COST MANAGER –
A GUIDE TO PAPERLESS BILLING

Focus on Cost Manager Monthly

SWITCHING TO ONLINE BILLS

Your online bills are available through COST MANAGER

Cost Manager is a web based bill reporting tool that allows your organisation to select and access paperless billing. Cost Manager enables your organisation to:

- Access up to 12 previous months of billing statements (from the date of first login) via a secure local portal so your information remains safely in New Zealand
- Monitor your telecommunication usage and cost. This enables you to identify inefficiencies and opportunities of improvement
- View predefined reports or edit report templates to focus on specific areas of interest (e.g. text to park)
- Save time by scheduling reports to be delivered to nominated inboxes each month

COST MANAGER PACKAGE TYPES

There are three Cost Manager package types to choose from:

1 Cost Manager Summary	Enables a single user to access paperless bills, and run a set of standard reports
2 Cost Manager Monthly	Allows multiple users in your organisation access to paperless bills and to perform data analysis of their monthly telecommunication costs and run specific reports. A customisable hierarchy for your organisation allows you to restrict access for different end users
3 Cost Manager Monthly & Daily	Use data feeds from the previous day to track usage trends and patterns. It allows you to respond to abnormal usage and ensure staff are on the right plans for their needs

WHICH COST MANAGER SHOULD YOU CHOOSE?

	Features and Benefits	Charge
Cost Manager Summary	• Get access to your organisation's electronic pdf bills • Access to multiple accounts in your organisation through a single login • Secure online access to your last 12 month invoices for mobile and fixed lines • Automatic reporting that reduces administrative time and costs	Free
Cost Manager Monthly	• Multiple user login access • A customisable hierarchy to restrict access for different end-users and make easy to allocate costs across your departments and branches • Detailed reporting with editable templates allowing analysis of your fixed and usage telecommunication costs, including filtering on specific areas of interest	$59.95 + GST per month
Cost Manager Monthly & Daily	Cost Manager Monthly features plus: • Daily reporting enables monitoring of usage before billing • Email alerts to identify any abnormal usages • Pre-bill transparency enables management of telecommunication budget proactively	$89.95 + GST per month

Where to find more help to choose the right package

- Check out the 'features and benefits' section at www.spark.co.nz/cost-manager
- Email costmanager@spark.co.nz – the team are available 8am – 5pm Mon – Fri (ex. public holidays) and will respond in 1 – 2 business days

This document focuses on Cost Manager Monthly – find out about Cost Manager Summary here.

How to use Cost Manager Monthly

The following slides provide steps for:

- Initial setup (Admin profile)
- Administration (Admin profile)
- Monthly bill retrieval (Account holders)

OVERVIEW OF THE STEPS TO GET PAPERLESS BILL WITH COST MANAGER MONTHLY

Initial Setup (Admin)

1. Register for Cost manager
2. Login for the first time – establish your preferences
3. Build a tree of entities/branches or create new branches
4. Allocate account to branch
5. Create a login/user access for each account holder
6. Change accounts to paperless on-line bill
7. Send user their login details

Monthly Administration (Admin)

1. Login to Cost Manager
2. Check for new accounts Administrator might require from time to time to allocate accounts to existing branches, create new branches, create new login/user access, change accounts to paperless one-line bill. To fulfil these requests, please follow the Steps 3 to 7 described in the "Initial Setup" above

Monthly bill retrieval (Account holder)

1. Receive email from Cost Manager advising bill(s) are ready and be directed to the Cost Manager login page
2. Login to Cost Manager
3. Download your bill

The following pages will detail each steps of the process

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EXAMPLE PAPERLESS BILL

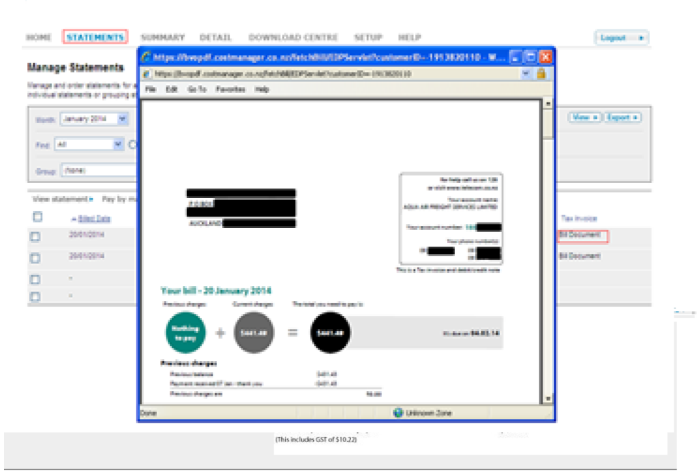
Question

What does a paperless bill look like?

Answer

Paperless bills look just the same as paper bills, but are .pdf documents

Online bill example



How to use Cost Manager Monthly

The following slides provide steps for:

- **Initial setup (Admin profile)**
- Administration (Admin profile)
- Monthly bill retrieval (Account holders)

INITIAL SETUP – STEP 1 –
HOW TO REGISTER FOR COST MANAGER

1. Go to www.sparkdigital.co.nz/costmanager
2. Click “**register now**”
3. You will be redirected to an online form – complete this form and submit it.
   The following information is requested:
   - Decided which Cost Manager Product your organisation wants:
     - Cost Manager Summary
     - Cost Manager Monthly
     - Cost Manager Monthly & Daily
   - Nominate who will be the administrator
     (this person will see all accounts, and have full access rights)
   - An account number (you can find this on the top right of your bill)

Once the form has been submitted, the application will be assessed and a number of pre-checks conducted.
Further contact should be expected approximately 1-2 weeks after the submission is made and will be sent to the nominated administrator.

INITIAL SETUP – STEP 2 –
ACCOUNT AUTHENTICATION AND SETUP LOGIN

1. Receive an **email from Cost Manager** (~2 weeks after online registration submission), click on the hyperlink
2. You will be directed to your **Account information** authentication page. Fill in the fields:
   - Account number (as supplied in email)
   - Current charges (from the current bill)
   - Bill date (from the current bill)
   - First name and Last name
3. You will be directed to the **Personal information** page. Fill in the fields and accept Terms & Conditions
   - **Currency** (we recommend display convertible amounts in **original** currency)
   - **Exchange rate** (we recommend system rate)
   - **New statement notification** (we recommend ticking this box)
4. You will then be redirected to the "**loading your information page**". Click **continue**
5. You will be redirected to the main login page – type in your login and password (please note it can take up to 24 hours for your first login to be accepted)

Email from Cost Manager

Account information

Personal information

Loading your information

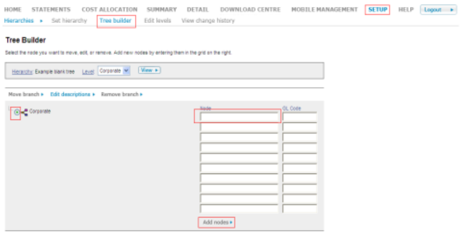
INITIAL SETUP – STEP 3 – BUILD A TREE OF ENTITIES/BRANCHES

1. **Login** to Cost Manager
2. Go to the **Setup** tab
3. Under Hierarchies, click on **Tree Builder** – this takes you to the tree builder screen
4. Ensure the green dot is on the radio button for the “parent node” (seen as “corporate” in screenshot 1)
5. **Type** the name of a new branch into the node field on the right hand side (e.g. “New branch example – Franchisee 6”)
6. Click **add nodes**
7. Repeat steps 4 & 5 until you have created all required branches

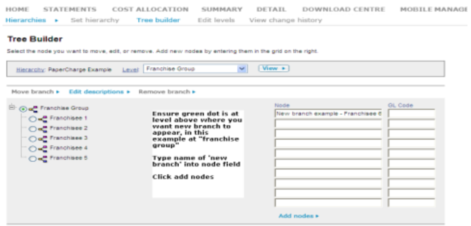
TIP

1. You can move/ edit or delete branches from this screen also
2. Branches will appear on the level below the parent node that the green dot is appearing in

Tree Builder tab



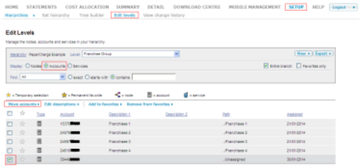
Tree Builder tab – Example



INITIAL SETUP – STEP 4 – ALLOCATE AN ACCOUNT TO BRANCH

1. **Login** to Cost Manager
2. Go to the **Setup** tab
3. Under Hierarchies, click on **Edit Levels –** this takes you to the edit levels screen
4. Select the **radio button** for accounts
5. Click **view**
6. Select the account you wish to move by **ticking the check box** next to it
7. Click **move accounts**
8. **Select** the new location from the drop down menu, then click **ok**
9. Confirm the account move by clicking **ok**

Edit Level tab



Confirm Move Account screen

Move Account screen

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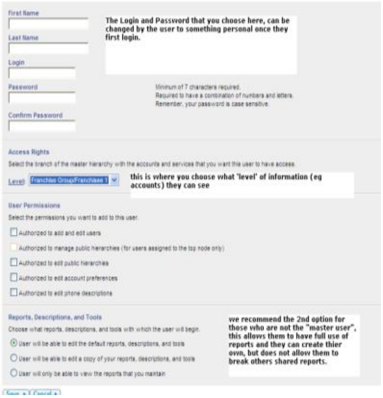
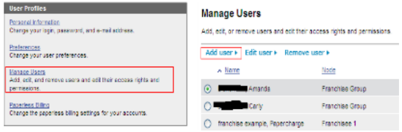
INITIAL SETUP – STEP 5 – CREATE AND ALLOCATE A USER

1. **Login** to Cost Manager
2. Go to the **Setup** tab
3. Under User Profiles, click on **Manage Users**
4. This takes you to a new screen, click **Add User**
5. Complete the following details:
   - Login credentials
   - Access right (i.e. level of tree the user will be able to view, this is how you restrict access to their accounts only)
   - User Permissions
   - Reporting rights
6. Click **Save**

Add user details screen



Setup and Manage Users screens



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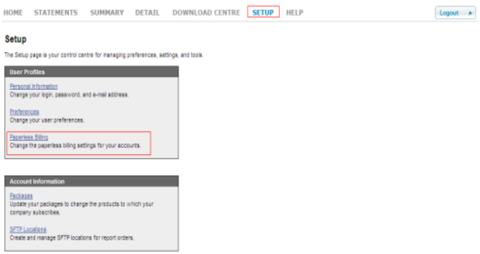
INITIAL SETUP – STEP 6 – CHANGE ACCOUNTS TO PAPERLESS

1. Go to **Setup** Tab
2. Under User Profiles, click on the hyperlink **Paperless Billing**
3. Tick the check box next to any account (or tick the top box to select all) that you want to change from paper to paperless, then click set to **paperless billing button**

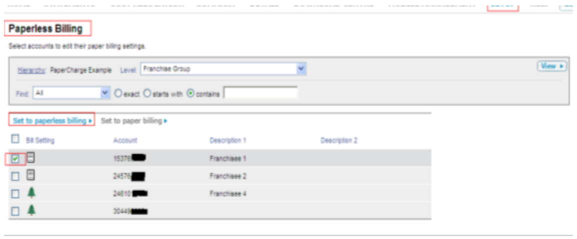
TIP

1. This will change the symbol from a piece of paper to a tree (indicating the account is now paperless). Your next bill will be available to download as a pdf paperless bill from the statement tab following your next bill run. Any account with a tree next to it is already paperless and doesn't need changing
2. Please only change accounts to paperless if you are giving the account holder access to Cost Manager

Setup tab



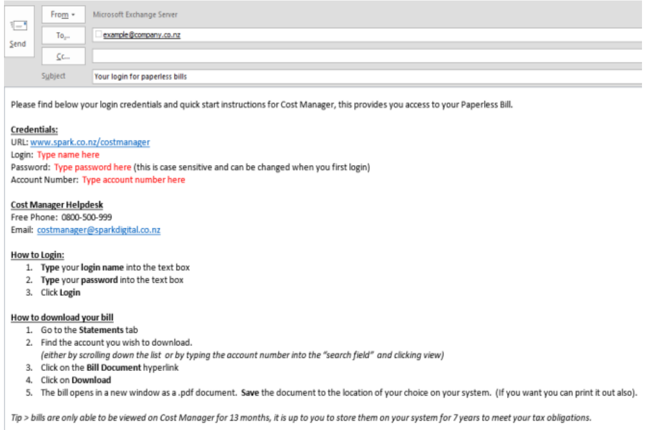
Paperless Billing screen



INITIAL SETUP – STEP 7 – SEND USER THEIR LOGIN DETAILS

1. **Compose** a new email (you could use the suggested template below, filling in the "red text" sections)
2. **Send** user their login, password (as created in step 6)

Email Example


From
Microsoft Exchange Server
To...
example@company.co.nz
Cc...
Subject
Your login for paperless bills

Please find below your login credentials and quick start instructions for Cost Manager, this provides you access to your Paperless Bill.

Credentials:
URL: www.spark.co.nz/costmanager
Login: Type name here
Password: Type password here (this is case sensitive and can be changed when you first login)
Account Number: Type account number here

Cost Manager Helpdesk
Free Phone: 0800-500-999
Email: costmanager@sparkdigital.co.nz

How to Login:
1. **Type** your **login name** into the text box
2. **Type** your **password** into the text box
3. Click **Login**

How to download your bill
1. Go to the **Statements** tab
2. Find the account you wish to download.
   (either by scrolling down the list or by typing the account number into the "search field" and clicking view)
3. Click on the **Bill Document** hyperlink
4. Click on **Download**
5. The bill opens in a new window as a .pdf document. **Save** the document to the location of your choice on your system. (If you want you can print it out also).

Tip > bills are only able to be viewed on Cost Manager for 13 months, it is up to you to store them on your system for 7 years to meet your tax obligations.

How to use Cost Manager Monthly

The following slides provide steps for:

- Initial setup (Admin profile)
- **Administration (Admin profile)**
- Monthly bill retrieval (Account holders)

ADMINISTRATION – STEP 1 – LOGIN TO COST MANAGER

1. **Go To** www.spark.co.nz/costmanager
2. Type your **login** name into the text box
3. Type your **password** into the text box
4. Click **Login**

Login screen

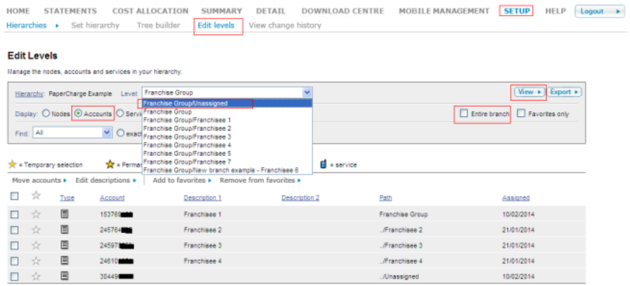
TIP

To login directly you can go to www.spark.co.nz/costmanager. Click on the "**Log In**" button and **Type** your login name and password into the text field boxes, then Click **login**

ADMINISTRATION – STEP 2 – CHECK FOR NEW ACCOUNTS

1. Go to the **Setup** tab
2. Under Hierarchies, click on **Edit Levels** – this takes you to the edit levels screen
3. Select the **radio button** for **accounts**
4. From the **level** drop down, select "../unassigned" branch
5. **Un-tick** the check box next to "entire branch". This will make it so only the selected level information is displayed (i.e. no child information)
6. Click **view** – this will display only accounts that need assigning
7. If there is accounts appearing here you will need to move them to a branch (Initial Setup – Step 4)

Edit Levels tab



How to use Cost Manager Monthly

The following slides provide steps for:

- Initial setup (Admin profile)
- Administration (Admin profile)
- **Monthly bill retrieval (Account holders)**

MONTHLY BILL RETRIEVAL – STEP 1 – ACCESS TO COST MANAGER LOGIN PAGE

1. Receive email from Cost Manager advising your bill(s) are ready
2. Click on the link in the email to be directed to the Cost Manager login page

Email example

From: <CostManager@sparkdigital.co.nz>
Date: 20/11/2012 6:00 PM
Subject: Your latest Cost Manager statement is available
To: [redacted]

Dear [redacted]our latest statement is now ready for you to review online. If you have elected to receive an online tax invoice for your account(s), this will be available to view within 72 hours. Your total amount due is $0.00. To review and analyse your bill, just click on the link below or paste it into your browser window: https://www.costmanager.co.nz/cv/log.asp?gru=936376791 We trust you enjoy the convenience of viewing your statements online. Regards, Cost Manager Support Helpdesk 0800 500 999

MONTHLY BILL RETRIEVAL – STEP 2 – LOGIN TO COST MANAGER

1. Type your **login** name into the text box
2. Type your **password** into the text box
3. Click **Login**

Email example

TIP

To login directly you can go to www.spark.co.nz/costmanager.
Click on the "**Sign In**" button and **Type** your login name and password into the text field boxes, then Click **login**

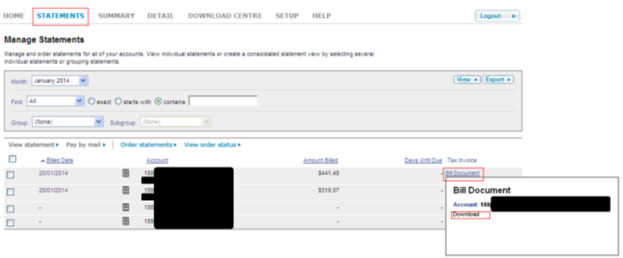
MONTHLY BILL RETRIEVAL – STEP 3 – DOWNLOAD YOUR BILL(S)

1. Go to the **Statement** tab
2. Find the account you wish to download (either by scrolling down the list or by typing the account number into the “search field” and clicking view)
3. Click on the **Bill Document** hyperlink
4. Click on **Download**. The bill opens in a new window as a .pdf document, save the document to the location of your choice on your system (if you want to you can print it also)

TIP

1. On an accumulative basis from the time you opt into paperless bills your statements will be viewable for up to 13 months
2. **It is up to you to store your paperless bills on your system for 7 years to meet your tax obligations**

Statement tab



Useful tips

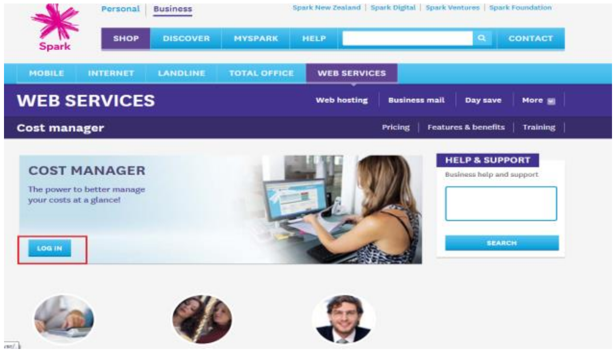
The following slides provide additional tips to get the best of Cost Manager

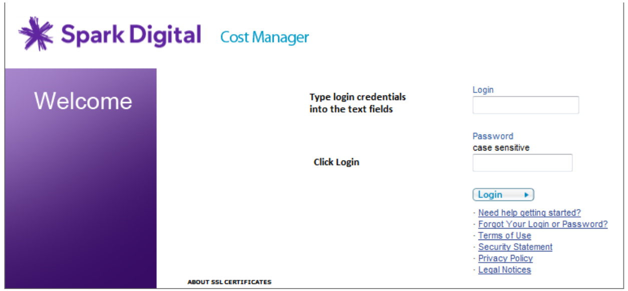
HOW TO LOGIN

1. To login directly go to www.spark.co.nz/costmanager
2. Click on the “**Log In**” button
3. Type your login name and password into the text field boxes
4. Click **login**

Or

1. To login from the statement notification email, click on the link inside the email
2. This opens the login screen, **type** your login name and password into the text field boxes
3. Click **Login**





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HOW TO RESET YOUR PASSWORD OR RECOVER YOUR LOGIN

1. Go to www.spark.co.nz/costmanager – select **login** to be directed to the login page
2. Click on the link "**forgot your login or password**"
3. If you have forgotten your login, type your email address and continue. Your login will be sent by email
4. If you remember your login but have forgotten your password type in your login and select **continue**
5. Answer your security question (you would have set this up on your first login) and select **continue**
6. Choose a new password, re-enter it, click **continue**
7. An email with a link will be sent to you – **click** on this link (within an hour) and you will be directed to a login page where your new password will be accepted

Login screen

Forgotten Login or Password

Answer the security question

Reset your password

Email to validate password

On 2/13/14, costmanager@sparkdigital.co.nz <costmanager@sparkdigital.co.nz> wrote:
> Please click the link below within 60 minutes of receipt in order to
> complete your password reset.
> http://www.costmanager.co.nz/cv/scripts/B3B0/eng/forgottenPassword.asp?
> guid=B25195CF – 78D5 - 461A - A1C0 – CA2AA8D0A700&gru=936376791 Regards, Cost
> Manager Support Helpdesk 0800 500 999

HOW TO KNOW WHEN BILL(S) ARE AVAILABLE TO DOWNLOAD

You can Set Up **Statement Notification** alerts by following these steps:

1. **Login** to Cost Manager
2. Go to **Setup** Tab
3. Under User Profiles, click **Preferences**
4. This opens a new screen, **scroll** down to "new statement notification" section
5. **Tick** the check box next "email"
6. Click **Save**

TIP

1. This notification is sent upon the date being loaded/available to view within Cost Manager and acts as a reminder that the bill can be downloaded, it will list the $value of the total number of bills that have loaded for that day
2. The billed data can sometimes load a little ahead of the bill itself, so the reminder clearly states that the bill will be available to download within 72 hours

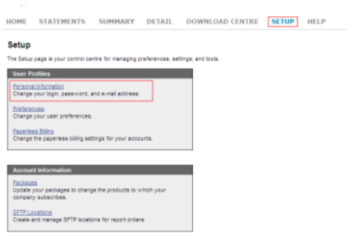
New statement notification

Setup tab/Preferences

HOW TO CHECK WHERE "STATEMENT READY NOTIFICATIONS" WILL BE SENT

1. **Login** to Cost Manager
   (72 hours after your bill run date or once you have received your statement is ready notification)
2. Go to the **Setup tab**
3. Under User Profiles, click on **Personal Information**
4. **Scroll** to the email address section and type in the desired email address
5. **Save**

Setup tab



Personal Information

HOW TO GET TECHNICAL SUPPORT AND ASSISTANCE

- Click on the **Help** tab to access the online user guide

Or

- Email us at costmanager@spark.co.nz – we're available 8am – 5pm Monday to Friday (excluding public holidays) and will respond to your query within 1 – 2 business days

- If you'd like training on Cost Manager please email your login name and contact details to costmanager@spark.co.nz – please note that training incurs a fee

Help screen