



Emersion Software Systems Pty Ltd

System Training – Session 2

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Session Contents



Understanding Packages and Plans:

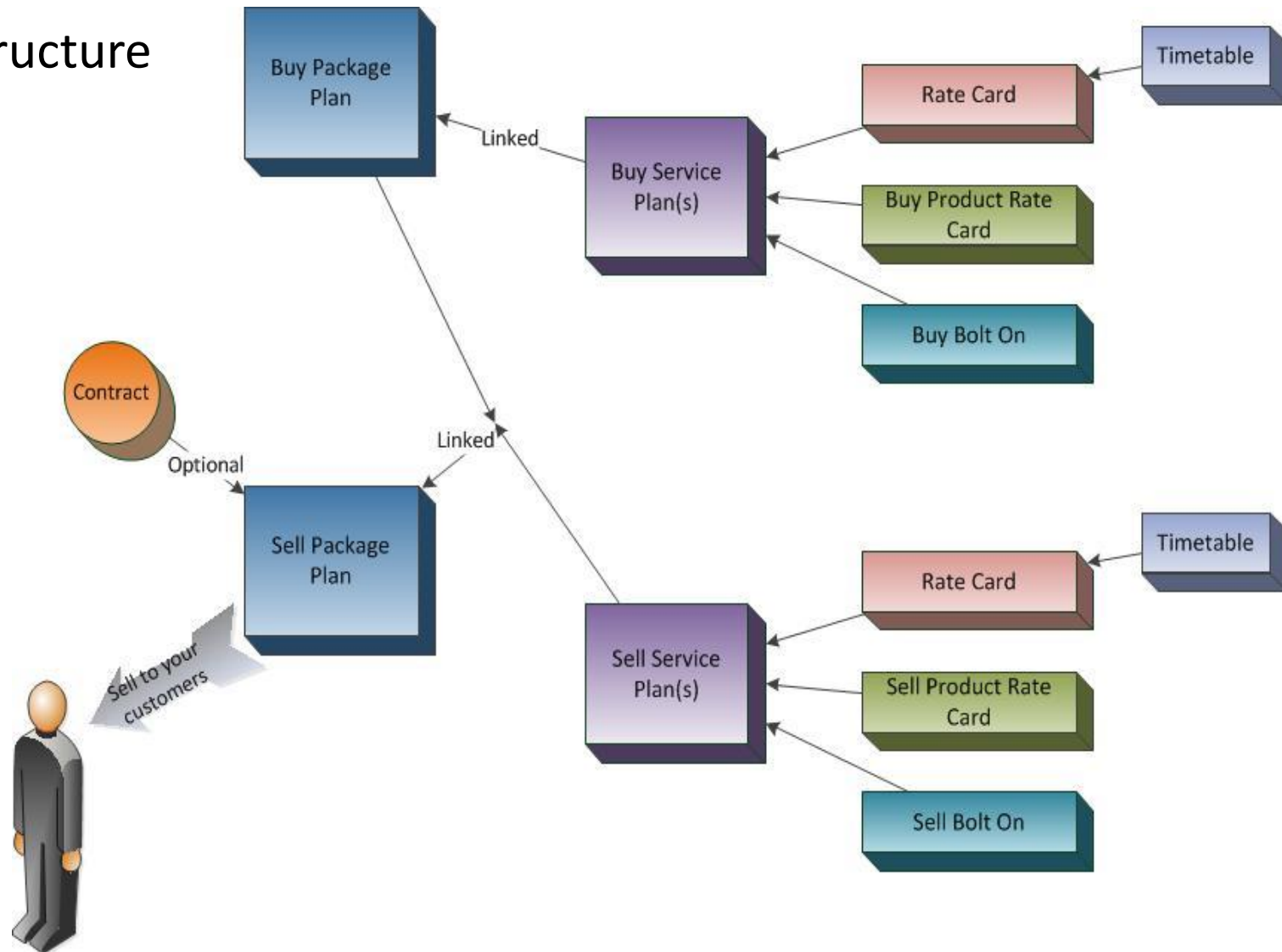
➤ Package Components

- Package Plan
- Service Plan
- Rate Card
- Bolt ons
- Timetables
- Contracts

Understanding Packaging



Overall Structure



Package Plans



- Made up of one or many Service Plans
- Buy package plans define the service costs from your upstream service providers
- Sell package plans are sold to your customers
- For services provided from a supplier within the system, buy package plans will be made available to you
- For other services, you create the buy package plans
- You create sell package plans
- Sell package plans must be linked with buy package plans before they can be sold to your customers.

Package Plans



➤ A Package Plan:

- can have a setup fee
- may have an access fee
- controls the billing period length, billing in advance, billing alignment to the account, and pro-rata charging
- may have a default contract
- allows for global discounts.

➤ Example package plan: PSTN phone service and a ADSL2 service bundled together for \$99 set up fee, and \$75 per month.

Service Plans



- Contains a single service type e.g. PSTN phone or ADSL2
- Linked to a Package Plan
- Defines the charging rules for the service i.e. how is it billed
- Both buy service plans and sell service plans need to be created
- Buy service plans are linked to buy package plans
- Sell service plans are linked to sell package plans
- Service plans cannot be sold by themselves and must be linked to a package plan.

Service Plans



➤ A Service Plan:

- can have setup fees based on setup type
- may have an access fee –package plan fees take precedence
- controls the service billing period
- telephony service types:
 - has a Rate Card to define call charges
 - can have included value (i.e. cap)
 - can have Bolt-Ons
- for data service types define the data quota
- can have a Product Rate Card to define charges relating to service and equipment.

Rate Cards

- Rate Cards are bound to Service Plans based on a service type e.g. PSTN phone, mobile phone, VOIP etc.
- Contain a group of *rates* and *tariffs*
- A rate defines what the system should charge, and also *how* the system should charge for a given call or usage type
- A tariff defines each individual service usage type (e.g. local call, national call, international call to USA etc)
- You can define which rates & tariffs (if any) are included in a cap, which is set on the service plan attached to the rate card
- Buy and sell rate cards can be defined based on the buy service plan or sell service plan the rate card is linked to.

Rate Cards



- External carriers (such as Telstra and Optus) provide CDRs containing all services and their associated usage
- Each usage record contains a *tariff key* that defines the usage type incurred
- The system looks up the tariff key in the rate card to determine the rating method to apply when calculating the charges to the customer
- Multiple rating methods are available.

Time Tables



- Time Tables define time bands for different times of the day and days of the week
- Linked to a Rate Card to allow different rates to be defined for each time band
- This allows a single rate card to be set up that defines the rate for a particular service at various days and times, instead of maintaining multiple rate cards.
- E.g. apply discounted phone call rates for off peak times or weekends etc.
- During rating, the billing and rating engine applies the rate that is valid for the time of day that the usage was recorded, based on the time table setup.

Product Rate Cards

- Linked to a Service Plan based on service type
- Define charges for additional services and equipment associated with certain service types
- E.g. telephone handset rental, voicemail, call forwarding etc
- Charge on a per use basis
- Contain rate IDs that identify each product and the rate to charge
- Service suppliers provide service and equipment files containing the service product and usage
- The system rates the product usage based on the product rate card set up
- You create buy and sell product rate cards to link to buy and sell service plans.

Bolt Ons



- A Bolt On is an addition to a Service Plan that can provide savings on particular service and usage type
- E.g. 50 free SMSs or 2GB data on a mobile phone service
- A Bolt on *Bonus* can provide a block of free usage as a dollar value, usage time, data, or usage units)
- Excess rates can be applied if the customer exceeds the maximum bolt on usage amount
- Set up and access fees can be charged
- A *First Time Fee* can be charged that allows the bolt on fee to be charged only when the customer uses the bolt on usage for the first time.

Contracts

- Can be optionally attached to a package
- Sets the minimum length of time a service should be retained
- Defines the system behaviour if the service is cancelled or a plan change occurs
- Can be used to apply a discount whilst the customer is on the contract
- Can be assigned at the time a customer purchases a package, or anytime after the package is active.

Contracts



➤ A Contract:

- length in months or years
- defines a break out method:
 - tiered – allows ranges of months and breakout fees to be defined
 - fee – a flat figure which will be charged
 - remaining value (current) – based on months left and current package
 - remaining value (initial) – based on months left and initial package
- defines a plan change action and fee to apply if the customer upgrades, cross grades or downgrades
- defines a maximum breakout fee
- can have a package pool that determines which plans are available for the customer to change to while on the contract.

How Charges Relate to Invoices



Account Invoice Period

- Each customer has an *Account Invoice Period*
- Account Invoice Period defines the customer's billing invoicing cycle
- At the end of an *Account Invoice Period*, the system will collect all pending charges created by the Billing and Rating Engine i.e. for the package plans, service plans, bolt ons, usage, products etc that the customer has been sold
- The charges are then allocated to an invoice, and the invoice is rendered into a .PDF document

Invoice Approval

- By default, all invoices are created in a pending status to allow you to review each invoice before it is sent to a customer
- Once you are satisfied that the invoice is correct, you can approve the invoice and it will be delivered by the customer's delivery method set up, as set in the customer account's details.

Questions?

