



OPTIMIZE YOUR REV.IO EXPERIENCE

Overseeing sophisticated billing and customer management systems can be complex. To streamline processes and maximize user efficiency, the software you employ should provide a wide array of configurable features and options.

At Rev.io, our sophisticated billing platform is supplemented by **Rev.io Modules** to help you get the most value out of our system and enhance your billing and back-office management experience. From Processes and Tasks to Ticketing and Collections, you can deploy our platform to the specific nuances of your business and customer base.



PROCESSES

What is it? A series of tasks to manage complex workflows associated with your Orders, Tickets, and Requests.

How does it work? A process contains multiple phases, with each phase featuring individual tasks that serve as to-do items. For each phase, you can assign routes to direct specific work in a certain direction. You can manually add processes to Orders, Tickets or Requests, or you can also configure the system to automatically assign a process to specific Orders or Tickets.

How does it interact with billing? The task list for Orders, Tickets, and Requests notifies selected team members when a specific activity is needed from them.

Why is it important? The Processes module provides clarity and organization for your team to keep your billing management and payment interactions efficient and timely, ensuring that all steps of a workflow are completed.

A screenshot of the 'Edit Process' interface in the Rev.io system. The interface has a dark grey header bar with navigation links: Home, Customers, Activity, Agents, Reports, and Settings. Below the header, there's a search bar and a 'Welcome to Demo' message. The main content area is titled 'Edit Process' and contains several sections. The 'Process' section has fields for 'Name' (set to 'New Voice Service'), 'Type' (set to 'Order'), and a checkbox for 'Active' which is checked. The 'Auto Assign' section has dropdown menus for 'User' and 'User Group', both currently set to '--None--'. Below this is a 'Phases' section with a 'Show' toggle set to 'Active'. A table lists various phases with their names and associated actions. The table has a dark grey header row with 'Phase Name' and two columns for actions (up/down arrows and an 'Options' button). The phases listed are: Customer Confirmation, Inventory Management (Optional), Determine if Site Visit Required, Site Visit (Optional), Order, FOC Received, Turn Up Phase, Billing, and Billing Confirmation. Each phase has corresponding up/down arrows and an 'Options' button.



What is it? Our ticketing system is used to create and manage customer inquiries and trouble tickets within your instance of Rev.io's billing platform.

How does it work? The Ticketing module is configurable and customizable based on your unique business needs. You can configure Ticket Types, Ticket Statuses, Steps, and Priorities. You can also configure custom email templates to automatically notify customers and/or internal users as required.

How does it interact with billing? The Ticketing module uses custom fields and numerous status options to provide the most granular customer management experience possible. You also have the ability to add charges or credits to an account directly from the ticket if that ticket should incur a billable item.

Why is it important? The Ticketing module allows you to easily interact with your customers when they have questions or issues with their service to maintain seamless communication with your customers and internal team, while providing visibility to your team within one platform when there are any issues affecting an account. Ticket history is viewable on the customer account so your team has visibility into any issues right from the billing platform.

A screenshot of the Rev.io Ticketing module interface. The top navigation bar includes links for Home, Customers, Activity, Agents, Reports, and Settings. The main header shows "Welcome to Demo" and a user profile icon. The "Tickets" section has a search bar and a "Create Ticket" button. Below this is a form with various filters: Status (set to "--ALL ACTIVE--"), Created By (set to "--ALL--"), Assigned To (set to "--ALL--" with a "Clear" link), Step (set to "--Select One--"), Type (set to "--Select One--"), Priority (set to "--ALL--"), User Group (set to "--ALL--"), Customer Class (set to "--ALL--"), Associated Ticket (empty), Bill Profile (set to "--ALL--" with a "Clear" link), View (set to "List View"), and a checkbox for "Requires Route Decision". There is also a "Custom Status" dropdown set to "--ALL--". At the bottom, there are options for "Export" (with icons for CSV, PDF, and Print), "Page Size" (set to "--"), "Record Count: 200", and a "Filter Results" section with a search bar, "Filter", and "Clear" buttons.



COLLECTIONS

What is it? The Collections module allows for a seamless and automated process for notifying customers of past due balances and managing the collections workflow for past due accounts.

How does it work? The Collections module allows you to create as many templated collection workflows as you need to customize the collection experience for your customers. You can create customized workflows that include email notifications, printed letters and phone calls, in addition to creating orders for suspension, blocking calls and disconnections, that you can configure to handle the collection process based on your specific business needs. Rev.io can automate many parts of the collection process, or you can choose to manage your collection flow manually.

How does it interact with billing? Past due notices can be sent seamlessly from the billing system as often as you desire, without any manual intervention from your team. As accounts go further past due, the system can automatically generate orders that your team can receive to take further action as far as suspending, blocking or disconnecting service for severely past due accounts. Using the collections workflow will ensure consistent and timely past due notifications, resulting in more consistent and efficient debt collection results.

Why is it important? Using the collections workflow within Rev.io will ensure consistent and timely past due notifications, resulting in more consistent and efficient debt collection results. It will also provide accurate and up to date collection history on each customer right on the customer account, available to your team at any time.

Home Customers Activity Agents Reports Settings Welcome to Demo

Collections Summary

View History Refresh

Total Money in Collections: \$53,994,113.69 Customer Count: 373 Reconciled This Month: 0 Reconciled Last Month: 0

Phone Call There are 241 in queue. There are 14 pending. View Calls Made This Week: 0 This Month: 0 Last Month: 0	Text Message (SMS) There are 50 in queue. View Calls Made This Week: 0 This Month: 0 Last Month: 0	Printed Letter 7/23/2020 2:33 PM PDT Download There are 33 in queue. There are 3 pending. View Letters Printed This Week: 0 This Month: 0 Last Month: 1	Email Letter There are 48 in queue. There are 2 pending. View Emails Sent This Week: 0 This Month: 0 Last Month: 1	Suspend (1-Way) There are 1 in queue. There are 11 pending. View Orders Created This Week: 0 This Month: 0 Last Month: 0
Suspend (2-Way) There are 0 in queue. View Orders Created This Week: 0 This Month: 0 Last Month: 0	Disconnect There are 0 in queue. View Orders Created This Week: 0 This Month: 0 Last Month: 0	LD Block There are 0 in queue. View List & Send Orders Created This Week: 0 This Month: 0 Last Month: 0	Manual There are 0 in queue. View Manual Steps Processed This Week: 0 This Month: 0 Last Month: 0	

