EVERSTREAM CUSTOMER PORTAL GUIDE

Updated 4.21.21

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Welcome to Everstream's Customer Portal! This online resource gives you access to key information about your Everstream account — from support needs and invoice history to account information and resources. Along with contacting us by phone or email, our Customer Portal is an additional way to review your account or request support.
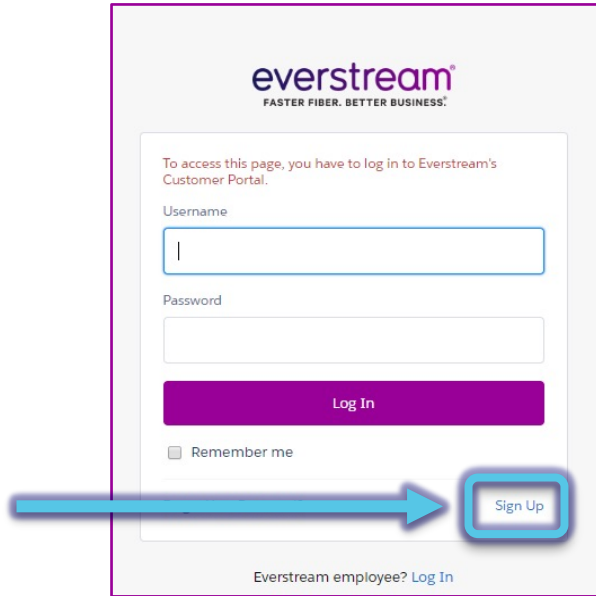
REGISTERING FOR CUSTOMER PORTAL

METHOD #1: INVITATION LINK FROM EVERSTREAM

- Everstream has sent each customer a unique, system-generated link via email.
- Use this link to create an account and access the Customer Portal.
  - **Please Note: This system-generated link expires after 30 days.**
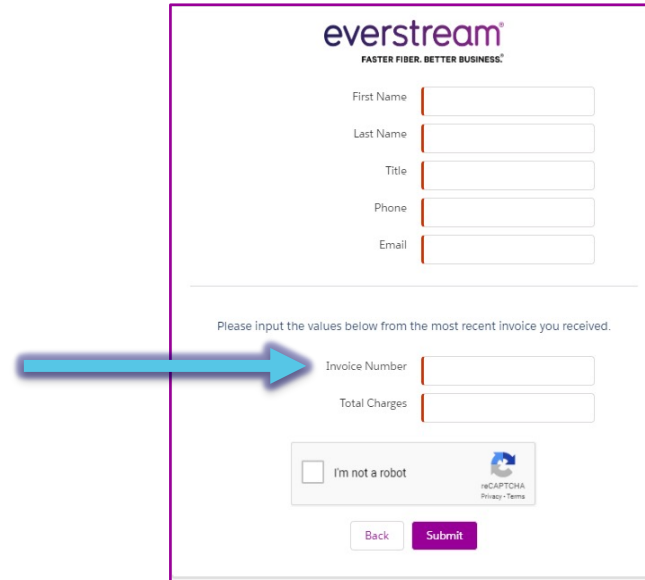- With this option, users do not need to provide invoice and balance information.

METHOD #2: DIRECT ACCESS VIA INVOICE

- Visit **customer.everstream.net**
- Click on **"Sign Up"**

- To sign up, you will need:
  1. An invoice from the past 60 days
  2. Enter the invoice number and balance for that invoice ("Total Charges") to complete your registration

REGISTRATION SUPPORT

If you have trouble registering, please contact Everstream's 24/7 Network Operations Center for assistance:

- Phone Support
  866.624.8624

- Email Support
  support@everstream.net

THINGS TO KEEP IN MIND

PLEASE KEEP IN MIND

- If you need to change the password for your Everstream Customer Portal registration, please visit **customer.everstream.net** and click on "Forgot Your Password?."

- For access to the full capabilities of Everstream's Customer Portal, it is best to log in via desktop.
  - The mobile user experience may vary from the full desktop experience.
  - Increased mobile-friendly features will be released in the future.

CUSTOMER PORTAL HOME

CUSTOMER PORTAL HOME

Once logged into your account, you will see your Home page, which offers an at-a-glance look at key account details, including:

- **Contact Our 24/7 NOC:** For customer support, contact Everstream's 24/7 Network Operations Center via phone or email. You also can create a ticket directly within the portal.

- **All Active Billing Accounts:** Click on an account number to review its balance and due date. You can enroll in automatic payments, make a payment by credit card and access your invoice history for the past 24 months.

- **Your Account Team:** Quick reference and contact information for your key Everstream account contacts.

REVIEW CURRENT INVOICE

To review a current invoice, **click on the account number** to open a detailed history for the past 24 months.

(NEW: 4/21) PAYMENT OPTIONS

- Select **"Make a Payment"** to pay your balance by credit card.

- **(NEW: 4/21):** Choose **"Enroll in Automatic Payments"** to sign up for this new option.

MAKE A PAYMENT BY CREDIT CARD

- For this option, fill out your billing information to complete payment with a credit card.

- Should you have any questions or concerns regarding your Everstream invoice, please contact our Billing department via email at ar@everstream.net.

(NEW: 4/21) ENROLL IN AUTOMATIC PAYMENTS

- For this option, complete the enrollment form to authorize payments.

- Once enrolled, your monthly payment will be **automatically debited in full on the 25th day of each month**.

- Should you have any questions or concerns regarding your Everstream invoice, please contact our Billing department via email at ar@everstream.net.

(NEW: 4/21) AUTOMATIC PAYMENTS CONFIRMATION

- Once enrolled in automatic payments, your account will note **"Current Automatic Payments Profile"** with the saved payment information listed.
  - Please consider this confirmation that you have successfully enrolled!

- Enrollment in Automatic Payments is **effective for the following month.**
  - For example, enrolling on April 23rd will begin your Automatic Payments for May.
  - Your automatic payment will be noted on your May 1 invoice and payment will be debited in full on May 25th.
  - **Please note that you are still responsible to pay your invoice for the current month** (e.g. April in our example).
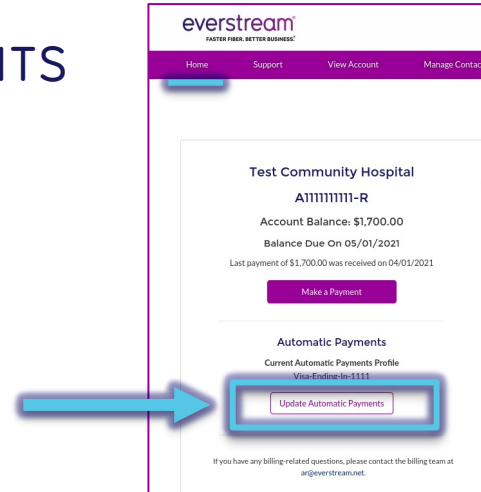
(NEW: 4/21) AUTOMATIC PAYMENTS INVOICE

- Once enrolled in Automatic Payments, your invoice also will **reflect the enrollment and automatic debit payment**.

- Should you have any questions or concerns regarding your Everstream invoice, please contact our Billing department via email at ar@everstream.net.

> **You are enrolled in Automatic Payments.**
> **Your monthly payment will be debited in full on the 25th of the month.**
>
> ACH and Wire Payments: Routing #: 211170101; Account #: 1918097542

(NEW: 4/21) UPDATE AUTOMATIC PAYMENTS

- Once enrolled in automatic payments, you can select **"Update Automatic Payments"** to make any changes to your payment method (e.g. add a different credit card).

- **Note:** Be sure to make any changes to your payment method by the **24th day for that month** (e.g. May 24th for a May 25th payment).
  - Any changes made on or after the 25th day of the month will be effective for the following month's payment (e.g. May 26th for a June 25th payment).

(NEW: 4/21) UNENROLL IN AUTOMATIC PAYMENTS

To unenroll in automatic payments:

- Select **"Update Automatic Payments"** then **"Unenroll in Automatic Payments."**

- You will be prompted to send an email request to Everstream's Billing department at ar@everstream.net to complete the unenrollment process.
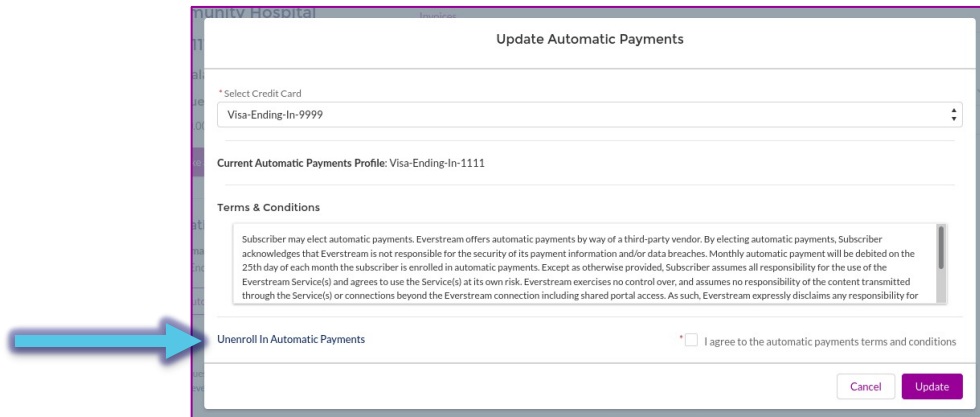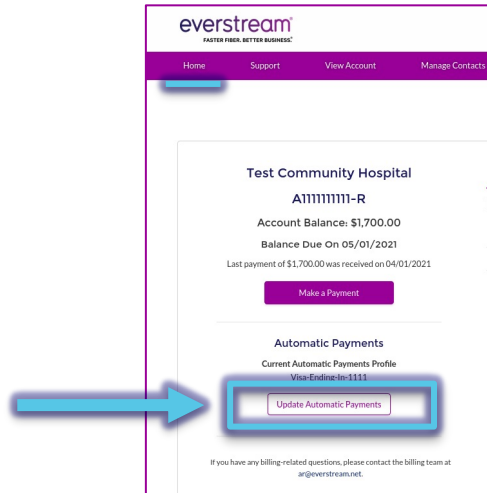
SUPPORT

NETWORK OPERATIONS CENTER SUPPORT

- The **Support** tab allows you to submit an online request for network support or review up to one year of your NOC Support Ticket history.

- To open a new ticket, click on **"Submit a Support Ticket."**

SUPPORT: SUBMIT NOC SUPPORT TICKET

- Be sure to include the circuit ID, asset ID or circuit's physical address.

- Once all relevant information has been included, click **"Submit"** to complete.

SUPPORT: TICKET LIST

NOC Support Tickets can be sorted by status (**Open** or **Closed**).

SUPPORT: TICKET LIST

To review in-depth details for a specific ticket, click on the linked **Ticket Number**.

SUPPORT: VIEWING A TICKET

- Once you click on the Ticket Number, you will have access to the ticket history in the **Timeline** section.

- Click **"New Comment"** to add ticket updates.

- Enter pertinent information and click **"Save"** to send an update or respond to the NOC.

SUPPORT: VIEWING A TICKET

- You also can upload files or screen shots directly to the ticket.

- Select **"Add Files."**

- When window opens, select **"Upload Files"** and choose your file(s).

- Click **"Add."**
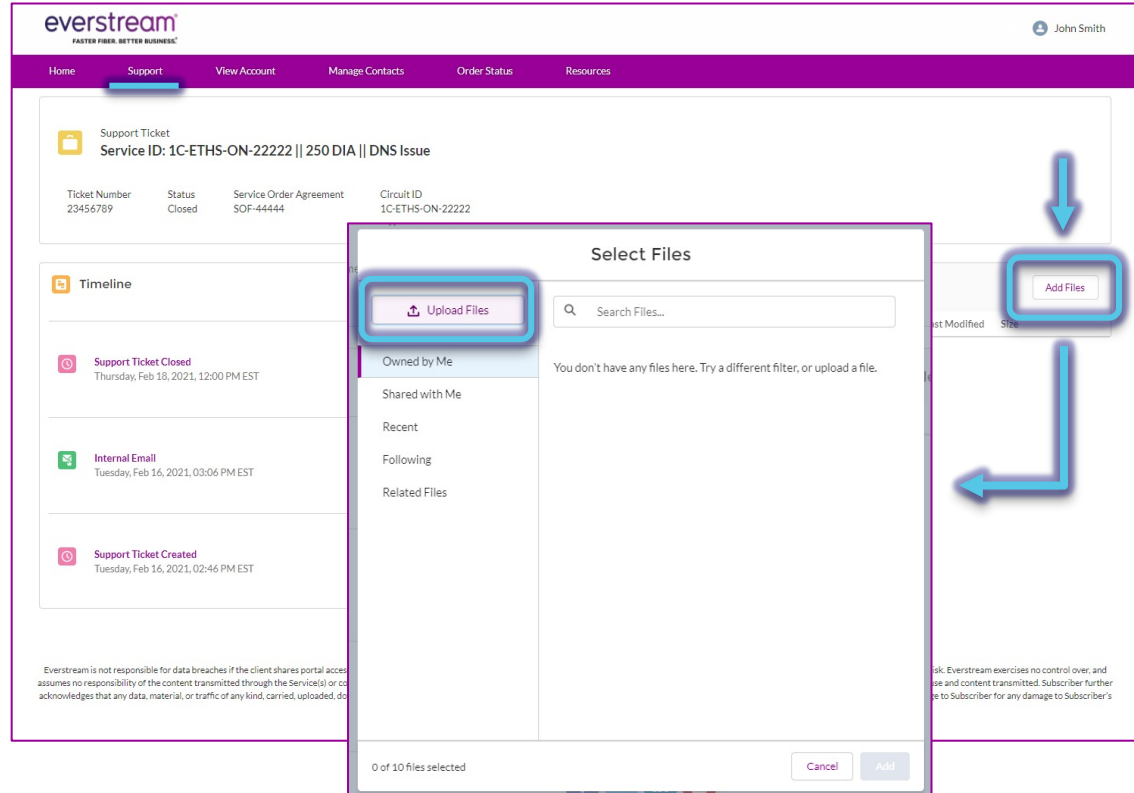
VIEW ACCOUNT

VIEW ACCOUNT

- We encourage you to review your account details for accuracy.
- If you have changes to this information, please feel free to contact our Billing department via email at ar@everstream.net.
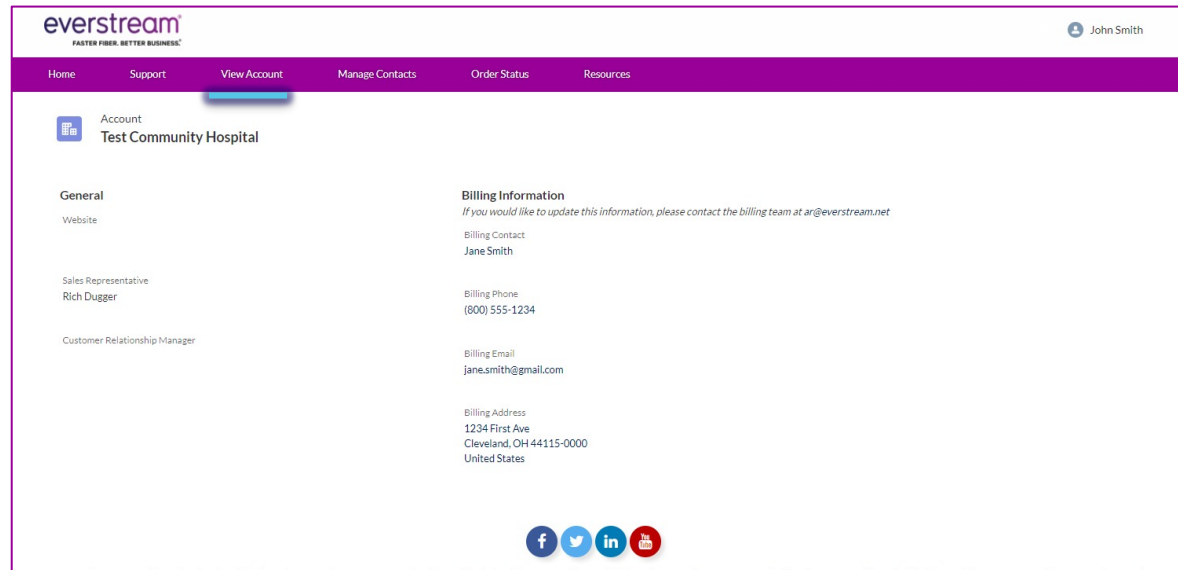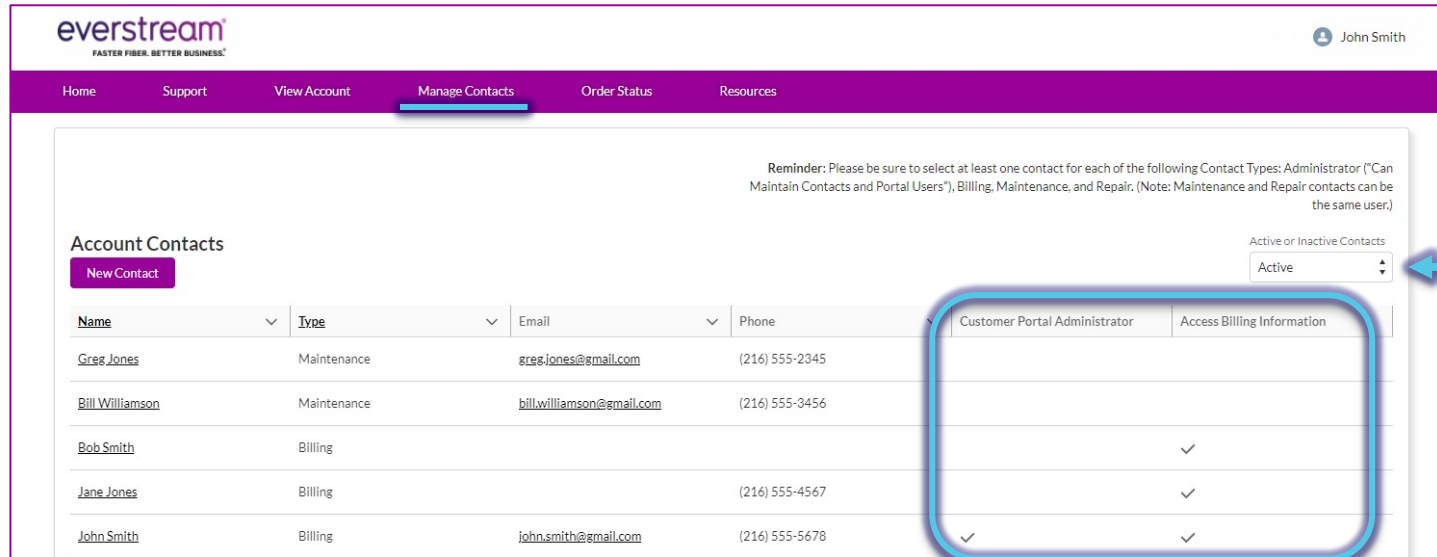
MANAGE CONTACTS

(NEW: 4/21) MANAGE CONTACTS

- At-a-glance list of Account Contacts with access to the Everstream Customer Portal and their permissions.
- **Customer Portal Administrators** have administrative and billing access and can add or edit any profile.
  - **Note:** The first user within a business to sign up for the Portal is the default Customer Portal Administrator.
- Contacts can be sorted by **Active** or **Inactive Contacts**.

(NEW: 4/21) MANAGE CONTACTS

- To review and manage your internal team members, select a **Contact Name** from the list.

- **Note:** There is no way to delete a contact no longer with your business. Instead, mark as an "**Inactive Contact**."

(NEW: 4/21) MANAGE CONTACTS: PORTAL ADMINISTRATORS

- Users with **"Can Maintain Contacts and Portal Users"** checked are the Customer Portal Administrators.

- Portal Administrators can:
  - Grant administrative access to other users
  - Enable/Disable users' billing access
  - Enable/Disable portal users
  - Add new contacts
  - Edit any user profile
  - Manage users' communication preferences

MANAGE CONTACTS: EDITING A PROFILE

- Any user can edit their own profile.

- **Note:** You can edit any field on this page except for "Account Name."

- Once in a contact record, click **"Edit"** in the top right corner to make changes.

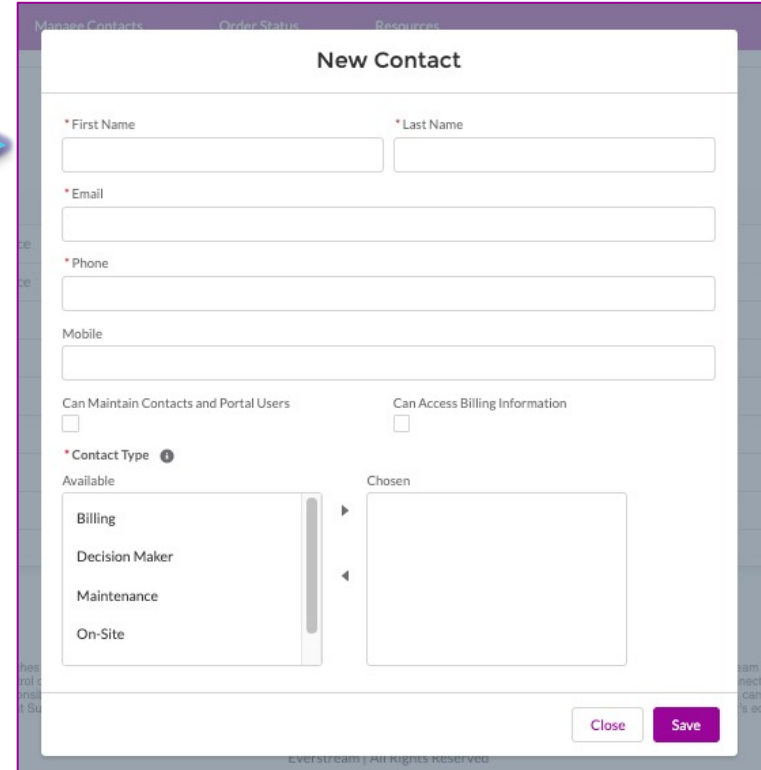- Alternatively, select the **pencil icon** to edit and save changes to your record.

(NEW: 4/21) MANAGE CONTACTS: ADD CONTACTS

- Portal Administrators (users with **"Can Maintain Contacts and Portal Users"** checked) can add new contacts.

- Select **"New Contact"** to add a new user to your account

- Fields with an asterisk (*) are required.

(NEW: 4/21) MANAGE CONTACTS: CONTACT TYPES

- Six Contact Types are available:
  - ** **Billing**
  - Decision Maker
  - ** **Maintenance:** Will receive scheduled and emergency maintenance notifications
  - On-Site
  - Order
  - ** **Repair:** Primary point of contact for repair and non-emergency repairs

- ** Please be sure your account has at least one contact listed for **Billing**, **Maintenance**, and **Repair** as well as a **Customer Portal Administrator**.

- **Note:** A single user can serve multiple roles. For example, the Maintenance, Repair and On-Site contacts could be the same employee for your business.

New Contact

* First Name: Joe
* Last Name: Johnson
* Email: joe.johnson@gmail.com
* Phone: (216) 555-7890
Mobile:

Can Maintain Contacts and Portal Users ☐
Can Access Billing Information ☐

* Contact Type ⓘ

Available
- Billing
- Decision Maker
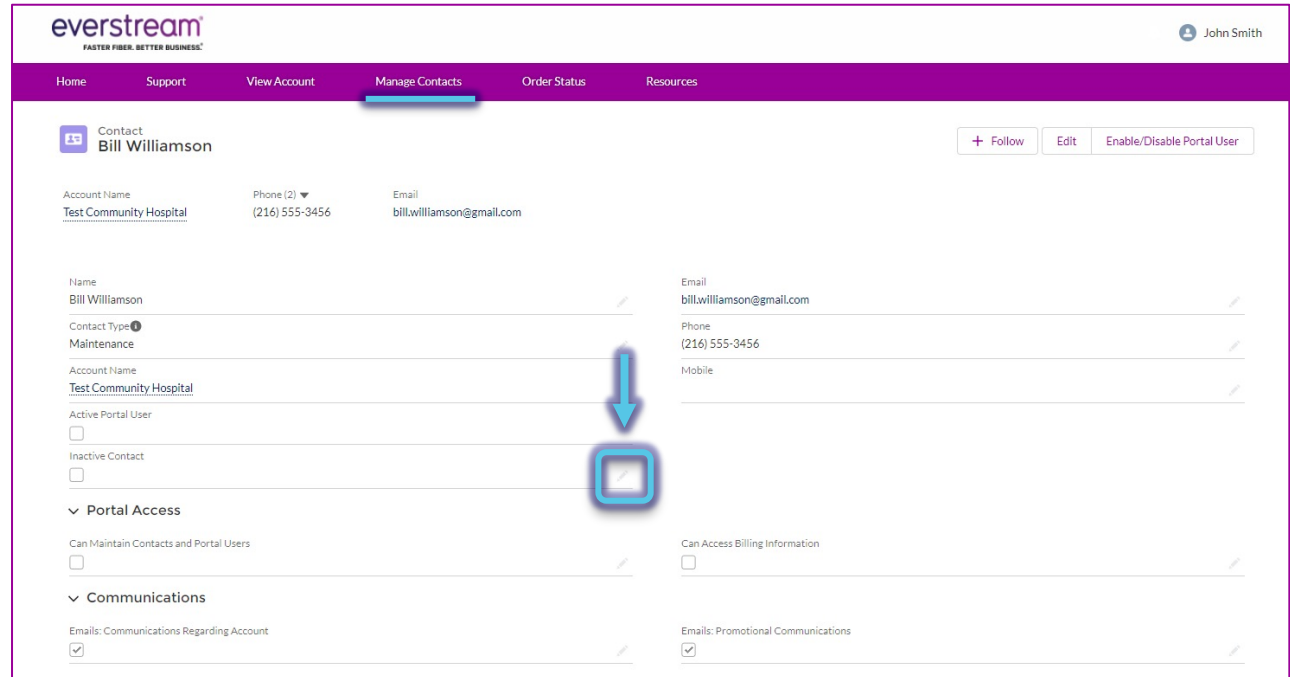- On-Site

Chosen
- Maintenance
- Repair

Close   Save

(NEW: 4/21) MANAGE CONTACTS: ENABLE PORTAL USER

- Portal Administrators (users with **"Can Maintain Contacts and Portal Users"** checked) can Enable Users.

- If a user is <u>not yet</u> using the Portal, select **"Enable/Disable Portal User"** then **"Create User"** to enable their account.

- Once completed, the **"Active Portal User"** box will be checked.

(NEW: 4/21) MANAGE CONTACTS: DISABLE PORTAL USER

- Portal Administrators (users with **"Can Maintain Contacts and Portal Users"** checked) can Enable Users.

- To remove a user from having Portal access, select **"Enable/Disable Portal User,"** then **"Disable User"** to disable their account.

- Once completed, the **"Active Portal User"** box will be unchecked.

(NEW: 4/21) MANAGE CONTACTS: INACTIVE CONTACT

- **Reminder:** There is no way to delete a contact no longer with your business. Portal Administrators should make these contacts inactive, instead.

- Select the **pencil icon** next to **"Inactive Contact."**

(NEW: 4/21) MANAGE CONTACTS: INACTIVE CONTACT

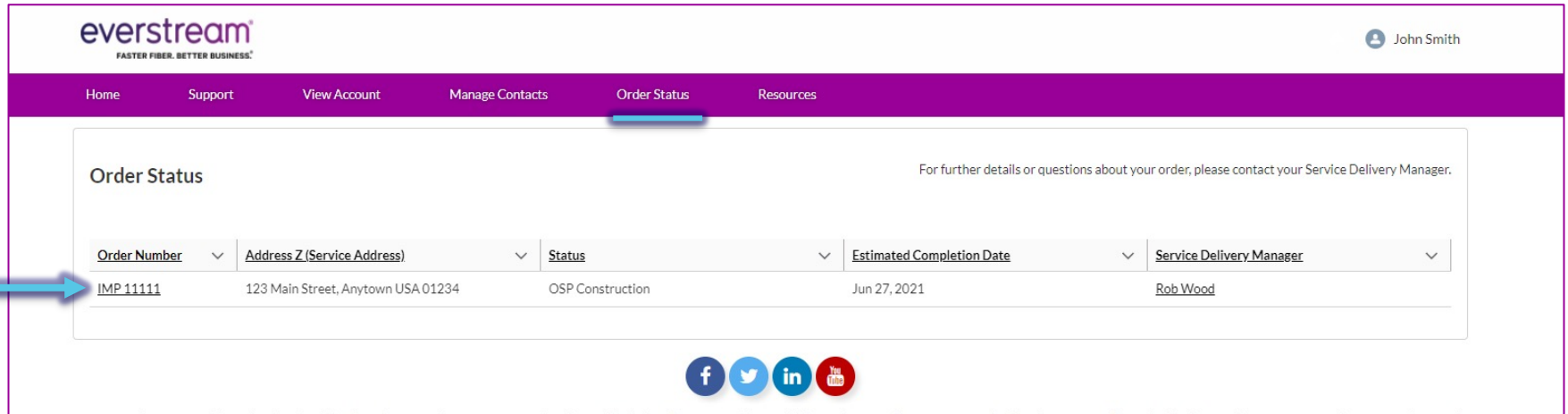- On the pop-up window, check the box for **"Inactive Contact."**

- Click **"Save."**

ORDER STATUS

(NEW: 4/21) ORDER STATUS

- Customers can now review the status of pending implementation orders by selecting the IMP ticket, under **Order Number**.

- Should you have any questions or concerns regarding the status of your order, please contact the Service Delivery Manager listed.
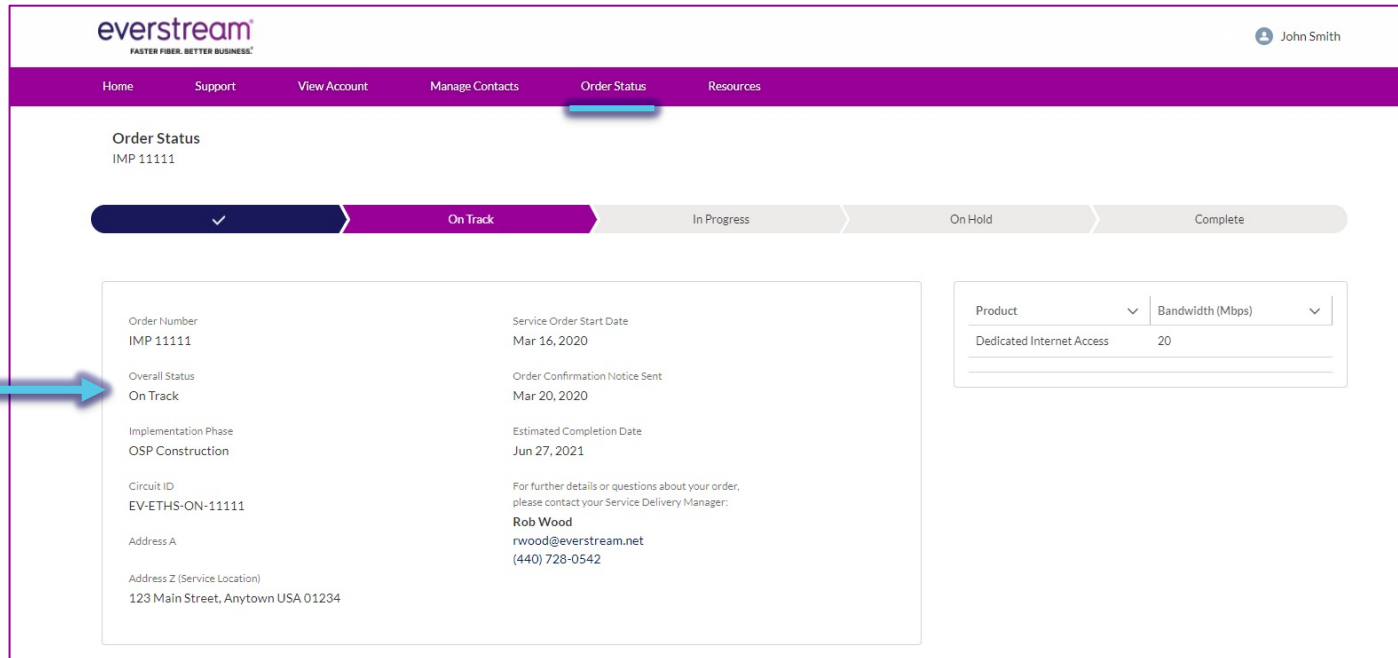
(NEW: 4/21) ORDER STATUS

On the next screen, review the details and status of your pending implementation order.

RESOURCES

RESOURCES

- Select the Resources tab to be directed to the Customer Support page on Everstream's website (everstream.net/support)
- Here you can access:
  - Our latest network status information
  - NOC Escalation List
  - Other helpful documents and important communications

CUSTOMER PORTAL HELP

CUSTOMER PORTAL HELP

Please contact the Everstream NOC with any questions or assistance related to the Customer Portal.

Call, email or submit a ticket through the portal:

- Phone Support
  866.624.8624

- Email Support
  support@everstream.net