much so that you forget your students. If students see that you're racing ahead without carefully explaining your steps, they will quickly lose interest.

Exercises

- Get students involved, when possible—get participants to give answers.

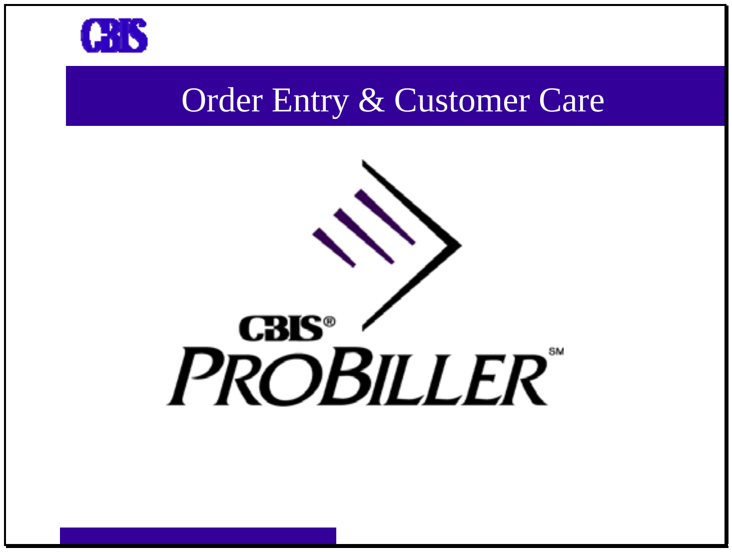
Discipline

What do you do about two or more students who continuously whisper to one another during class?

- Pause (wait for them to stop talking and then continue).
- Walk towards the students, not calling on them or looking at them specifically.
- Mention in general that class members should try to keep talking to a minimum to avoid distracting others.
- If that fails, talk to the offending student(s) during the next break.

- Don't just ignore the behavior. Idle chatter among students makes it difficult for other students to concentrate and can damage the integrity of the class as a whole.

Course Overheads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Course Agenda

- Introduction
- Concepts and terminology
- Graphical User Interface (GUI)
- Accounts
- Hierarchies
- Services
- Adjustments

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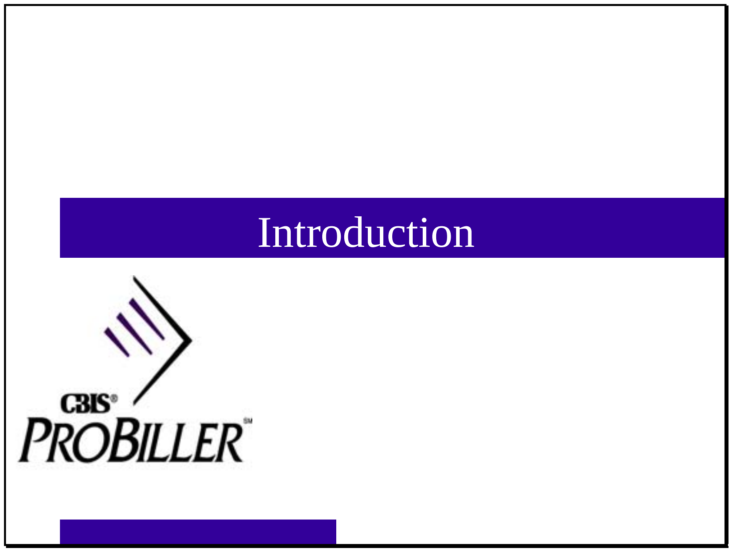
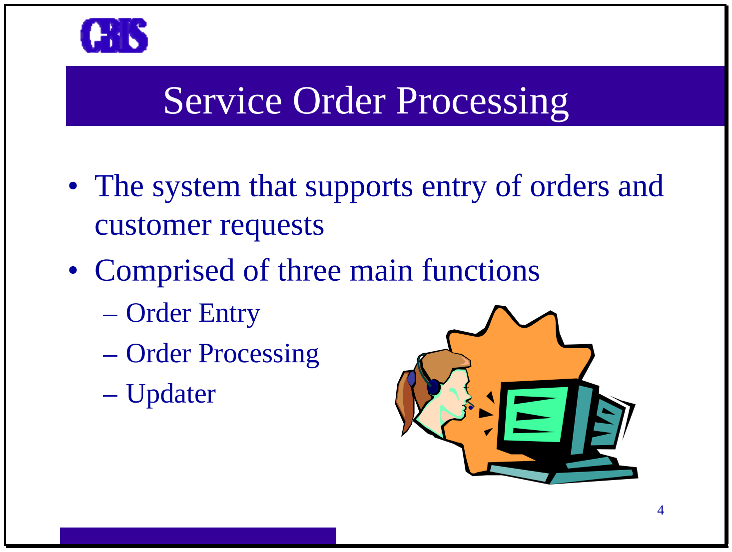


The next few slides review of some of the concepts and terms that were first introduced in the Introduction to ProBiller course. They are meant as a review for concepts and terms that the students should already be familiar with.



Service Order Processing is one of ProBiller’s subsystems. It supports the entry of orders and the generation of customer reports.

Service Order Processing is comprised of three subsystems:

1. Order Entry
2. Order Processing
3. The Updater

This course will focus on the order entry functionality of Service Order Processing.

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Order Entry

- A set of GUI screens through which customer requests and orders are placed
- Adds, maintains, and disconnects customer information
- Defines customers, billing hierarchies, and services
- Defines features, rating plans, discounts, and reports

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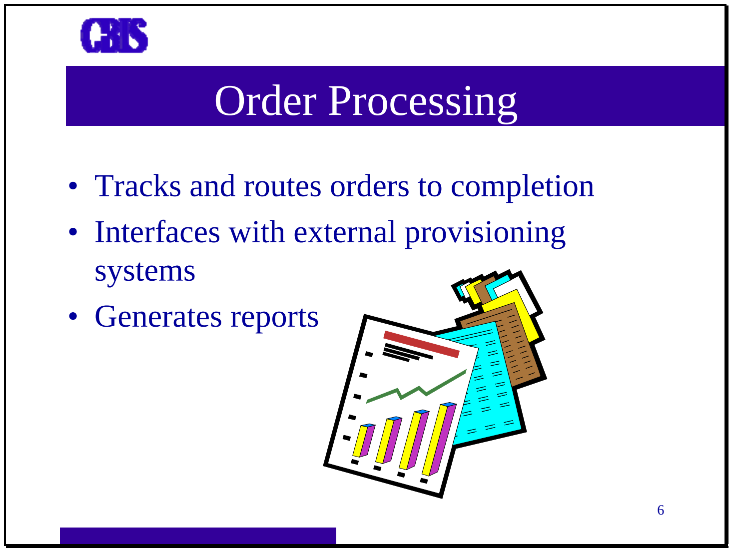
The order entry subsystem is a graphical user interface (GUI) through which customer requests and orders are placed. Here, users can add, maintain, and disconnect customer information.

Some of the other types of functions that users can perform here are the ability to define customers, their billing hierarchies, their services and features, select their rating plans, select customer discounts, enter comments, and define the customer's required invoicing and reporting needs.

One of the objectives of this course is for the students to be able to perform all of these functions.

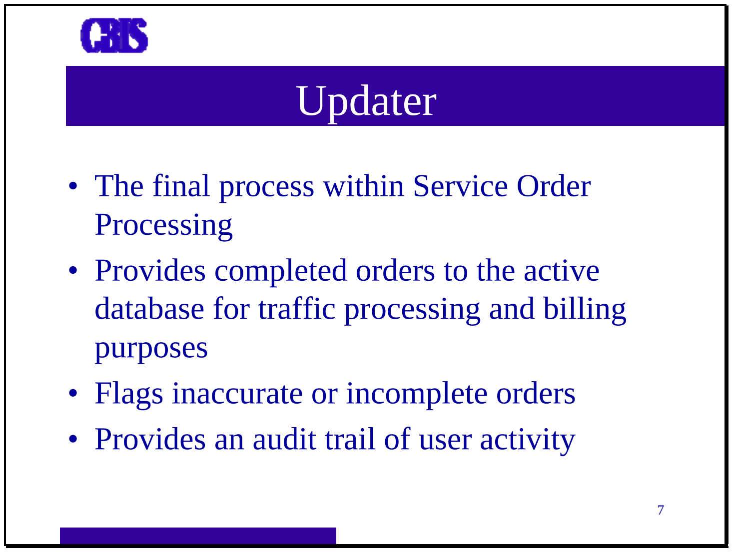


The path (or steps) that an order goes through is called an order route. The order route is the sequence of activities that are required for an order to be completed. Order processing tracks where the order is in the order process.

Order processing monitors where orders are at any given time through the order process. It also generates various reports.

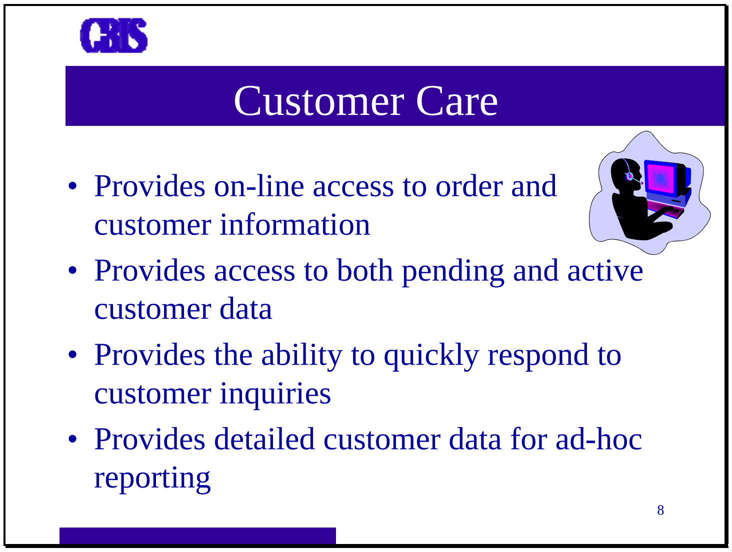
Order processing tracks and routes an order through to its completion. It provides the ability to route orders to various users and/or systems for each of the functions that are required to complete an order.

Note: This functionality is currently unavailable. It is scheduled for future releases.



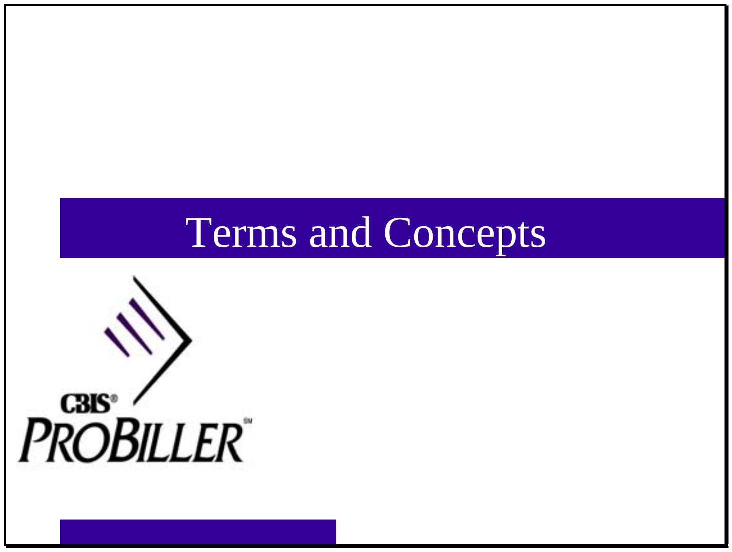
ProBiller makes use of two separate database structures: the order database and the active database. Data obtained in the order entry process is saved to the order database.

The Updater is the last activity to take place in the order route. It is a batch job that runs on a regularly scheduled basis. The overall purpose of the Updater is to validate order data and move that data from the order database to the active database where billing can access it.



The Customer Care functionality provides access to order information and customer information. It provides users with access to both pending and active customer data.

The availability of this information is used to provide quick responses to customer inquiries and to make necessary adjustments to customer's accounts.


Terms and Concepts
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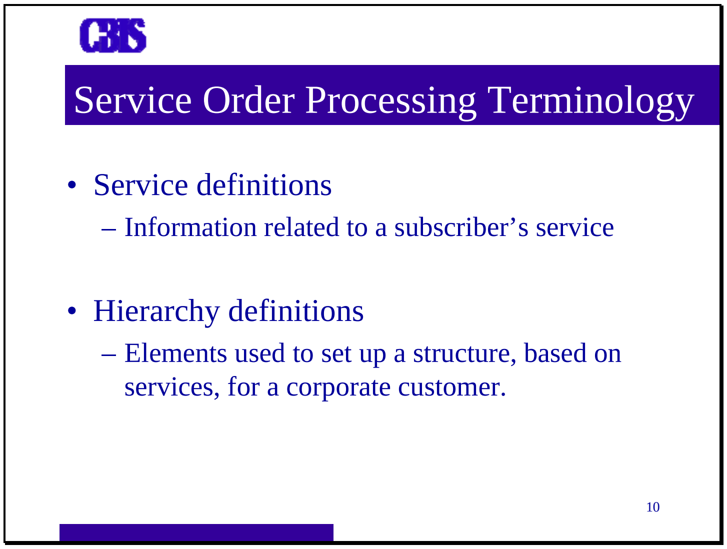
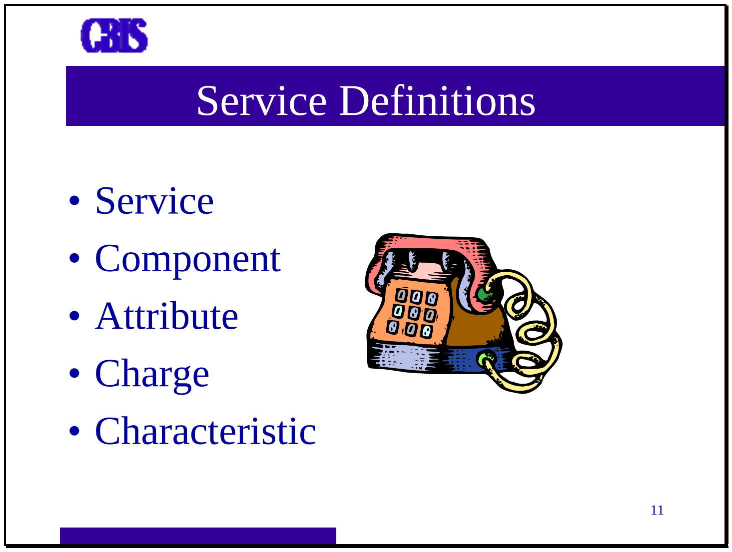


Next, we are going to go over two different sets of terminology. The first set refers to the way that ProBiller defines services. The second set refers to the way that ProBiller sets up customer hierarchies.



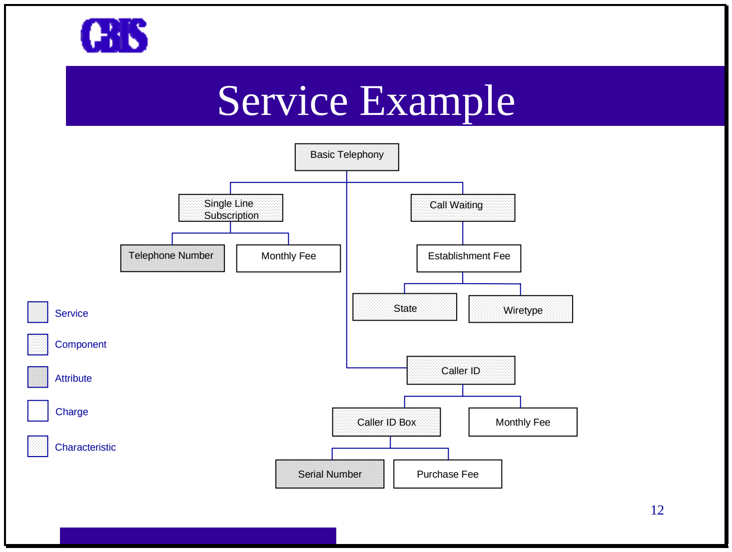
A service is a telecommunications product that is offered to customers. It is priced and sold. An example of a service would be basic telephony (POTS).

Components are the different elements or features that define a service. Call waiting is an example of a component of basic telephony.

Attributes are elements that capture descriptive information about a component. For example, if a customer orders call forwarding, the attribute would the forwarding telephone number. Some attributes are essential for keeping track of a component and are identified as identifying attributes. An example of an identifying attribute would be a telephone number of serial number.

A charge is the lowest level item that you would see on an invoice. Charges can be either recurring or nonrecurring. A nonrecurring charge is a one time charge like an installation fee. A recurring charge would be a monthly fee for a service.

Characteristics are detailed descriptive information about a charge. They are the pieces of information that are used to calculate the charge. For example, if a charge appeared on an invoice for installation of a service, one of the characteristics used to calculate that charge might be the number of miles the technician had to travel in order to get to that installation.



This is an example of a service definition.

There are three components under the basic telephony service: single line subscription, caller waiting, and caller ID.

The single line subscription has one attribute (telephone number). Note that the telephone number is an identifying attribute. It also has one charge (monthly fee). The monthly fee is a recurring charge.

The call waiting component has one charge (establishment fee). The establishment fee is a nonrecurring charge. The charge has two characteristics (state and wiretype).

The caller ID component has one recurring charge (monthly fee) and one sub-component (called ID box). This sub-component has one attribute (serial number). The serial number is an identifying attribute. The sub-component also has one charge (purchase fee). The purchase fee is a nonrecurring charge.

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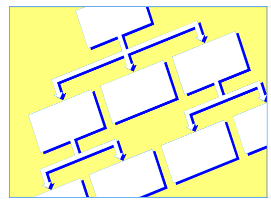
Hierarchy Definitions

- Account
- Remittance Account
- Division Account
- Headquarter Account



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There are two types of customers: residential and business. Each business customer must have a hierarchy of accounts. The hierarchy may be made up of only a single acount or it may have multiple levels of accounts tied together (up to ten levels deep). Hierarchies are built by defining parent-child relationships between the various accounts.

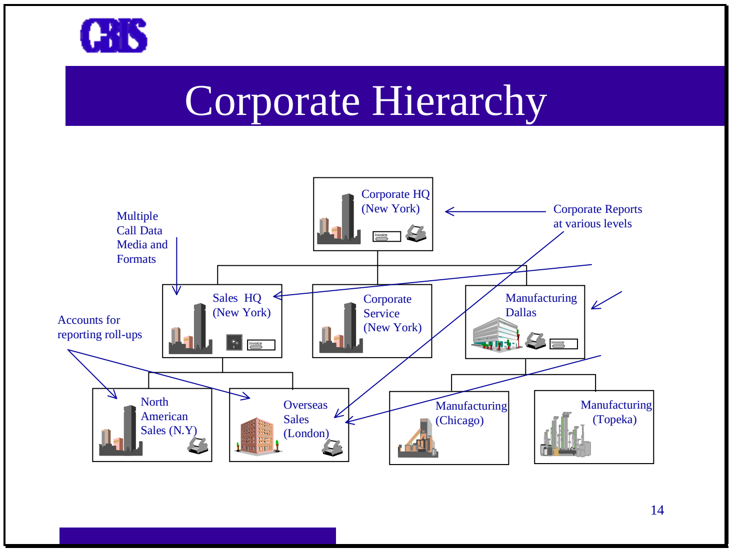
The account hierarchy defines who is paying the bill for whom. It also defines who will receive what reports.

An account is someone who subscribes to a service. An account can be either business or residential. Services are associated with an account.

A remittance account is that account that receives the invoices for charges it incurs and those charges incurred by all non-remittance sub-accounts associated with it.

A division account is an account that has a grouping of accounts underneath it for which reports are produced. A division account can also be a remittance account, however, it cannot be a headquarter account. The purpose of a division account is to get rollup reports. A division account must have at least one child.

The headquarter account is at the highest level of the customer hierarchy. It is always designated as a remittance account.



This is an example of a corporate structure. The corporate headquarters receives roll-up reports and an invoice for charges incurred by itself, as well as for the Corporate Service account.

On the second level, the Sales Headquarters receives multiple call data media and an invoice for charges incurred by itself as well as the two child sales accounts beneath it.

The Manufacturing account receives roll-up reports and an invoice for charges incurred by itself, as well as for the two child accounts located beneath it.

On the third level, both the North American sales account and the Overseas sales account receive their own roll-up reports. The Overseas sales account also receives corporate reports at various levels. The manufacturing accounts in Chicago and Topeka are directly related to the manufacturing account in Dallas.

The headquarter account is always a remittance account. Alternate media can be ordered at the headquarters or remittance levels.

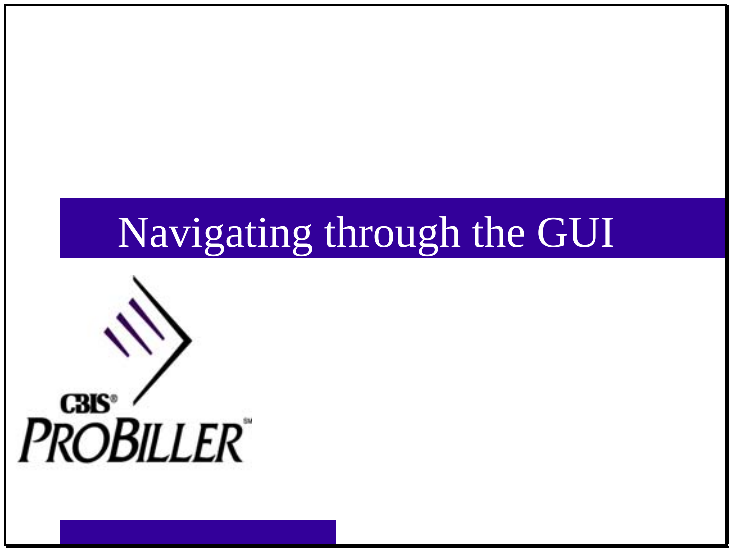
Note: The envelopes indicate remittance accounts. The printers indicate accounts that receive reports.

Review

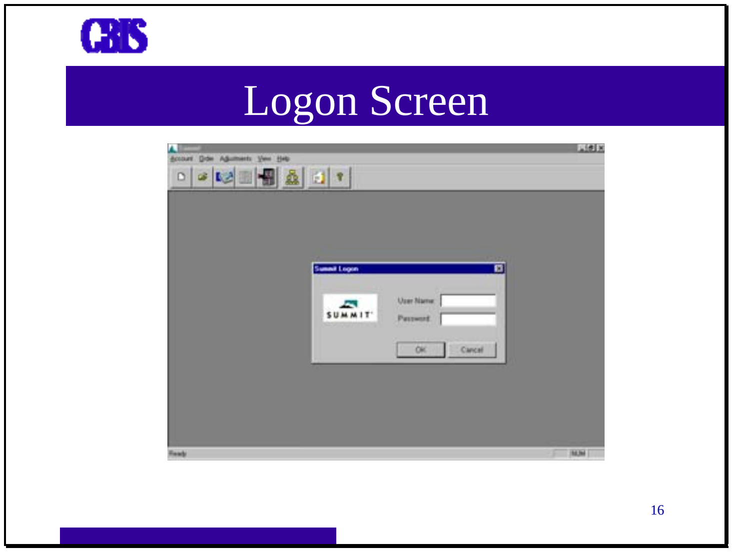
Let's see how much you remember! Match the definitions at the top of the page with the appropriate terms at the bottom of the page.

1. A telecommunications product offering local, long distance, and/or leased lines.
2. What a service consists of.
3. Examples are telephone numbers and serial numbers.
4. The two types of customers that the ProBiller system supports.
5. A description of the customer's organization.
6. A person or company who subscribes to telephone service.
7. The highest level of the customer hierarchy.
8. The account responsible for paying the invoice(s) incurred by all non-remittance and sub-accounts associated with it.
9. It must have at least one child account.

8	Remittance account	2	Components	9	Division account
4	Business & residential	5	Hierarchy	1	Service
7	Headquarter account	3	Identifying attribute	6	Account

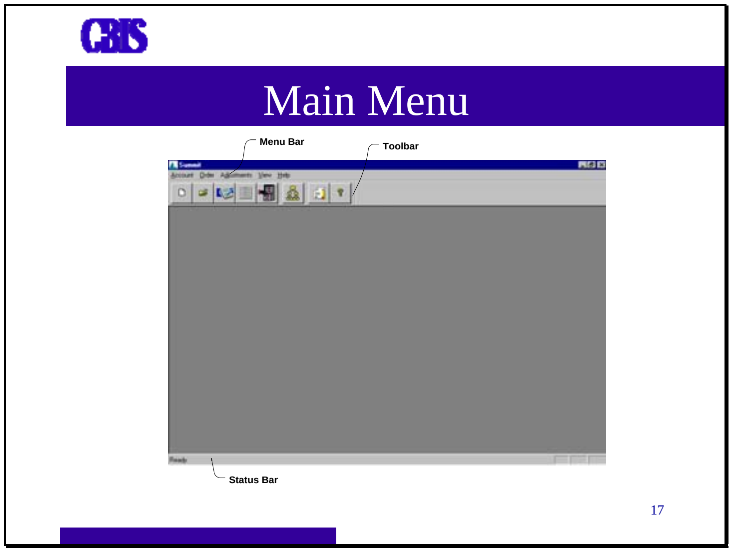


Next we are going to take a look at the ProBiller graphical user interface (GUI). Here you will learn how to start the Order Entry system, as well as how to navigate within its windows and operate its various order entry features.



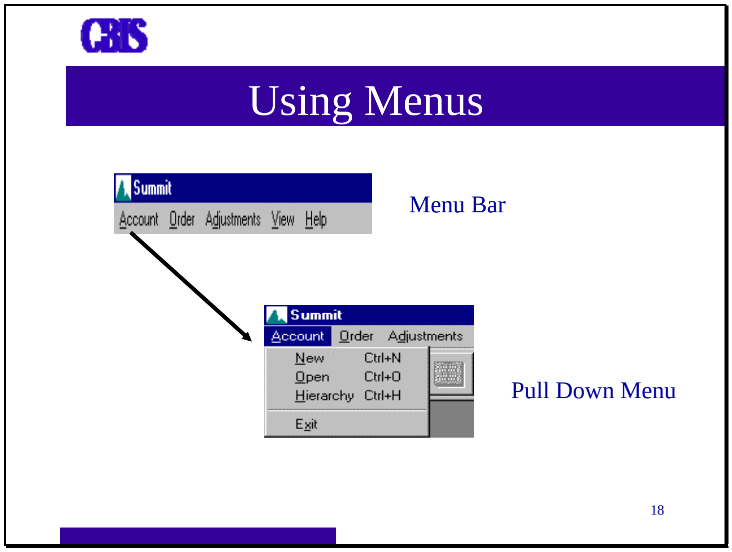
Once you have ProBiller installed on your PC, there will be a ProBiller icon on your screen or a ProBiller selection from the Windows Start menu. Use one of these two methods to start ProBiller. This is the first screen that will appear.

Type your user name and password into the appropriate text boxes.



Once you have successfully logged on to the ProBiller order entry system, you will see the screen displayed above.

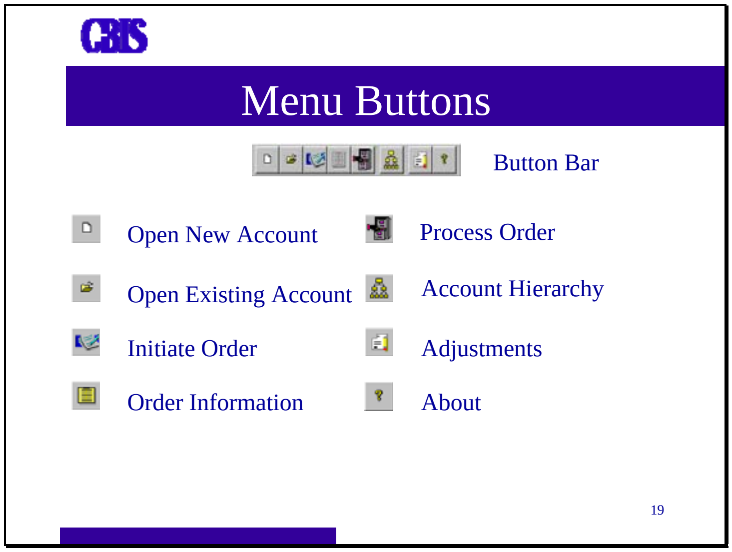
The screen is blank except for the menu bar with the Account, Order, Adjustments, View, and Help options. You will also see the Toolbar which gives you one-click access to some of the most commonly used features. The status bar, located at the bottom of the screen, provides you with written feedback on the status of your operations.



You can access all of ProBiller's order entry functions using the menu bar.

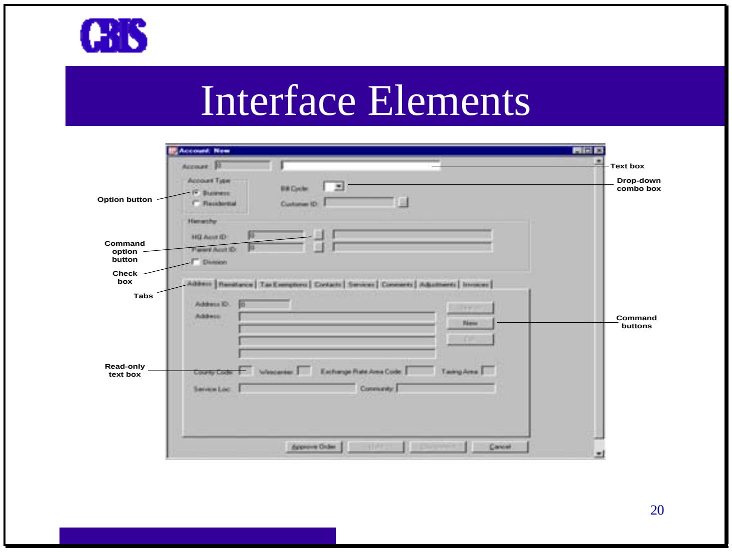
You can access the menu bar with either the mouse or with the keyboard (using ALT+underlined letter).

Once you select a menu option, a drop-down menu (or pull-down menu) will appear with a list of options.



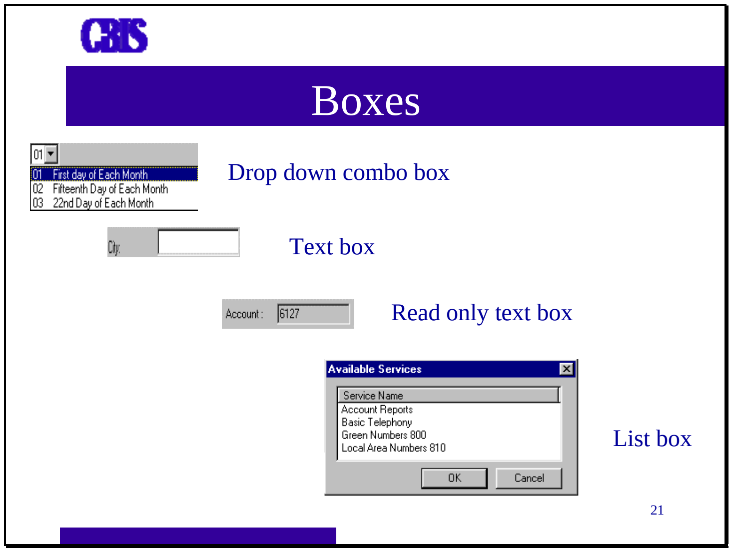
The button bar provides quick access to some commonly used features. These buttons are described below.

Open New Account	Used for entering data for business or residential accounts.
Open Existing Account	Accesses the Account Search screen. Here users can search for an existing account.
Initiate Order	Accesses the Initiate Order dialog box. Here users can enter order entry mode where new orders can be created or outstanding orders can be completed.
Order Information	Accesses the Order Information dialog box. Here users can enter order-level comments and tie in contract information regarding an order.
Process Order	Accesses the Order Search dialog box. Here users can search for orders that have been put on hold or view orders that need to be processes.
Account Hierarchy	Used to display the corporate structure of the headquarter account in a tree view.
Adjustments	Accesses the Adjustment Approval dialog box. Here authorized users may search for, approve, or disapprove pending adjustments.
About	Displays information about the version of ProBiller that you are using.



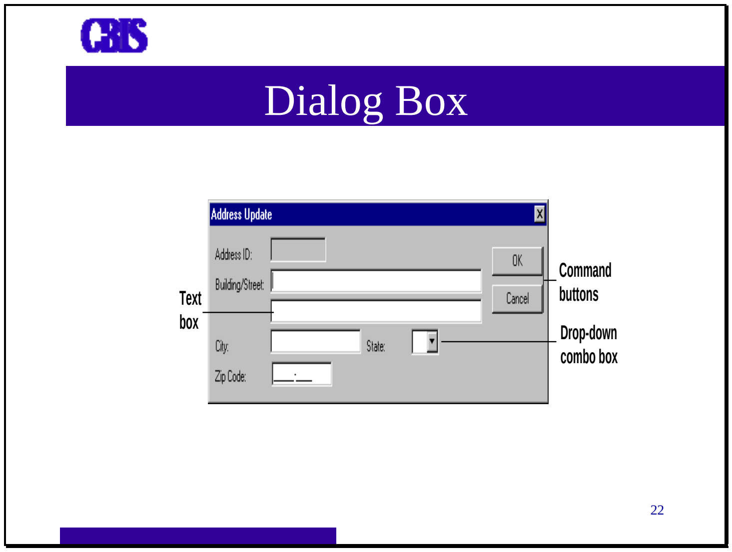
The figure above illustrates some of the kinds of data entry areas you will encounter when using the order entry system. These include option buttons (or ratio buttons), text boxes, command buttons, and drop-down list boxes.

A more detailed description of each of these data entry areas follows on the next few slides.



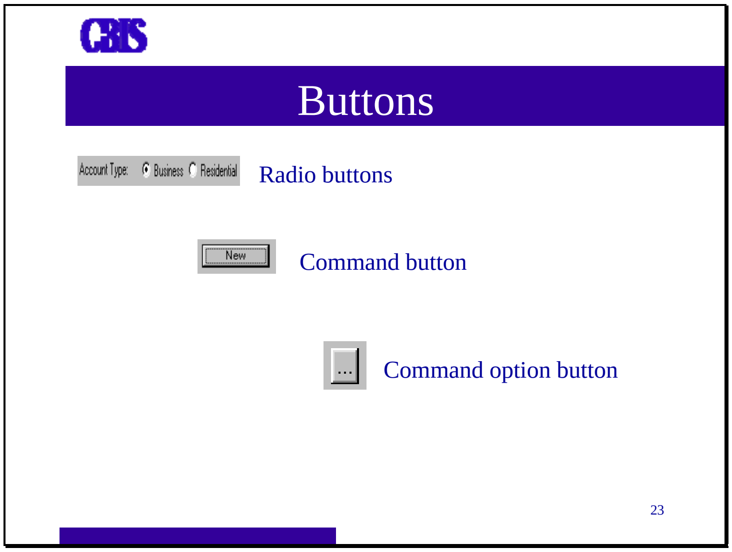
Here are some of the various types of boxes you will encounter when using the order entry system.

Drop down combo boxes	Displays a vertical list of choices when you click on the arrow. You may only select one choice from the list. Instead of choosing from the drop-down list, you may also type in the correct value directly.
Text boxes	Rectangular areas into which you type information. You can enter free-form information into them. They have a white background.
Read only text boxes	Will not allow you to enter data into them. They merely display information that has already been entered into the system. They are always gray.
List boxes	Presents a list of choices from you can select one.



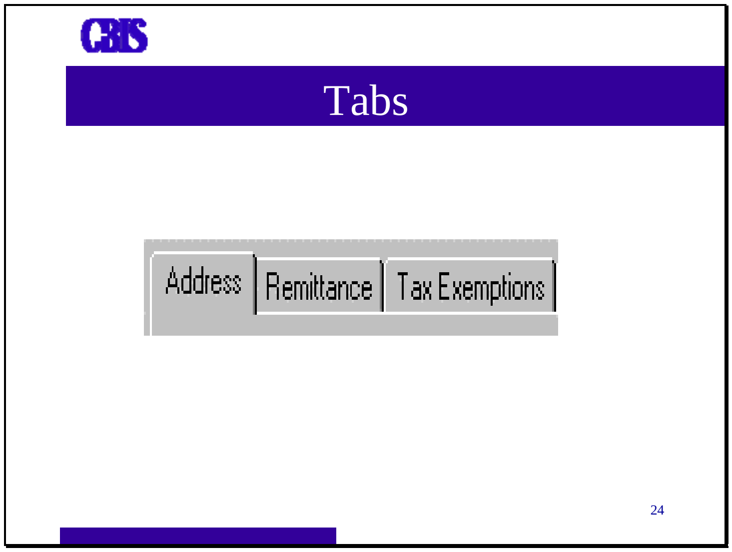
A dialog box is a separate, self-contained window in which you are required to enter information and perhaps make some selections.

Almost every dialog box has two command buttons (OK and Cancel). Use the OK button to accept the information entered. Use the Cancel button to disregard your entries.

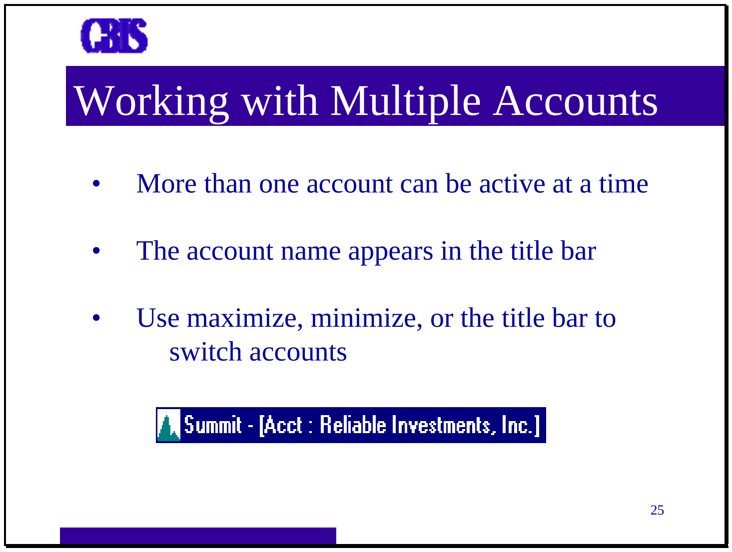


Here are some of the buttons you will see when using the order entry system.

Radio/Option buttons	A set of two or more circles that represent mutually exclusive options. You can only select one of the options.
Command buttons	Are boxes words that execute a command.
Command option buttons	Are boxed ellipses (…) that usually appear after a text box. When selected, command option buttons bring up a list box from which you can select an entry that will appear in the accompanying text box.



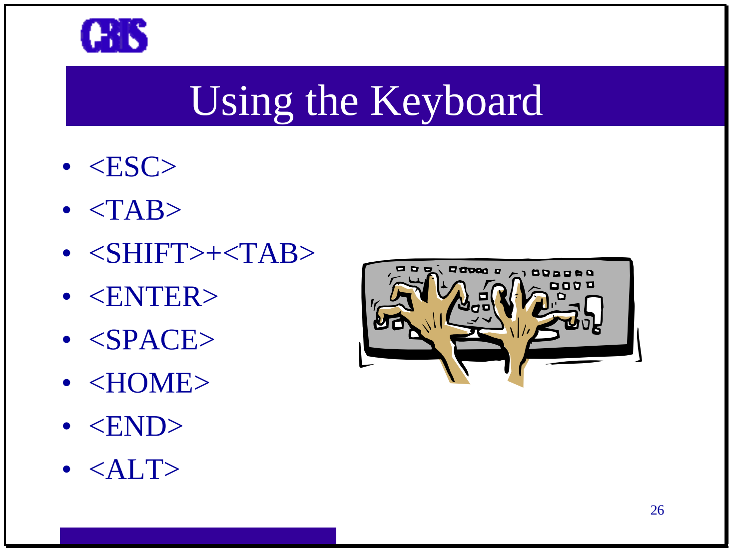
Tabbed dialog boxes provide you with quick access to different sets of information without losing view of the Account View screen. They are analogous to the dividers in a notebook or the labels in a file cabinet. You can move from one tab to another by clicking on the tab label.



With ProBiller, you can work on multiple accounts at one time.

You will notice that the name of the account appears in the title bar of an account screen. This becomes useful when you are working with multiple accounts.

To bring an open account into the foreground (to make it active), clicking once on the title bar will make it active.



Within ProBiller, you can use either the mouse or the keyboard when making selections or moving within the application. Listed below are some of the most common keys that you might have the chance to use.

<ESC>	Cancels an operation without saving it.
<TAB>	Moves the insertion point (or cursor) from field to the next, or from one command button or selection area to another.
<SHIFT>+<TAB>	Moves the insertion point (or cursor) backwards rather than forwards (see <TAB> above).
<ENTER>	Executes a command.
<SPACE>	Either inserts a space, or when a command bar is highlighted, is also activates that command.
<HOME>	Moves the insertion point (or cursor) to the beginning of a text box field.
<END>	Moves the insertion point (or cursor) to the right of the last character entered in a text box field.
<ALT>	Used in conjunction with a menu selection where a character within that selection is underlined. Pressing the <ALT> plus the underlined character will activate that menu selection.

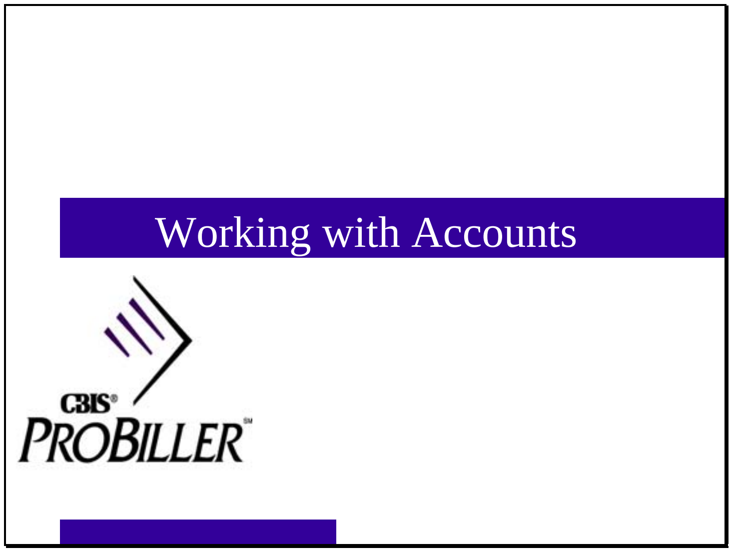
Exercise

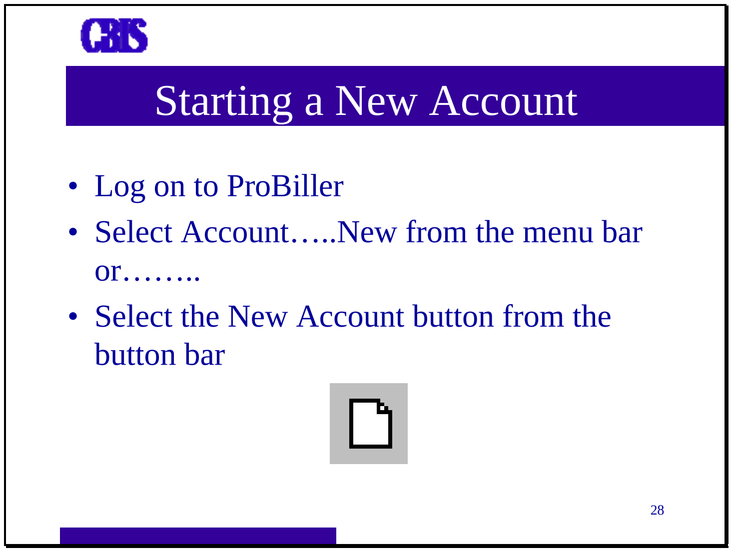
Fill in the blanks.

1. ____Text____________ __Boxes______________ are white, rectangular areas into which users can enter free-form information.
2. ___Read_____________ ____Only____________ text boxes will not allow you to enter data into them. They merely display information that has already been entered into the system.
3. ____Radio____________ ___Buttons_____________ are a set of two or more circles that represent mutually exclusive options. Only one option can be selected at a time.
4. ____List____________ ___Boxes_____________ present a list of choices from which the user can select one.
5. ___Command_____________ _____Buttons___________ are boxed words that carry out a command when selected.
6. ___Command_____________ _____Option___________ ___Buttons__________ are boxed ellipses (…) that usually appear after a text box. When selected, it brings up a list box from which users can select an entry that will appear in that text box.
7. ____Tabs____________ are similar to the dividers in a notebook or the labels in a file cabinet.
8. A ___Dialog____________ ___Box_____________ is a separate, self-contained window in which users are asked to fill in a few blanks and perhaps make some choices.

Match the keystrokes listed in the left-hand column with the correct result in the right-hand column.

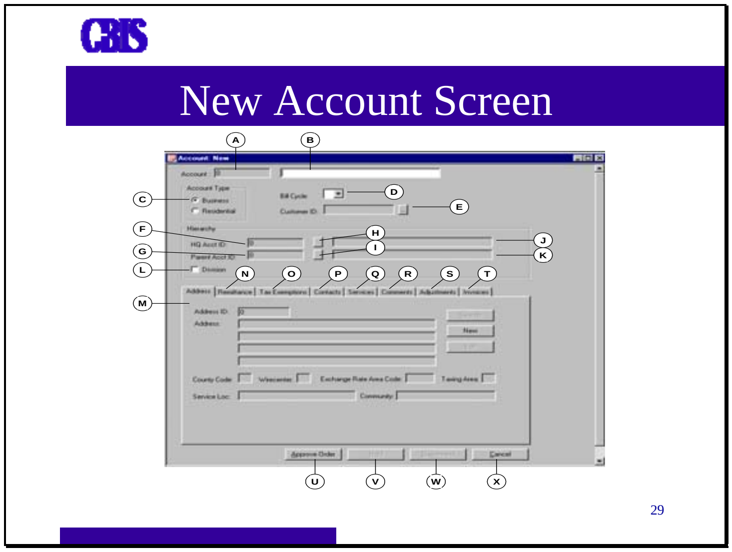
1.	<ESC>	☐	Moves the insertion point to the right of the last character entered in a text box field (7).
2.	<TAB>	☐	Is not only used to enter a space, but is equivalent to pressing <ENTER> (5).
3.	<SHIFT>+<TAB>	☐	Executes a command (4).
4.	<ENTER>	☐	Moves the insertion point from one field to the next or from one command button or selection to another (2).
5.	<SPACE>	☐	Returns the insertion point to the beginning of a text box field (6).
6.	<HOME>	☐	Cancels an operation without saving (1).
7.	<END>	☐	Pressing these two keys together moves the insertion point backwards (3).
8.	<ALT>	☐	Is used in conjunction with an underlined character in a menu selection to activate that selection (8).


Working with Accounts
CBIS
PROBILLER



To start or create a new account, log on to the ProBiller order entry system.

You can either select Account…..New from the menu bar press the New Account button as illustrated above.



The New Account screen is displayed above. Here is where you will begin entering account information. A detailed description of each area of the screen is outlined on the next couple of pages.

The following table describes the various boxes and buttons available on the New Account screen.

A	Account ID Number	The account ID number is automatically generated by the system when a new account is created.
B	Account Name	The account name is required for all new accounts and must be filled in before any other information can be entered.
C	Account Type	Indicates the type of account being established (business or residential). Business is the default selection.
D	Bill Cycle	The day of the month on which the account is to be billed.
E	Customer ID	Used to populate the account name field automatically when the customer ID option button is selected and the user locates the name of the new account holder.
F	Headquarter Account ID	Indicates the headquarter account identification number.
G	Parent Account ID	Indicates the parent account identification number.
H	Headquarter Account ID command option button	Used to search for and select the headquarter account ID number for the new account.
I	Parent Account ID command option button	Used to search for and select the parent account ID number for the new account.
J	Headquarter Name	Indicates the name of the headquarter account.
K	Parent Name	Indicates the name of the parent account.
L	Division checkbox	Used to establish the account as divisional.
M	Address tab	Used to enter the address of the account.
N	Remittance tab	Used to enter the remittance information for the account.

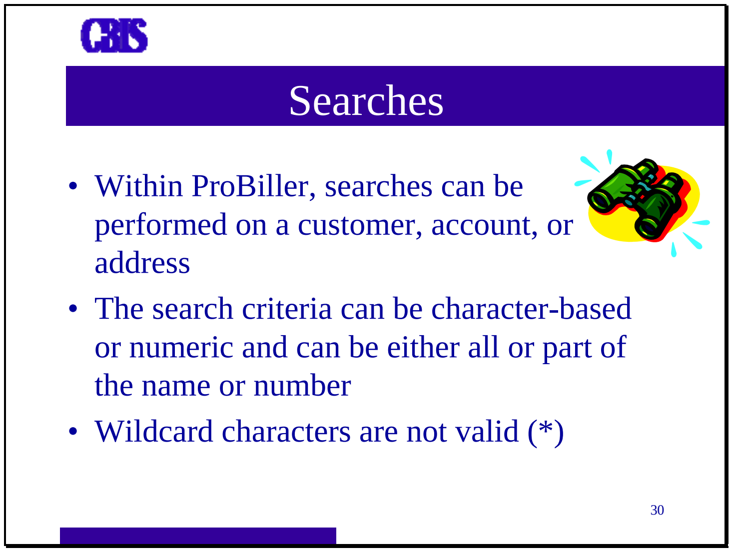
O	Tax Exemptions tab	Used to enter the tax exemption information for the account.
P	Contacts tab	Used to enter the name(s) of the account's contacts.
Q	Services tab	Used to select the services requested by the account.
R	Comments tab	Used to enter miscellaneous comments regarding the account.
S	Adjustments tab	Used in customer care to make adjustments to the account.
T	Invoices tab	Used to select invoice information for the account.
U	Approve Order button	Validates the order and provides the user with a message as to whether the order was successfully entered or errors occurred.
V	Hold button	Used to place an order on hold and store it away temporarily before sending it off for approval.
W	Disconnect button	Used to disconnect an account (as opposed to an order).
X	Cancel	Exits ProBiller without any changes and returns the user to the ProBiller main menu.

Exercise

In this exercise, you will practice logging on to and off of the ProBiller system as well as using both the menu selections and the toolbar to access the Account New screen.

1. Log on to ProBiller using the user ID and password provided to you by your instructor.
2. Select Account from the main menu bar.
3. Select the New option from the Account drop down menu. You should be taken to the Account New screen.
4. Use the *Maximize* button to maximize the Account New screen. Take some time to review the fields and buttons on the Account New screen.
5. Press the *Cancel* button to return to the ProBiller main menu.
6. Press the *Account New* button from the ProBiller toolbar. You should be taken to the Account New screen.
7. Use the *Maximize* button to maximize the Account New screen.
8. Press the *Cancel* button to return to the ProBiller main menu.
9. Select Account from the main menu bar.
10. Select the Exit option from the Account drop down menu.

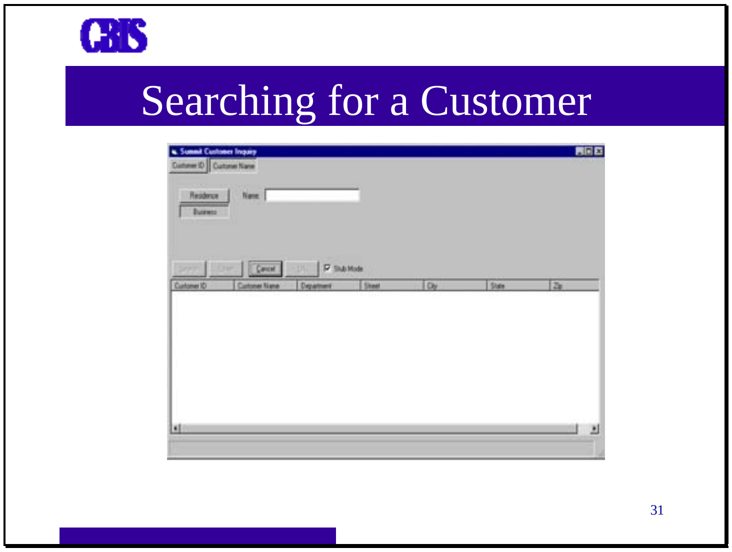
Performing searches is one of the ways that existing customers, accounts, and addresses are accessed. Therefore, it is very important that users are able to use ProBiller's search capabilities. The next several slides will provide an overview of how to perform searches within the order entry system.



There are many ways to search for a customer, an account, or an address. As you will see on the next few slides, you can search based on name or based on various numbers such as ID number, telephone number, etc.

You can also perform full or partial searches. For example, if you want to search for the account, CBIS, you could enter the letter “C” or “CB” or the full name “CBIS”. Searches are quicker if you can enter as much of the account name as possible. Name searches are not case sensitive.

Wildcard characters are not valid on this system.

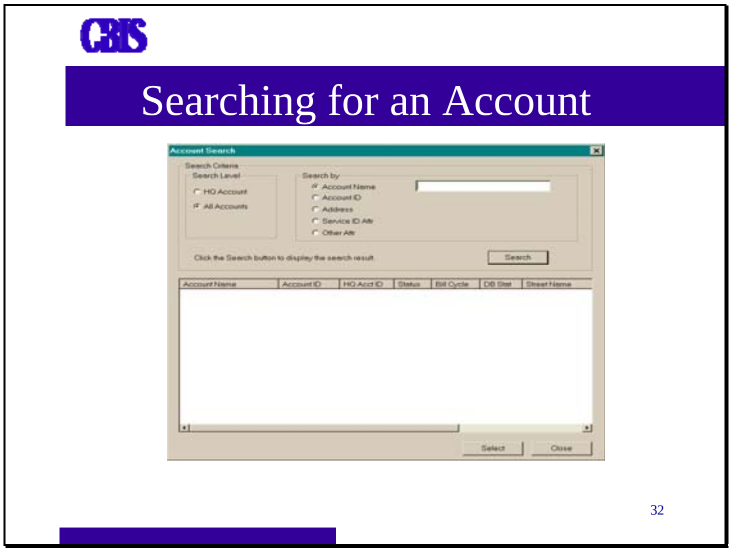


This screen is used to search for a customer. It is primarily used to access CBT's existing database of customers who are not yet part of ProBiller's database.

Here you can search for a customer either by the customer's name or their customer ID number. You could search for a residential customer or a business customer.

Then, you would enter your search criteria in the name text box and press the Search button.

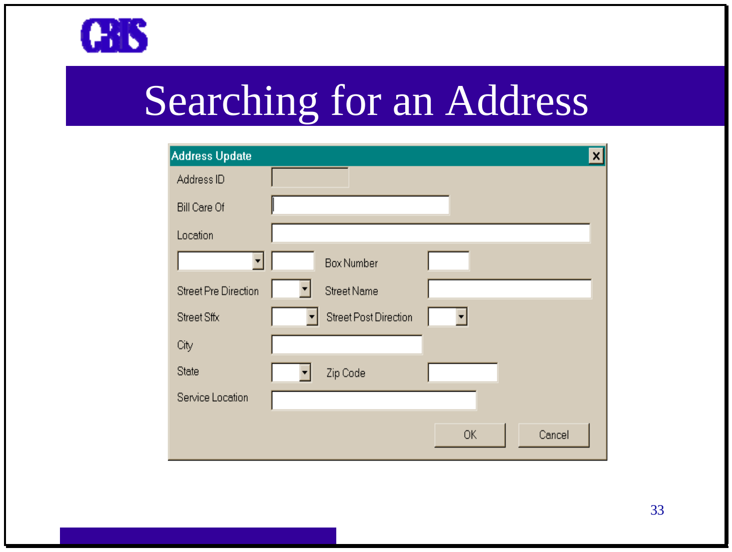
The results of your search would be displayed in the list box on the bottom half of the screen. You would then use the list box to select the account using your mouse. You would be returned to the Account New screen. The account you selected would then appear in the Customer ID field on the Account New screen.



Whenever you open an existing account or search for an account, you will use the Account Search dialog box as displayed above. The top half of this dialog box is used to specify the search criteria. The window in the lower portion of the screen is used to display the results of a search.

Here you can perform searches for only headquarter accounts or for all accounts. You can search by account name, account ID, address, by the service's identifying attribute (for example a telephone number), or by other types of attributes like circuit reference ID number of port ID number. Once you enter your search criteria and press the Search button, the results of your search are displayed in the lower portion of the screen. The information displayed includes the following:

Account Name	Displays the name of the account
Account ID	Displays the account ID number
HQ Account ID	Lists the ID number of the headquarter account associated with the account name
Status	Displays a code indicating the current status of the account including: A – Active, P – Pending disconnect (a disconnect order has been placed but no final invoice has been yet sent out), F – Final (a final invoice has been sent but the account has not officially been disconnected) D – Disconnected (the account has been disconnected)
Bill Cycle	Displays the bill cycle code
DB Status	Indicates the database status and can have one of the following values: O – The account resides in the order database, A – The account resides in the active database
Street Name	The name of street on which the account resides
Location	Displays information such as building name or floor number
City, State, and Zip	Displays the account's city, state, and zip code



On the previous screen, there was an option available whereby you could perform a search based on the account's address. If that type of search was selected, the screen above would be displayed.

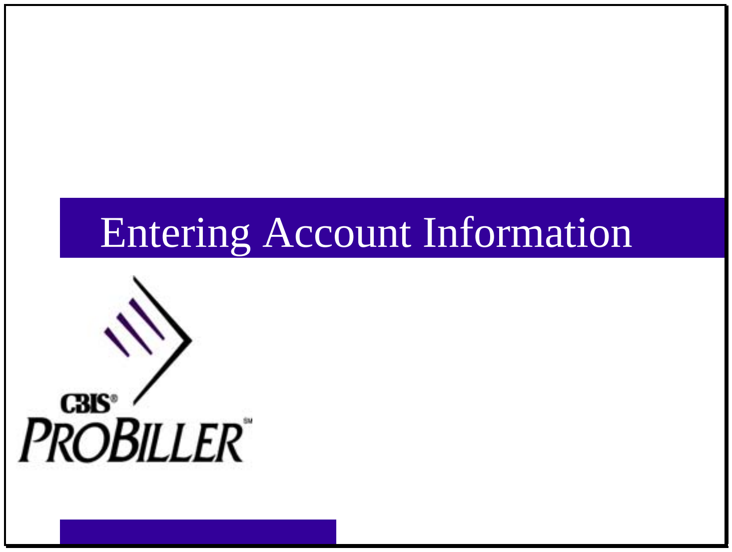
Here, you can search on various types of address criteria like PO box number, street name, city, state, and zip code.

Once you have entered your search criteria on this screen, press the OK to return to the Account Search screen and press the Search button to initiate your search.

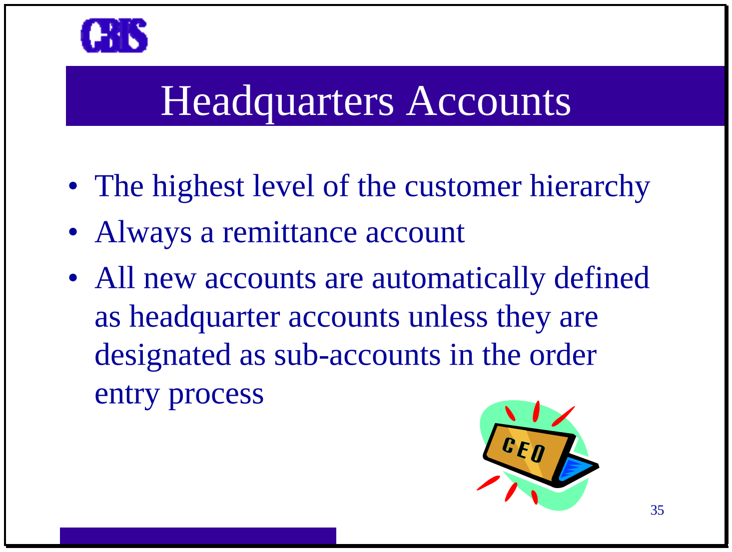
Exercise

In this exercise, you will practice performing searches.

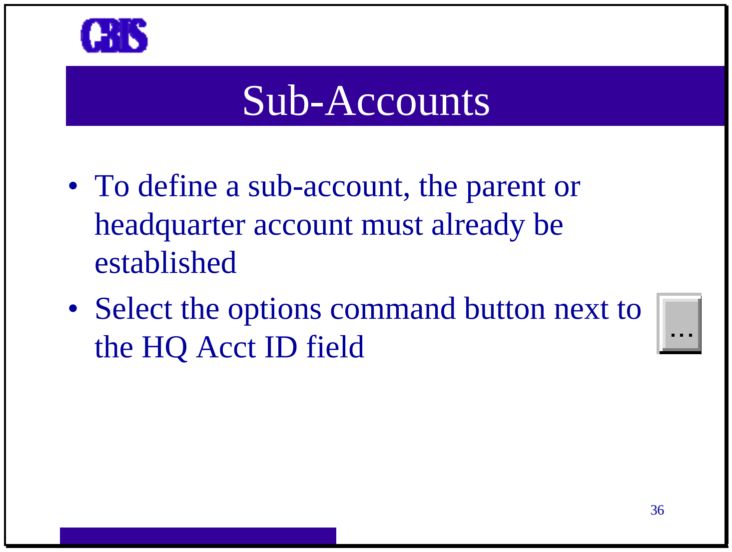
1. Log on to ProBiller using the user ID and password provided by your instructor.
2. Select Account from the main menu bar.
3. Select the Hierarchy option from the Account drop down menu. The Account Search screen should be displayed.
4. Now, perform a search for all headquarter accounts starting with the letter “C”. To do this, make sure that the HQ Account and Name radio buttons are selected. Enter the letter “C” in the Search by text box. Then, press the Search button. A list of headquarter accounts starting with the letter “C” should appear in the list box in the lower portion of the screen.
5. Press the *Cancel* button to return to the ProBiller main menu.
6. Press the *Hierarchy* button from the ProBiller toolbar.
7. Now, perform a search for <u>all</u> accounts starting with the letter “A”.
8. Press the *Cancel* button to return to the ProBiller main menu.
9. Exit the ProBiller system.



Next, we'll talk about account hierarchies – how to establish them and how to manipulate them once they are established.

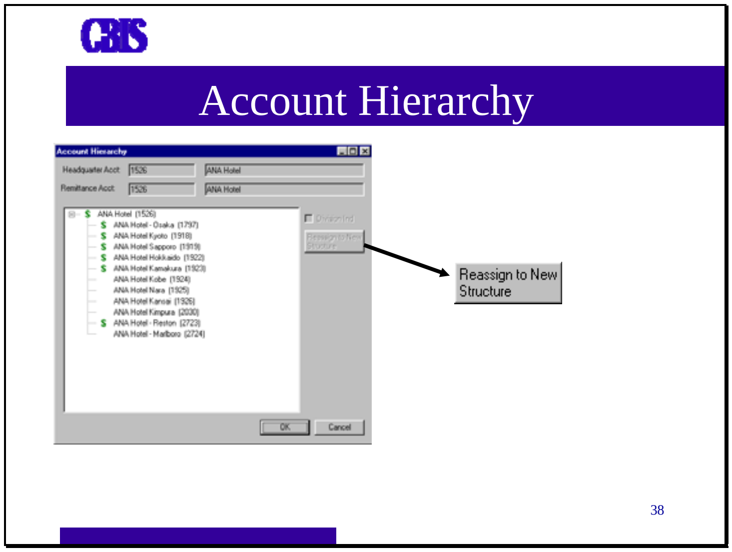


We have talked about headquarters accounts before. However, keep in mind that all new accounts are automatically defined as headquarters accounts unless you specifically designate them as sub-accounts in the order entry process.



To designate an account as a sub-account, the parent or headquarter account must already exist within the system. If it has, you would use the HQ Acct ID command button to activate the Account Search dialog box.

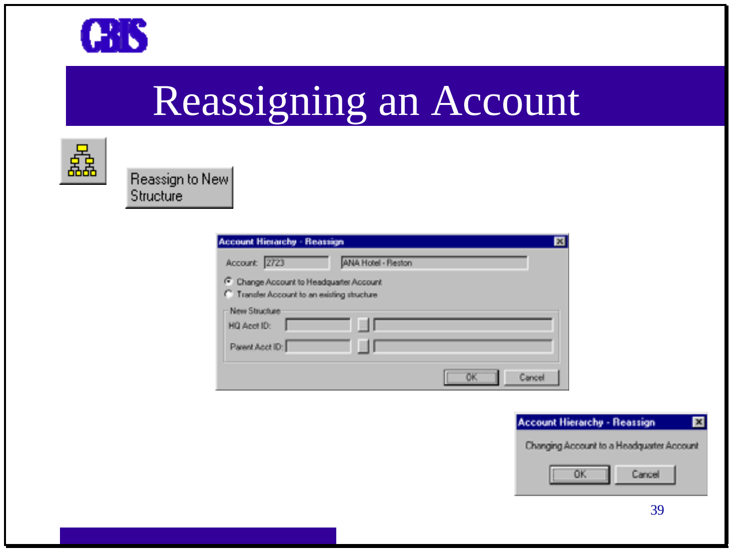
Then, you would search for the appropriate headquarter account. Once you located the right account and selected it from the Account Search results list, you would then see the screen displayed on the next slide.



Displayed above is the Account Hierarchy screen. Note that the headquarter account is ANA Hotel. The headquarter account ID number is 1526. Also note that the dollar signs are used to indicate remitting accounts.

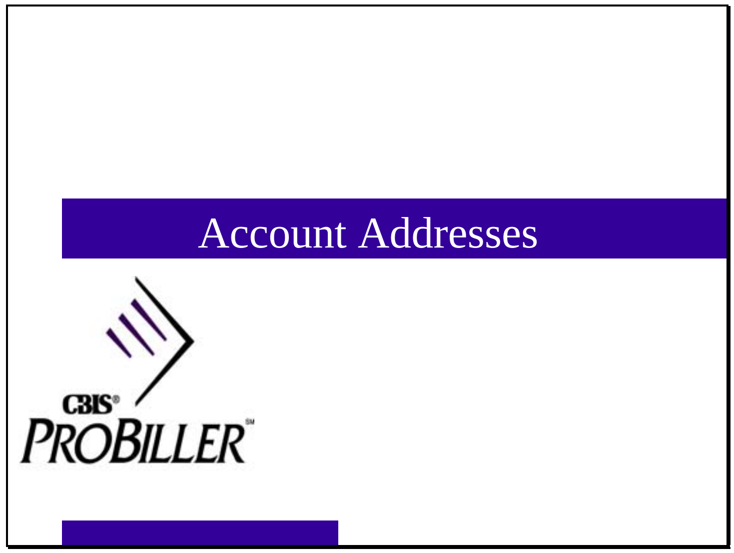
To assign a parent account to the new sub-account, simply highlight the account to be designated as the parent account and select the OK button.

Here you can also change the reporting structure of an account using the Reassign to New Structure button. The steps required to reassign an account are displayed on the next slide.

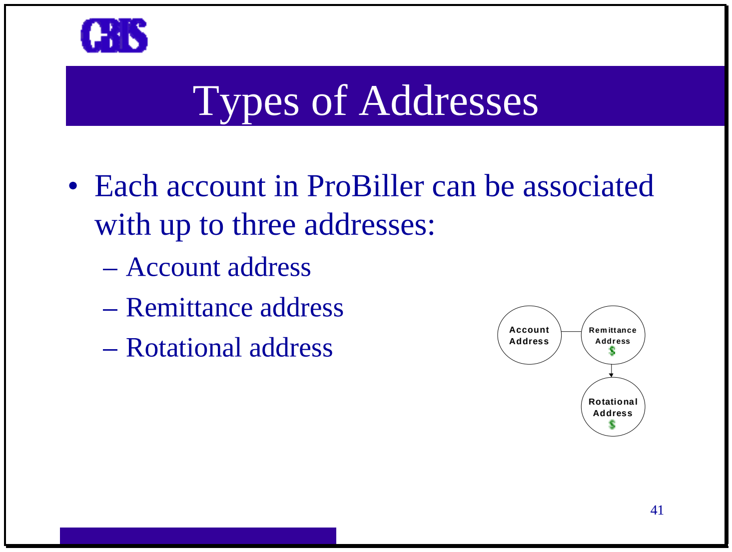


To reassign an account, first locate the hierarchy within which the account you wish to reassign resides. Click the Reassign button to display the Account Hierarchy – Reassign screen. Here you would indicate whether you want to make the account a headquarter account or transfer the account to a new hierarchy. If you are transferring an account to a new hierarchy, select the new headquarter and/or parent account using the command option buttons.

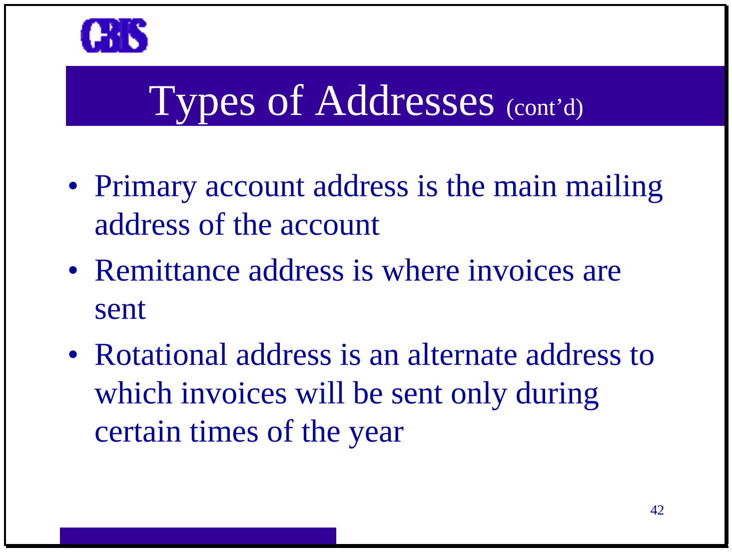
You will receive an acknowledgement of the reassignment.



Next, we'll talk about setting up addresses.



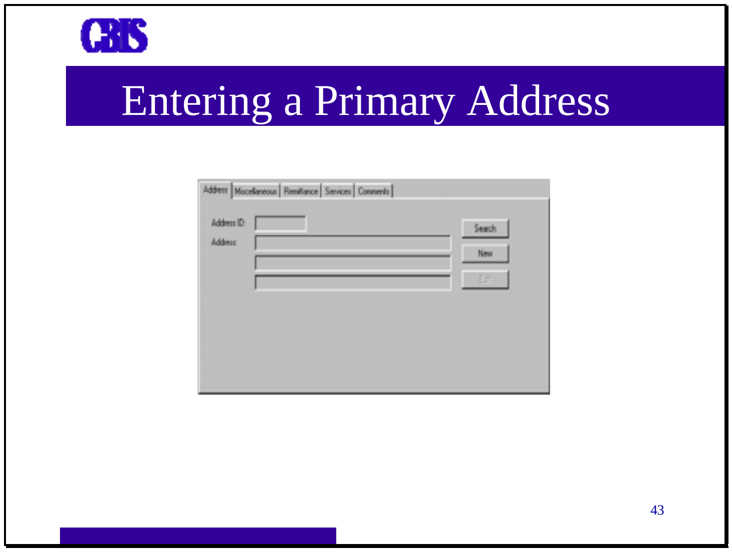
Each account in ProBiller can be associated with up to three addresses as indicated above.



The primary account address is the main mailing address of an account. This may or may not be the same address to which bills are sent.

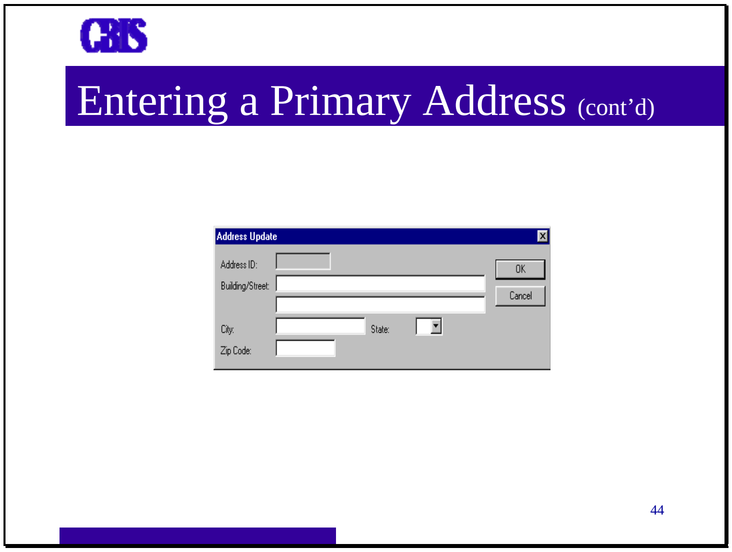
The remittance addresses is where invoices are sent. This may be different from the account address. For instance, if invoices are sent to a headquarter or parent account, then that entity's address would be the remittance address.

The rotational address is an alternate address to which invoices will be sent only during certain times of the year. For example, if an account requests that invoices be sent to a summer residence during three months out of the year, that address would be indicated as the rotational address.

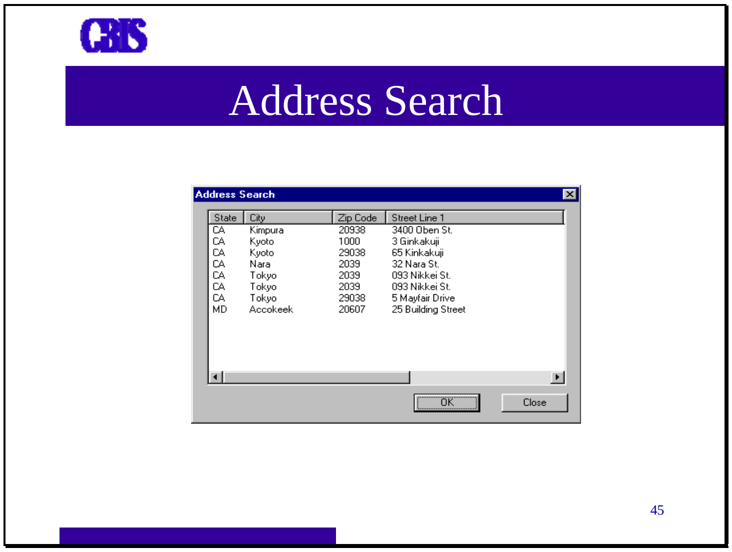


There are two ways to enter a primary address, depending on whether you are creating an entirely new account or whether you are ordering services for a sub-account (one that already has a parent or headquarter account in the system). Whichever method you choose, you will be working with the Address tab illustrated above.

If the account you are editing is new, press the New button. The Address Update screen will be displayed as seen on the next slide.



Enter the address information into the appropriate fields and press the OK button. The completed address information will appear in the Address tab. ProBiller will automatically assign an Address ID number.



If you are entering an address for a sub-account, use the Search button on the Address tab. You will be taken to the Address Search screen as displayed above.

Simply select the correct address from the list and press the OK button. The completed address information will appear in the Address tab.

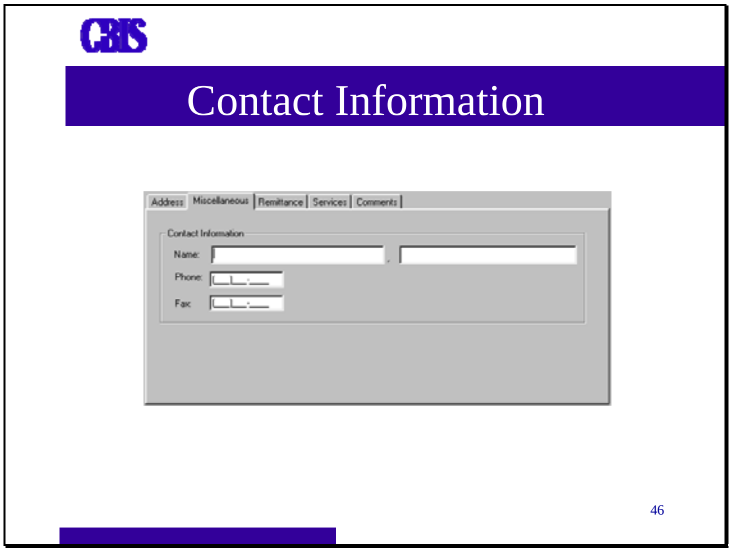
Exercise

In this exercise, you will create a new headquarter account and a new sub-account.

1. Log on to the ProBiller system using the user ID and password provided by your instructor.
2. Select the Account New option from either the main menu bar or by using the appropriate button on the toolbar.
3. Use the *Maximize* button to maximize the Account New screen.
4. Enter your last name followed by “Corporation” in the account name text box. For example, if your last name is Smith, you would enter Smith Corporation in the account name text box.
5. Verify that this new account type is a business account.
6. Select a Bill Cycle number indicating the day of the month you would like to receive your invoice.
7. Now, it’s time to enter address information. Press the *New* button on the Address tab portion of the screen.
8. Enter your home address in the Address dialog box. Press the *OK* button to return to the Account New screen. Your home address should now appear in the Address tab.
9. Press the *Approve Order* button to approve the order and save the changes. You should receive a message indicating that the order was successful. Press the *OK* button to acknowledge the message and return to the ProBiller main menu.
10. Now, let’s create a sub-account. Select the Account New option from either the main menu bar or by using the appropriate button on the toolbar.
11. Use the *Maximize* button to maximize the Account New screen.
12. Enter your first name followed by “Corporation” in the account name text box. For example, if your first name is Mike, you would enter Mike Corporation in the account name text box.
13. Verify that this new account type is a business account.
14. Press the HQ Acct ID command button next to the HQ Acct ID text box. The Account Search screen should be displayed.

15. Perform a search for all headquarter accounts beginning with the first initial of your last name. For example, if your last name is Smith, you would enter the letter “S” in the Search by text box. Then, press the *Search* button to initiate the search.
16. The new account you created in step 4 (your last name followed by “Corporation”) should appear in the list box in the lower portion of the screen.
17. Using your mouse, select your corporation’s name and press the OK button. You will be taken to the Account Hierarchy screen. Note that your new corporation is the headquarter account and currently is the only account in the hierarchy.
18. Press the *OK* button. You will return to the Account New screen and the account you created in step 4 is now the headquarter account and the parent account of your new account.
19. Now, it’s time to specify an address for your new account. Press the *Search* button in the Address tab. Your home address should appear in the Address Search list box.
20. Use your mouse to select your address and press the *OK* button. You should be taken back to the Account New screen with your address appearing in the address tab.
21. Press the *Approve Order* button to approve the order. Press the *OK* button to acknowledge the successful entry of your new account.
22. Select the Hierarchy option from either the main menu bar or the toolbar.
23. Perform a search on all headquarter accounts starting with your last name. The search should return the headquarter account you created in the list box on the lower portion of the screen.
24. Use your mouse to select your headquarter account. You should be taken to the Account Hierarchy screen. It should display your headquarter account as the well as the sub-account you created in a hierarchical format.
25. Press the *Cancel* button to return to the ProBiller main menu screen.
26. Exit the ProBiller system.

Next we will discuss how to enter contact and remittance information.



Sometimes, it is important to know whom to contact at a client site regarding account issues. That is why ProBiller provides a place for you to enter contact information in the Miscellaneous tab.

Note that any information you enter into this tab is optional. However, the best time to enter contact information is when initially setting up the account.

CBIS

Remittance Information

- Remittance information pertains to how people or organizations pay their bills
  - Credit card
  - Direct debit
  - Check

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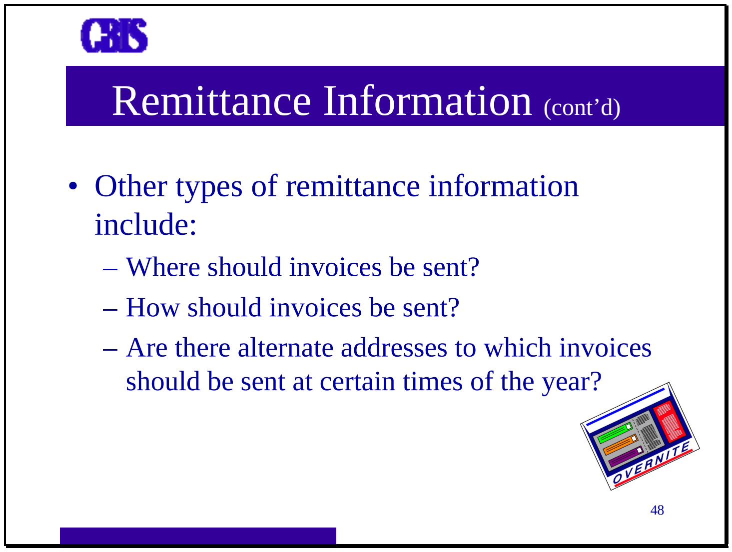
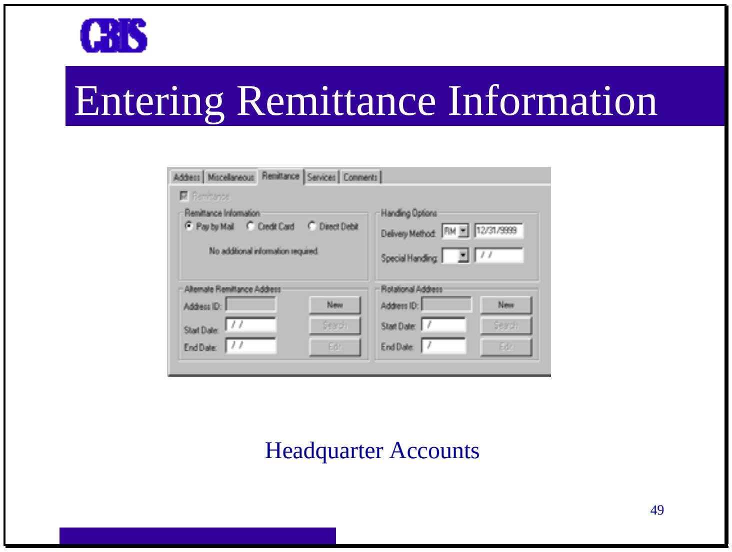


Remittance information includes not only how people or organizations pay their bills, but also to what address should the invoices be sent; how should invoices be sent (by regular mail, overnight delivery, or some other method); as well as to what alternate address should invoices be sent at certain times of the year.

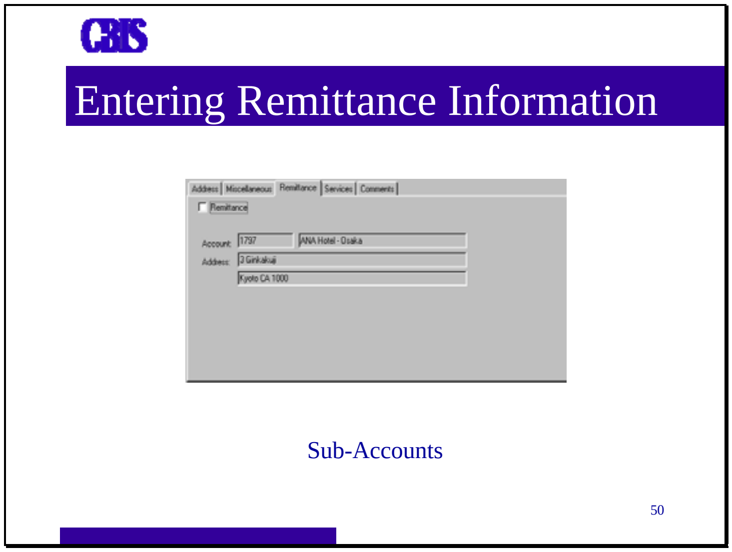
These questions should be answered in the course of setting up the remittance information for an account.



You enter remittance information by using the Remittance tab. What information you will see on this tab will depend upon whether you are establishing a primary, headquarter, or sub-account.

If you are setting up a headquarter account, the Remittance tab will resemble the screen displayed above.

Note that by default, all headquarter accounts are automatically assumed to be remittance accounts. Therefore, the Remittance check box located in the upper left-hand corner of the tab is selected.

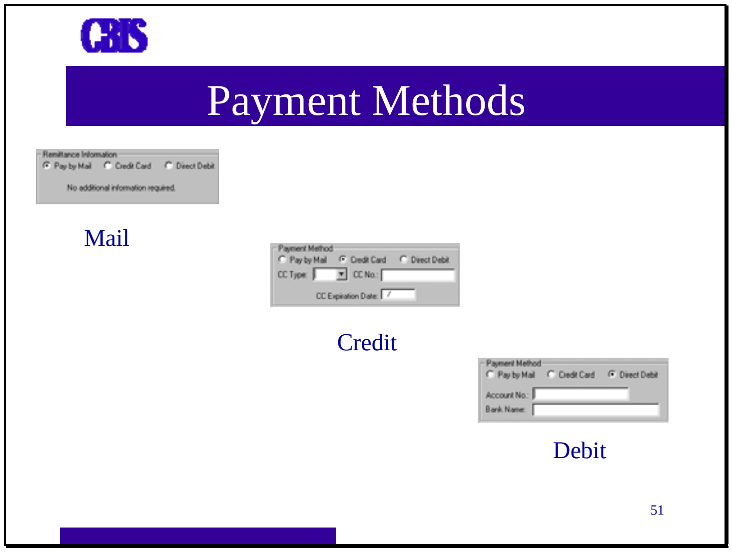


If you have set up a sub-account, the Remittance tab will appear as displayed above.

When setting up sub-accounts, if all invoices are to be sent to the remittance account, then no action is required.

However, sub-accounts may also be remittance accounts. To make a sub-account a remittance account, you would select the remittance check-box. The Remittance tab would change to allow you to enter remittance information.

When you enter remittance information, you will notice that the Remittance tab is divided up into four sections: Payment Method, Handling Options, Alternative Remittance Address, and Rotational Address. The next several slides will review each of these four sections.

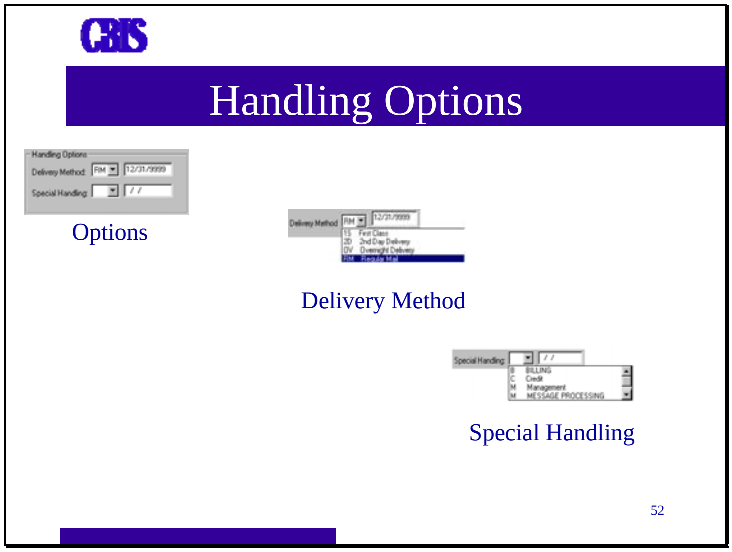


This section allows you to designate how account holders will pay their invoices. They can either pay by mail, by credit card, or by debiting their bank account.

The pay by mail option does not require any additional information as the invoices will be sent to the designated address.

To pay by credit card, you must enter the credit card type, the credit card number, and the credit card expiration date.

The direct debit option requires the holder's bank account number and the name of the bank.

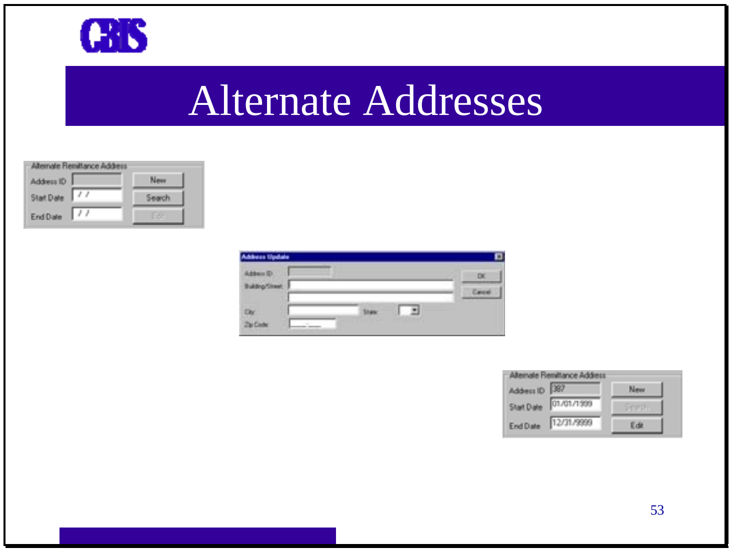


In the Handling Options section of the Remittance tab, you can specify how invoices should be sent and how long those delivery methods should remain in effect.

Select the appropriate delivery method using the Delivery Method drop down box. In the date area, enter the date on which this delivery method will expire. If you do not specify an expiration date, leave the expiration date to the default of 12/31/9999.

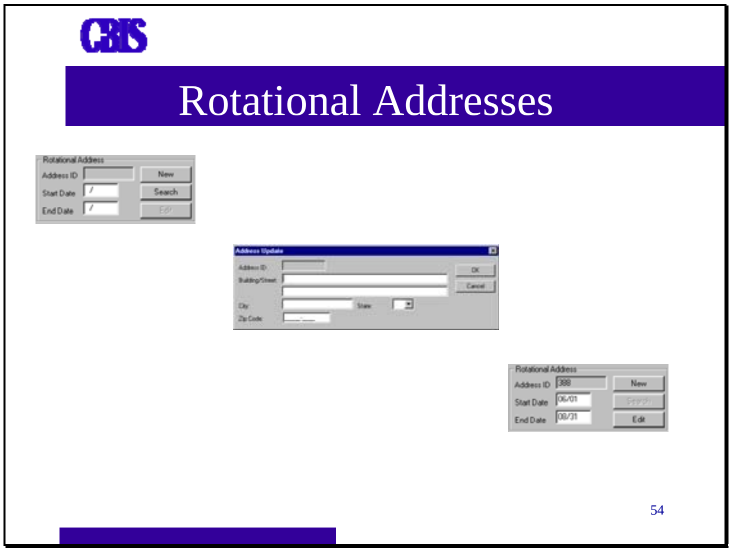
The Special Handling option allows you to specify whether an invoice needs to be routed to a specific internal office or division before being sent to the account. For example, a large client's invoices may first need to be reviewed by management, or an account that shows an account surplus rather than a debit may need to be reviewed by the credit department before being sent out.

To establish special handling options, select the appropriate handling method using the drop down box and enter the date on which the special handling option you chose will expire. If you do not specify an expiration date, leave the expiration date field blank.



Normally, invoices are sent to the main account address as specified in the Address tab. However, if invoices should be sent for a certain period of time to an address different from the main address, then you would indicate this address in the Alternate Remittance Address section of the Remittance tab.

To enter an alternate address, either select the New button to create a new address or press the Search button to search for an existing address. For new addresses, enter the address information and press the OK button. You will return to the Alternate Remittance Address tab. Then enter the effective start and end dates for the alternate address.



Rotational addresses are used when an account holder wants to receive their invoices at an alternate address during a specific time of each year. For example, a customer who spends every summer away from their main account address. These addresses are entered into the Rotational Address section of the Remittance tab.

Use the New button to enter a new rotational address, or use the Search button to select from an existing address. For new rotational addresses, enter the address information in the Address Update dialog box and press the OK button. Then enter the effective start and end dates for the rotational address. Note that you are only required to enter the month and day because ProBiller assumes that these dates are to be effective every year until it is changed.

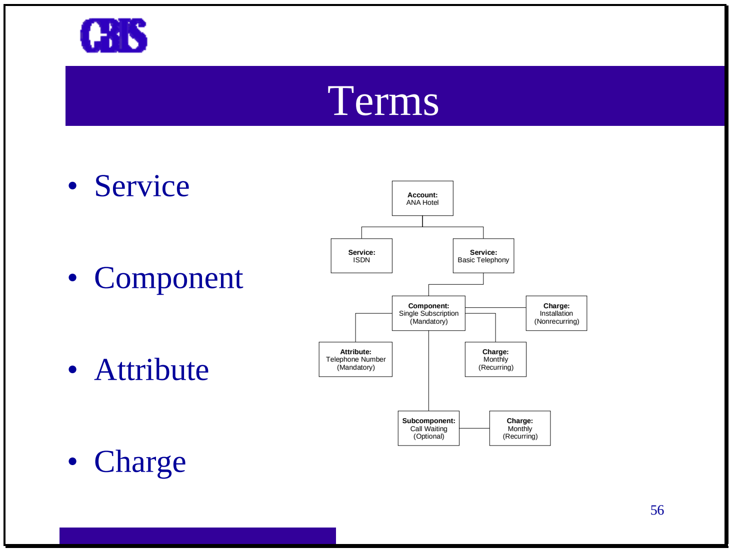
In cases where the alternate and rotational addresses conflict, the rotational address will take precedence over the alternate address while the rotational address is in effect.

Exercise

In this exercise, you will enter contact and remittance information for the headquarter account you created in the previous exercise.

1. Log on to the ProBiller system using the user ID and password provided by your instructor.
2. Using either the main menu bar or the tool bar, select the Account open option.
3. Perform a search on all headquarter accounts starting with the first letter of your last name. Your headquarter account should appear in the list box in the lower portion of the Account Search screen.
4. Use your mouse to select your headquarter account and press the *OK* button. The Account screen should be displayed.
5. Use the *Maximize* button to maximize the Account screen.
6. Use your mouse to select the Miscellaneous tab in the lower portion of the screen. The Contact Information screen should be displayed.
7. Enter your last name and first name respectively in the Name text boxes and enter your work telephone number and your fax number in the Phone and Fax text boxes.
8. Next, select the Remittance tab to display the Remittance screen. Enter the following information:
    a. Your account intends to pay its invoices by mail
    b. You would like your invoices sent by overnight delivery
    c. Your alternate remittance address is your work address (Hint: Use the *New* button)
    d. From June 1st through July 31st of each year, you would like your invoices sent to your work address (Hint: Use the *Search* button)
9. Press the *Approve Order* button to save your changes. Press the *OK* button.
10. Exit the ProBiller system.

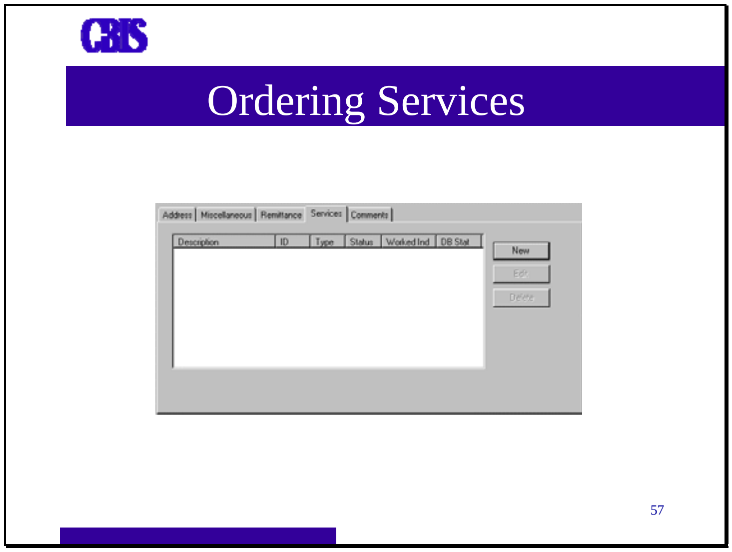
Next, we will discuss how services are ordered in ProBiller.



Here are the key terms to understand when setting up account services.

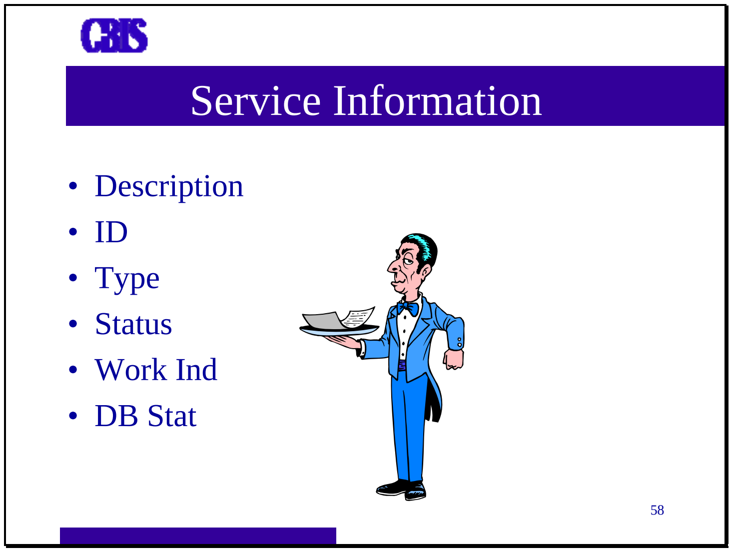
Service	A telecommunications product
Component	The descriptive part or logical feature of a service
Attribute	Specific information about individual components
Charge	The price that customers pay for particular services and components

Ordering services is a multi-step process. Next, we will go over the primary screens that you will work with when ordering services.



The Services tab is where you will begin the process of setting up, editing, or deleting services for an account.

The display fields are outlined on the next slide.



Description High level information about the type of service

ID The system generated identification number of each service

Type A one letter abbreviation of the type of service displayed including:

S – Service
R – Report
D – Discount

Status A one letter abbreviation for each of the service's current state including:

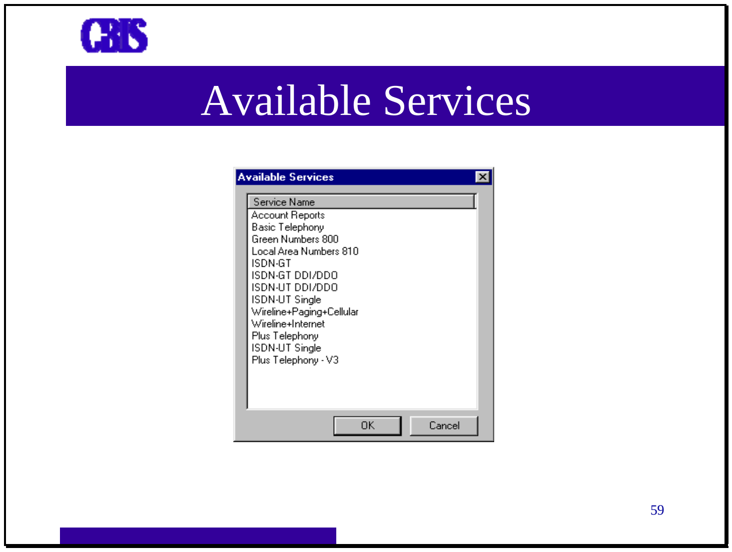
A – Active
D – Disconnected
P – Pending disconnection
F – Final invoice

Worked Ind A one letter abbreviation code indicating whether the service has been validated including:

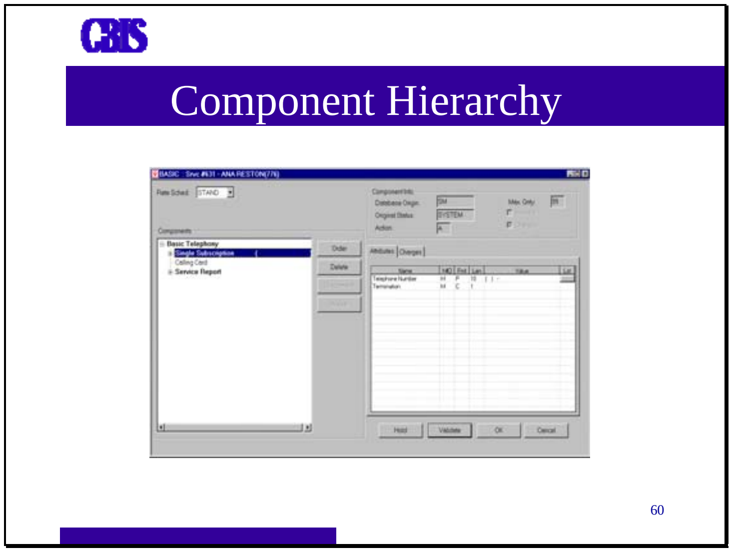
W – Worked (has been validated)
O – Open (has not been validated)

DB Stat A one letter abbreviation indicating in which database the service is currently being held including:

N – New Order
O – Order database
A – Active database



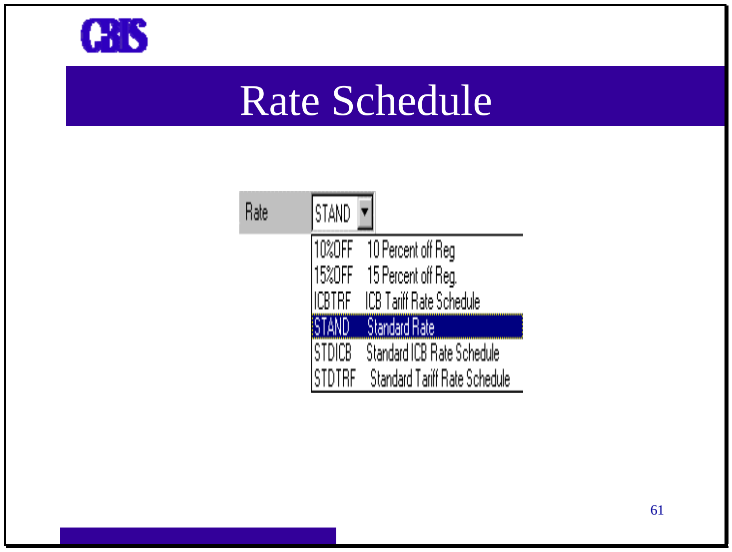
To access the Available Services screen, press the New button on the Services tab. Select the service to be ordered from this list box. You will then be taken to the Component Hierarchy screen as shown on the next slide.



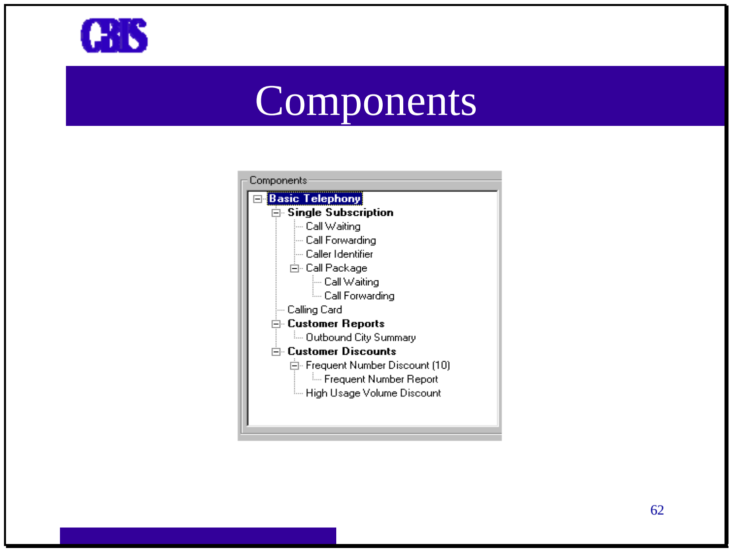
The Component Hierarchy screen appears whenever you order a new service or edit an existing service. This window consolidates the selection of service components and the definition of component attributes. Use this screen to enter, delete, disconnect, or waive components.

Note that the title bar displays the service code, service identification number, account name, and the account identification number.

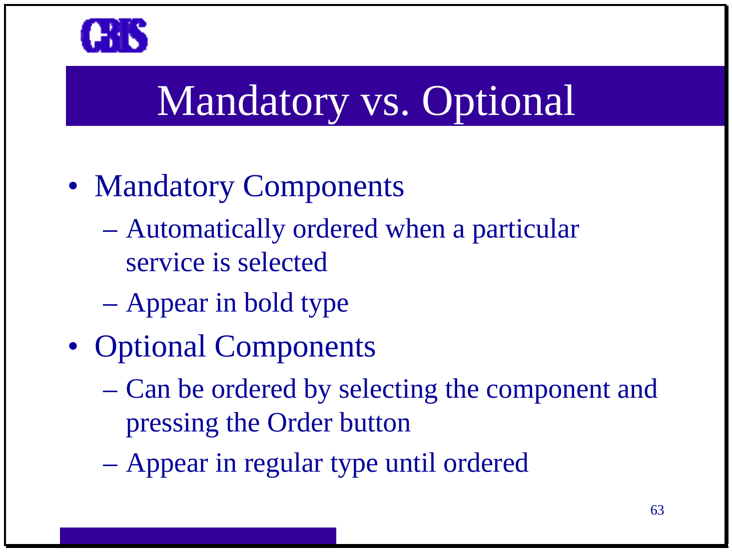
The next several slides will go over each part of the Component Hierarchy screen.



The Rate Schedule drop-down box allows you to select codes that represent pre-defined billing catagories.

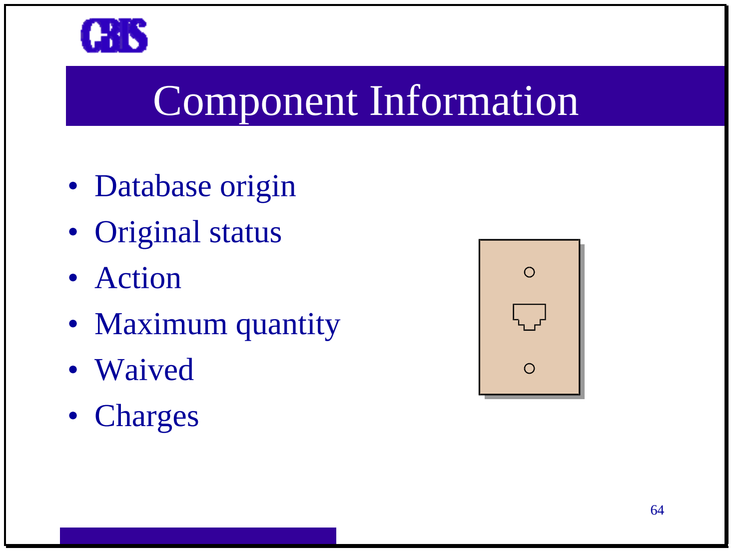


The Components section displays the components of the selected service in a “tree” structure. To expand a branch of three, click on the plus sign (+), to collapse a branch of the tree, click on the minus sign (-).



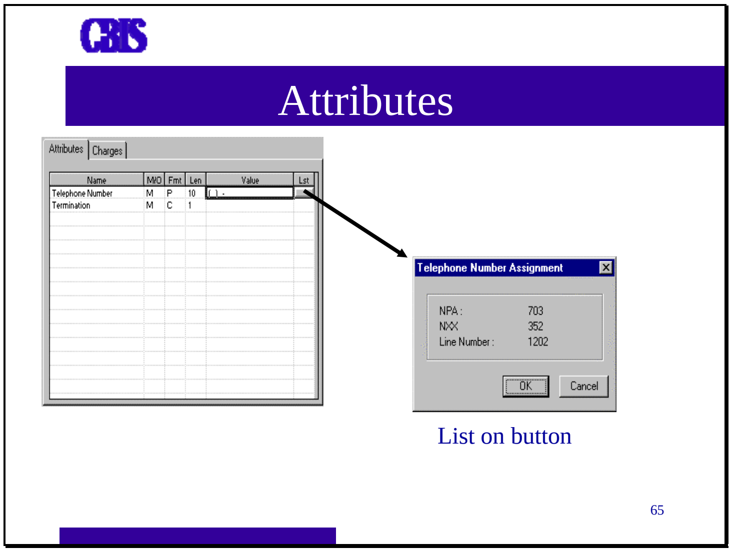
Within the Components section, you will notice that some entries appear in bold type, which others appear in regular type. Bold entries are mandatory components, or those that are automatically ordered when a particular service is selected.

Optional components appear in regular type. These can be ordered by first selecting the component in the tree and pressing the Order button. Once ordered, the optional component changes from normal to bold type.



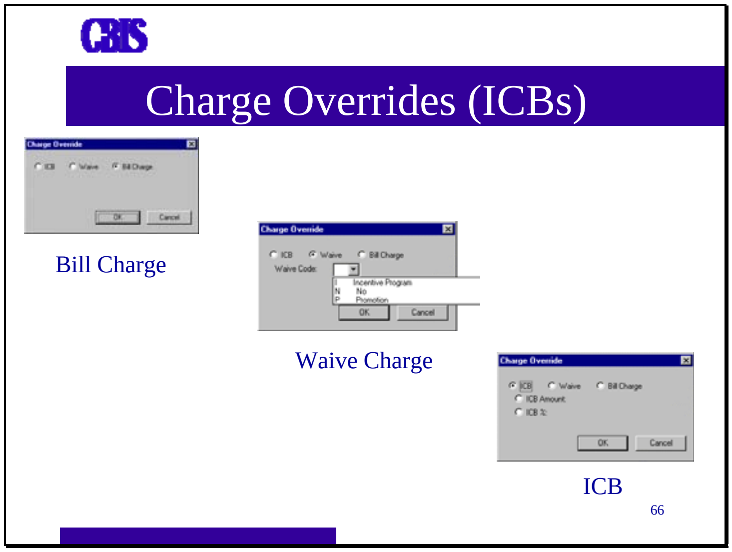
The Component Information section of the Component Hierarchy screen contains read-only text fields and check boxes that provide you with information currently selected. The fields in the Component Information section are described below:

Database origin	Specifies where the currently-selected component information is held; possible values are: SM – System Maintenance (component has not been ordered); O – Order database; A – Active
Original status	Indicates which state the component was in on the previous order; possible values are: Available – designates optional components System – designates either mandatory or standard components For an existing order that resides in the order database, the possible values are: A – component was added C – component was changed D – disconnected Blank – no change was made
Action	Indicates the type of activity being performed on the selected component; possible values are: A – component is being added C – component is being changed D – disconnected Blank – no change is being made
Max Qnty	Indicates the highest number of the selected component that can be ordered
Waived	Indicates whether the selected component was waived
Charges	Indicates whether there are charges associated with the selected component



Within the Component Hierarchy screen, there are two tabbed dialog boxes. One is the Attributes tab. Here is where you enter such values as telephone number and calling card number. The fields within the Attributes tab are defined below:

Name	The name of the attribute
M/O	Indicated whether the field is (M)andatory or (O)ptional
Fmt	Refers to the format of the value in the Value column; valid codes are: N – numeric C – character D – date P – phone
Len	Refers to the length, in characters, of the value in the Value column
Value	Holds the digits entered either by the system or the user
Lst	List on button – opens a dialog box containing valid values for the Value column



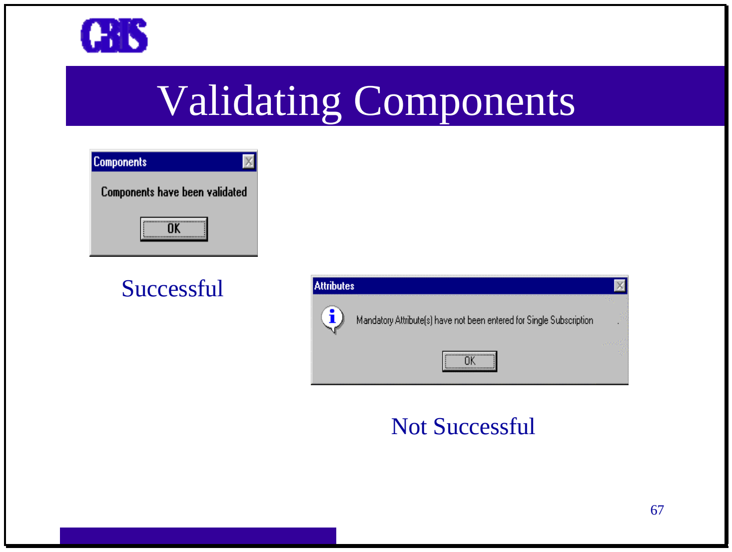
The Charges tab provides information about the charges associated with the selected component. The Overrid column in the Charges tab allows you to override the default charge associated with the selected component. Whenever a charge is associated with a comment, a button appears in the Overrid column, when selected, the button brings up the Charge Override dialog box.

The Charge Override dialog box allows you to:

1. Remove the charge by selecting the Waive radio button
2. Establish a new, fixed rate for the charge, or establish a percentage off of the default charge by selecting the ICB (individual case basis) button
3. Recall the default charge by selecting the Bill Charge radio button

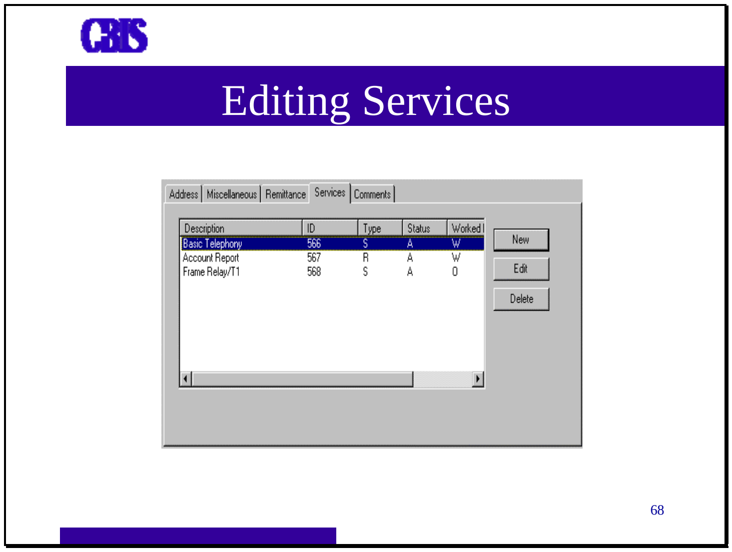
To waive a charge, select the Waive radio button. Then, select the appropriate waive code from the Waive Code drop down box.

To discount the charge either by a fixed amount or a percentage off, select the ICB button. Then, select either the amount or percentage button. Finally, enter the amount of the discount in the available field.



When all components have been ordered, and all attribute values and charges have been entered, select the Validate command button. If all of the values have been properly entered, the Components dialog box will confirm the validation.

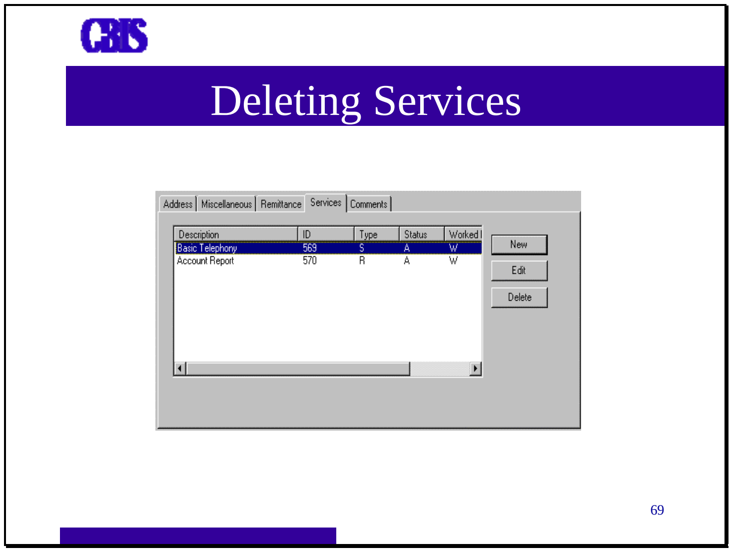
If any values have not been properly entered, a dialog box will inform you of the missing or incorrect data. Upon pressing OK, you will be returned to the area where values are missing.



You can make changes to a service regardless of whether you have just entered and validated it or whether it has already been sent off for approval.

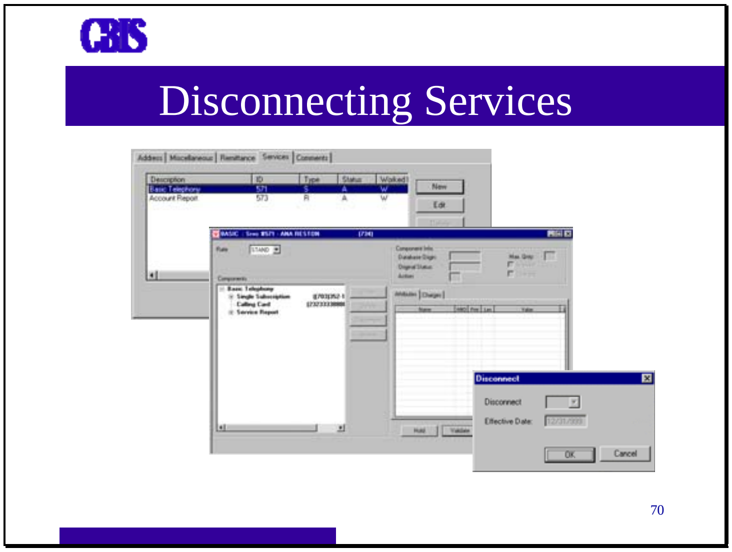
To edit a service, start at the Services tab and select the service you wish to edit. Next, select the Edit button. You will be taken to the Component Hierarchy screen where you can select the component you wish to change.

Once your changes are complete, press the Validate button to validate the changes.

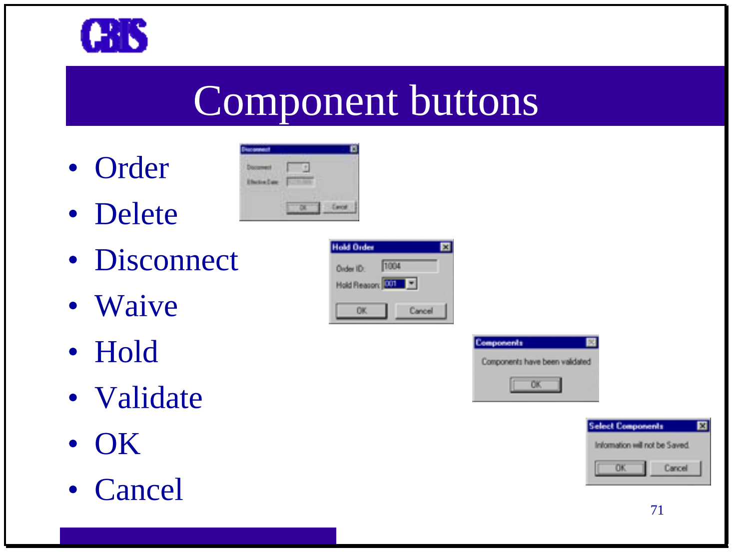


To delete an entire service that has not yet been approved, start at the Services tab. Select the service you want to delete and press the delete button.

To delete a sub-component that has not yet been approved, select the service and select the Edit button. You will be taken to the Component Hierarchy screen where you can select the component and press the delete button, then validate the deletion.

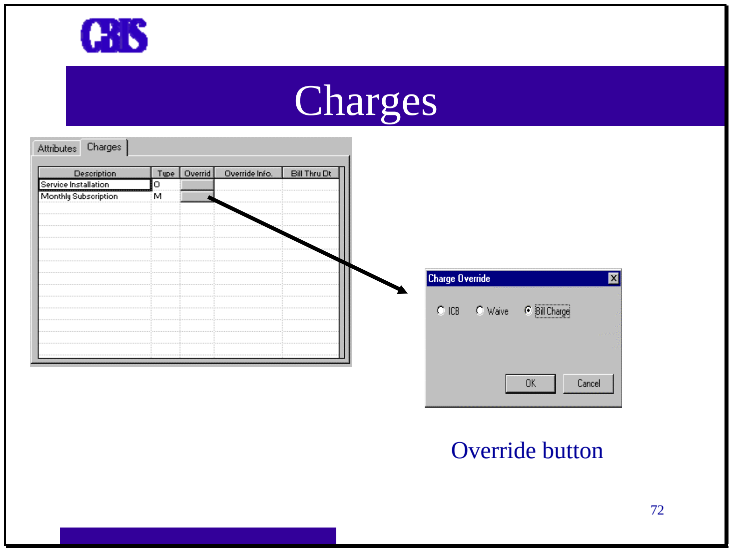


To remove a component from a service order that has already been approved, use the disconnect function. You will be required to give a reason for the disconnection, and then validate your changes.



This slide lists some of the buttons that are available on the Component Hierarchy screen.

Order	Used to order components and sub-components for accounts
Delete	Removes the currently selected component from the account
Disconnect	Terminates the service for the selected component
Waive	Only available for standard reports and discounts, results in the reports or discount not being added to the service order
Hold	Used to postpone the validation of service orders if more information is required to complete the order
Validate	Confirms the service order process
OK	Validates the service order and returns you to the main application screen
Cancel	Ignores any changes made and returns you to the main application screen


Charges
Attributes
Charges
Description
Type
Override Info.
Bill Thru Dt
Service Installation
O
Monthly Subscription
M
Charge Override
ICB
Waive
Bill Charge
OK
Cancel
Override button
72

Exercise

In this exercise, you will order services for your headquarter account.

1. Log on to the ProBiller system using the user ID and password provided by your instructor.
2. Access the Account screen for the headquarter account you previously created.
3. Use the *Maximize* button to maximize the Account screen.
4. Using your mouse, select the Services tab in the lower portion of the screen.
5. Press the *New* button. The Available Services screen should be displayed.
6. Use your mouse to select the service Basic Telephony and press the *OK* button. The Component Hierarchy screen should be displayed.
7. Use the *Maximize* button to maximize the Component Hierarchy screen.
8. Use your mouse to select the Single Subscription option and press the *Order* button.
9. Now, you need to assign the attribute of telephone number to this new service. Press the *Lst* button in the Telephone Number line of the Attributes tab. This will automatically assign a telephone number to the service. Press the *OK* button in the Telephone Number Assignment box to accept the new telephone number. The new telephone number should appear in the Value field.
10. Within the Termination line of the Attributes tab, enter the letter "Y" in the value field.
11. In the charges tab, give the account a 25% discount on the service installation and waive the monthly subscription charge.
12. Press the *Validate* button to validate that you have correctly ordered these services. If successful, press the *OK* button to acknowledge the successful order. If you are provided with an error message, correct the order and try again.
13. Press the *OK* button twice to return to the Account screen. Note that the new service you ordered now appears in the Services tab.
14. Press the *Approve Order* button and the *OK* button.
15. Exit the ProBiller system.

Next, we will discuss the purpose of comments and how to enter, edit, and delete them.

What are Comments?

- Comments are designed to capture any miscellaneous information related to accounts, orders, invoices, and adjustments

Example: A customer will only be available weekdays from 1:00 - 5:00 p.m. to let service people in.

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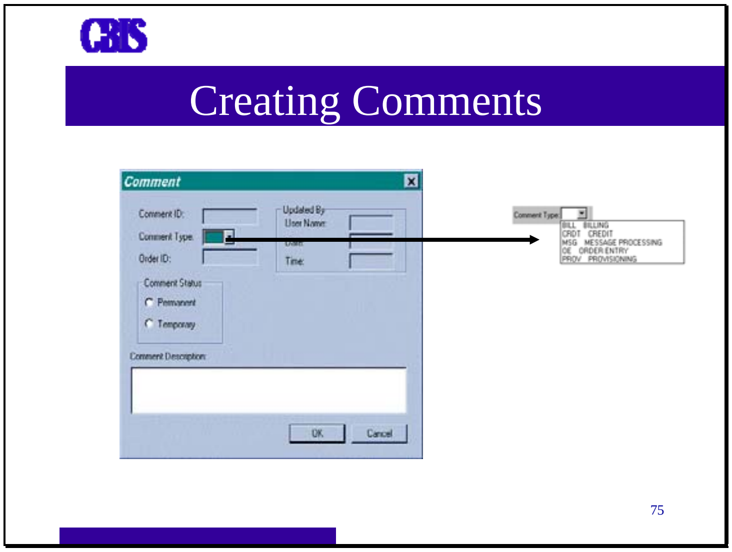
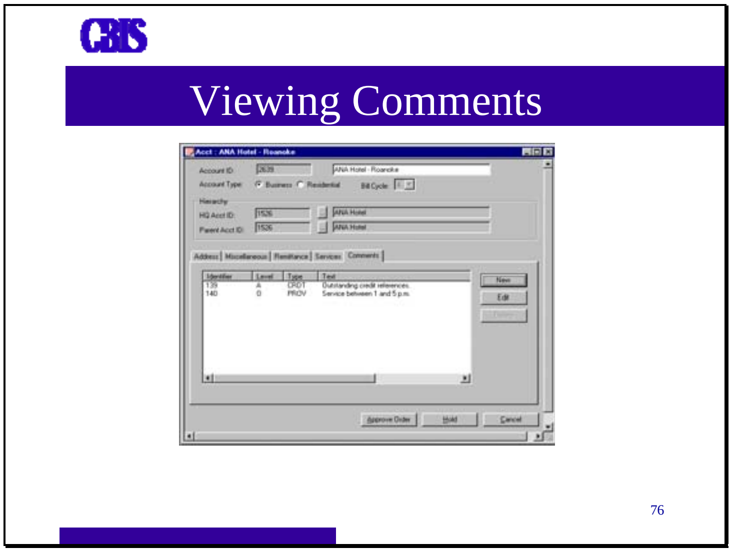


Comments are entered through the Comments tab. For a new comment, press the New button and the screen displayed above will appear.

Select the type of comment from the Comment Type drop down box. Next, select the Permanent or Temporary radio button in the Comment Status section. Permanent comments remain in the system for the lifetime of the account and cannot be deleted. Temporary comments are often tied to orders or provisioning. They are deleted or archived after a certain period of time.

Move the cursor to the Comments Description text box and type the comment. Press the OK button to close the comment dialog box. The User, Date and Time text boxes are automatically filled in by the system.



The Comments tab allows you to view all comments previously entered into the system. Here, comments can also be entered, edited, and in some cases, deleted.

When viewing comments, you will see seven column headings that provide you with a quick overview of the purpose and nature of the comments. They are:

Perm/Temp Indicator	Indicates whether a comment has a status of permanent or temporary
Identifier	Displays a system-generated comment ID number
Type	Displays an abbreviation of the type of comment; examples are: BILL – relating to the billing department ORDR – order entry comments CRED – relating to the credit department
Text	Displays the first few words of the actual comments text
Update By	Displays the user name of the person who created the comment
Update Date	The date that the comment was created
Update Time	The time that the comment was created

To view the entire comment, use the Edit button.

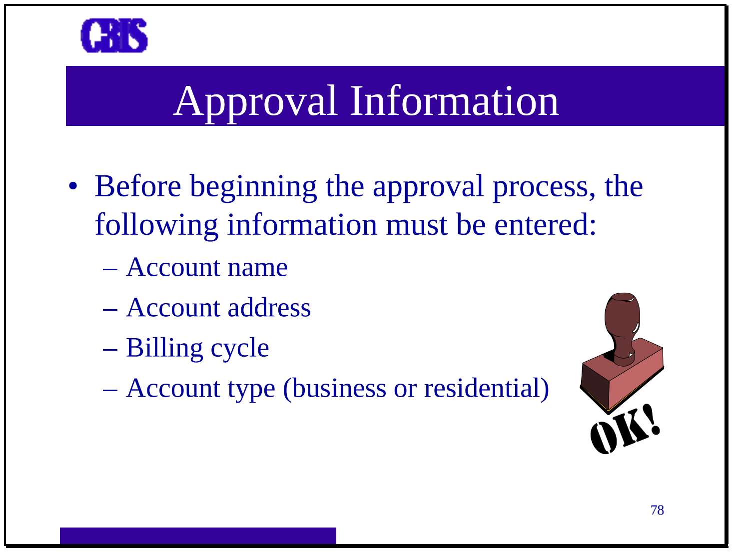
To edit a comment from the Comments tab, select the comment to edit and press the edit button. Again the Comment dialog box will be displayed and the comment can be edited. When finished editing, press the OK button.

Exercise

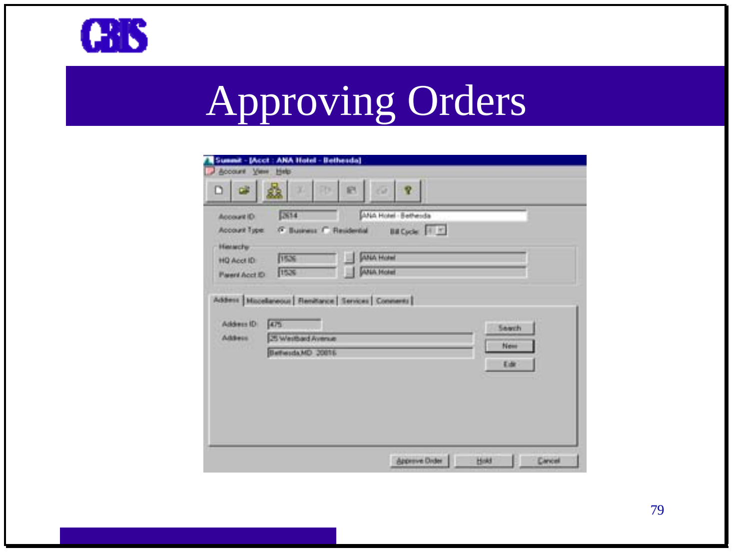
In this exercise, you will enter comments regarding your headquarter account.

1. Log on to the ProBiller system using the user ID and password provided by your instructor.
2. Access the Account screen for the headquarter account you previously created.
3. Using the Comment tab, enter the following provisioning comment:
   "The customer is not available for weekend installations."
4. Save your comments and exit the ProBiller system.

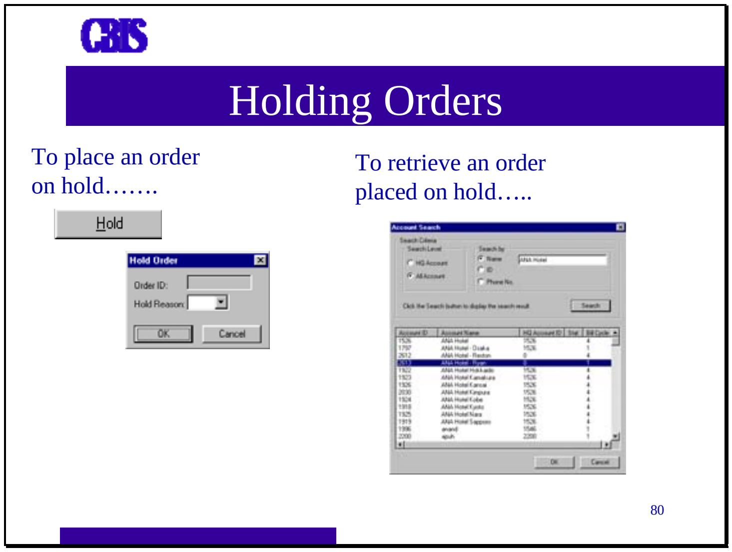
Next, we will discuss the approval process for completed orders including how to place orders on hold.



This is the minimum information required to establish an account. If you should attempt to approve an order before supplying this information, you will receive an error message.



When all account information has been entered, press the Approve Order button. After you select the Approve Order button, the window will close and you will be returned to the main menu.



Placing an order on hold allows you to set aside an order temporarily before sending it off for approval. Both new orders and existing accounts that have been changed can be placed on hold.

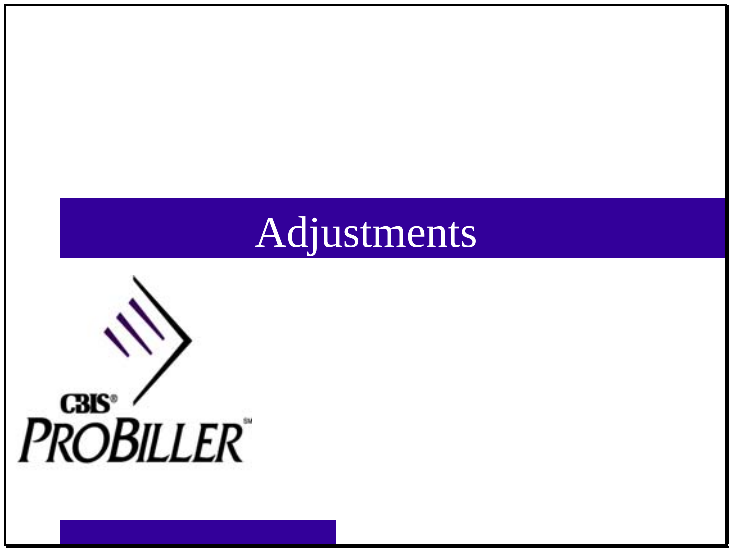
There are two places where you can place an order on hold, either the main menu or on the Component Hierarchy screen. Either way, the procedure is the same. Select the account and press the Hold button. Use the drop down combo box to select the appropriate reason code and press the OK button.

To retrieve an order placed on hold, retrieve the account (use the search function).

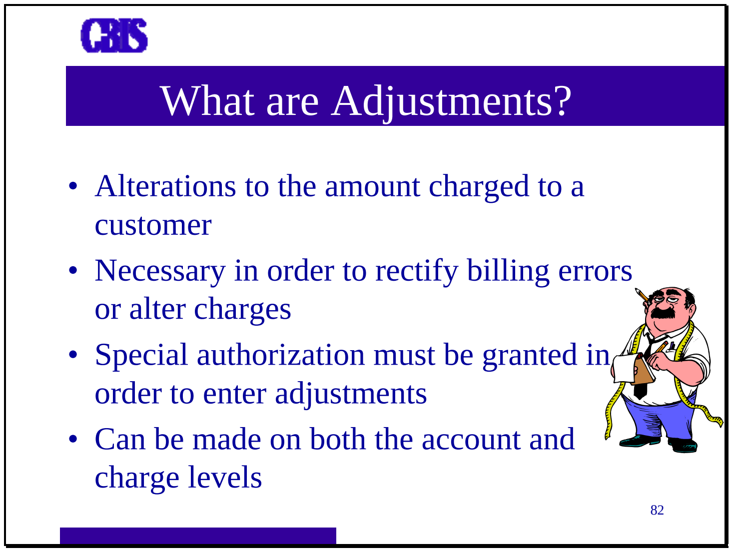
Exercise

In this exercise, you will create a new account, order services, and place the order on hold.

1. Log on to the ProBiller system using the user ID and password provided by your instructor.
2. Create a new residential account using your full name (first and last) as the name of the new residential account.
3. Select the bill cycle of your choice.
4. Enter your home address.
5. Order the services Basic Telephony, Single Subscription, and Caller ID.
6. Give yourself a $10.00 discount on the Service Installation and waive the Caller ID charges.
7. Validate your order and return to the Account New screen.
8. Now, delete the service (Basic Telephony) you just ordered and place the account on hold until credit can be verified.
9. Exit the ProBiller system.



Next, we will discuss how to enter and edit account adjustments.


What are Adjustments?
• Alterations to the amount charged to a customer
• Necessary in order to rectify billing errors or alter charges
• Special authorization must be granted in order to enter adjustments
• Can be made on both the account and charge levels
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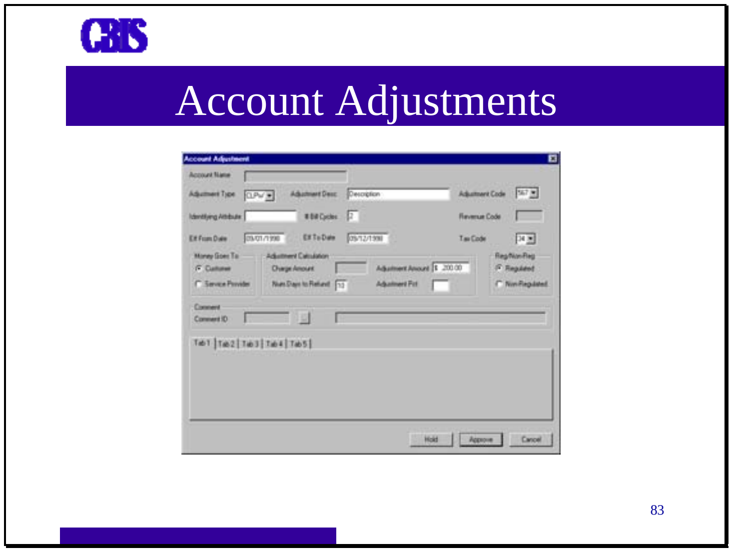
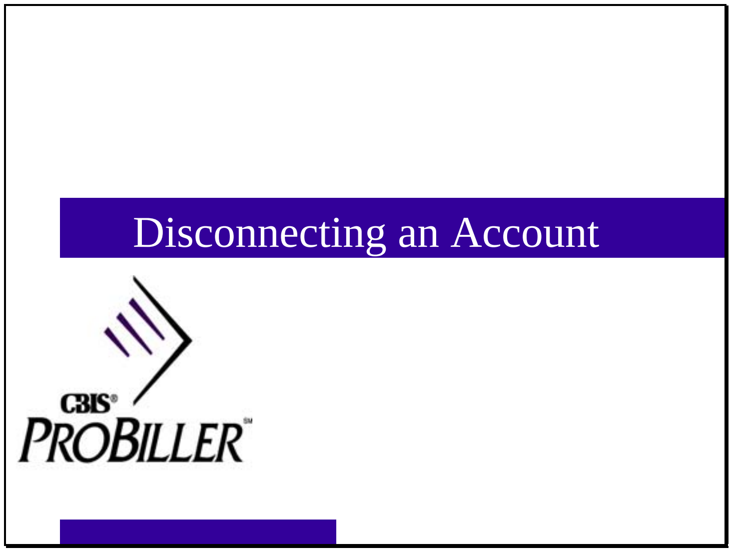
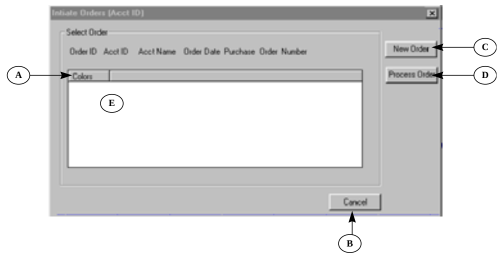


Adjustments are made through the Adjustment tab.



Next, we will discuss how to disconnect an account.

Initiating an Order



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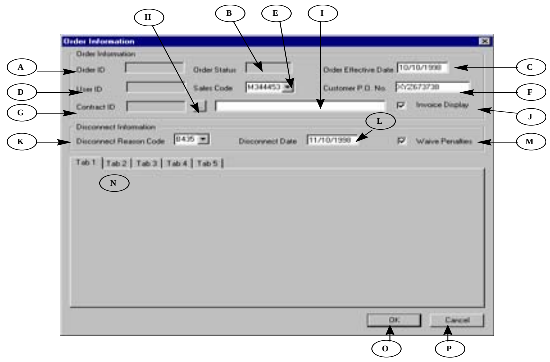
Order Information



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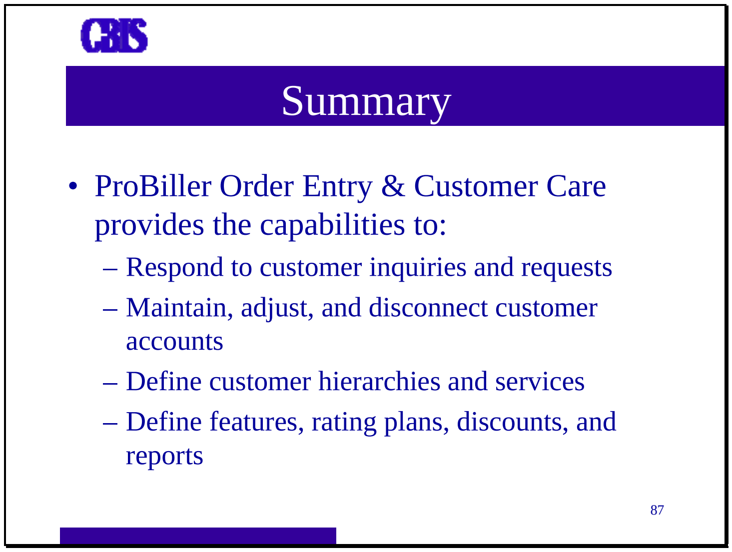
CBIS
Summary
• ProBiller Order Entry & Customer Care provides the capabilities to:
– Respond to customer inquiries and requests
– Maintain, adjust, and disconnect customer accounts
– Define customer hierarchies and services
– Define features, rating plans, discounts, and reports
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Course Evaluation

Workshop Evaluation

Your opinion is important to us. Please take some time to complete the following evaluation. Thank you.

Course Name:	
Course Code:	Date:
Instructor:	Location:

On a scale from 1 to 5, rate the following statements (1 = Not at all, 5 = To a great extent).

1. The stated objectives were met.
2. The activities (exercises, quizzes, case study, simulation, etc.) were appropriate.
3. The materials were up-to-date, factual, reliable, and easy to understand.
4. The instructor was able to effectively communicate the material presented and answer questions.
5. The instructor demonstrated knowledge of the subject matter.
6. The environment (room, equipment, etc.) was conducive to learning.
7. The duration of the workshop was:

   Too long   About right   Too short

8. Would you recommend this workshop to your colleagues?   [Yes]   [No]
9. Please indicate your overall level of satisfaction:

   Very Satisfied   Satisfied   Neutral   Dissatisfied   Very Dissatisfied

10. What did you like best about the workshop?

    ____

    ____

    ____

11. What suggestions do you have for improving this workshop?

    ____

    ____

    ____

Name (optional): ______________________ Phone: ______________