

Sign-Up Wizard Procedure

Introduction

Engage IP's Sign-Up Wizard was created to finesse an existing function and has met its' goal of simplifying and enhancing the Sign-Up a User process. Essentially, there are two ways to Sign-Up a User. One can be considered manual; while the other, the wizard, can be viewed as considerably faster and preferable, with same value function. We suggest that the administrator use the Sign-Up Wizard, but would like to bring to the reader's attention that our standard Engage IP Sign-Up process will continue to exist alongside the wizard to be used for backup purposes.


Getting Started

When using the Sign-Up Wizard there are certain criteria that will need to be adhered to. For example, the settings and data you input into the wizard are temporarily saved in the Engage IP server's memory; it is currently configured to give the administrator 30 minutes to complete each Sign-Up process. Therefore, if gone from the computer too long the wizard automatically logs out after this set time frame and all information will be lost, including any reserved hardware or service options inputted to this point.

Another simple, but mandatory step, is to fill in all fields with a blue asterisk beside its' field request, before continuing on to the next page:



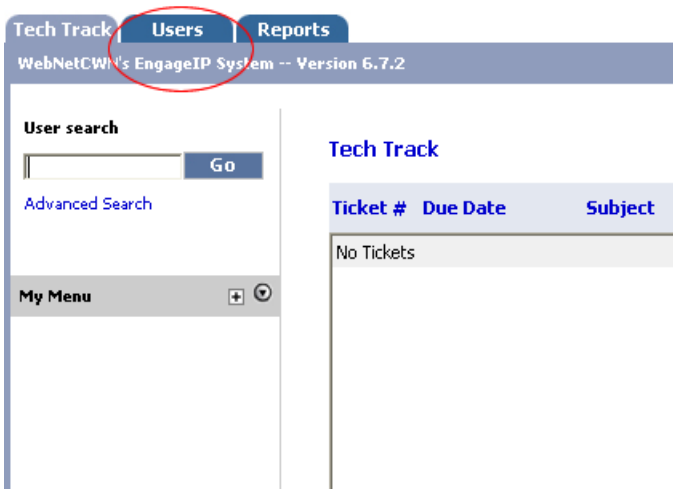
A further specific requirement when navigating through the Sign-Up Wizard process is that the administrator must only use the **Prev** and **Next** buttons to go back and forth within the wizard. Further to this end, understand that this also extends to the web browser equivalents. Essentially, only use the **Prev** and **Next** buttons as seen below, or lose all data and settings inputted in that session:



How to Use the Sign-Up Wizard

A login form with two input fields. The first field is labeled "Username:" and the second is labeled "Password:". Both fields are highlighted with red ovals. Below the fields is a blue button with a right-pointing arrow and the text "sign-in".

Login into Engage IP, with the username and password that has been provided to you.



Select the Users tab at the top of the screen.



Select the **Add User (Wizard)**.

Clicking this link will activate the Sign-Up Wizard process.

Select Customer Type (Step 1 of 8)

Customer Types:

Residential

Business

In this step you will select the option that best suits the type of customer you are adding into Engage IP. A selection is required to move to the next screen. Once you have selected customer type, click **Next**.

Select Service Type (Step 2 of 8)

Service Types:

ISP

VOIP

Here you will select the Service Type options that need to be added to a customer's account. You can select one or both, before clicking **Next**.

Select Services (Step 3 of 8)

Services:

ISP

WebNet Residential Internet

VOIP

WebNet North America Plan VoIP

Here the system has filtered services based on the options selected in the previous steps. (i.e. ISP and/or VOIP). Choose the service being requested by the customer and then click **Next**.

NOTE: This list will change as new services are added and old services are removed. An example may be a promotional service temporarily added as a selectable item, but removed after the promotion is dated. Please know your services, as this list is adjustable and set accordingly.

User Account Information (Step 4 of 8)

User Information:

*New UserID:

*Password:

*Verify Password:

Date Added:

Tax Description:

Agent:

The User ID will be the username or unique identifier of the anchor account, and is to be chosen by the client.

The password is also chosen by the client, and is visible in plain text for trouble-free use.

Once the username and password have been decided and verified, click **Next**.

This action will prompt the administrator to Add User Account Information, as seen on the next page, where the following information is to be inputted:

1. User Information Fields (obvious and provided by customer or Service Agreement for input)

2. Check Boxes:

Block General Emails - do not check unless customer specifically requests.

Same for Billing – if this is checked you will see the contact equivalent of the billing information pre-populated and grey out (as seen in next screen shot on page 6)

3. Always select the **Mail Domain** webnetcwn.com for default email.

4. User Account Validation, to be filled in as needed:

Expiry Date	The date on which the account will expire.
Birth Date	The primary contact's birthday, used for internal purposes or as a personal verification on the account.
Personal Validation Question	Optional field used for recording notes. Value entered in this field will be displayed on the account's main screen.
IP Address	The IP address assigned to the user.
Personal Verification	Optional field containing information about the account that can be used during support calls to verify the account.

User Account Information (Step 5 of 8)

Contact Information:		Mail Domain: webnetmail.ca	
*First Name:	<input type="text"/>	Expiry Date:	<input type="text"/> <input type="button" value="Select"/>
*Last Name:	<input type="text"/>	Birth Date:	<input type="text"/> <input type="button" value="Select"/>
Business Name:	<input type="text"/>	Personal Validation Question:	<input type="text"/>
Contact Name:	<input type="text"/>	IP Address:	<input type="text"/>
Contact Title:	<input type="text"/>	Personal Verification:	<input type="text"/>
*Address Number:	<input type="text"/>	Territory:	Name of Dealer
*Street Name:	<input type="text"/>		
Address2 (non-E911):	<input type="text"/>		
Apt. #:	<input type="text"/>		
*City:	<input type="text"/>		
*Prov/State:	British Columbia		
*Country:	Canada		
*Postal/Zip Code:	<input type="text"/>		
*Phone #:	<input type="text"/>		
Alternate Phone #:	<input type="text"/>		
Fax #:	<input type="text"/>		
*E-mail Address:	<input type="text"/>		
Block General Emails:	<input type="checkbox"/>		
Same for Billing:	<input type="checkbox"/>		

Block General Emails: When emails are sent from the Auto Emailer Tool, they can be flagged as General and sent to all. However, if this option is selected to block, then they will not receive them. Therefore, only check if customer requests this to be done. **NOT RECOMMENDED TO SUGGEST.**

Essentially, fill in pertinent information, as defined above, and click **Next**.

NOTE: The Contact Address: Address Number, Street Name, City, Prov/State and Postal/Zip Code; must conform to E-911 validation standards.

E-911 Validation Standards

Essentially, this means that WebNet Global provides an E-911 Dialing feature as a means of supporting safe and reliable communication in times of emergency; know this feature must be activated in advance. To activate E-911 Dialing you will have to fill out a short form during the sign up process that tells us of your customer's location information.

If a client moves their device to a different location, they must update their E-911 Dialing information with their new address. If a line is added to the account, then this new line will also need to be activated and registered to utilize the E-911 Dialing feature.

A client will not be able to reach their local emergency response center until we confirm that the location has been registered and/or updated. A customer will receive a confirmation email once an E-911 Dialing device has been activated for an initial location and/or for a newly registered line or location.

User Account Information (Step 6 of 8)

Billing Information:

*Accounts Payable Name:

Purchase Order Number:

*Address:

Address2:

Apt. #:

*City:

*Prov/State:

*Country:

*Postal/Zip Code:

*Phone #:

Fax #:

E-mail Address:

Payment Term:

*Account Holder:

Market:

Credit Card

*Pay Via: Invoice

Pre-Auth Payment(PAP)

If, in the previous step, you selected **Same for Billing**, you will see the contact equivalent of the billing information grayed out here, as seen in this example.

However, if this checkbox was not checked, then you would fill in the address of where the client would like the bill sent.

Fill in necessary information and click **Next**.

Credit Card

*Pay Via: Invoice

Pre-Auth Payment(PAP)

Credit Card:

Credit Card #:

Expiry Date: / (mm/yyyy)

Credit Card

*Pay Via: Invoice

Pre-Auth Payment(PAP)

Bank:

Routing Number:

Account #:

Account Type:

When selecting the **Pay Via** options there will be additional credit information to be added based on your selection (as seen in the image to the left).

Input necessary credit information as needed, each of these fields is required for billing purposes. When complete, click **Next**.

Hardware Selection: (Step 7 of 8)

The screenshot shows a form with two rows of service selection options. The first row is for 'WebNet Residential Internet' with a dropdown menu set to 'TR-CPQ-15f', a 'Quantity' dropdown set to 'Select', and a dropdown menu set to 'CPE Enhanced Mobility Kit 1 Charge'. The second row is for 'WebNet North America Plan VoIP' with a dropdown menu set to 'iAN-02EX', a 'Quantity' dropdown set to 'Select', and a dropdown menu set to 'VOIP 1 Charge'. At the bottom right of the form are two buttons: 'Prev' and 'Next'.

From the services you have selected in the previous steps it will group the device models and their payment options.

Hardware Selection: (Step 7 of 8)

This screenshot is identical to the previous one, but the dropdown menus for 'TR-CPQ-15f' and 'iAN-02EX' are circled in red to highlight the device model selection step.

First, select a device model:

For each device model you would like to attach to the Customer's Account, you must make a request for a Quantity of them (even if it is singular), and then assign it to a payment option.

Hardware Selection: (Step 7 of 8)

This screenshot is identical to the previous ones, but the 'Quantity' dropdown menus and the payment option dropdown menus ('CPE Enhanced Mobility Kit 1 Charge' and 'VOIP 1 Charge') are circled in red to highlight the payment selection step.

The first payment option available is automatically selected; this can be changed to reflect need. If you mistakenly select an incorrect quantity, or request a device model not needed, or no longer wish to attach device; then simply chose the **Select** option in the Quantity Field to cancel out the request. Once accurately filled in, click **Next**.

Provisioning: (Step 8 of 8)

WebNet Residential Internet: TR-CPQ-15f

Enter MAC:

*MAC Address:

Here you will only see an option for inputting a MAC address of the device model.

Entering a MAC Address protocol:

- The MAC address must be entered in the following format: xx:xx:xx:xx:xx:xx
- Where x is assigned based on any number 0 through 9 or letter A through F
- This address can be found on the physical device and/or its packaging box
- Clicking the **Find MAC** button will temporarily reserve this device for this Customer Account so that it cannot be used by another.

VOIP ONLY - Provisioning

If in the previous step you have selected a VOIP device, you will not only see an option for the MAC address, but also options for assigning a phone number and verification options of the emergency service device location (E-911 Dialing Information).

WebNet North America Plan VoIP: iAN-02EX

Enter MAC:

*MAC Address:

*Phone Number:

Change Address if Device Location is different

Verify Device Location for Emergency service as required by law

*Address Number:

*Street Name:

*City:

*Prov/State:

*Country:

*Postal/Zip Code:

NOTE: Clicking the **Change** button will launch the Phone Number selection tool.

Search for WTN

Country: Cnd ▾

Prov/State: British Columbia ▾

Area Code: 604 ▾

Select City: Vancouver ▾

Select City Code: 638 ▾

WTN

604-638-5085	Assign
604-638-5088	Assign
604-638-5089	Assign
604-638-5090	Assign
604-638-5091	Assign
604-638-5092	Assign
604-638-5093	Assign
604-638-5094	Assign

After you select the Country, Prov/State, Area Code, City, (and optionally, the city code) the system, by design, will find available Phone Numbers for that area.

Note: Currently the Sign-Up Wizard does **not** restrict the phone numbers by the Customer's Contact location. Therefore, it is possible to assign a Calgary, Alberta number to a customer in Vancouver, British Columbia.

Clicking on the **Assign** button will temporarily reserve this phone number for this customer so that it cannot be used by another account. ...**(end of VOIP Provisioning Only)**

Clicking the **Finish** button will actually create the Customer Account; in addition to attaching services and hardware permanently. This button should only be clicked on once.

Processing Results:

Product: WebNet Residential Internet; TR-CPQ-15f, **Attached to Account:** shawn_july17_02
Account Name: shawn_july17_02_child1 **is created.**
Product: WebNet North America Plan VoIP; iAN-02EX, **Attached to Account:** shawn_july17_02_child1
Tried Provisioning WTN: 604-755-1748

[View Account](#)

After the system finishes processing the data it should display a status log of the results; any failures to create an account, or attach services and hardware, should be displayed here. If everything goes correctly you will see similar results, as above.

Clicking on the **View Account** button will take you to the newly created account in Engage IP, at which point normal Engage IP processes resume.

NOTE: It is recommended at this point that you check the Customers Account to ensure that all the settings, services, and devices have actually been saved correctly in Engage IP. In the event that an error occurs, please take note of the message (if possible) and contact the manager at your early convenience; particularly, if the Sign-Up Wizard is in a non-functional state or the error occurs repeatedly.

Sign-Up Wizard Verification

User Utilities > shawn_july17_03

Company:
User ID: shawn_july17_03
Web Login:
Contact: shawn_july17_03
 shawn_july17_03
Dealer: STR1_DLR1_RICHMOND_BC_CA
Agent: mgr1str1dlr1richmond
Address: 20777 lorne ave
Address2:
City: maple ridge
State: British Columbia
Phone: 123-1234
E-mail: fdsa@fdsa.com
Mail Client: fdsa@fdsa.com
Used for:
Balance: \$102.55

Tickets		
#	Subject	Due Date

Total support incidents this month: 0

[New](#) [View All](#)

Memo

WebNet Residential Internet NBD:8/17/2007



User Profile

- Contact Info
- Billing Info
- Change Web Login

- **Services**
- Radius Attributes
- Child Accounts (1)



Reports and Notes

- Event Log
- Call History
- Time Usage
- Bandwidth Usage
- Notes (0)

To verify a service (Residential ISP, in this case), you should see the service either displayed directly on the User Utility Screen or within the Account Services screen. If it's not attached to the account then you should do so manually, and send a bug report to the manager or system administrator to notify.

WebNet Global Communication Ltd.

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