

## GX (EXEC) Overview

### Conferencing Overview

Site Name	Site Id	Product	Payment Type	SKU	Trials?
	17	SMB	Pay as You Go	CR\$\$	Yes
		SMB	Monthly	CM\$\$	Yes
		EXEC	Signup	GX00	No
		EXEC	Non-Reservation (Daily)	GX01	No
		EXEC	Reservation (Scheduled)	GX02	No
	8	Caller	Pay as You Go	CR\$\$	Yes

The above table puts the GX (EXEC) product into perspective within the overall Conferencing product offering. Throughout this document we will use GX and EXEC interchangeably.

The GX (EXEC) product is a separate offering from the SMB product and is only available through

Originally, it was intended that a customer would be able to select only one of the products – either EXEC or SMB (we originally had a third offering which is no longer available). However, with customers performing trials of the SMB product or originally selecting the SMB product and then determining they want EXEC, we evolved our configuration to allow customers to actively utilize both products at the same time under the same account. The terminology Mixed or BOTH represents this type of customer.

The GX or EXEC product is broken down into two types:

- Non-Reservation – this is a daily usage subscription-based product
- Reservation – this is non-daily usage where conferences are requested and scheduled through a separate custom process

When we refer to the GX (EXEC) product, we are typically referring to the Non-Reservation or daily usage product.

### GX Signup Overview

A GX (EXEC) customer performs a signup on and submits their contact and payment information. The signup request is sent to the back end as a new order where it is evaluated for processing. If it is processed, the customer is charged for a \$50 deposit and a subscription is created for the customer to be utilized with the account. Subscription information is emailed to the customer.

- The GX (EXEC) signup is considered to be the Master Account. Most GX (EXEC) signups will only have the Master account and the initial subscription.
- The Master account contact and subscription information is stored at as well as in our local tables.
- Master accounts may add additional subscriptions to the Master account.
- Master accounts may also add Sub-accounts that each include a subscription. For this to work, the Master account is changed from User to Power User to have the ability to manage the Sub-accounts.
- The Sub-account exists only at the local level; as far as is concerned, there is only the Master account and all subscriptions belong to the Master account.

## GX Customer Identification

The mechanism for identifying a GX (EXEC) customer is different between [REDACTED] and for our local records as summarized below. We have used one of our primary customers as an example to reflect this:

Field Name	Our Value	[REDACTED]
Customer Id	[REDACTED]	[REDACTED]
Email Address	[REDACTED]	[REDACTED]
Wholesale Customer Id	[REDACTED]	[REDACTED]
SP Unique Id	[REDACTED]	[REDACTED]
Client Id	[REDACTED]	[REDACTED]

*Note: The table above reflects one reason why it is so important to perform the custom process for changing a GX (EXEC) email address in the system as this is a primary mechanism for identifying the customer that is shared between our two systems.*

## GX Billing Overview

Billing for the GX (EXEC) product is handled in a much different way than for the SMB products – PAYG and Monthly. As the customer utilizes the subscription, charges are accumulated and are recorded by our service provider, [REDACTED].

Each weekday, including holidays, [REDACTED] runs a process on their system that accumulates the billing charges for this activity and assigns them for processing. These charges are added to a billing file which is created and placed on an FTP site managed by [REDACTED] where the file is available to be downloaded and processed at our convenience.

Each weekday, we download the billing file and run a local program that processes the records in the billing file one line at a time. This process inserts customer, conference, and detail billing records into our local tables and assigns these records to the specific customer.

Next, we run a second program that accumulates the detail billing records for each customer and determines the associated total amount for each customer. For each customer, there are two amounts that are calculated:

- Wholesale/Incoming or Cost – this is the amount for the service that is charged to us by [REDACTED].
- Retail/Outgoing or Charge – this is the amount for the service that we charge the customer and is based on a markup from what we are charged by [REDACTED].

Each line item detail record corresponds to the type of service known as the Chargeable Item. As an example, the LONG DISTANCE Chargeable Item Type for USA has a Chargeable Item Code of L8R. The calculated amounts are based on the Units of usage, which in this case are minutes. The Cost for L8R is \$0.19/minute while the Charge is \$0.43/minute. The accumulated Charge amount for all line items for one customer is then charged to the customer to complete the billing process and an email is sent to the customer reflecting the charge. This is done for all customers with charges for that day.

*Note: The Cost component is confidential and this information should never be provided to the customer.*

*Note: Most Chargeable Items have a second line item called a PACKAGE SURCHARGE associated with the charge. Also, certain other charges associated with subscription usage are considered value added charges (such as recording services) and are not charged at the same time as regular subscription charges. These charges may come as much as two months later depending on the cycle for processing. It is important to be aware of this as customers may be confused about receiving a billing charge many weeks later after having a conference.*

## Conferencing Customers

### Image Removed

There are two primary ways to access a GX customer – both from the CSR Main Menu (Conferencing):

- GX (EXEC) Administration Menu – this is the original product module that was used prior to the creation of the Audit System.
- Conferencing Customers – this is the preferred manner to access a customer as it provides the appropriate links available through the GX (EXEC) Administration Menu but you also see the critical Audit System information in Customer Detail.

In Conferencing Customers, the default display lists all customers that have signed up for the current date. Enter either the Customer Id or Email Address to locate the customer which also overrides the selected date range, so the Start Date and End Date do not need to be changed.

The Email Address is based on a Search so you may enter just a portion of the Email address (such as the domain), but keep in mind these customers are generally business accounts and may have multiple Master and/or Sub-accounts so make sure you identify the proper account.

*Note: It should display as EXEC (17) in the Site Id column if it is a GX (EXEC) customer.*

## Customer Detail – Customer Overview

### Image Removed

Once you have located and selected the customer, the customer is displayed on the Customer Detail page. The critical section to be aware of for a GX (EXEC) customer is the Customer Overview:

- Site/Product should be displayed in one of two ways for a GX (EXEC) customer:
  - EXEC (GX ONLY)
  - EXEC (BOTH) - for a Mixed customer
- As mentioned above, any Email Address change for an EXEC (GX ONLY) or EXEC (BOTH) customer MUST be performed through the EXEC Email Address Change link to make sure all locations are updated.
- The Customer Billing Dashboard and Customer Home links provide direct access to the critical pages in the old GX (EXEC) Administration Menu to perform whatever actions might be necessary to manage the customer account.

## Customer Billing Dashboard

### Image Removed

The Customer Information section primarily contains fields for identifying the customer as well as the Customer Status which is displayed as Status (Local):

*Note – this is the same field as Cust Status from the Customer Detail page in the Audit System.*

### Customer Status

Status	Explanation
<b>Active</b>	
<b>Suspended</b>	This status is utilized for a customer with a credit card decline to indicate the service has been suspended and includes all subscriptions being deactivated.
<b>Closed</b>	This status is utilized when we close out a GX Only customer.
<b>Mixed</b>	This status is utilized to reflect an Active customer that has been closed out for GX but is still using the SMB product.
<b>Inactive</b>	This status is utilized to reflect a customer that submitted a signup request that was not processed and was set to Inactive.
<b>Fraud</b>	This status is typically not used for GX (EXEC) so it reflects a customer that submitted a signup request that was not processed and was determined to be fraudulent or it may be the result of a <b>Mixed</b> customer that was frauded out for SMB usage.

As mentioned above, SP Unique Id and Chairperson ID represent service provider values used to identify the customer at [REDACTED]. The Customer Type value is usually going to be SP Unique Id as this represents most customers but there are some that are identified by the Chairperson or Client ID value.

Reservation customers are displayed in the top right of the page as **Active** or **Inactive**. At this point, we only have one Active Reservation customer so this is not a significant issue. Reservation customers have conferences scheduled through a separate process and are charged at the time the reservation is scheduled. The detail billing records still come through the daily billing file but are excluded from being charged as the charge is processed when the reservation conference is scheduled and confirmed with the customer.

*Note – A Reservation customer may also have a subscription and corresponding daily usage so it is important to track Active Reservation customers when conferences are scheduled to keep reservation and subscription based charges separated. This can be tricky so we are fortunate right now that our only Active Reservation customer does not utilize subscription based services.*

The Prepaid Customer Account Information section contains the fields used for charging the customer during billing:

- You can ignore the Ceiling, Floor, and Current Balance for the most part as those fields are used to manage the pre-payment status in billing – a customer starts out with a \$50 deposit and is charged upon usage to bring the account back to the \$50 balance.
- The Account Number and Expiration are the values for the credit card that will be used during daily billing so any changes provided by the customer should be entered here (no spaces or dashes and Expiration should be MMY format).

- The Last Bill Date indicates the last successful charge and is a good indicator of whether the customer is actively using the service. *Note – you should also select the Credit Card Declines button to check if there was a declined charge since the last successful charge date if trying to confirm customer activity.*
- Active should be set to True for a customer that is currently using the service. When a customer charge is declined, this value is changed by the system to False so we must make sure we change back to True when updating a credit card for a customer with a declined charge. *Note – the Active = True/False field reflects whether the customer is Active for billing and does not represent Cust Status from the Customer Detail page in the Audit System.*

Signup Date and the Amount field to the right of Customer Payment History are important fields to notice as a large number of our GX (EXEC) customers are long-time users of the service which is a significant consideration when making evaluations. Additionally, as this system has been in place for around 12 years, it is difficult to run a Billed Detail Report, Billed Detail Report (B), or Customer Conferences Listing for some of these customers with a tremendous amount of usage without the system timing out. For this reason, we have provided a Start Date and End Date field which should be set when looking at these reports so that only the specified information is included in the search.

For example, to view all billing detail records for a customer charged on 2/5/19, you would enter a Start Date of 2/5/19 and an End Date of 2/6/19 and select the Billed Detail Report (B) – which lists detail billing records by billing date. Also, make sure to select Clear to remove the date range values when finished or the Amount values will be distorted and confusing.

## GX Troubleshooting Matrix

The GX Troubleshooting Link at the bottom of the page is not typically needed as most of this information is available in other locations. However, this section can be useful if you did not come into the Customer Billing Dashboard through Customer Detail.

At the top of the page, Customer Type will be GC ONLY (GX) or BOTH. At the bottom of the page, there is a chronological listing of orders in reverse date sequence that includes the SKU value for each order so you can easily separate the product and charge date which is extremely helpful in evaluating GX (EXEC) customers for close out. For a Customer Type = BOTH, if there is fairly recent SMB usage we will need to set the customer as **Mixed** as part of the close-out process to make sure they have access to manage the SMB portion of the account.

**Image Removed**

Orders Listing for Site Id = 17						
Id	Date	T-Id	O-Stat	N-Stat	SKU	Total
562647	2/11/2019	12345	C	N	<b>GX00</b>	50.00

## Customer Home

Customer Home primarily contains functions that interact with   through the API but also includes some other account management functions.

## Image Removed

SPUniqueid: GCStatusString=OK;OK OK;;1;OK;OK;2; is actual output from a call to the [REDACTED] API to determine the customer status with [REDACTED] and is used to display the value for Customer Status (GX).

The Quick Links section provides easy navigation within the Customer Home page (except for Admin Menu which goes to the GX (EXEC) Administration Menu. This is helpful as some of our customers have a large number of Sub-accounts and/or Subscriptions.

The Profile section contains identifying information for the customer but there are several actions that may be performed:

- Most customers are set to a User Level = User. A Master account that will be adding Sub-account values should be changed to Power User to allow that account to manage the other Sub-accounts. The Administrator level is not used.
- Customer Status (Local) is detailed above. This is where we may suspend or close-out a customer. If the customer is considered to be **Mixed** due to recent SMB product usage, we do not want to change this value to Closed but will instead leave the status as Active. In this case, the Billing and Administration section below will have a Set Mixed (SMB) ON button to reflect this designation and the Customer Status (Local) value will show as **Mixed**.

---

### Sub-Accounts

#### Hints

\* Click Delete Sub-Account button to **Delete** a Sub-Account. You will select the Sub-Account to delete on the next page.

The Sub-Accounts section displays any Sub-accounts for the displayed account. Sub-accounts are discussed previously and exist only at the local level. You may add (which also provides the option to add a subscription for the Sub-account) or delete a Sub-account here. If a Sub-account is selected, note that in the Profile section that Customer Status (GX) has been changed to Parent Account and a link is provided to return to the corresponding Master account.

## Image Removed

The Subscriptions section lists all subscriptions for the selected account and is where any actions to manage subscriptions may be taken:

- The Email Address reflects the owner of the subscription which will be the Master account unless there are Sub-accounts under the Master account.
- Status may be Active, Inactive, or Deleted. If Active or Inactive, click the Status link to Activate, Deactivate, or Delete the selected Subscription. *Note – this is a two-step process.*
- If the subscription is Active at [REDACTED], the Access Code, Chair Pass Code, and Subscription Size will be displayed. To change these values, enter or select a new value and click the Subscription ID button in the “**Click to Update**” column to complete the change in settings for the selected subscription. An email is sent to the customer. *Note – the Access Code, Chair Pass Code, and Subscription Size values are not stored locally and are only available from [REDACTED].*

- Click The Subscription ID button in the “**Change Account**” column to select a different Customer or Sub-Account for the selected subscription (choices will be available on the subsequent page). This option also allows you to change the subscription settings for the selected subscription.
- **Subscriptions = 56** is actual output from a call to the [REDACTED] API to determine the active subscriptions with [REDACTED] for the selected customer. *Note – this value does not include Inactive or Deleted subscriptions.*
- A subscription may be added using the Add Subscription button at the bottom. Certain values may be filled out or may be auto-generated by the system.

## Steps for Suspending a Customer

As previously mentioned, the **Suspended** status is typically utilized for a customer with a credit card decline. We may also utilize this status for an Active customer who has not used the product for a while and has credit card information that has expired.

For a credit card decline, the customer receives a corresponding notification email. This typically does not result in action from the customer so, depending on the length of time as a customer, total usage, and amount of the decline, we will typically try to contact the customer to request updated credit card information. If we fail to hear back or obtain this information, we suspend the customer until we do have credit card information to charge the account and reactivate.

The following are the steps to suspend:

- In the Prepaid Customer Account Information section of Customer Billing Dashboard, Active will be set to False automatically by the system when a customer charge is declined. This value must be set back to True when updating a credit card for a customer with a declined charge to include in the daily billing as well as to allow the customer to log into the account.
- In the Profile section of Customer Home, the Customer Status (Local) value is changed from Active to Suspended. This value will need to be set back to Active to attempt a billing charge for a customer when updated credit card information has been obtained.
- In the Subscriptions section of Customer Home, all subscriptions with a Status of Active will need to be changed to a Status of Inactive. This is a two-step process initiated by clicking the Active link. *Note – after clicking the Active link, there are two button options. Make sure to select Deactivate Subscription and NOT Delete Subscription when suspending a customer.*
- Some customers may have a number of Active subscriptions and/or subscriptions that they have already set to Inactive. In these cases, it is worthwhile to make an extra effort to follow up in obtaining credit card information as suspending and activating such a customer can be a time consuming process. If it is necessary to suspend such a customer, it is important to note the subscriptions already set to Inactive so that they are not set to Active when the customer is activated upon a successful billing charge.

## Steps for Closing a Customer

We have just completed an exercise where we evaluated the subscription status and last usage for all of our customers and deleted all subscriptions that had not been used since 7/1/17. After this step, we evaluated and made a status determination on each customer. The table below indicates the Status breakdown of our customers upon the completion of this process on 2/11/19.

## Customers

Active	Mixed	Suspended	Closed	Signup Fail	Total
73	37	3	512	127	752

We will perform this exercise again periodically as a maintenance task to reduce our exposure to malicious activity, but we may also need to close an account at a customer's request. There are a number of steps required to properly evaluate and close an account based on the complexity of the product setup, but all steps will not be necessary for all cases. In this section, we will list each step required in order with a minimum of explanation as the details are covered in the earlier parts of this document, so it would be advisable to review this document before initiating the process.

In some cases, there are multiple ways to perform a step or to obtain required information. The steps provided here are based on the assumption that this is being done as a maintenance task that will involve evaluating many customers, so we have isolated the actions to the GX (EXEC) Administration Menu module so the Audit System is not required.

See the section at the end that describes the details of the [Customer and Subscription Maintenance](#).

### Steps:

- Select the GX (EXEC) Administration Menu link from the CSR Main Menu (Conferencing).
- Select the Customer Administration link. From here, the customer may be displayed by entering the Customer Id or Email Address.
- From the Customer Billing Dashboard, select Troubleshooting Matrix.
- In Troubleshooting Matrix, we are looking for two things:
  - Determine if Customer Type is GC ONLY (GX) or BOTH.
  - In the Orders Listing at the bottom, determine the last usage by product type depending on if the Customer Type is GC ONLY (GX) or BOTH. As discussed earlier, we will only close out the GX portion if the Customer Type is BOTH and the customer has recent order activity for a SMB product (this will be a **Mixed** customer).
- In the Prepaid Customer Account Information section of Customer Billing Dashboard, set Active to False and click Update Account (leave alone if a **Mixed** customer).
- Go to Customer Home – the remaining actions are performed from this page.
- Go to the Subscriptions section:
  - Check the Subscriptions = # count and make sure it reconciles with the number of Active subscriptions displayed in the listing below or there may be a mismatch that needs to be reconciled in what is stored at [REDACTED] against our local tables. *Note: As of 2/11/19, we have an exact match between subscription information at [REDACTED] and in our local tables.*
  - For each subscription with a Status = Active, perform the two-step process to delete the subscription.
  - For each subscription with a Status = Inactive, you will need to perform the two-step process to first make the subscription Active to then be able to perform the two-step process to delete the subscription.
  - When finished with deleting all subscriptions, check the Subscriptions = # count and make sure it = 0.
- Go to the Sub-Accounts section:



- Most customers do not have Sub-Accounts so this step can be skipped.
- If the customer (Master Account) does have Sub-Accounts, click the link on each Sub-Account and perform the Sub-Account close-out:
  - Any subscriptions should have already been deleted in the previous step.
  - In the Password section:
    - Select Close Password GX.
    - Select Close Password Cust.
  - In the Profile section:
    - Change Customer Status (Local) to Closed and select Update Local Status.
    - Click the Parent Account link to return to the Master Account and perform these steps for each Sub-Account.
- Go to the Password section (leave alone if a **Mixed** customer):
  - Select Close Password GX.
  - Select Close Password Cust.
- In the Profile Section:
  - Change Customer Status (Local) to Closed and select Update Local Status (leave alone if a **Mixed** customer).
  - For a **Mixed** customer, leave Customer Status (Local) = Active and instead select the Set Mixed (SMB) ON button in the Billing and Administration section.
  - Change the Customer Status (GX) setting by selecting the Discard Account button which closes out the account at [REDACTED]. This step IS also performed for a **Mixed** customer.

## Customer and Subscription Maintenance

- An alert has been added to the GX Alerts to set **Customer and Subscription Maintenance** as an annual task performed in February.
- The initial exercise involved evaluating subscriptions based on a last usage date of 7/1/17 which allowed us to separate out subscriptions based on usage within the previous 18 months. With this in mind, the maintenance to be initiated on 2/1/20 should evaluate based on a last usage date of 7/1/18.
- To perform the maintenance, we will need to request two reports from [REDACTED]:
  - Last Used Report
  - Subscribers Report
- Delete all subscriptions identified in the Last Used Report that have no activity since 7/1/18.
- Once the subscriptions portion has been completed, utilize the Subscribers report (eliminate duplicates) to identify all customers in the [REDACTED] system. Go through these customers one at a time systematically to determine:
  - Does an Active customer need to be Closed or set to **Mixed**?
  - Does a **Mixed** customer need to be Closed?
  - Does a **Suspended** customer need to be Closed?