



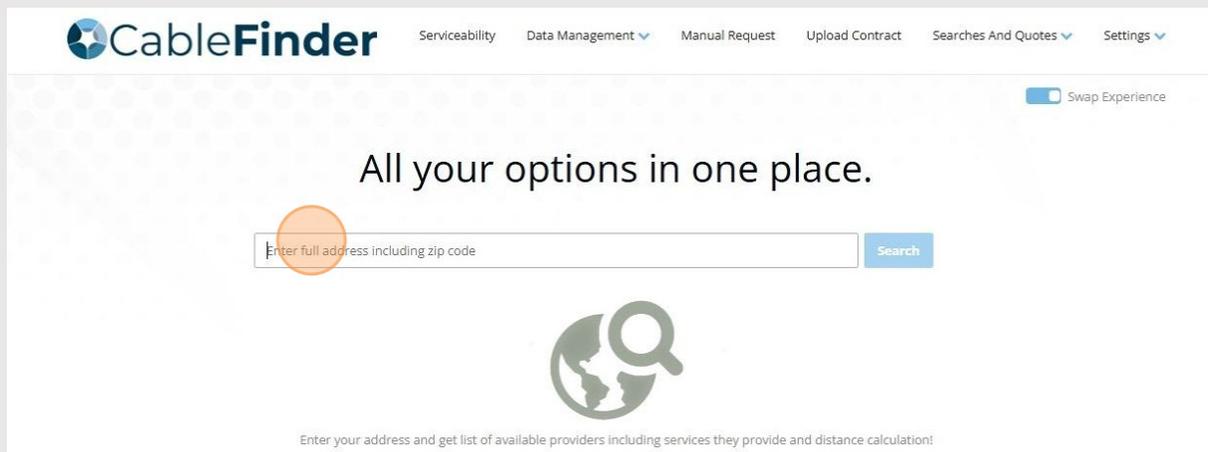
User Guide

Cox Coax: Generating
and Uploading Contract

User Guide for Cox Coax: Generating and Uploading Contract

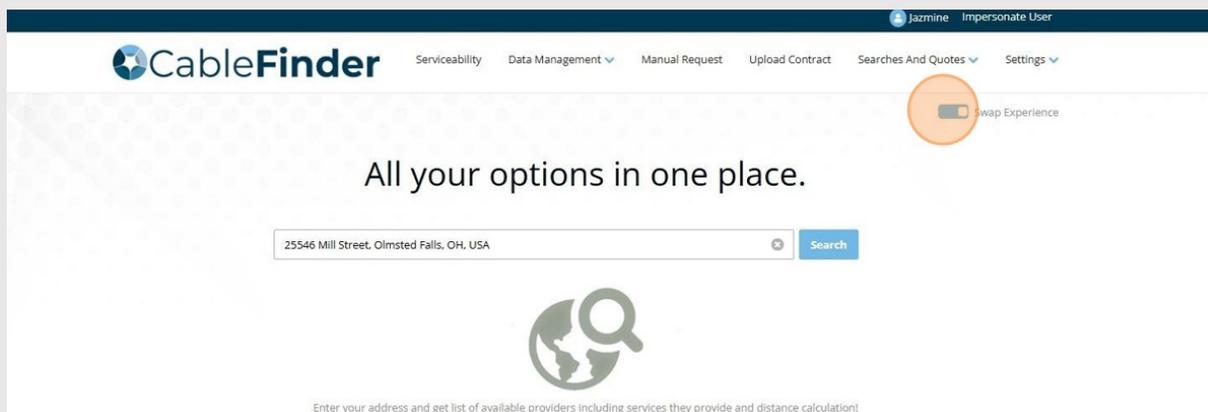
1

Click the address bar to type in a business name or address and click Search. After typing in a business name or address in the search bar, the results page will generate who the provider is, a serviceability description, the anticipated timeframe to install, the max speed and the products available.



2

Options will display as shown in the next step. Toggle "Swap Experience" in top right corner to change the view of your results.



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3

Click “Swap Experience” Toggle in top right corner.

The screenshot shows the CableFinder web application interface. At the top right, a user profile for 'Jazmine' is visible with an 'Impersonate User' link. Below this is a navigation menu with items: 'Serviceability', 'Data Management', 'Manual Request', 'Upload Contract', 'Searches And Quotes', and 'Settings'. A 'Swap Experience' toggle switch is highlighted with an orange circle. The main content area features the heading 'All your options in one place.' and a search bar containing '1111 St. Olmsted Falls, OH 44138, USA'. Below the search bar, there are three checked filters: 'Dedicated', 'Best Efforts', and 'Wireless'. The results section shows 'Showing 11 results' and three serviceable options, each with a 'Serviceable' status and a 'Green' indicator. The options are for Spectrum BUSINESS, ACC BUSINESS, and AT&T. Each option includes fields for 'TIME:', 'DIST:', and 'MAX SPEED:'.

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When “Swap Experience” is toggle off, the results will be given as seen below.

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If green, the user can then click “Configure Pricing” to go to the pricing catalog. If red, “Request Pricing” will be displayed to engage with the TSD back-office team to find additional solutions.

The screenshot shows the CableFinder search results page for the address 25546 Mill St, Olmsted Falls, OH 44138, USA. The page is divided into two main sections: "DEDICATED SERVICE RESULTS" and "BEST EFFORTS RESULTS".

DEDICATED SERVICE RESULTS:

- SPECTRUM FIBER:** Serviceability Description: Serviceable - Ready to install with little or no construction required (green). Anticipated Timeframe to Install Spectrum: 60-90 Days. Max Speed: 10G. Products: DFI, SDFI and Enterprise Internet. Building Type: Autobuild. Button: CONFIGURE PRICING (blue).
- ACC FIBER:** Serviceability Description: Serviceable - Ready to install with little or no construction required (green). Anticipated Timeframe to Install Acc: 30-45 Days. Max Speed: 10G. Products: ADI. Button: CONFIGURE PRICING (blue).

BEST EFFORTS RESULTS:

- COAX & CFI:** Serviceability Description: Serviceable - Ready to install with little or no construction required (green). Anticipated Timeframe to Install Cox: 10-15 Days. Technology: DOCSIS 3.1, Cox Fiber Internet Available. Max Speed: 2G. Products: Internet, Phone. Button: CONFIGURE PRICING (blue, circled in orange).
- AT&T BROADBAND:** Serviceability Description: Serviceable - Ready to install with little or no construction required (green). Anticipated Timeframe to Install AT&T: 10-15 Days. Max Speed: 5 Gig. Products: Internet. Button: CONFIGURE PRICING (blue).

An orange arrow points to the "Swap Experience" button in the top right corner.

6

Build your cart by selecting the “Select Term” box to pick a term.

The screenshot shows the "PRICING CATALOG" page for Cox Business. The address 25546 Mill St, Olmsted Falls, OH 44138, USA is displayed. The page features the Cox Business logo and several interactive elements:

- Standard Pricing:** A button at the top left.
- Select Term:** A dropdown menu currently showing "3 Year Coax" (circled in orange).
- Internet Speed Filter:** An empty dropdown menu.
- Select Package:** A partially visible dropdown menu at the bottom.

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Select "Internet Speed Filter" to display drop down of internet speeds.



5546 Mill St, Olmsted Falls, OH 44138, USA

COX BUSINESS

Select Term: 3 Year Coax

Internet Speed Filter: CBI 300 - 300Mbps x 30Mbps

Select Package: [Empty]

COAX INTERNET INTERNET

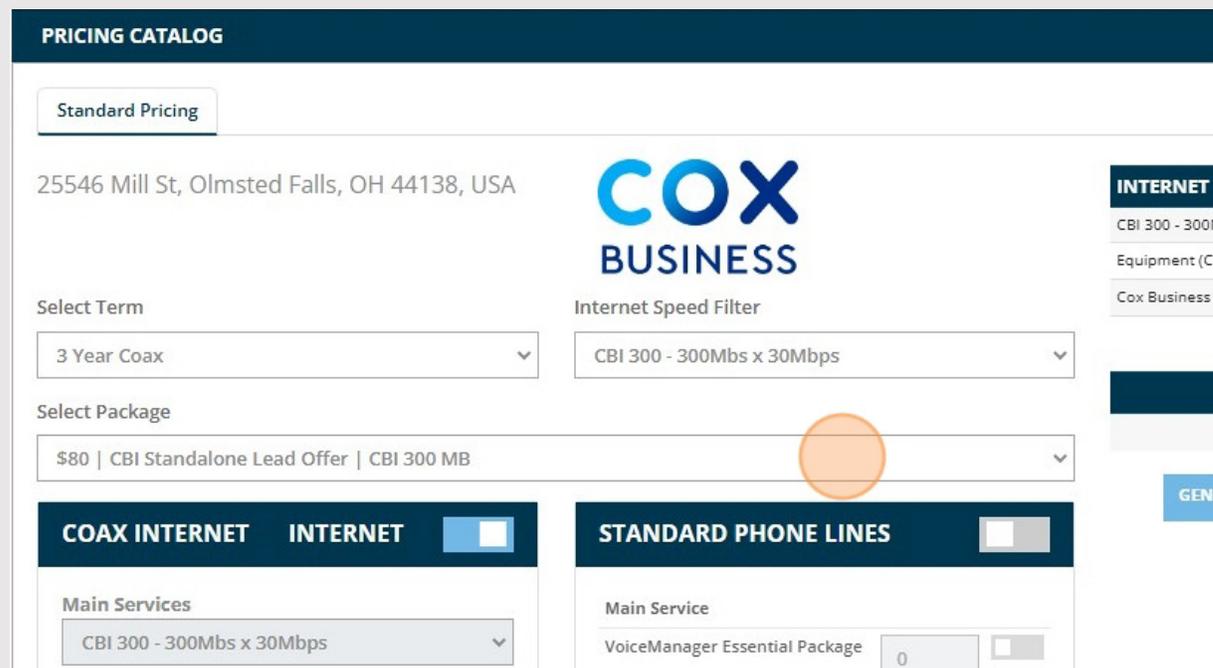
STANDARD PHONE LINES

Main Services: CBI 100 - 100Mbps x 20Mbps

Main Service: VoiceManager Essential Package

8

After filtering term and speeds, click box under "Select Package" to display drop down of package offers based off your filters.



PRICING CATALOG

Standard Pricing

25546 Mill St, Olmsted Falls, OH 44138, USA

COX BUSINESS

Select Term: 3 Year Coax

Internet Speed Filter: CBI 300 - 300Mbps x 30Mbps

Select Package: \$80 | CBI Standalone Lead Offer | CBI 300 MB

COAX INTERNET INTERNET

STANDARD PHONE LINES

Main Services: CBI 300 - 300Mbps x 30Mbps

Main Service: VoiceManager Essential Package 0

INTERNET

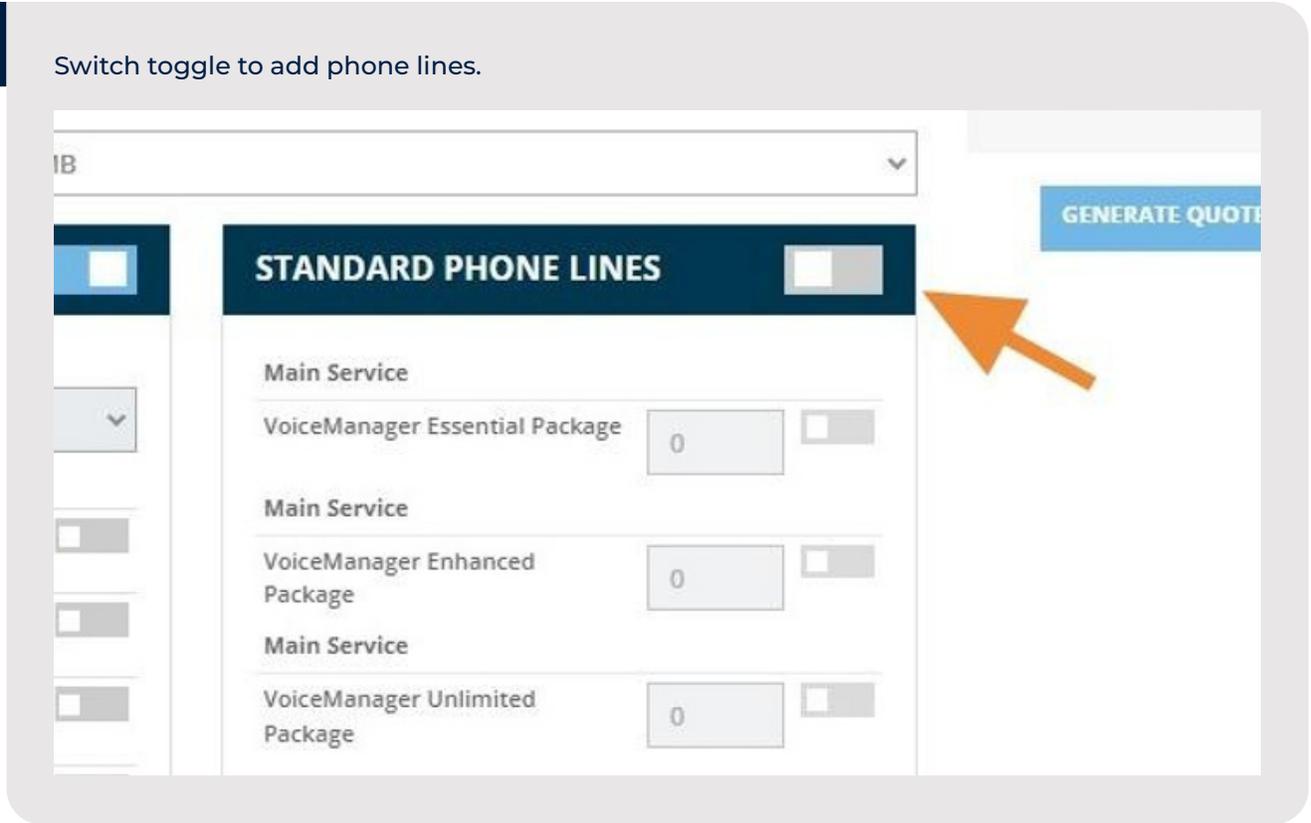
- CBI 300 - 300Mbps
- Equipment (CBI)
- Cox Business I

GEN

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Switch toggle to add phone lines.



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A shopping cart appears on the right-hand side of the screen. Make any additional adjustments or add-on services, updating the shopping cart in real time.

INTERNET	NRC	MRC
CBI 300 - 300Mbps x 30Mbps	0.00	80.00
Equipment (CBI Gateway)	99.00	13.00
Cox Business Internet Install (0)	0.00	0.00
Subtotal:	\$99.00	\$93.00

PROMO	NRC	MRC
\$100 Prepaid Card (Internet)	0.00	0.00
Subtotal:	\$0.00	\$0.00

	NRC	MRC
Total:	\$99.00	\$93.00

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NRC is any “Non-Reoccurring Charges”, MRC is “Monthly Reoccurring Charges.

	NRC	MRC
Total:	\$99.00	\$93.00

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To create paperwork, click “Generate Contract” on the pricing page.

The screenshot shows a pricing page with a 'STANDARD PHONE LINES' section on the left and a summary table on the right. The 'STANDARD PHONE LINES' section has three 'Main Service' options, each with a quantity of 0 and a toggle switch. The summary table is divided into three sections: 'INTERNET', 'PROMO', and a 'Total' section. The 'INTERNET' section lists 'CBI 300 - 300Mbps x 30Mbps' (0.00 NRC, 80.00 MRC), 'Equipment (CBI Gateway)' (99.00 NRC, 13.00 MRC), and 'Cox Business Internet Install (0)' (0.00 NRC, 0.00 MRC), with a subtotal of \$99.00 NRC and \$93.00 MRC. The 'PROMO' section lists '\$100 Prepaid Card (Internet)' (0.00 NRC, 0.00 MRC) with a subtotal of \$0.00 NRC and \$0.00 MRC. The 'Total' section shows a final total of \$99.00 NRC and \$93.00 MRC. At the bottom, there are two buttons: 'GENERATE QUOTE' and 'GENERATE CONTRACT', with the latter circled in orange.

INTERNET	NRC	MRC
CBI 300 - 300Mbps x 30Mbps	0.00	80.00
Equipment (CBI Gateway)	99.00	13.00
Cox Business Internet Install (0)	0.00	0.00
Subtotal:	\$99.00	\$93.00

PROMO	NRC	MRC
\$100 Prepaid Card (Internet)	0.00	0.00
Subtotal:	\$0.00	\$0.00

	NRC	MRC
Total:	\$99.00	\$93.00

13

Type in the Registered Business Name and Quote Name. You have a quotes and contracts library so please be specific when labeling for easier identification in your library.

The screenshot shows the same pricing page as in step 12, but with a 'Please Enter Quote Info' dialog box overlaid in the center. The dialog box contains the following text: 'Once you create a quote you can proceed to the contract generation.' Below this text are two input fields: 'Registered Business Name' and 'Quote Name'. The 'Registered Business Name' field is circled in orange. At the bottom of the dialog box, there is a checkbox labeled 'Send Quote via Email' and two buttons: 'OK' and 'CANCEL'.

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Enter customer information to reflect on paperwork.

General Customer Information

Registered Account Name

Business Phone

Email

Address Line 1

Contact Name

Cell Phone

Address Line 2

General

Billing

CPNI

Confirmation

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Ensure the address is correct, including the suite or unit number.

Address Line 2

I confirm that there is no Unit or Suite number for this location.

State

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If there is not a suite or unit number, confirm by clicking the box to proceed.

Address Line 2

I confirm that there is no Unit or Suite number for this location.

17

Use the "Same as customer info" radio button to carry down the information if applicable.

Address Line 1	Address Line 2
<input type="text" value="25546 Mill St"/>	<input type="text"/>
	<input checked="" type="checkbox"/> I confirm that there is no Unit or Suite number for this location.
City	State
<input type="text" value="Olmsted Falls"/>	<input type="text" value="OH"/>
Zip	
<input type="text" value="44138"/>	
<input type="checkbox"/> Same as customer info?	
Technical Contact Name	Tech Email
<input type="text"/>	<input type="text"/>
Tech Phone	Tech Cell Phone
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> On-site?	
	<input type="button" value="SAVE"/>

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Click "Save" to move onto the billing page.

Tech Email
test@test.com

Tech Cell Phone
5555555555

SAVE

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Use the "Same as location?" radio button to copy customer information into available fields if desired.

General
Billing
CPNI
Confirmation

Billing Customer Information

Same as location?

Bill Account Name: Test

Bill Contact Name: [Empty]

Bill Phone: [Empty]

Bill Cell Phone: [Empty]

Bill Email: [Empty]

Billing Address Line 1: 25546 Mill St

Billing Address Line 2: [Empty]

I confirm that there is no Unit or Suite number for this location.

City: Olmsted Falls

State: OH

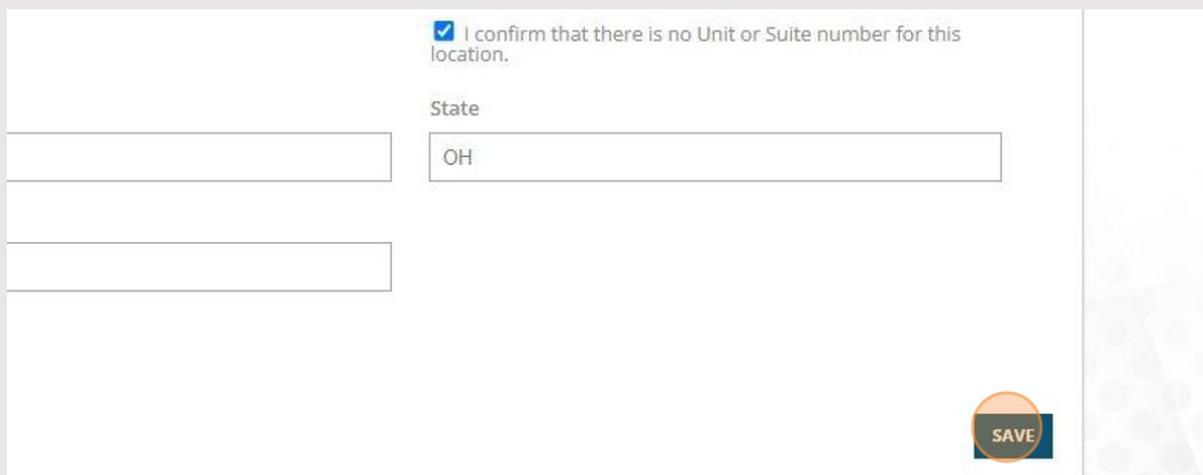
Zip: 44138

Tax Exempt?

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Click "Save" to move onto CPNI Form.



I confirm that there is no Unit or Suite number for this location.

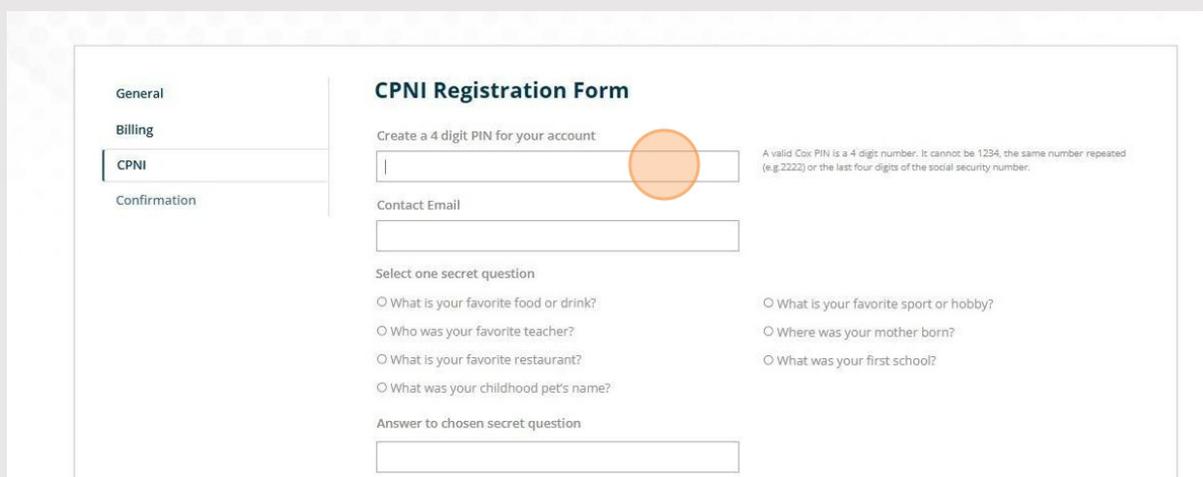
State

OH

SAVE

21

Fill out the required security questions for the Cox Business account.



General

Billing

CPNI

Confirmation

CPNI Registration Form

Create a 4 digit PIN for your account

A valid Cox PIN is a 4 digit number. It cannot be 1234, the same number repeated (e.g. 2222) or the last four digits of the social security number.

Contact Email

Select one secret question

What is your favorite food or drink?

Who was your favorite teacher?

What is your favorite restaurant?

What was your childhood pet's name?

What is your favorite sport or hobby?

Where was your mother born?

What was your first school?

Answer to chosen secret question

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Below the security questions are field to add any authorized users to the account. You may also click the same radio button to carry over the customer information.

○ What is your favorite restaurant? ○ What was your first school?
● What was your childhood pet's name?

Answer to chosen secret question
|

List the names of all individuals authorized to discuss Account Information, make changes to this account, or receive Billing/Account Information

Same as customer info? | |

Same as technical info? | |

Same as billing info? | Jazmine Pizarro

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Click "Save" to move onto finalizing your paperwork.

Same as customer info?
| |

Same as technical info?
| |

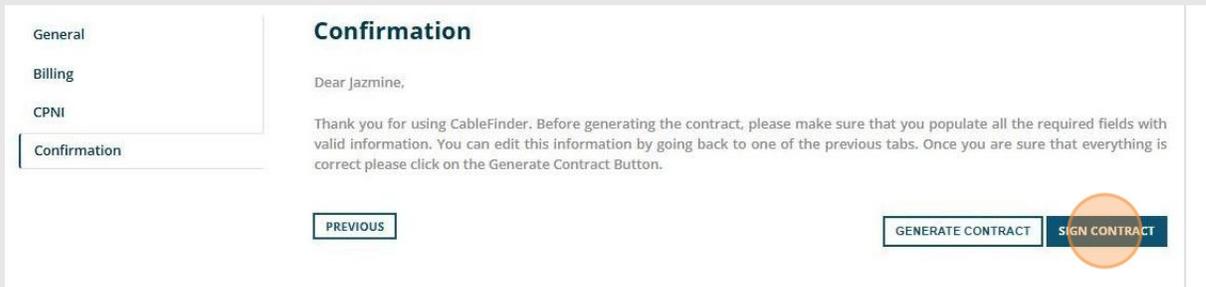
Same as billing info?
| |

PREVIOUS SAVE

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Click "SIGN CONTRACT" to send your contract with DocuSign integration.



The screenshot shows a web interface with a sidebar on the left containing tabs for "General", "Billing", "CPNI", and "Confirmation". The "Confirmation" tab is selected. The main content area is titled "Confirmation" and contains the following text: "Dear Jazmine," followed by "Thank you for using CableFinder. Before generating the contract, please make sure that you populate all the required fields with valid information. You can edit this information by going back to one of the previous tabs. Once you are sure that everything is correct please click on the Generate Contract Button." At the bottom of the page, there are two buttons: "PREVIOUS" on the left and "GENERATE CONTRACT" and "SIGN CONTRACT" on the right. The "SIGN CONTRACT" button is highlighted with a red circle.

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After clicking "Sign with DocuSign" complete the signee contact information that will pop up on the screen. Click the "Signee E-mail Address" field to enter the desired e-mail in which the DocuSign will be sent to.

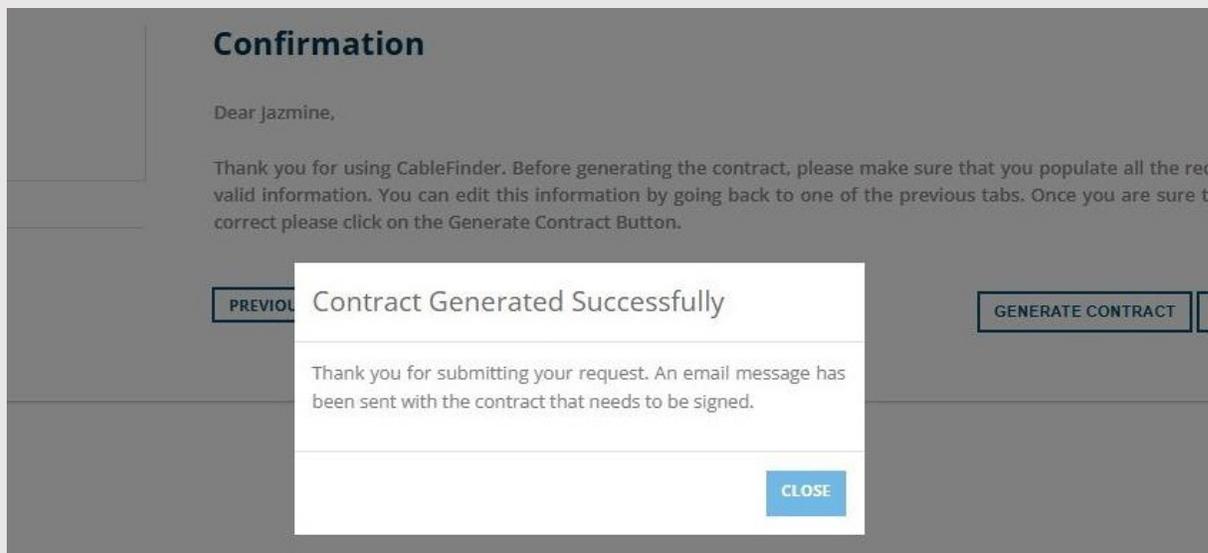


The screenshot shows a form titled "Signee Contact Information". Below the title is the instruction: "Please enter the full name and email address of the person that will sign the contract." The form contains three input fields: "Signee Name" (with a hyphen "-" in the field), "Title", and "Signee E-mail Address". Below these fields is a checkbox labeled "Would you like to send a copy?". At the bottom right of the form are two buttons: "OK" and "Close".

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After sending your DocuSign, you will see a confirmation pop up, and an email will also be sent to you with the ordering details.



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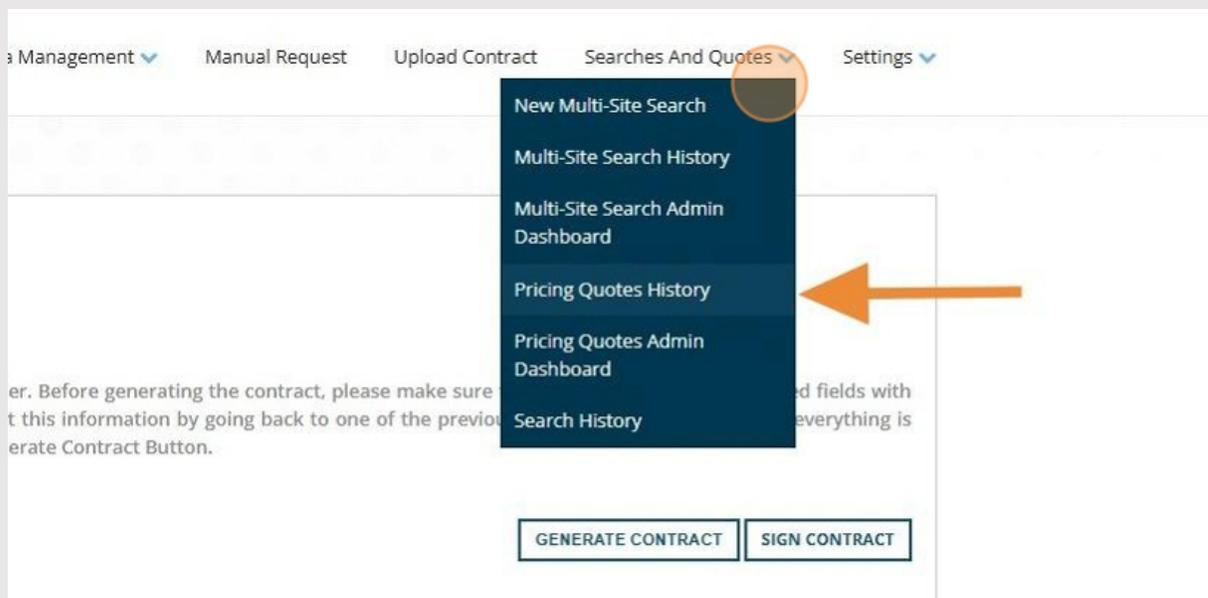
Uploading Cox Coax Contract to CableFinder

27

For contract upload, once you have the signed contract, head back into CableFinder to upload the document. This will store the contract in Cable Finder and send the document to the TSD for processing.

28

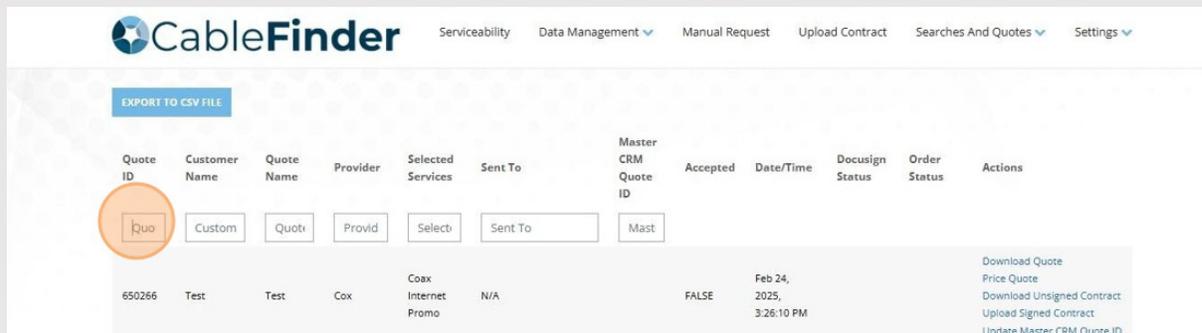
Click “Searches and Quotes” in the top right corner of screen to display drop down, then click “Pricing Quotes History”



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Click “Searches and Quotes” in the top right corner of screen to display drop down, then click “Pricing Quotes History”

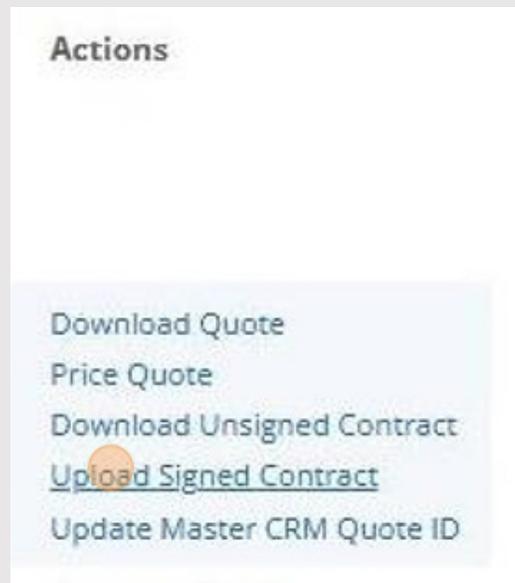


EXPORT TO CSV FILE

Quote ID	Customer Name	Quote Name	Provider	Selected Services	Sent To	Master CRM Quote ID	Accepted	Date/Time	DocuSign Status	Order Status	Actions
650266	Test	Test	Cox	Coax Internet Promo	N/A		FALSE	Feb 24, 2025, 3:26:10 PM			Download Quote Price Quote Download Unsigned Contract Upload Signed Contract Update Master CRM Quote ID

30

Under Actions, Click “Upload Signed Contract”



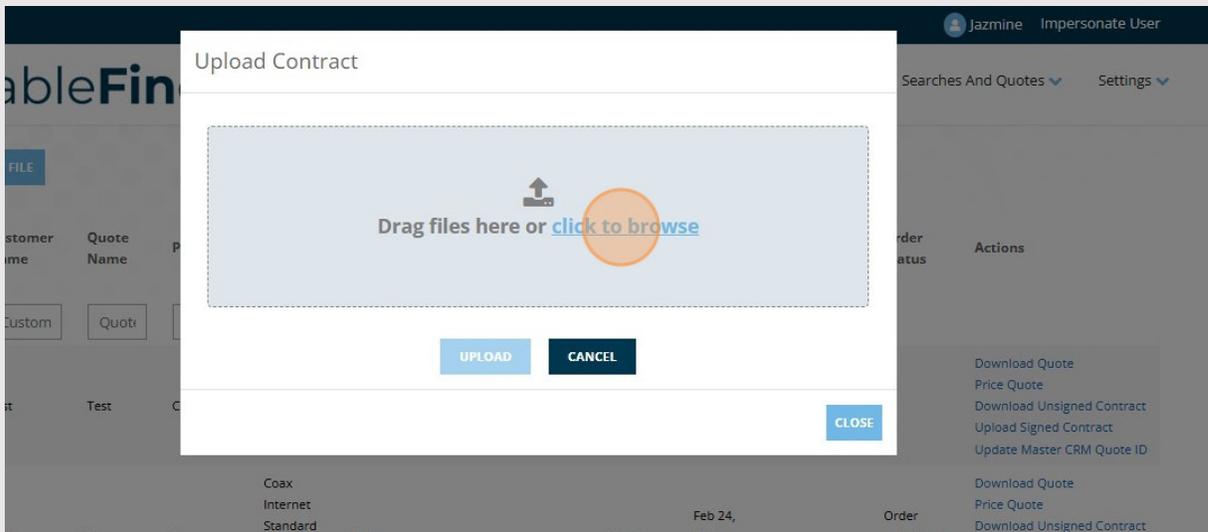
Actions

- Download Quote
- Price Quote
- Download Unsigned Contract
- [Upload Signed Contract](#)
- Update Master CRM Quote ID

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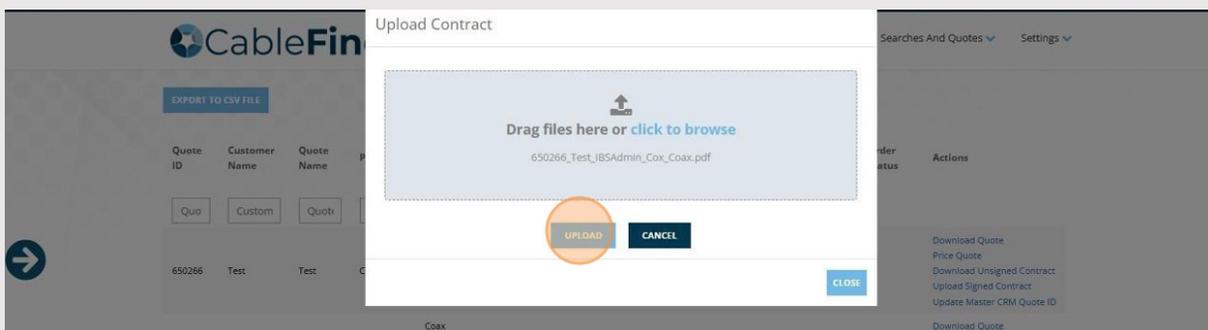
31

Here you can either drag and drop your PDF file, or “click to browse” to choose from your computer files.



32

The file name will display on the screen once it has attached. Click “Upload”



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Post CableFinder Emails

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Email Confirmation from CableFinder “Contract Uploaded for Quote ID #####”. This will go to CableFinder user and the TSD.

Contract Uploaded for Quote ID: 650266



CableFinder <noreply@cablefinder.net>
To
Cc



A contract has been uploaded for the Quote: 650266.

Following are the details:

Username: jazmine

Email Address: jazmine@cablefinder.net

Phone Number: NA

Distributor: IBSAdmin

Customer Name: Test

Address: 25546 Mill St, Olmsted Falls, OH 44138, USA

Service Provider: cox

Service Type: Coax Internet,Promo

MRC: 93

NRC: 99

Kindly view the attachment for the uploaded contract.