INTELENEWS

ADOPT A NEW LOOK FOR INVOICES

InTELEbill® invoices have a new look. Changes were made to the invoice layout, font style, headers, invoice backers and message areas. "The bill's new format not only has a crisper look, but also increases clients' functionality and flexibility in bill presentment," commented Sandy Beaches Software President Jeff Lytle.

The cover page now boasts a large custom message area that can also be populated with many types of information including usage graphs. The service types are displayed in user defined header boxes.

"SBS is known for producing accurate and timely bills. We believed it was time to update the look and layout of the invoice. Our new custom format enables clients to effectively convey their corpo-

rate image and highlight the multitude of services they provide," said IT Director Scott Roberts.

"Our programming staff will work with the client in order to create the invoice that best meets their needs,"Lytle said. "For most service providers the bill is the only tangible element in the relationship with their customers. An informative invoice that's easy to understand is a key element in customer retention and cross-selling," remarked Lytle. "Allowing our customers to essentially design their own bill is another way they can increase their brand presence and customer loyalty."

Contact SBS (405)603-6150 x109, to discuss how to set up the invoice layout that best suits your company. *(See page 3 for related story)*

Remit Page boasts a larger message area.

The Tax Section, reflects the customer's taxes broken-out.

Invoice Sections feature customized wording and layout.

STOP LEAKS, GAIN REVENUE
Simple Fix Provides More Billable Call Records

Working bad ANIs is probably not on anyone's "fun things to do" list. But, it is critical to stopping revenue leakage. There is one reason code that should always be corrected prior to billing: NF Rate. The good news is it's a simple fix. The NF Rate will appear on a valid ANI, and little or no research is needed to repair it.

The code is created because

the ANI was turned into the carrier and began billing prior to the ANI being entered into InTELEbill®.

The Fix: Simply go to the ANI Tab on the Customer Information Screen. Edit the "effective" date on the Rate Plan Tab to any time prior to the date shown as the customer "turn-up date" in the customer information section of InTELEbill®. So, when you see "NF" remember - it's an easy fix for more billable revenue.

Message from the President

Exhibiting at the Comptel Spring Conference and Expo in San Diego this past March turned out to be from a marketing perspective, one of the most successful shows we've had in several years. *(To give you an idea of how long we've done this: when I first exhibited in 1993 at TRA, now Comptel, my "pop-up" booth was quite a marvel at the time!)* The reason I always make it a point not only to exhibit, (even during the telecom downturn) but also to work in our booth, is to have the chance to "take the pulse" of the Industry. Meeting and listening to prospects helps me determine which direction to lead our software development.

The number of solid companies looking for a new billing solution is promising to us from a business development aspect. But, I believe it also shows that there are quality companies (in addition to our clients) who have survived the turmoil and insecurity the FCC and RBOCs brought upon the competitive telecom sector. The survivors have waited for the

seas to calm and are now ready to get out of the life boat and succeed! Changing billing and customer-care platforms is not a decision to be taken lightly, but many companies who have been treading water where their billing is concerned are ready to dump their patched-up billing systems and convert to a solution that will help them grow and remain profitable.

This trend also benefits our current customers because we are reviewing a fresh set of "wish lists" from these potential clients. And, as always, we will incorporate new features into InTELEbill® free of charge to all of our clients based on their universal appeal. You can expect to see even more innovative features added to InTELEbill® in the next few months. We encourage our current customers to continue to provide us with ideas and feature requests. Please send these via e-mail to: features@intelebill.com.
Thank you for your business.

Jeff Lytle

SBS OPERATIONS CORNER
Updating Severity Codes for Trouble Tickets

If you haven't done it already…don't forget to update your trouble ticket reference information. Trouble tickets can be set to require a corresponding ANI and a severity code under Global Settings. There is also a new menu item under "Reference" called "Severity Codes." These codes will appear in a drop-down list when viewing the Trouble Ticket Screen.

Severity codes are 3 characters long and have a drop-down list with descriptions. In order to create or update codes and their descriptions, go to: Update Screens→Reference→Severity Codes.

Interested in automatic notifiers that correspond to trouble ticket resolution? Contact SBS Operations (405)603-6150 x113 for more information about adding the **InteleFLOW** workflow module to your system. This product is also useful when tracking work orders and for working collection accounts.

Tax Update
Are You Selling Bundled Services?

There is an important telecom tax change reflected in Notice 2006-50. The IRS states that it will no longer collect Federal Excise Tax (FET) on bundled and long distance services. Their definition for a bundled service is: local and long distance service provided under a plan that does not separately state the charge for the local telephone service. This goes into effect on any non-taxable service billed after July 31, 2006. Also, the collectors are not required to report to the IRS any refusal by their customers to pay any tax on a non-taxable service that is billed after May 25, 2006.

Another important aspect of this notice is that refunds will be available from services billed after February 28, 2003. The refund process will be incorporated into the 2006 income tax reporting that is filed in 2007. A complete copy of the order can be found by visiting: http://www.irs.gov/pub/irs-drop/n-06-50.pdf.

Bundled Service is defined as: local and long distance service provided under a plan that does not separately state the charge for the local telephone service.

If you are selling "bundled" services you will need to go into InTELEbill® and change the customers who will be affected by this change. (The program will automatically handle long distance customers.) We will provide the new tax category and codes list for the bundled services so that you can code customers and their affected ANIs and/or MRCs. For more information on updating customers with bundled services contact Sam Mauer in Operations: (405) 603-6150 x 109.

ADDRESS SCRUBBING
GETTING IT RIGHT THE FIRST TIME

You can now verify addresses "on-the-fly" inside of InTELEbill®. Whether you are entering a brand new customer, or want to check an address already in the system, verification is easily done within the program. After Sandy Beaches Software enables the verification feature, click the box located directly to the right of the customer's ZIP code on the customer information screen or in the order entry wizard. The program will suggest a correction which you may approve. If accepted, it will populate the corrected address information for the account, including the county for the corrected physical address.

> **Programming Note**
>
> *If the verified address box is checked for a particular account, the account will remain as entered. Avoid checking this box unless you are positive that the address is correct.*

The tool is USPS CASS (Coding Accuracy Support System) certified, ensuring that ZIP+4 codes and mail carrier route numbers are correct and properly standardized. Utilizing this feature helps avoid undeliverable addresses enabling quicker accounts receivable turn around. To begin using the address verification tool, contact SBS Operations at (405)603-6150 x101.

REPORTING HIGHLIGHTS

The Line Count Report can be filtered to gather data that is key to running your business. Reports can be generated for lines according to status, cycle, reseller, affinity, geographic state, line type, sales rep., or ANI status. Choose between detailed or summary only reports. To access this report go to: *Reports→Customer Reports →Counts→LineCounts*

> **WOULD YOU LIKE TO KNOW....**
> - How many new business lines were turned up last month?
> - How many lines in Calif. went to dropped status?

The LD Charges Report will generate a report that reflects the last 13 months of activity.

This report is very useful for analyzing sales rep. performance if filtered by "rep."

> **DISCOVER INFO SUCH AS....**
> - How much profitability are the agents building into their rate plans?
> - Flagged accounts reflect significant increases or decreases in sales.

It also provides a profitability summary by sales representative. Not finding the exact information you are looking for? Send us an e-mail with the criteria you need in your report along with a brief explanation of why and how you are using the report. SBS will write the report for you and save it for your future use.

I WANT MY INVOICE TO LOOK LIKE THAT
Steps For Changing to the New InTELEbill® Invoice Layout

Ready to update the look of your invoices? There are a few things to decide first. These include: headers for Bill Sections; Remit Page Backers; Marketing Messages; Tear Line Messages; Service Messages; and a Tagline for the logo. All of the messages can be previewed prior to printing using the "preview message" buttons.

If you aren't already using a descriptive header for the various Bill Sections, you will need to decide how they will display on the bill. If you are already using descriptions, you might want to re-word what you currently have

(there is a 26-character limit.) Remember, the better the description, the easier the bill is to read and the fewer billing inquiries you will have to answer. These will be set up under: *Update Screens→ Reference→ Invoice Options →Bill Sections.*

There is now an option for a backer on the remit page. This can be anything you choose. Examples include: additional advertising; tariff and billing information; change of account information. You may have multiple backers within the same billing cycle. To set these up go to: *Update Screen →Reference→Invoice Options→Invoice Backer.*

Marketing Messages are also located under "Invoice

Options" and because they now have room for more text and can be filtered on any field, you might want to update them as well. To set the filter, go to: *Update Screens → Reference→Invoice Options→Backer/Message Criteria.* The Tear Line Message can be changed, as well as the Remit Coupon Message. Update these messages under: *Update Screens→Reference→Invoice Options→Print Format→Gen.* Also located on the general tab is a place to update the "Account Summary" headers.

The Service Message is a new messaging area that runs vertically down the left column of each invoice page with the exception of the re-

mit page. A tagline can be displayed under the logo if it is set to the default position on the remit page. To set up both of these items, go to: *Update Screens→Reference→Invoice Options→Print Format→ Messages.*

All of the information on a customer's invoice can be previewed prior to printing from the "Invoice Messages" tab on the customer information screen. To preview, go to the account's customer information screen, select the "Invoice Messages" tab and choose the "Preview Messages" button. For more detailed information on how start using these features, contact (800)982-6221 x100 and request the new invoice set-up guide.

Sandy Beaches Software
8208 N. Glade Ave.
Oklahoma City, OK 73132

Phone: 800-982-6221 x103
E-Mail: suzy.lytle@intelebill.com
www.intelebill.com

SBS Staff Spotlight

Our staff member spotlight shines on operations team member Luis Aita. Luis provides tech support to clients, and performs billing runs for SBS customers. His other duties include invoicing clients and accounts payable.

Luis began working at Sandy Beaches as an intern in January 2004. An accounting major, he focused on accounting functions for the company during his internship. Luis also began sporadically helping out in operations. His attention to detail was a tremendous asset, particularly in auditing billing registers and sample invoices.

After graduating from the University of Central Oklahoma, and an intensive training period in telecom and database management, Luis began his career at SBS.

Luis Aita, Operations Department

"I enjoy working with customers and helping them achieve their goals," said Luis. "Whether it is to reduce their number of unbillable call records for a cycle, or help them build a new rate plan needed for a marketing strategy, I know I can make a difference in their job performance."

Luis' wife Amy is an elementary school teacher and will begin teaching first grade in the fall. During his spare time, Luis enjoys watching football, playing poker, and gaming with friends.

"Luis' hard-working attitude and attention to detail benefits SBS clients and the company as a whole," commented SBS President, Jeff Lytle.

Welcome New Staff Member
Tom Testi - Sr. Software Developer
Congratulations
To David Beardain & wife Barbara on their 25th wedding anniversary.