
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	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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: <ul style="list-style-type: none">• 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

EXAMPLE PAPERLESS BILL

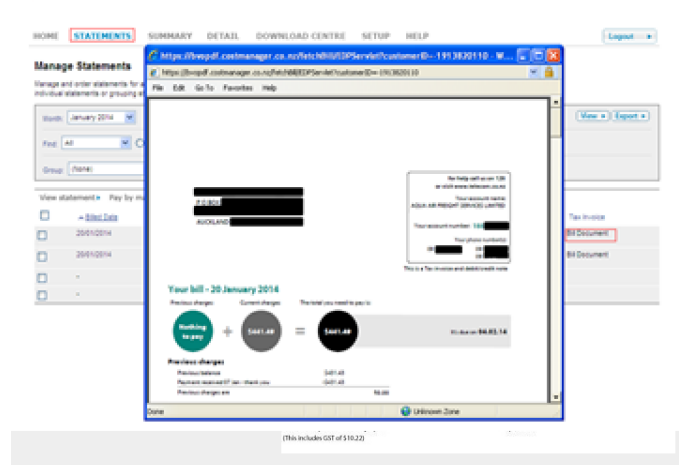
Question

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.

- ## Email from Cost Manager

Without a copy of this account you will not be able to complete the registration questions.

Account information

[illegible]

Personal information

Personal Information

Login Please choose a sign and password for future access

Remember Minimum of 7 characters required

Remember Me I want to be a combination of username and email

Confirm Password Remember your password to avoid trouble

E-mail Your email address will be used to notify you when your statement is posted online and to send you password reset request.

Confirm E-mail

Security Questions Create Your Own Security Question

What is the name of your favorite team?

Security Answer The security question will store a code you type or answer. Choose a question which only you know the answer to and that you rarely tell to other people.

Loading your information

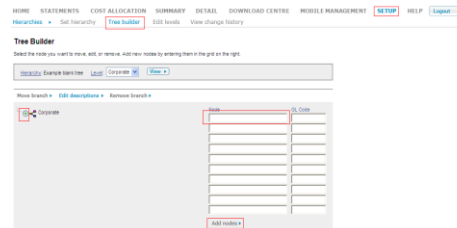
INITIAL SETUP – STEP 3 – BUILD A TREE OF ENTITIES/BRANCHES

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

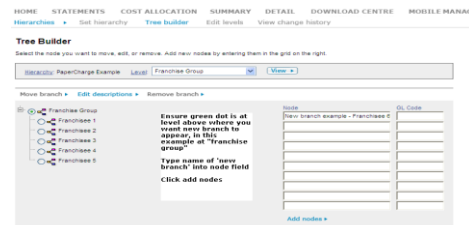
TIP

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



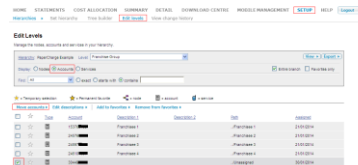
Tree Builder tab – Example



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 **tick**ing 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



HOME | STATEMENTS | COST ALLOCATION | SUMMARY | DETAILS | DOWNLOAD CENTER | PROJECTS MANAGEMENT | **SETUP** | HELP | Logout

Accounting > THE HIERARCHY > THE BUILDING > Edit Levels > View Change History

Edit Levels

ACCOUNTING > THE HIERARCHY > THE BUILDING > Edit Levels > View Change History

Level: Name: Description:

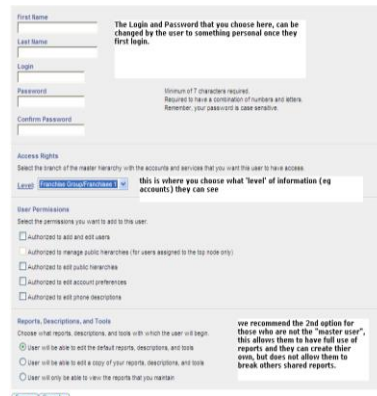
☐ Accounts ☒ Accounts ☐ Services ☐ Materials

Level	Type	Account	Description	Balance
1	Account	1000000.0	1000000.0	0.000000
2	Account	1000001.0	1000001.0	0.000000
3	Account	1000002.0	1000002.0	0.000000
4	Account	1000003.0	1000003.0	0.000000
5	Account	1000004.0	1000004.0	0.000000
6	Account	1000005.0	1000005.0	0.000000
7	Account	1000006.0	1000006.0	0.000000
8	Account	1000007.0	1000007.0	0.000000
9	Account	1000008.0	1000008.0	0.000000
10	Account	1000009.0	1000009.0	0.000000
11	Account	1000010.0	1000010.0	0.000000
12	Account	1000011.0	1000011.0	0.000000
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171	Account	1000170.0	1000170.0	0.000000
172	Account	1000171.0	1000171.0	0.000000
173	Account	1000172.0	1000172.0	0.000000
174	Account	1000173.0	1000173.0	0.000000
175	Account	1000174.0	1000174.0	0.000000
1				

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**

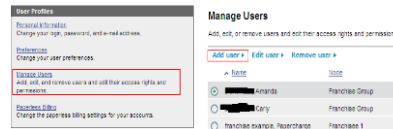
Add user details screen



The screenshot shows the 'Add user details screen' with the following sections:

- First Name** and **Last Name** input fields.
- Login** input field.
- Password** input field with a note: "Minimum of 7 characters required. Required to be a combination of numbers and letters. Remember, your password is case sensitive."
- Confirm Password** input field.
- Access Rights** section: "Select the branch of the master hierarchy with the accounts and services that you want this user to have access." It includes a dropdown menu for 'Level' with options: 'Master (Level 1) (readonly)', 'Level 1', 'Level 2', 'Level 3', 'Level 4', 'Level 5', 'Level 6', 'Level 7', 'Level 8', 'Level 9', 'Level 10', 'Level 11', 'Level 12', 'Level 13', 'Level 14', 'Level 15', 'Level 16', 'Level 17', 'Level 18', 'Level 19', 'Level 20'. A note says: "this is where you choose what 'level' of information (eg accounts) they can see".
- User Permissions** section: "Select the permissions you want to add to the user." It includes checkboxes for:
 - ☐ Authorized to add and edit users
 - ☐ Authorized to manage public hierarchies (for users assigned to the top node only)
 - ☐ Authorized to add public hierarchies
 - ☐ Authorized to edit account preferences
 - ☐ Authorized to edit phone descriptions
- Reports, Descriptions, and Tools** section: "Choose what reports, descriptions, and tools with which the user will begin." It includes radio buttons for:
 - ☒ User will be able to edit the default reports, descriptions, and tools
 - ☐ User will be able to edit a copy of your reports, descriptions, and tools
 - ☐ User will only be able to view the reports that you maintain
- A note on the right: "we recommend the 2nd option for those who are not the 'master user', this allows them to have full use of reports and they can create their own, but does not allow them to break others shared reports."

Setup and Manage Users screens



The screenshot shows the 'Manage Users' screen with the following sections:

- User Profiles** section: "Personal & public: Change your sign, password, and e-mail address." It includes a link to "Change your user preferences".
- Manage Users** section: "Add, edit, or remove users and edit their access rights and permissions." It includes links to "Add user", "Edit user", and "Remove user".
- Users** table:

Name	Role
John Doe	Franchise Setup
John Doe	Franchise Setup
John Doe	Franchise Setup
Franchise example, Peter charge	Franchise 1

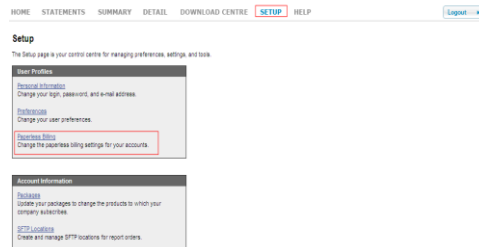
INITIAL SETUP – STEP 6 – CHANGE ACCOUNTS TO PAPERLESS

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**

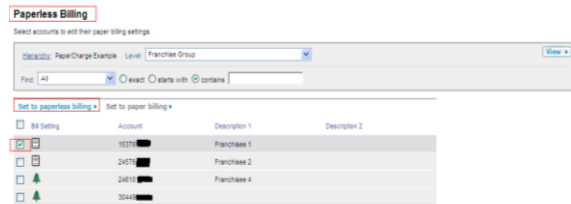
TIP

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

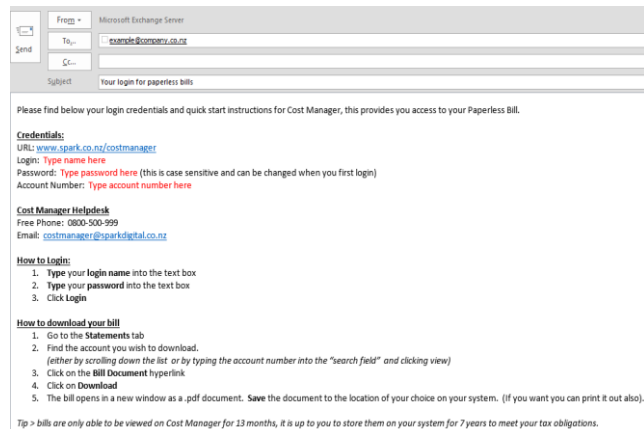


	Account	Description 1	Description 2
<input checked="" type="checkbox"/>	1537	Franchise 1	
<input type="checkbox"/>	2457	Franchise 2	
<input checked="" type="checkbox"/>	2481	Franchise 4	
<input type="checkbox"/>	3544		

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



The screenshot shows an email composition window. The header bar includes a 'From' field with a plus icon, a 'To' field with an email address, and a 'Subject' field. The body of the email contains the following text:

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 Helpline
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**

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**

Login screen

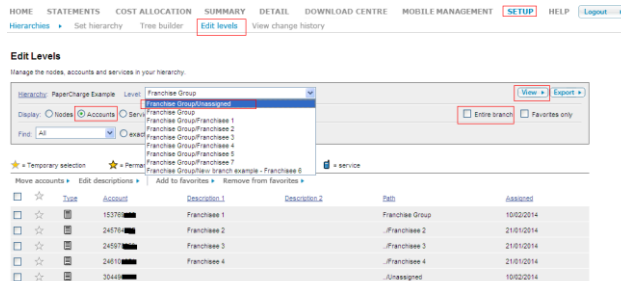


The screenshot shows the login interface for Spark Digital Cost Manager. On the left, there is a purple vertical bar with the text "Welcome". To the right of this bar, the Spark Digital logo and "Cost Manager" text are displayed. Below the logo, there are two input fields: "Login" and "Password". The "Password" field has a small icon indicating it is case sensitive. Below the password field is a "Login" button with a right-pointing arrow. At the bottom right, there are several links: "Need help getting started?", "Forgot Your Login or Password?", "Terms of Use", "Security Statement", "Privacy Policy", and "Legal Notices". At the bottom left, there is a small link "ABOUT SSL CERTIFICATES".

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



Manage the nodes, accounts and services in your hierarchy.

Select: PaperCharge Example Level: Franchise Group
 Display: ☒ Nodes ☐ Accounts ☐ Service
 Find: All

☐ Entire branch ☐ Favorites only

★ Temporary selection ★ Permanent selection
 Move accounts ▾ Edit descriptions ▾ Add to favorites ▾ Remove from favorites ▾

	Type	Account	Description 1	Description 2	BD	Assigned
<input type="checkbox"/>	★	15376	Franchise 1		Franchise Group	10/02/2014
<input type="checkbox"/>	★	24576	Franchise 2		Franchise 2	21/01/2014
<input type="checkbox"/>	★	24577	Franchise 3		Franchise 3	21/01/2014
<input type="checkbox"/>	★	24578	Franchise 4		Franchise 4	21/01/2014
<input type="checkbox"/>	★	20441	Franchise 5		Unassigned	10/02/2014

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/login.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**

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**

Email example



The screenshot shows the Spark Digital Cost Manager login interface. On the left, there is a purple vertical bar with the text "Welcome". To the right of this bar, the Spark Digital logo and "Cost Manager" text are displayed. Below the logo, there are two input fields: "Login" and "Password", with a note "case sensitive" below the password field. A "Login" button is positioned below the password field. At the bottom right, there are several links: "Need help getting started?", "Forgot Your Login or Password?", "Terms of Use", "Security Statement", "Privacy Policy", and "Legal Notices". At the bottom left, there is a small link "ABOUT SSL CERTIFICATES".

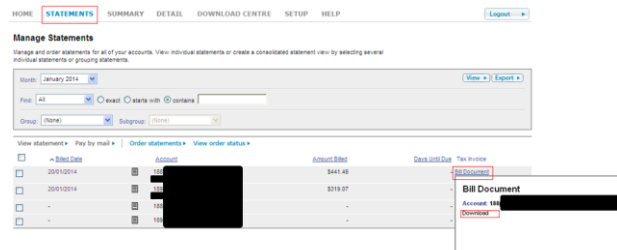
MONTHLY BILL RETRIEVAL – STEP 3 – DOWNLOAD YOUR BILL(S)

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



HOME **STATEMENTS** SUMMARY DETAIL DOWNLOAD CENTRE SETUP HELP [Logout](#)

Manage Statements
Manage and view statements for all of your accounts. View individual statements or create a consolidated statement view by selecting several individual statements or grouping statements.

Month: January 2014 [View](#) [Export](#)

Find: 48 ☐ Exact ☐ Starts with Contains

Group: 00001 Subgroup: 00001

[View statements](#) [Pay by mail](#) [Order statements](#) [View order status](#)

<input type="checkbox"/>	Bill Date	Account	Amount Billed	Days until Due	Tax Invoice
<input type="checkbox"/>	2015/01/14	00001	\$441.45		
<input type="checkbox"/>	2015/01/14	00001	\$719.07		
<input type="checkbox"/>	-	00001	-		
<input type="checkbox"/>	-	00001	-		

Bill Document
Account: 00001
[Download](#)

Useful tips



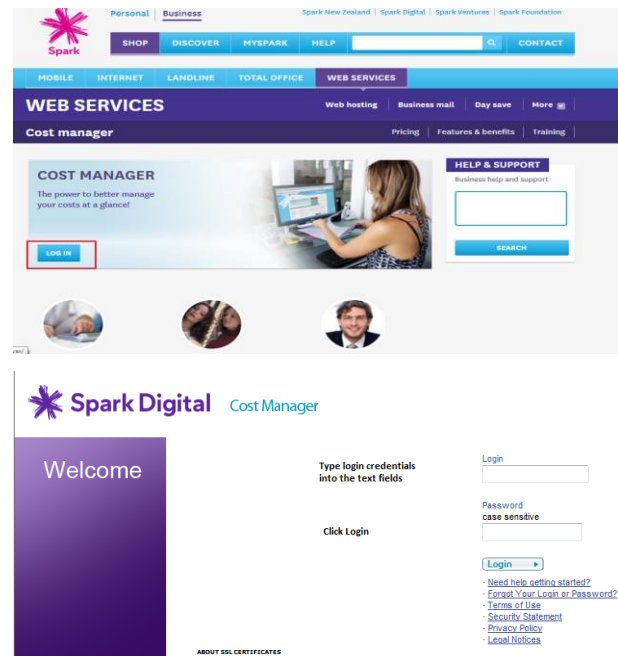
The following slides provide additional tips to get the best of Cost Manager

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**



The screenshot shows the Spark Digital website's 'Cost Manager' login interface. At the top, there's a navigation bar with 'Personal' and 'Business' tabs, and links for 'Spark New Zealand', 'Spark Digital', 'Spark Ventures', and 'Spark Foundation'. Below this is a 'SHOP' section with buttons for 'SHOP', 'DISCOVER', 'MYPARK', 'HELP', a search bar, and 'CONTACT'. The main content area is titled 'WEB SERVICES' and includes links for 'Web hosting', 'Business mail', 'Day save', and 'More'. A 'Cost manager' section highlights 'The power to better manage your costs at a glance!' with a 'LOG IN' button. A 'HELP & SUPPORT' section offers 'Business help and support' with a 'SEARCH' button. The bottom section features a 'Welcome' message, a 'Type login credentials into the text fields' prompt, a 'Click Login' button, and a 'Login' button. A sidebar on the right contains links for 'Need help getting started?', 'Forgot Your Login or Password?', 'Terms of Use', 'Security Statement', 'Privacy Policy', and 'Legal Notices'.

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

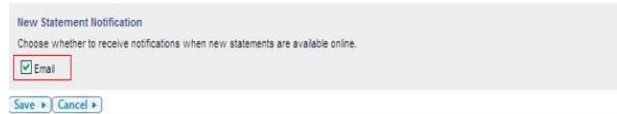
You can Set Up **Statement Notification** alerts by following these steps:

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

HOME STATEMENTS SUMMARY DETAIL DOWNLOAD CENTRE **SETUP** HELP

Setup

The Setup page is your central centre for managing preferences, settings, and tools.

User Profiles

Personal Information
Change your login, password, and e-mail address.

Profile Email
Change your user preferences.

Payment Dates
Change the paperless billing settings for your accounts.

Account Information

Products
Customize your packages to change the products to which your company is subscribed.

PDF Locations
Create and manage PDF locations for report orders.

Personal Information

Personal Information

Change your personal information below:

View > | < Cancel x

First Name
[Redacted]

Last Name
[Redacted]

Phone
[Redacted]

Mobile
[Redacted]

Business
[Redacted]

Residential
[Redacted]

Cardless Payment
[Redacted]

Email
[Redacted]
[Redacted]
[Redacted]

Your e-mail address will be used to notify you when your statement is posted online. It will also be used to send you important alerts. This is the email address that "Invoice notifications" will be sent to.

Security Question
What is your city of birth? [Redacted] OK

Create Your Own Security Question

Security Answer
[Redacted]

The security question will be used to alert you if your password is changed. Choose a question - avoid only you know the answer to and that has nothing to do with your password.

View > | < Cancel x

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

