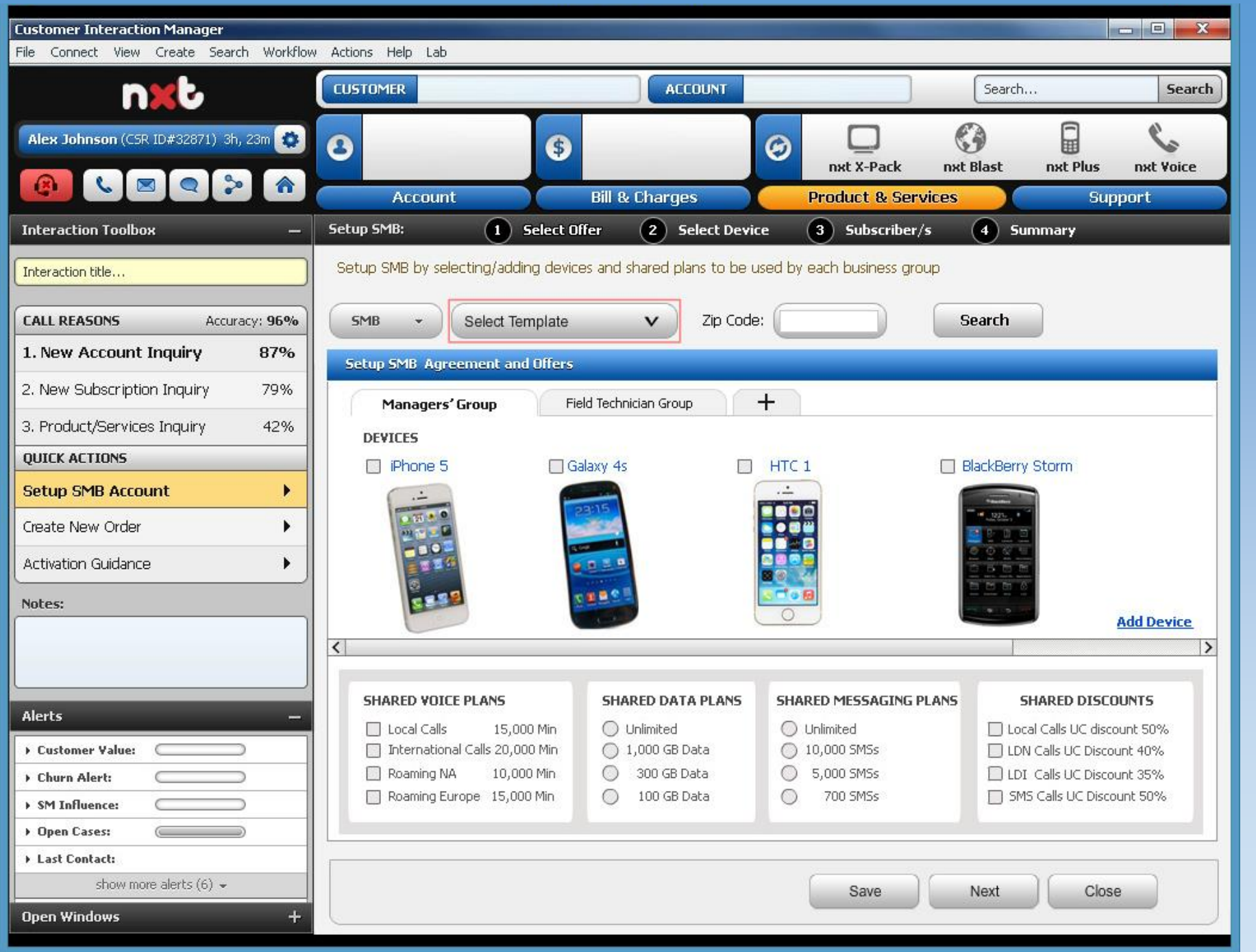
Small Medium Business (SMB)

Screens extracted from Flash Demo for InTouch 2014

Designer: Mark Weinberg

Scenario 1: Onboarding New SMB Customer

CSP Agent View


Customer Interaction Manager
File Connect View Create Search Workflow Actions Help Lab
nxt
Alex Johnson (CSR ID#32871) 3h, 23m
CUSTOMER
ACCOUNT
Search...
Search
nxt X-Pack
nxt Blast
nxt Plus
nxt Voice
Account
Bill & Charges
Product & Services
Support
Interaction Toolbox
Interaction title...
CALL REASONS
Accuracy: 96%
1. New Account Inquiry 87%
2. New Subscription Inquiry 79%
3. Product/Services Inquiry 42%
QUICK ACTIONS
Setup SMB Account
Create New Order
Activation Guidance
Notes:
Alerts
Customer Value:
Churn Alert:
SM Influence:
Open Cases:
Last Contact:
show more alerts (6)
Open Windows
Setup SMB:
1 Select Offer
2 Select Device
3 Subscriber/s
4 Summary
Setup SMB by selecting/adding devices and shared plans to be used by each business group
SMB
Select Template
Zip Code:
Search
Setup SMB Agreement and Offers
Managers' Group
Field Technician Group
DEVICES
iPhone 5
Galaxy 4s
HTC 1
BlackBerry Storm
Add Device
SHARED VOICE PLANS
Local Calls 15,000 Min
International Calls 20,000 Min
Roaming NA 10,000 Min
Roaming Europe 15,000 Min
SHARED DATA PLANS
Unlimited
1,000 GB Data
300 GB Data
100 GB Data
SHARED MESSAGING PLANS
Unlimited
10,000 SMSs
5,000 SMSs
700 SMSs
SHARED DISCOUNTS
Local Calls UC discount 50%
LDN Calls UC Discount 40%
LDI Calls UC Discount 35%
SMS Calls UC Discount 50%
Save
Next
Close

Customer Interaction Manager

File Connect View Create Search Workflow Actions Help Lab

nxt

Alex Johnson (CSR ID#32871) 3h, 23m

CUSTOMER ACCOUNT Search... Search

nxt X-Pack nxt Blast nxt Plus nxt Voice

Account | Bill & Charges | Product & Services | Support

Interaction Toolbox

Interaction title...

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Create New Order
Activation Guidance

Notes:

Alerts

- Customer Value:
- Churn Alert:
- SM Influence:
- Open Cases:
- Last Contact:

show more alerts (6)

Open Windows

Setup SMB: 1 Select Offer 2 Select Device 3 Subscriber/s 4 Summary

Select a shared plan and one or more services for each business group

Managers' Group | Field Technician Group

Unlimited

Additional Shared Voice Plans
International calls 20,000 minutes
USA, Europe, Asia
Tethering

Messaging
10% discount on UC depends on data
25% discount on UC depends on RC

RC: **$25.00** OC: **$15.00**

Talk & Messages BlackBerry

Additional Shared Data Plans
10GB data

BlackBerry Access

Messaging
100 SMSs and 500 minutes
25% discount on UC depends on RC

RC: **$55.00** OC: **$15.00**

Roaming

Additional Shared Messaging Plans
10,000 SMSs
USA, Europe, Latin America
International Roaming

Messaging
500 SMSs

RC: **$25.00** OC: **$15.00**

Enhanced IP Flex

Enhanced BVoIP
IP Flexible Reach for US Offering

Cloud Infra Services

Cloud Infra Services

Host - Mobile Apps Development

a virtual machine hosted on the network (cloud) with preconfigured licensed application specific for mobile aps devlopment

Save Back Next Close

Customer Interaction Manager

File Connect View Create Search Workflow Actions Help Lab

nxt

CUSTOMER ACCOUNT Search... Search

Alex Johnson (CSR ID#32871) 3h, 23m

nxt X-Pack nxt Blast nxt Plus nxt Voice

Account Bill & Charges Product & Services Support

Interaction Toolbox

Interaction title...

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Setup SMB Account

Create New Order

Activation Guidance

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Alerts

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Churn Alert:

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Open Cases:

Last Contact:

show more alerts (6)

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Select a shared plan and one or more services for each business group

Managers' Group Field Technician Group

Unlimited

Business Complete Mobile Agreement

Shared Voice Plans
Local Calls 15,000 minutes
International Calls 20,000 minutes

Shared Data Plans
1,000GB data

Shared Messaging Plans
10, 000 SMSs

Voice
International
USA,Europe, Asia
Tethering

Messaging
10% discount on UC depends on data
25% discount on UC depends on RC
RC: $25.00 OC: $15.00

es BlackBerry
ed Data Plans
ess
minutes
UC depends on RC
OC: $15.00

Roaming
Additional Shared Messaging Plans
10,000 SMSs
USA, Europe, Latin America
International Roaming

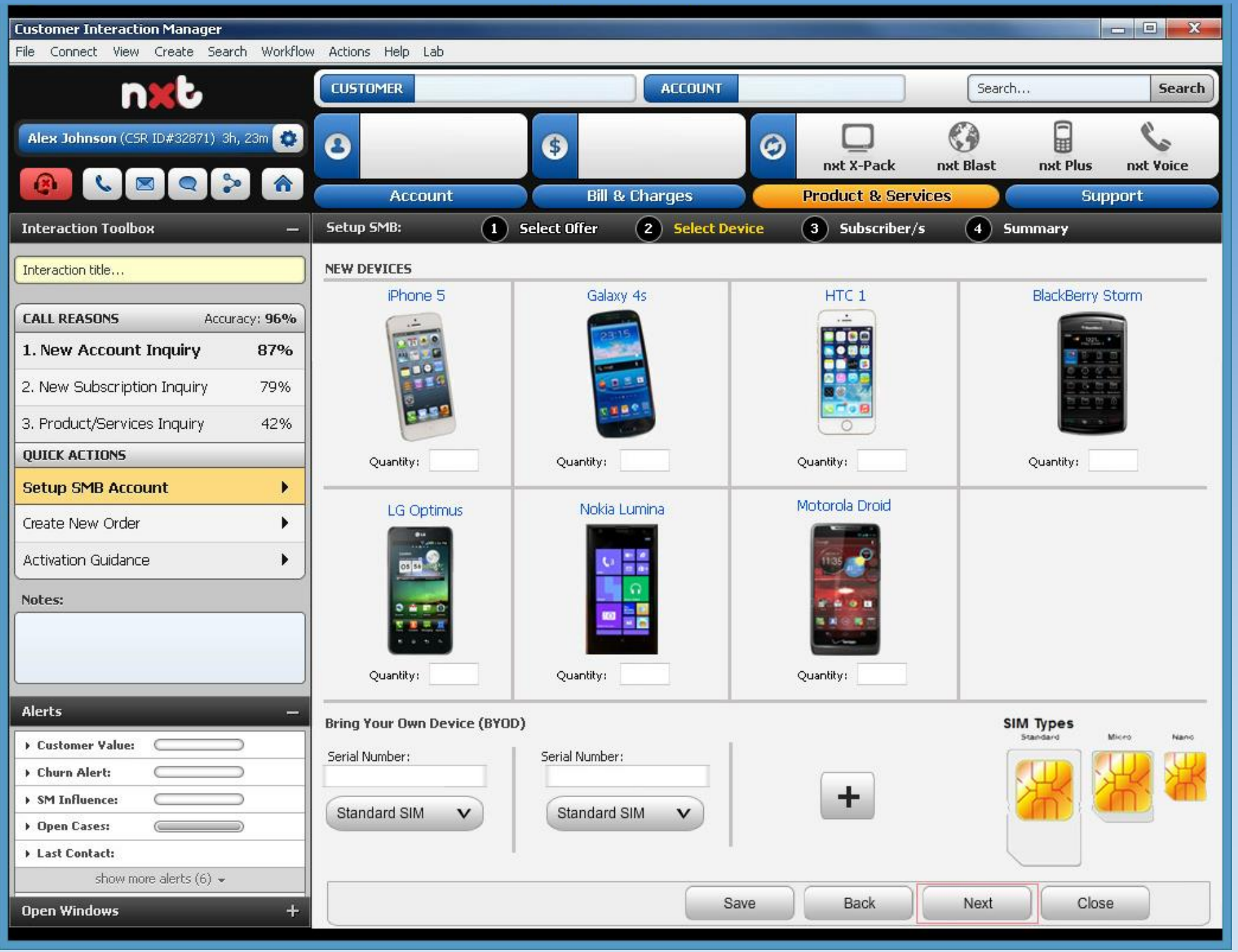
Messaging
500 SMSs
RC: $25.00 OC: $15.00

ervices
ices

Host - Mobile Apps Development

a virtual machine hosted on the network (cloud) with preconfigured licensed application specific for mobile aps devlopment

Save Back Next Close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Bill & Charges
Product & Services
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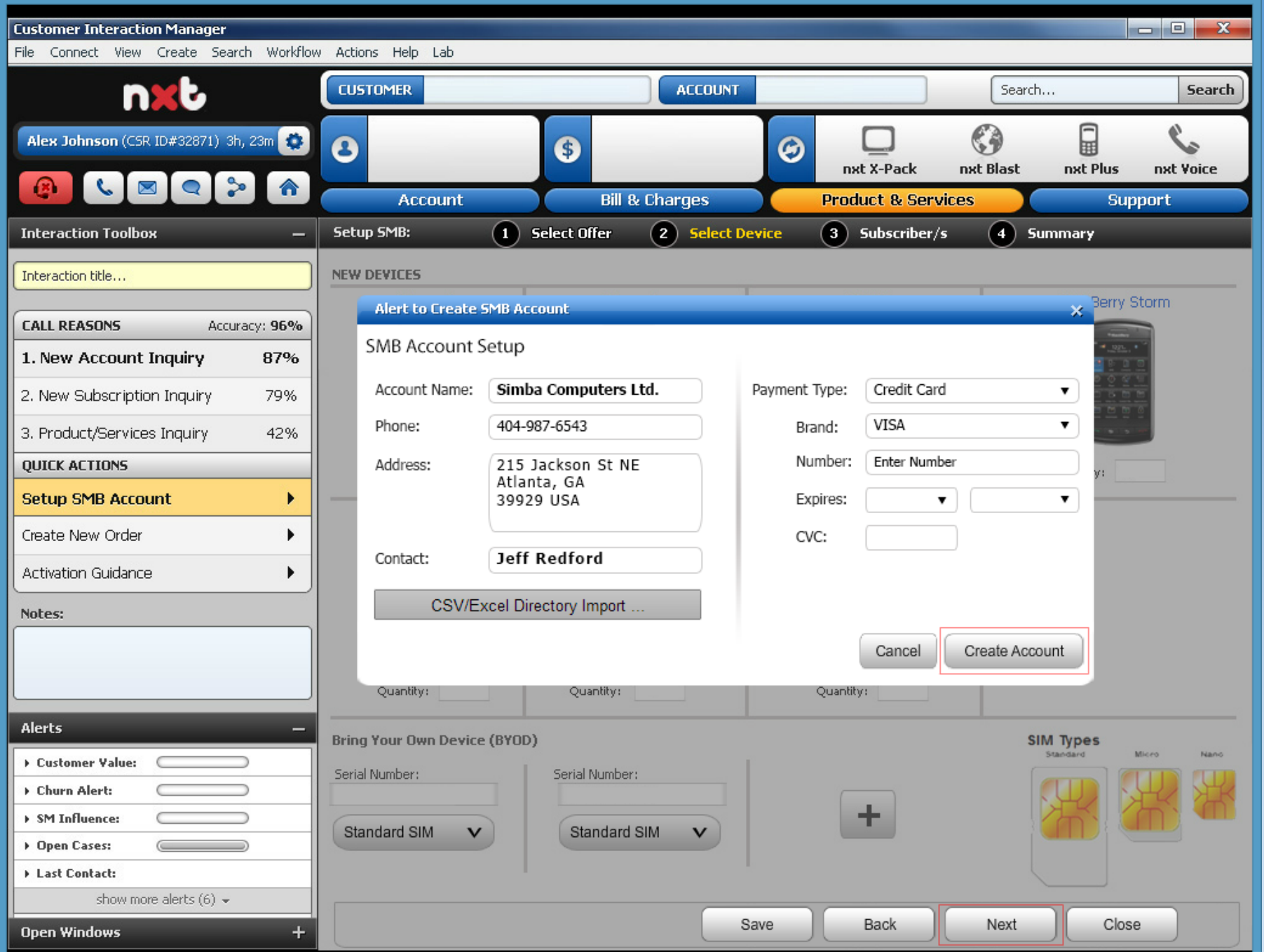
Alerts
Customer Value:
Churn Alert:
SM Influence:
Open Cases:
Last Contact:
show more alerts (6)
Open Windows
Setup SMB: 1 Select Offer 2 Select Device 3 Subscriber/s 4 Summary
NEW DEVICES
iPhone 5
Galaxy 4s
HTC 1
BlackBerry Storm
LG Optimus
Nokia Lumina
Motorola Droid
Quantity:
Bring Your Own Device (BYOD)
Serial Number:
Standard SIM
SIM Types
Standard
Micro
Nano
Save
Back
Next
Close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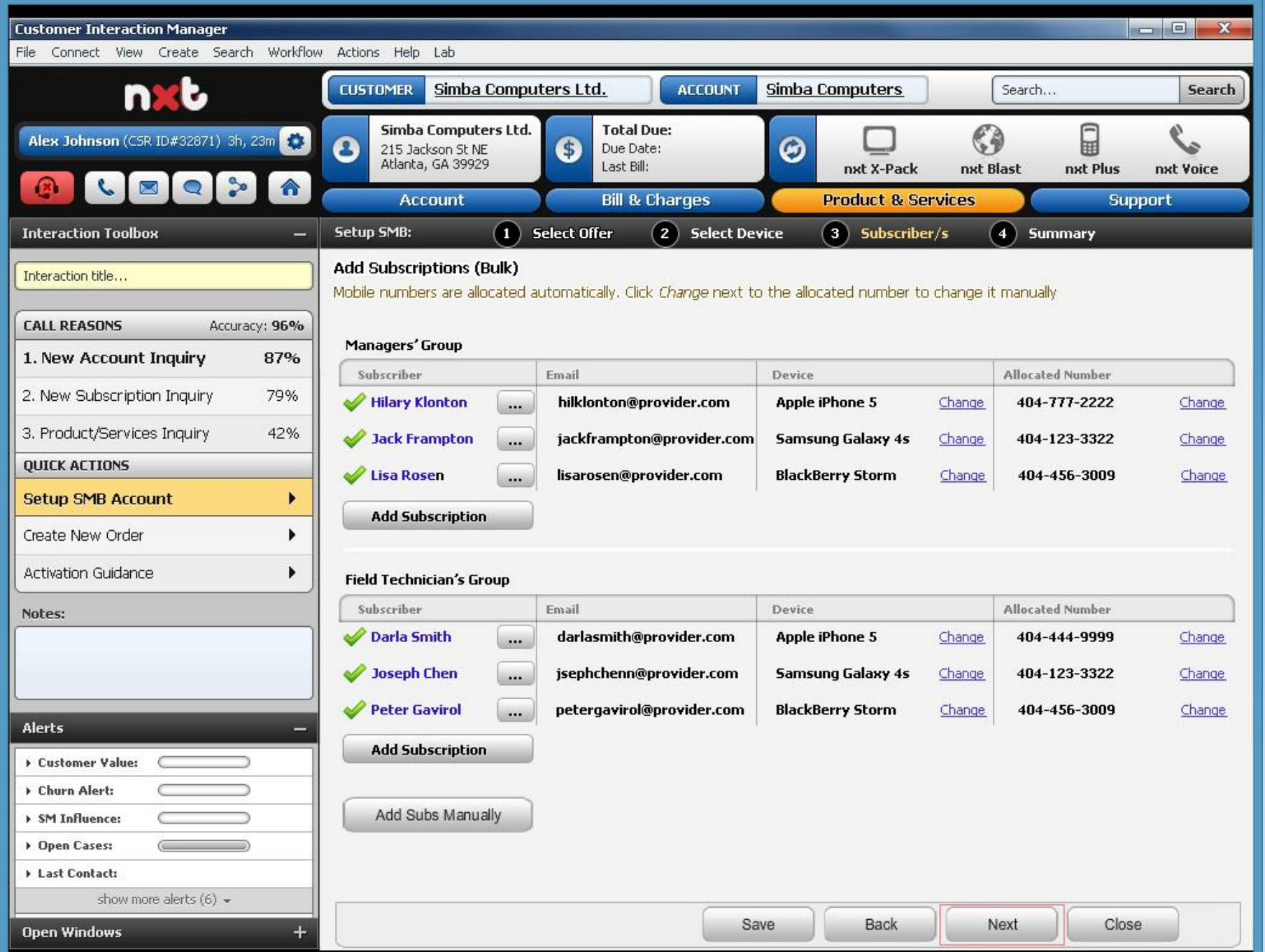
Churn Alert:
SM Influence:
Open Cases:
Last Contact:
show more alerts (6)
Open Windows
Setup SMB: 1 Select Offer 2 Select Device 3 Subscriber/s 4 Summary
NEW DEVICES
Alert to Create SMB Account
SMB Account Setup
Account Name: Simba Computers Ltd.
Phone: 404-987-6543
Address: 215 Jackson St NE
Atlanta, GA
39929 USA
Contact: Jeff Redford
CSV/Excel Directory Import ...
Payment Type: Credit Card
Brand: VISA
Number: Enter Number
Expires:
CVC:
Cancel
Create Account
Berry Storm
Quantity:
Bring Your Own Device (BYOD)
Serial Number:
Standard SIM
SIM Types
Save
Back
Next
Close


Customer Interaction Manager
File Connect View Create Search Workflow Actions Help Lab
nxt
Alex Johnson (CSR ID#32871) 3h, 23m
CUSTOMER Simba Computers Ltd.
ACCOUNT Simba Computers
Search... Search
Simba Computers Ltd.
215 Jackson St NE
Atlanta, GA 39929
Total Due:
Due Date:
Last Bill:
nxt X-Pack
nxt Blast
nxt Plus
nxt Voice
Account
Bill & Charges
Product & Services
Support
Interaction Toolbox
Interaction title...
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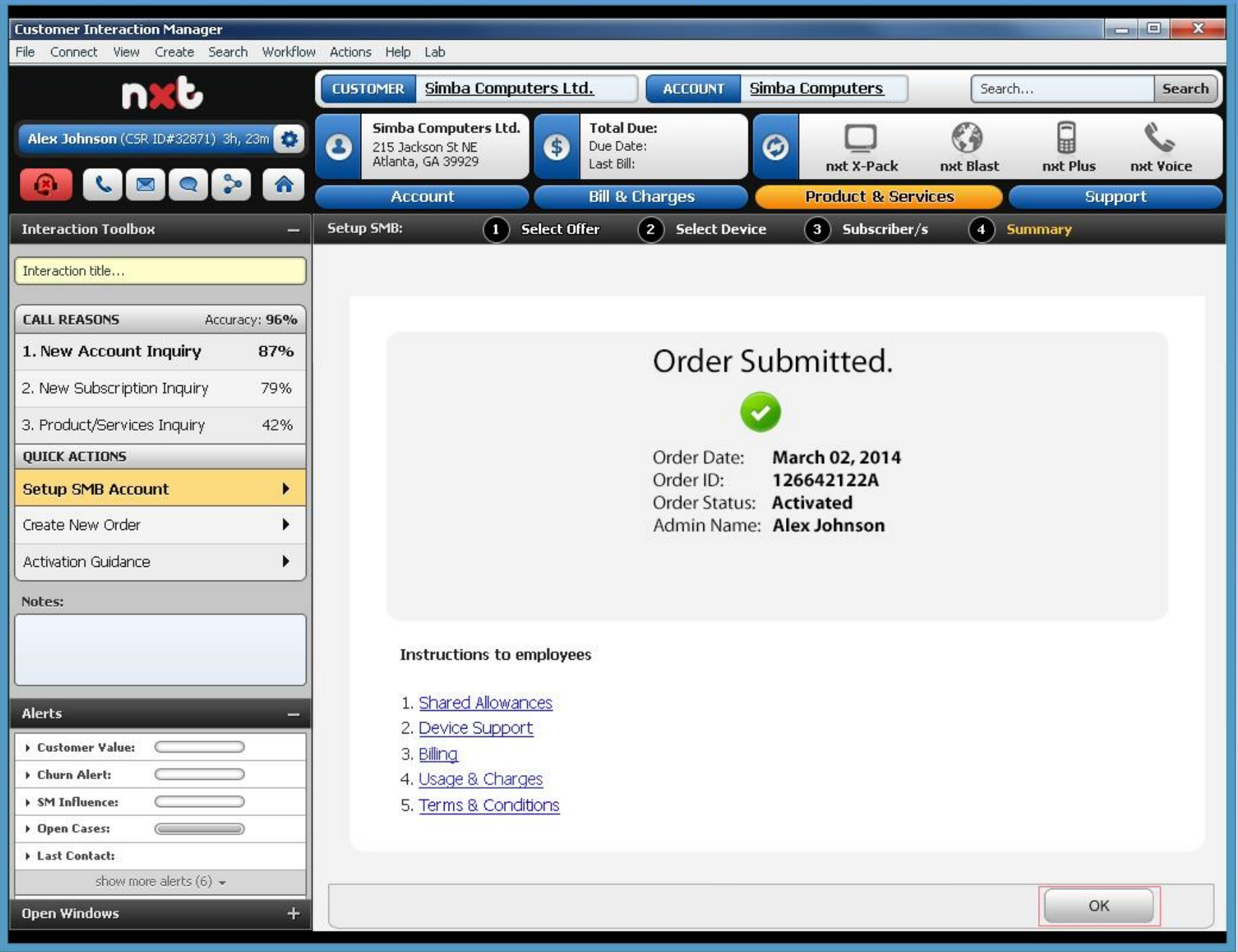
Customer Value:
Churn Alert:
SM Influence:
Open Cases:
Last Contact:
show more alerts (6)
Open Windows
Setup SMB: 1 Select Offer 2 Select Device 3 Subscriber/s 4 Summary
Add Subscriptions (Bulk)
Mobile numbers are allocated automatically. Click Change next to the allocated number to change it manually
Managers' Group
Subscriber Email Device Allocated Number
Hilary Klonton ... hilklonton@provider.com Apple iPhone 5 Change 404-777-2222 Change
Jack Frampton ... jackframpton@provider.com Samsung Galaxy 4s Change 404-123-3322 Change
Lisa Rosen ... lisarosen@provider.com BlackBerry Storm Change 404-456-3009 Change
Add Subscription
Field Technician's Group
Subscriber Email Device Allocated Number
Darla Smith ... darlasmith@provider.com Apple iPhone 5 Change 404-444-9999 Change
Joseph Chen ... jsephchenn@provider.com Samsung Galaxy 4s Change 404-123-3322 Change
Peter Gavirol ... petergavirol@provider.com BlackBerry Storm Change 404-456-3009 Change
Add Subscription
Add Subs Manually
Save Back Next Close


Customer Interaction Manager
File Connect View Create Search Workflow Actions Help Lab
nxt
Alex Johnson (CSR ID#32871) 3h, 23m
CUSTOMER Simba Computers Ltd.
ACCOUNT Simba Computers
Search...
Search
Simba Computers Ltd.
215 Jackson St NE
Atlanta, GA 39929
Total Due:
Due Date:
Last Bill:
nxt X-Pack
nxt Blast
nxt Plus
nxt Voice
Account
Bill & Charges
Product & Services
Support
Interaction Toolbox
Interaction title...
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QUICK ACTIONS
Setup SMB Account
Create New Order
Activation Guidance
Notes:
Alerts
Customer Value:
Churn Alert:
SM Influence:
Open Cases:
Last Contact:
show more alerts (6)
Open Windows
Setup SMB: 1 Select Offer 2 Select Device 3 Subscriber/s 4 Summary
Order Submitted.
Order Date: March 02, 2014
Order ID: 126642122A
Order Status: Activated
Admin Name: Alex Johnson
Instructions to employees
1. Shared Allowances
2. Device Support
3. Billing
4. Usage & Charges
5. Terms & Conditions
OK

Scenario 2: Add/Change Subscription

Admin Self Service View

nxt

Login | Register

Welcome to Nxt SMB Management

SMB management is an intuitive, easy to use system to manage all your business telco needs conveniently located in one place.

Learn more...

Subscriber Management
Billing Management
Ordering
Reports
Support

Watch Video

User Name

Password:

Remember Me

Login

or register

Forgot Username? | Forgot Password?
Not yet Registered? Register Now

Special Offers

Cases

Shake Things Up

Keep your style fresh with iPhone® 5 cases starting at $5

shop now

CHAT WITH AN AGENT

chat

nxt

Number | Search | Frequent Tasks | Alerts 2 | Jeff Redford

Home | Orders | Billing | Reports | Support

Choose group: Managers Group

Allowances

- Voice Min. 702 / 1,250 Min.
- Internationals Voice Min. 125/600 Min.
- Messages. 125/600 Msgs.
- Internationals Voice Min. 125/600 Min.

Shared Allowances

- 5,000 Minutes 4112 / 5,000 Min.
- 600 Minutes 412 /600 Min.
- 900 Messages 750/ 900 Msgs.
- 1000 MB Data 780 / 1000 MB

Total Usage Charges: $75

Not including tax, monthly charges and discounts

Latest Bills

Financial Account 1:	$1,042.40
Financial Account 2:	$801.40
Financial Account 3:	$2,400.55

Current Usage Charges

Total: **$4,243.95**

Pay by 05-Jun-2014
Next bill: 31-Aug-2014

Pay Bills

Total Charges

Last 12 Months

- Financial Account 3
- Financial Account 2
- Financial Account 1

Add Subscriber | Pay Bill | Open Ticket

Manage Groups | Manage Subscriptions | Troubleshoot

Top Spenders (28)

May 2014 bill

Latest Tickets

Mistake in invoice calculation from 01-Aug-2013
15-Sep I.D: 4354678A on hold

Orders With Conflicts

Add new subscription for: Alex Brown, mobile: (314) 333 1234
15-Sep I.D: 4354678A By: Sarah Smith

nxt

Number | 408-799-8823 | Search | Frequent Tasks | 2 Alerts | Jeff Redford

Home | Orders | Billing | Reports | Support

Linda Smith
Regional Manager
(408) 799 8823
LindaSmith@provider.com

Type Postpaid
Role Owner

Allowances

450 Minutes 212 / 450 Min.

100 Internationals Min. 65/100 Min.

Shared Allowances

5,000 Minutes 4112 / 5,000 Min.

600 Minutes 412 /600 Min.

900 Messages 750/ 900 Msgs.

Bill Charge

May 2014 Bill $248.40

Pay by 07-Jun-2014

Your Shared Plan

500 SHARED MINUTES & MESSAGES

UPGRADE YOUR PHONE
Samsung I9300 Galaxy SIII
$499

Add Subscriber | Pay Bill | Open Ticket

Manage Groups | Change Device | Troubleshoot

Most called numbers

4 Months average

Device

iPhone 4S

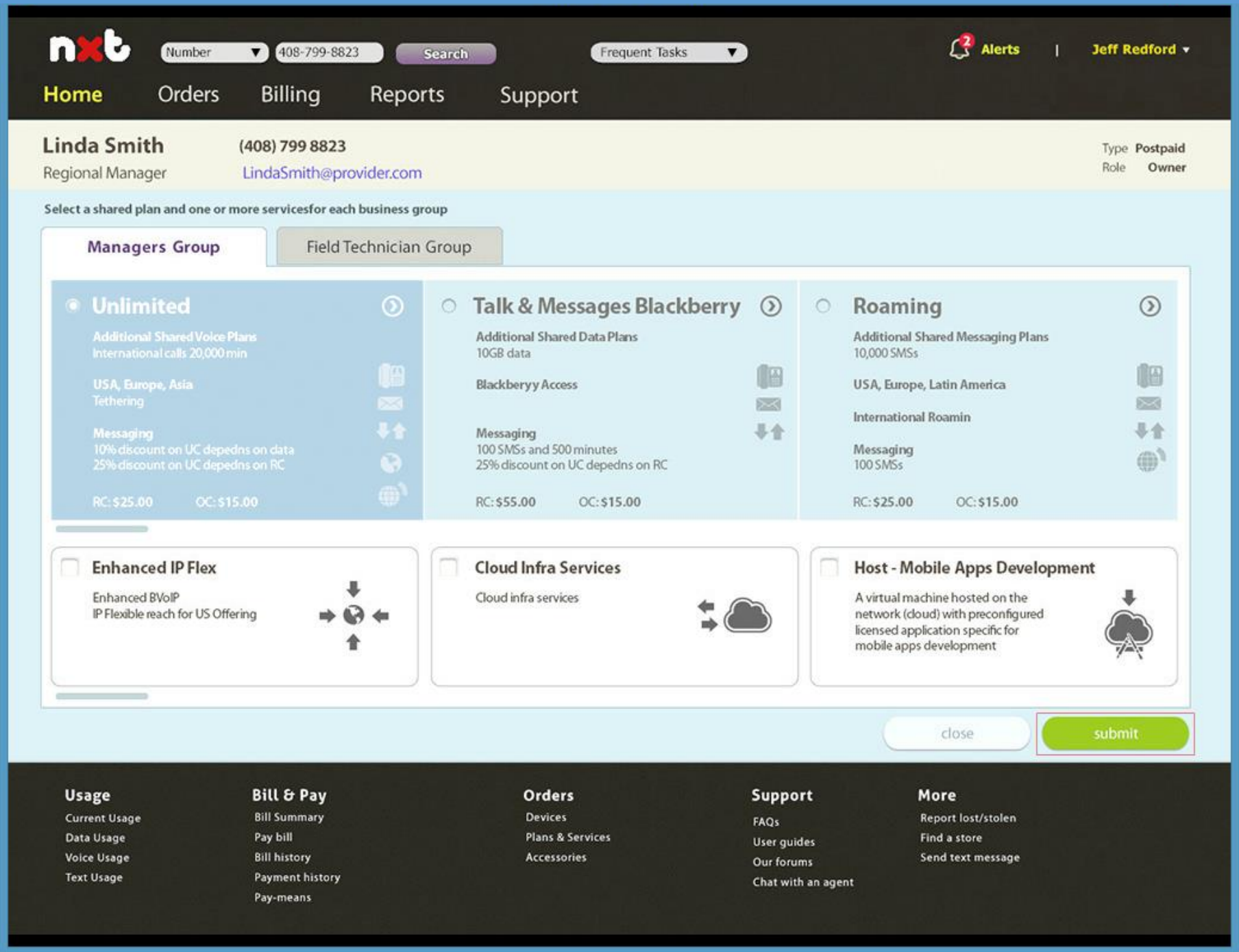
Usage
- Current Usage
- Data Usage
- Voice Usage
- Text Usage

Bill & Pay
- Bill Summary
- Pay bill
- Bill history
- Payment history
- Pay-means

Orders
- Devices
- Plans & Services
- Accessories

Support
- FAQs
- User guides
- Our forums
- Chat with an agent

More
- Report lost/stolen
- Find a store
- Send text message


nxt
Number
408-799-8823
Search
Frequent Tasks
2
Alerts
Jeff Redford
Home
Orders
Billing
Reports
Support
Linda Smith
Regional Manager
(408) 799 8823
LindaSmith@provider.com
Type Postpaid
Role Owner
Select a shared plan and one or more servicesfor each business group
Managers Group
Field Technician Group
Unlimited
Additional Shared Voice Plans
International calls 20,000 min
USA, Europe, Asia
Tethering
Messaging
10% discount on UC depedns on data
25% discount on UC depedns on RC
RC: $25.00
OC: $15.00
Talk & Messages Blackberry
Additional Shared Data Plans
10GB data
Blackberyy Access
Messaging
100 SMSs and 500 minutes
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Roaming
Additional Shared Messaging Plans
10,000 SMSs
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International Roamin
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100 SMSs
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Enhanced IP Flex
Enhanced BVoIP
IP Flexible reach for US Offering
Cloud Infra Services
Cloud infra services
Host - Mobile Apps Development
A virtual machine hosted on the network (cloud) with preconfigured licensed application specific for mobile apps development
close
submit
Usage
Current Usage
Data Usage
Voice Usage
Text Usage
Bill & Pay
Bill Summary
Pay bill
Bill history
Payment history
Pay-means
Orders
Devices
Plans & Services
Accessories
Support
FAQs
User guides
Our forums
Chat with an agent
More
Report lost/stolen
Find a store
Send text message

nxt

Number | 408-799-8823 | Search | Frequent Tasks | 2 Alerts | Jeff Redford

Home | Orders | Billing | Reports | Support

1. Select Offer — 2. Select Device — 3. Subscriber — 4. Summary

New Devices

iPhone 5

More details

Quantity:

Glaxy 4s

More details

Quantity:

HTC 1

More details

Quantity:

Blackberry Strom

More details

Quantity:

LG Optimus

More details

Quantity:

Nokia Lumina

More details

Quantity:

Motorola Droid

More details

Quantity:

Bring Your Own Device (BYOD)

Serial Number:

SIM Type: Choose..

Add another (BYOD)

Add

SIM types

next

Usage
- Current Usage
- Data Usage
- Voice Usage
- Text Usage

Bill & Pay
- Bill Summary
- Pay bill
- Bill history
- Payment history
- Pay-means

Orders
- Devices
- Plans & Services
- Accessories

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- Our forums
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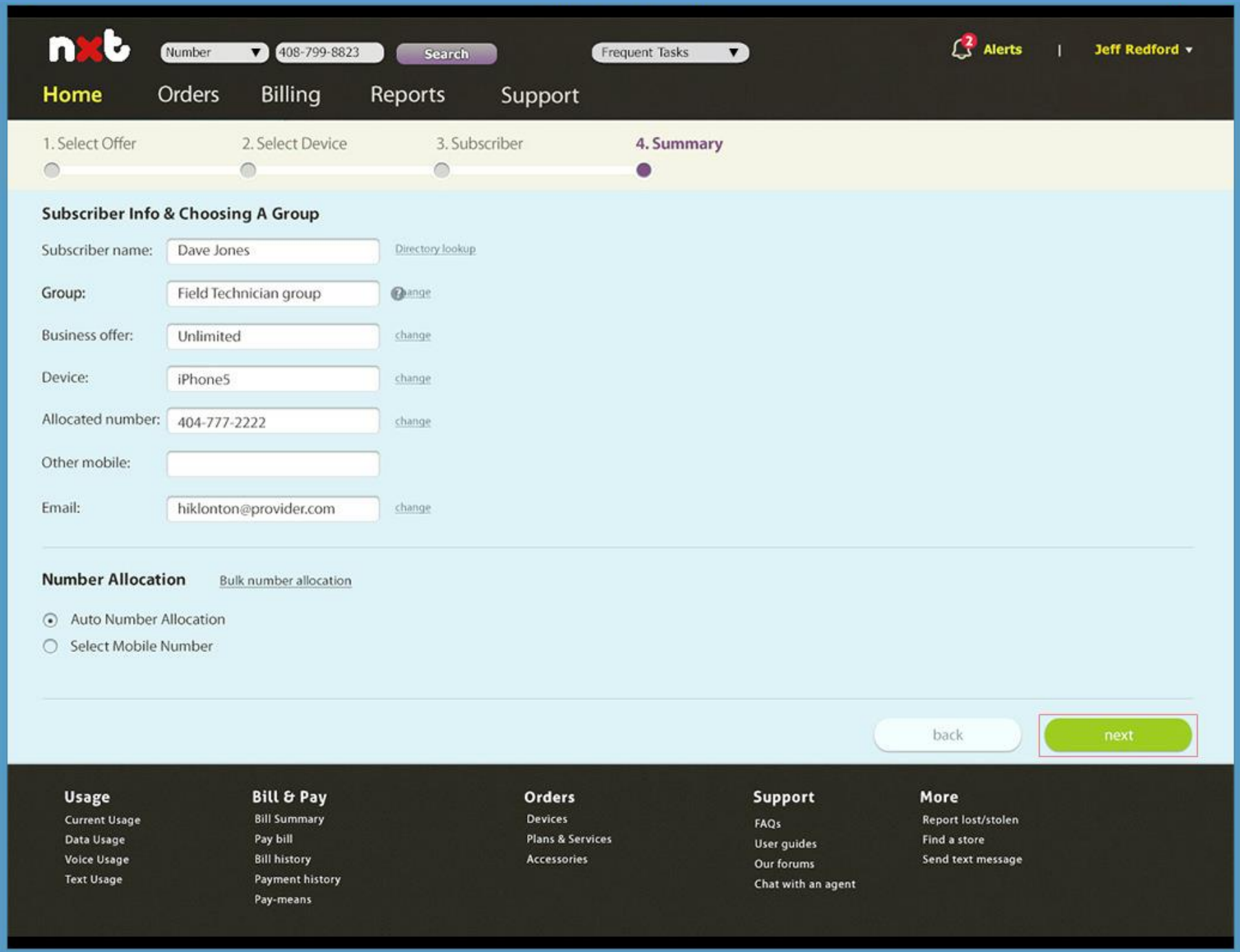
More
- Report lost/stolen
- Find a store
- Send text message


nxt
Number
408-799-8823
Search
Frequent Tasks
2
Alerts
Jeff Redford
Home
Orders
Billing
Reports
Support
1. Select Offer
2. Select Device
3. Subscriber
4. Summary
Subscriber Info & Choosing A Group
Subscriber name:
Dave Jones
Directory lookup
Group:
Field Technician group
change
Business offer:
Unlimited
change
Device:
iPhone5
change
Allocated number:
404-777-2222
change
Other mobile:
Email:
hiklonton@provider.com
change
Number Allocation
Bulk number allocation
Auto Number Allocation
Select Mobile Number
back
next
Usage
Current Usage
Data Usage
Voice Usage
Text Usage
Bill & Pay
Bill Summary
Pay bill
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Payment history
Pay-means
Orders
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Plans & Services
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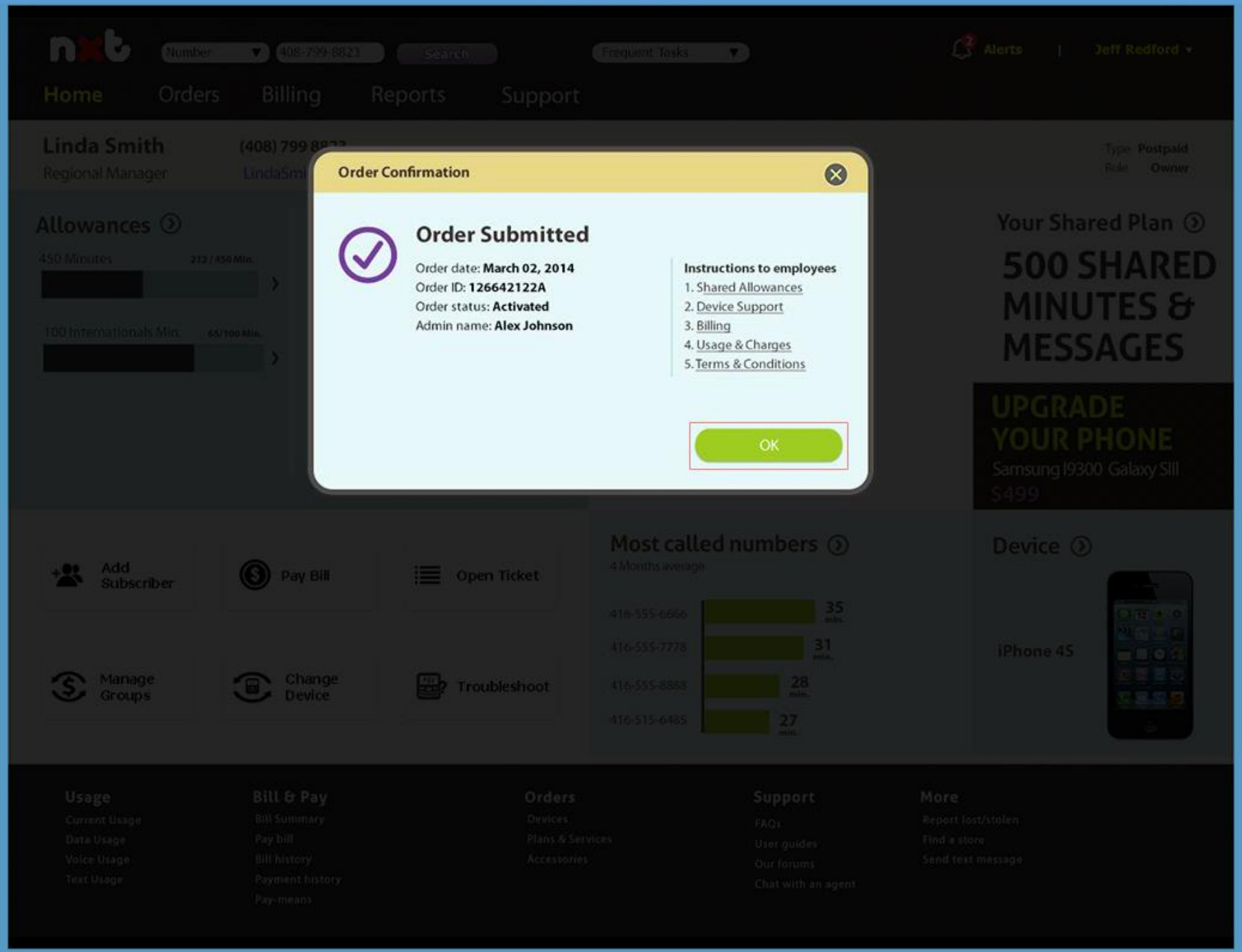
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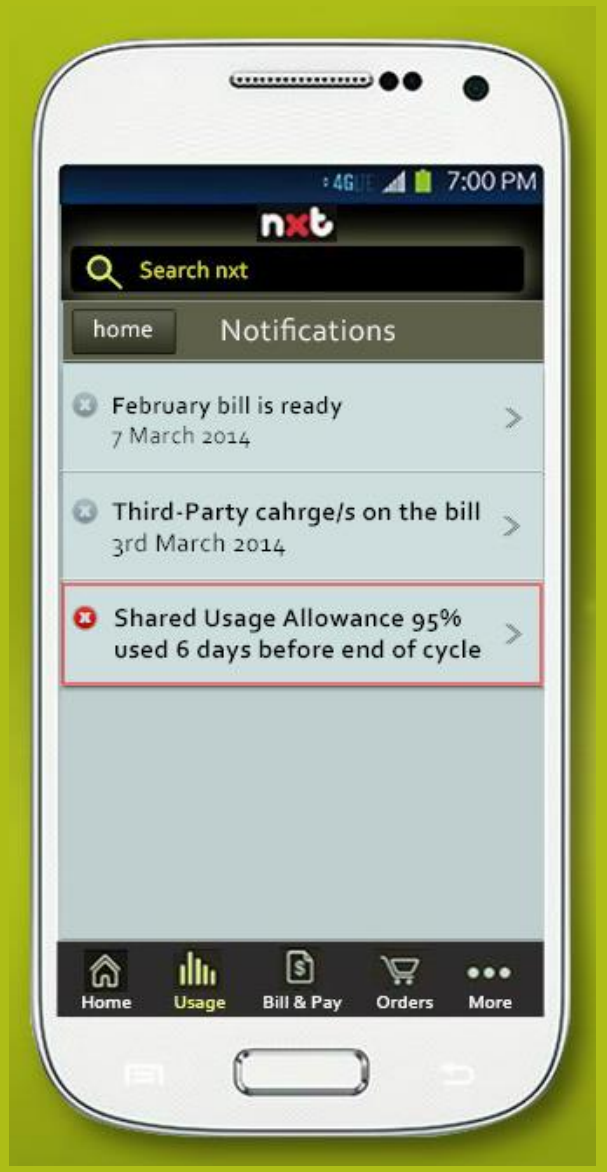
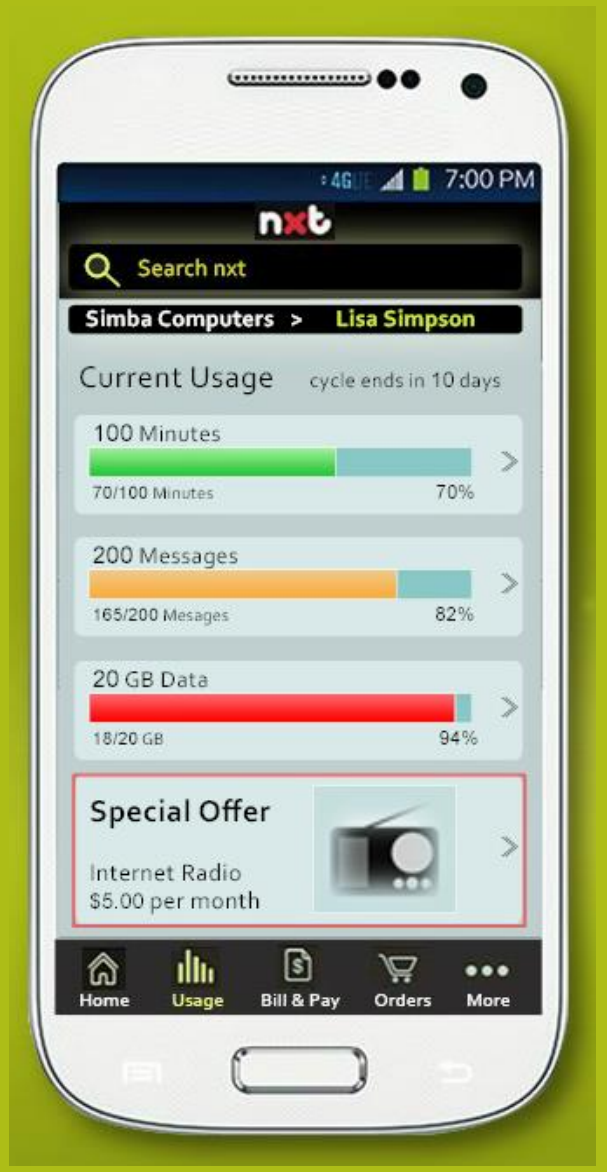
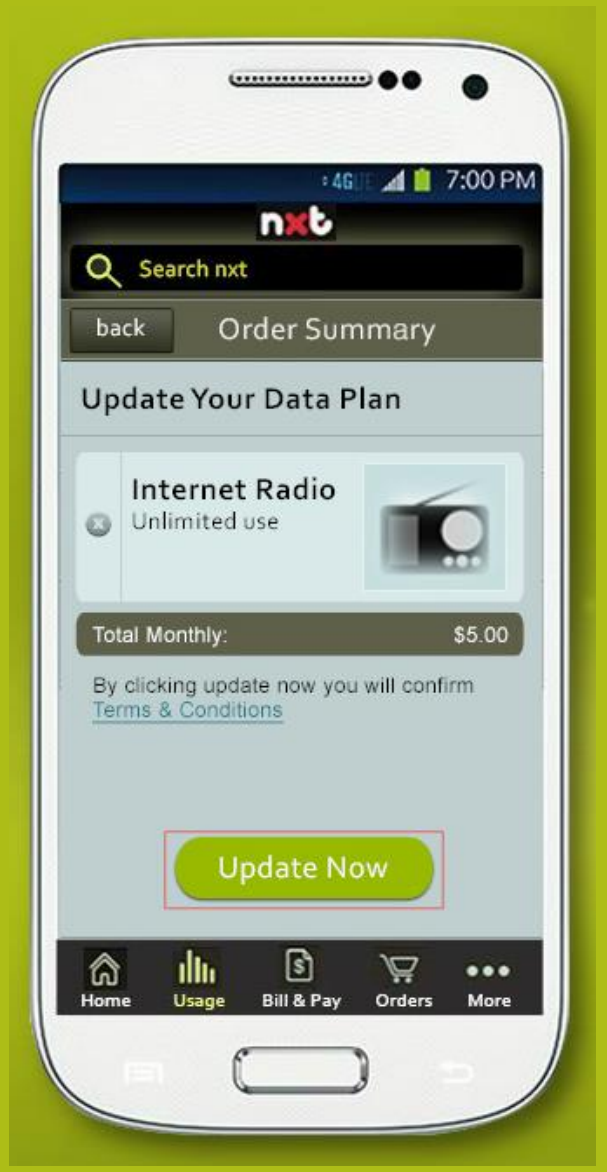
3. Billing
4. Usage & Charges
5. Terms & Conditions
OK
Home
Orders
Billing
Reports
Support
Linda Smith
Regional Manager
Allowances
Your Shared Plan
500 SHARED MINUTES & MESSAGES
UPGRADE YOUR PHONE
Samsung I9300 Galaxy SIII
$499
Add Subscriber
Pay Bill
Open Ticket
Manage Groups
Change Device
Troubleshoot
Most called numbers
Device
iPhone 4S
Usage
Bill & Pay
Orders
Support
More

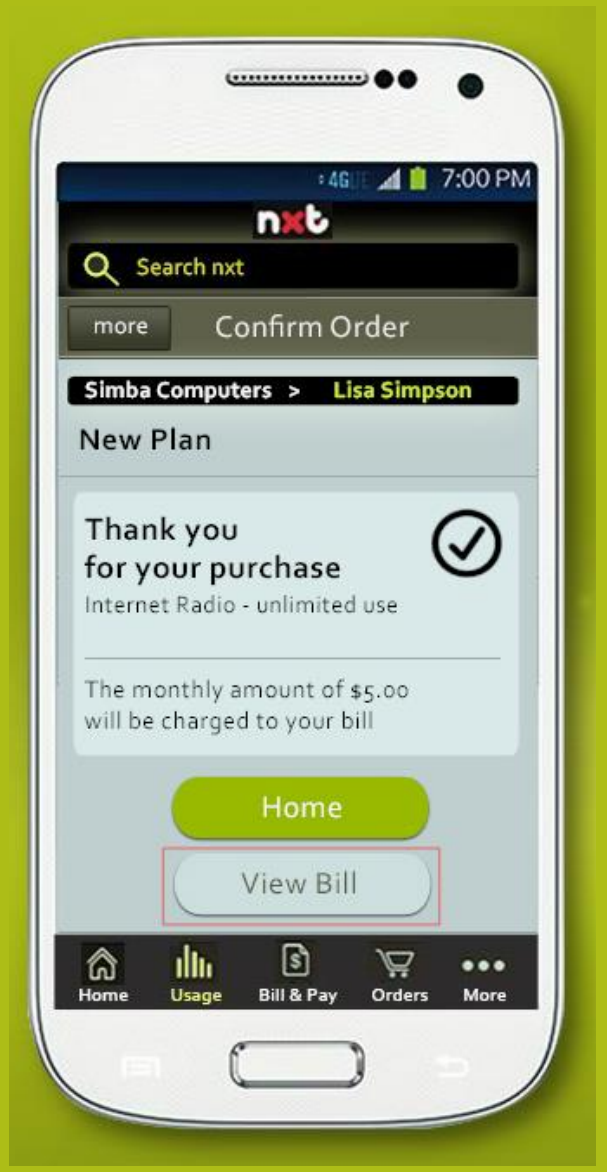
Scenario 3: Billing & Support

Customer Mobile View


7:00 PM
nxt
Search nxt
home
Notifications
February bill is ready
7 March 2014
Third-Party cahrge/s on the bill
3rd March 2014
Shared Usage Allowance 95% used 6 days before end of cycle
Home
Usage
Bill & Pay
Orders
More


7:00 PM
nxt
Search nxt
Simba Computers > Lisa Simpson
Current Usage
cycle ends in 10 days
100 Minutes
70/100 Minutes
70%
200 Messages
165/200 Mesages
82%
20 GB Data
18/20 GB
94%
Special Offer
Internet Radio
$5.00 per month
Home
Usage
Bill & Pay
Orders
More


7:00 PM
nxt
Search nxt
back
Order Summary
Update Your Data Plan
Internet Radio
Unlimited use
Total Monthly:
$5.00
By clicking update now you will confirm
Terms & Conditions
Update Now
Home
Usage
Bill & Pay
Orders
More


4G
7:00 PM
nxt
Search nxt
more
Confirm Order
Simba Computers > Lisa Simpson
New Plan
Thank you
for your purchase
Internet Radio - unlimited use
The monthly amount of $5.00
will be charged to your bill
Home
View Bill
Home
Usage
Bill & Pay
Orders
More

7:00 PM
nxt
Search nxt
home
Bill & Pay
Balance Due $262.30
AutoPay to be appllied on 10-Jan-2012
AutoPay Settings
Pay With Card ***1234
Payment Options
February Bill 01-Feb to 28-Feb 2014
Bill History
Sep $130.20
Oct $270.80
Nov $250.20
Dec $262.30
Home
Usage
Bill & Pay
Orders
More