# Product Management

# User Manual

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# About This Document

## Purpose

The purpose of this document is to describe the operation of the Emersion Product Management module. Other Emersion user manuals describe the use and operation of other system modules, such as Customer Management and Service Management, which may be mentioned or referred to within this manual.

## Intended Audience

The intended audience for this user manual are stock control, purchasing or system administrator staff of a service provider who order and who manage hardware and other physical products within the Emersion System.

## Document Control

| Version | Date | Description | Author |
|---|---|---|---|
| 0.1 | 15/12/2011 | Initial version | Kathy Berkidge |
| 1.0 | 21/12/2011 | Finalised for release | Kathy Berkidge |

# Emersion® Umbrella System

The Emersion® Umbrella System was developed specifically to satisfy the needs of service providers selling complex products such as telephony, broadband and 3G mobile phone plans with bolt-ons to the wholesale and retail markets. The unique Emersion Umbrella Architecture allows products, services and packages to be created, provisioned, billed, and managed as an end to end process using our Thunder™ Workflow Manager. This single Umbrella System will allow a service provider to be more efficient and reduce the human resource requirements to manage their operations, whilst providing complete control over customers and services from a single interface.

Emersion's end-to-end interfaces with Australia's leading national carriers and aggregators makes ordering, provisioning, and billing of data and telephony products and services effortless. The Umbrella System guides the user through the service qualification and ordering process, removing the confusion and complication and costly re-keying of information. Customer invoices are generated automatically for all charges associated with their services.

The Emersion Umbrella System comprises core systems developed on the robust Emersion Umbrella Architecture and a number of Emersion® Umbrella System modules, managed and operated by Emersion, that interact to each other via the Umbrella Architecture, as well as interface to external systems via the Batch Mediation System (*BMS*), Cyclone (for provisioning services), and EPS (Electronic Payment System).

The B2B Application Programming Interface (API) interfaces with multiple carriers and service providers using different communications protocols, such as web services (XML and SOAP) and FTP. CDRs and RADIUS data usage are retrieved from carriers or the service provider without user intervention.

Emersion's super-flexible Billing System allows plans for all types of products and services to be created. The Rating component allows rate cards to be created and managed to associate with plans, including shifting rates based on time, quantity or usage, call block partitions, and traffic zones. Plans can be linked making it easy to build packages and apply discounts or concessions without needing to create countless plans that are both confusing and difficult to manage.

As well as all the flexibility provided in the Plan and Rate components, Emersion also stores historical rate information allowing historical invoicing as well as re-rating to be performed. The Billing Engine integrates with the Invoice Generation system to automatically generate invoices for customers, whether they are service providers, agents or end users. A single, unified bill is presented, showing customers' packages, services and charges. Customers may view their bills on-line through the User Interface or receive them via email in Adobe® Acrobat® PDF format. Emersion also supports integration to external mail houses for paper invoice generation and posting.

Teamed with the other system modules for Customer Management, Support (Ticketing), Provisioning, Payment Services, Data Retrieval and verification, the Emersion platform provides a degree of flexibility not often seen in services of this kind to date.

Emersion meets the requirements of even the most demanding service provider:

- Improved efficiency - provisioning, billing & support from one system (no re-keying) ✓
- Flexible pro-rata billing, rating and invoicing solutions, bundling, credit management and customer management solutions ✓
- Intuitive User Interface ✓
- Customisable Workflows ✓
- Documentation and training ✓
- Scalable, available and secure, ready to go equipment, software and solutions ✓
- Support backed by an industry leading Service Level Agreement ✓

## Introduction

On behalf of the team at Emersion, we would like to take this opportunity to welcome you to Emersion. Emersion may update the system to improve your experience, updates, additional features and changes may occur beyond the date of the creation of this document. Therefore, some information or screens in this version of the manual may become slightly out of date.

ⓘ Note that other Emersion modules referred to in this manual are not described in detail in this document. Please refer the specific Emersion system manual for further information about each module if required.

You will be provided with a username and password to access the Emersion system. The Emersion system components are seamlessly integrated and you will access the Emersion Customer Management System (CMS), the Product Management module, and all other Emersion system modules from a single Web interface through the Emersion Cumulus user interface.

## Emersion Product Management

The Emersion Product Management module provides the ability to create and manage *product categories, sub categories,* and *point of sale products*. Products can be grouped by product category and sub-category, which is a simple grouping of similar products.

The *Create Purchase* function allows you to sell the products to customers either as an *Outright Purchase,* or under an *Installment Plan* that can then be invoiced to the customer immediately or at the end of the billing period.

The *Product Pricing* module allows you to update the price points of existing products, as well as keep a history of product pricing over time.

## Document Conventions

The following conventions are used throughout this manual to describe information and procedures:

| | |
|---|---|
| *Italics* | Indicates the name of a screen, field or setting. The capitalisation and punctuation are the same as displayed on the screen. For example:<br>Complete the *Address* field. |
| **Bold text** | Bold text indicates either the name of a command, button or other interactive element. For example:<br>Type the user's name in the *Customer Name* field, and then click **Search**. |
| **BOLD CAPITALS** | Text in bold capitals indicates the name of a key on a keyboard. For example:<br>Type your password, and then press **ENTER**. |
| **Navigation >** | Menu options or navigation paths are described in shorthand using the following convention:<br>**Module > Functional Area > Option**<br>For example, selecting the Account Profile area can be described as:<br>Select **Admin > Settings > Account Profiles** from the Menu**.** |
| `Monospace text` | Used to represent the text you may type in a field. For example<br>Type `abc` in the *Search* field. |
| ⓘ | The ⓘ symbol indicates some useful information or a handy tip. |

Where possible all images are taken directly from the Cumulus User Interface

## Assumptions Made

As this manual cannot hope to cover more than the operation of the Emersion Product Management functions, the following assumptions have been made:

- You are familiar with the Emersion Cumulus user interface and you can competently use it.
- You have a computer that you can competently operate.
- You have an Internet connection, and are capable of establishing a connection.
- A Web Browser capable of supporting Web 2.0 functionality is installed on your computer.
- Acrobat® Reader version 6.00 or higher is installed on your computer.
- You have a basic understanding of computer and Internet terminology.
- You have a basic understanding of the day-to-day business operations of a Service Provider.

# Product Categories and Sub Categories

Product categories and sub categories are used to sort products into groups of similar products and allow you to quickly locate products during a customer sale transaction. For example, a product category of "Mobile Phone Accessories" could be used to group accessories, that you can further divide into sub categories of "Bluetooth", "Chargers", "Car kits", "Covers and Cases" etc. Products can then be created under each relevant Product Category and Sub Category.

Product categories and sub categories are related in a hierarchical structure. Sub categories must be associated with a product category. Products are then associated with a product category and sub category. However, products can be associated with a product category without a sub category.

## To Display the Product Categories

1. Select **Products** > **Product Categories** from the menu. The *Product Category Management* page will be displayed showing a list of existing product categories.


Figure 1. The *Product Category Management* page

### Search

You can locate a category by using the *Search* function. The following fields can be used to search:

- Category ID
- Category Name

## To Create a Product Category

1. From the *Product Category Management* page, click the **Create New Product Category** button. The *Create New Product Category* page will appear.


Figure 2. The *Create New Product Category* page

2. Enter the *Category Name* to give the new product category.
3. Enter the *Description* of the product category.
4. Click the **Create** button. The *Product Category Management* page will be displayed with an information box showing the category has been saved.

## To Display a Product Category

1. On the *Product Category Management* page, click the product category link in the *ID* column of the list. The *View Product Category* page will appear showing the selected product category and all related sub categories.


| Id | Name | Description | Category Name |
|---|---|---|---|
| 101 | Nokia | Nokia | Phones |
| 103 | iPhones | iPhones | Phones |
| 105 | Motorola | Motorola | Phones |
| 108 | HTC | HTC | Phones |
| 110 | Samsung | Samsung | Phones |

Figure 3. The *View Product Category* page

2. Click the **Back** button to return to the *Product Category Management* page.

## To Edit a Product Category

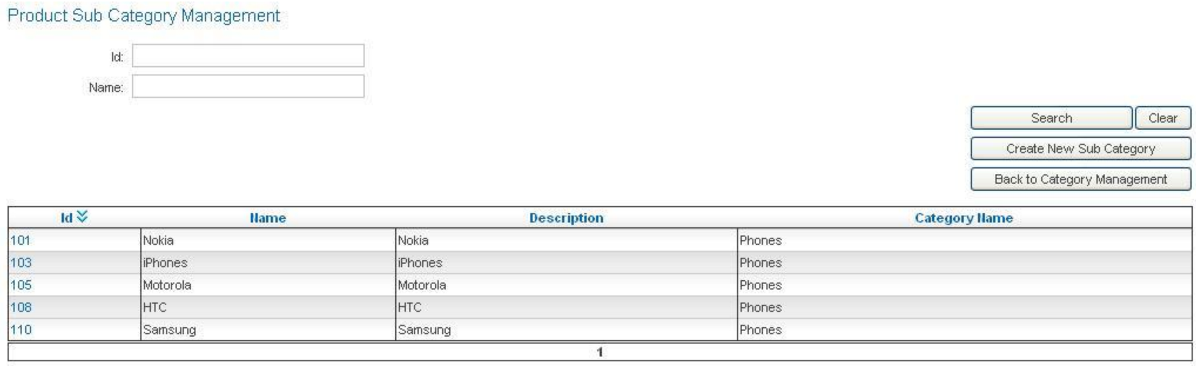
1. From the *Product Category Management* page, click the product category link in the *ID* column of the list. The *View Product Category* page will appear showing the selected product category.
2. Click the **Edit** button. The *Edit Product Category* page will appear.


Figure 4. The *Edit Product Category* page

3. Enter or modify information in the *Category Name* and *Description* fields.
4. Click the **Save** button. The *Product Category Management* page will be displayed with an information box showing the category has been saved.

## To Display the Product Sub Categories

1. Select **Products** > **Product Categories** > from the Menu. The *Product Category Management* page will be displayed.
2. Click the **Manage Sub Categories** button. The *Product Sub Category Management* page will appear showing a list of existing product sub categories.




| Id | Name | Description | Category Name |
|---|---|---|---|
| 101 | Nokia | Nokia | Phones |
| 103 | iPhones | iPhones | Phones |
| 105 | Motorola | Motorola | Phones |
| 108 | HTC | HTC | Phones |
| 110 | Samsung | Samsung | Phones |

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Figure 5. The *Product Sub Category Management* page

### Search

You can locate a sub category by using the *Search* function. The following fields can be used to search:

- Sub Category ID
- Sub Category Name

## To Create a Product Sub Category

1. From the *Manage Product Categories* page, click the **Manage Sub Categories** button. The *Create New Product Sub Category* page will appear.
2. Click the **Create New Sub Category** button. The *Create New Product Sub Category* page will appear.

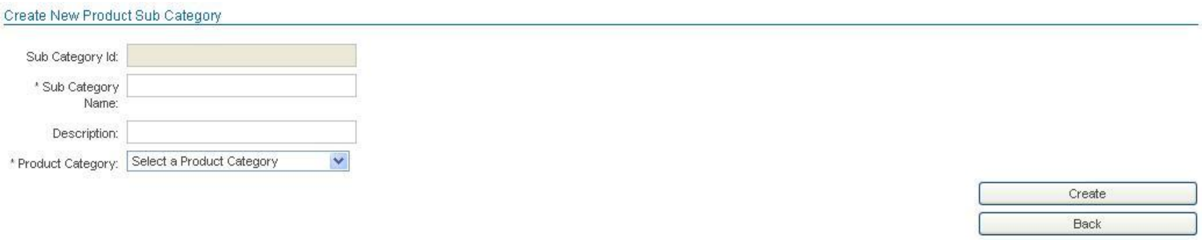



Figure 6. The *Create New Product Sub Category* page

3. Enter the *Sub Category Name* to give the new sub category.
4. Enter the *Description* of the sub category.
5. Select the category to associate with the sub category from the *Product Category* drop list. This list will show all existing product categories.
6. Click the **Create** button. The *Product Sub Category Management* page will be displayed with an information box showing the sub category has been saved.
7. Click the **Back to Category Management** button to return the *Product Category Management* page.

## To Display a Product Sub Category

1. On the *Product Sub Category Management* page, click the sub category link in the *ID* column of the list. The selected product sub category will be displayed.

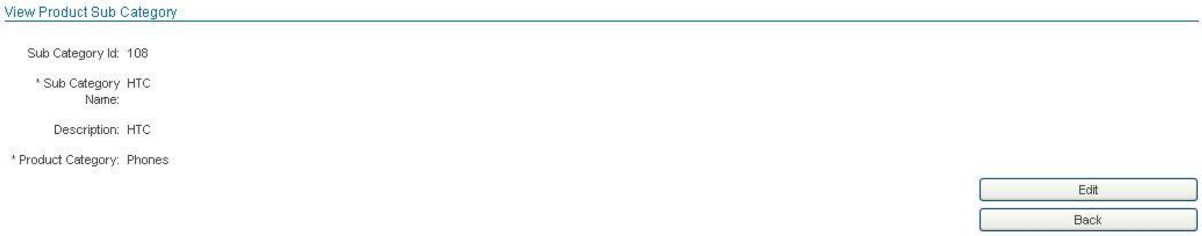



Figure 7. The *Create New Product Sub Category* page

2. Click the **Back** button to return to the *Product Sub Category Management* page.

## To Edit a Product Sub Category

1. On the *Product Sub Category Management* page, click the sub category link in the *ID* column of the list. The selected product sub category will be displayed.
2. Click the **Edit** button. The *Edit Product Sub Category* page will appear.


Figure 8. The *Edit New Product Sub Category* page

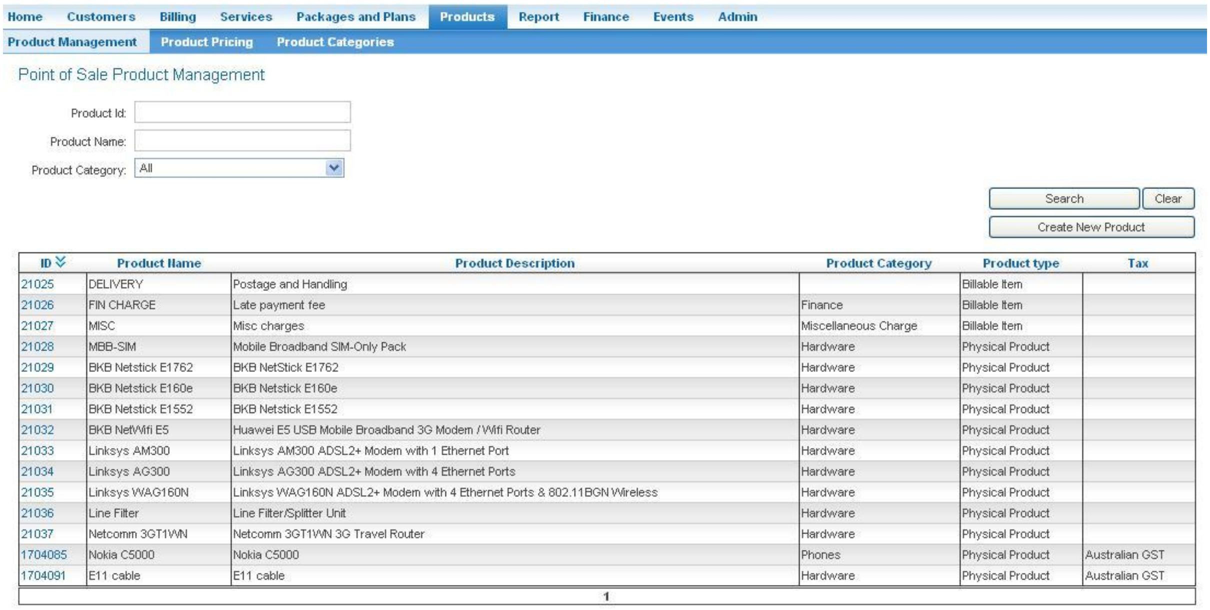
3. Enter or modify information in the *Sub Category Name* and *Description* fields, and select a different category from the *Product Category* drop list, as required.
4. Click the **Save** button. The *Product Sub Category Management* page will be displayed with an information box showing the sub category has been saved.
5. Click the **Back to Category Management** button to return the *Product Category Management* page.

# Products

Products are physical items such as modems, handsets, hardware, accessories etc You can sell products to your customers as either as an *Outright Purchase,* or under an *Installment Plan* that can then be invoiced to the customer immediately or at the end of the billing period.

## To Display Products

1. Select **Products** > **Product Management** > from the Menu. The *Point of Sale Product Management* page will appear showing a list of existing products.




| ID | Product Name | Product Description | Product Category | Product type | Tax |
|---|---|---|---|---|---|
| 21025 | DELIVERY | Postage and Handling | | Billable Item | |
| 21026 | FIN CHARGE | Late payment fee | Finance | Billable Item | |
| 21027 | MISC | Misc charges | Miscellaneous Charge | Billable Item | |
| 21028 | MBB-SIM | Mobile Broadband SIM-Only Pack | Hardware | Physical Product | |
| 21029 | BKB Netstick E1762 | BKB NetStick E1762 | Hardware | Physical Product | |
| 21030 | BKB Netstick E160e | BKB Netstick E160e | Hardware | Physical Product | |
| 21031 | BKB Netstick E1552 | BKB Netstick E1552 | Hardware | Physical Product | |
| 21032 | BKB NetWifi E5 | Huawei E5 USB Mobile Broadband 3G Modem / Wifi Router | Hardware | Physical Product | |
| 21033 | Linksys AM300 | Linksys AM300 ADSL2+ Modem with 1 Ethernet Port | Hardware | Physical Product | |
| 21034 | Linksys AG300 | Linksys AG300 ADSL2+ Modem with 4 Ethernet Ports | Hardware | Physical Product | |
| 21035 | Linksys WAG160N | Linksys WAG160N ADSL2+ Modem with 4 Ethernet Ports & 802.11BGN Wireless | Hardware | Physical Product | |
| 21036 | Line Filter | Line Filter/Splitter Unit | Hardware | Physical Product | |
| 21037 | Netcomm 3GT1WN | Netcomm 3GT1WN 3G Travel Router | Hardware | Physical Product | |
| 1704085 | Nokia C5000 | Nokia C5000 | Phones | Physical Product | Australian GST |
| 1704091 | E11 cable | E11 cable | Hardware | Physical Product | Australian GST |

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Figure 9. The *Point of Sale Product Management* page

### Search

You can locate a product by using the *Search* function. The following fields can be used to search:

- Product ID
- Product Name
- Product Category

## To Create a Product

1. On the *Point of Sale Product Management* page, click the **Create New Product** button. The *New Product Details* page will appear.


Figure 10. The *New Product Details* page

2. Select the *Product Category* from the drop list.
3. Select the *Product Sub Category* from the drop list.
4. Enter the *Product Name* of the new product.
5. Enter a *Description* of the product.
6. Tick the *Use Default Ledger Code* check box to assign the default product ledger code to this product. This ledger code will be recorded in the cardline when the product is sold to a customer. The default ledger code will display next to the check box.
7. If you wish to use another ledger code, un-tick the *Use Default Product Ledger* Code check box. The *Custom Ledger Code* drop list and the *New Ledger Code* fields will appear.

   Select the required ledger code from the *Custom Ledger Code* drop list; or if you wish to create a new ledger code, enter the ledger code name in the *New Ledger Code* field. The system will add this ledger code to the ledger when the product is saved.
8. Select the *Product Type* from the drop list. Options available are 'Physical Product' or 'Billable Item'.
9. Enter the price of the item in the *Total (Inc Tax)* field. The system will automatically calculate the price *Amount (ex tax)* and *the Tax Amount.*

   Alternately, enter the price of the item in the *Total (Ex Tax)* field. The system will automatically calculate the price *Total (Inc tax)* and the *Tax Amount*.

   Note that this price is referred to as the product *base* price, or *regular* price. It is the price the item will be sold at when there are no product price points in effect.
10. Select the *Tax Type* applicable to this item in the drop list. By default, this is set to 'Australian GST'.
11. Enter the date the product is available for sale from in the *Saleable From* field. A calendar tool will appear to allow you to select the required date.
12. If required, enter the date the product is available until in the *Saleable To* field. A calendar tool will appear to allow you to select the required date.

    The *Saleable From* and *Saleable To* fields control when the product will able available to sell to your customers. If you do not enter a *Saleable To* date, the product will be available indefinitely.

13. Enter the *Minimum Quantity* of this product required to sell at one time. This field can be used to control multi quantity or bulk pricing (see Product Pricing on page 16 for further information). Normally, you should leave this minimum quantity as ‘1’.
14. Click the **Create** button. The *Point of Sale Product Management* page will be displayed with an information box showing the product has been saved.
15. To cancel without saving, click the **Back** button.

## To Display a Product

1. On the *Point of Sale Product Management* page, click the product link in the *ID* column of the list. The *View Product Details* page will appear showing the selected product with the *Product Price List Details* and the *Price Point List Details* information. These details are maintained using the *Product Pricing* function.

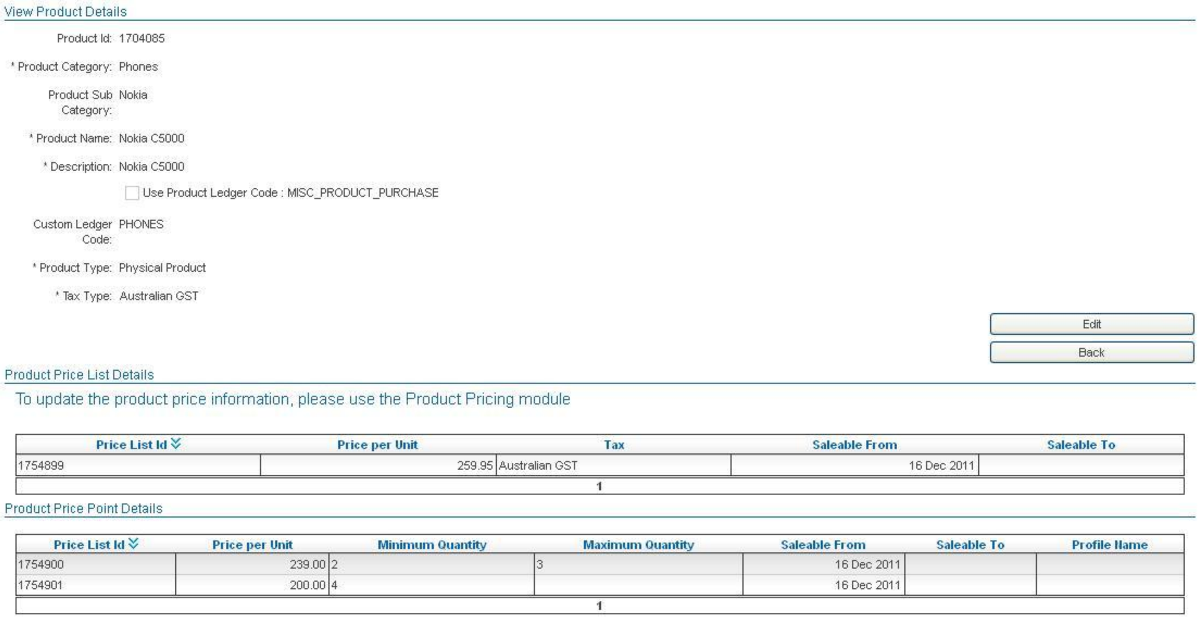



Figure 11. The *View Product Details* page

2. Click the **Back** button to return to the *Point of Sale Product Management* page.

## To Edit a Product

1. On the *Point of Sale Product Management* page, click the product link in the *ID* column of the list. The *View Product Details* page will appear showing the selected product.
2. Click the **Edit** button. The *Edit Product Details* page will appear.


Figure 12. The *Edit Product Details* page

3. Enter or modify the product information in the appropriate fields.

   Note that you can only modify the Product Category, Product Sub Category, Product Name, Description, ledger code information, and Product Type. To modify the product price, minimum quantity, and saleable dates, use the *Product Pricing* function.
4. Click the **Save** button. The *Point of Sale Product Management* page will be displayed with an information box showing the product has been saved.

# Product Pricing

The product pricing function allows you to manage your products' price point information. Emersion provides a number of different ways to manage your pricing:

- Date Driven or Promotion pricing
- Multiple Quantity or Bulk pricing
- Account Profile or Tiered pricing

## Date Driven Pricing

Date driven pricing allows product prices to be set by date range, which is applied based on the date of the sale. For example, the base or regular product price may be $50; but between the 1st and 10th of the month, the price may be $40. This is like a special promotion or sale.

## Multiple Quantity Pricing

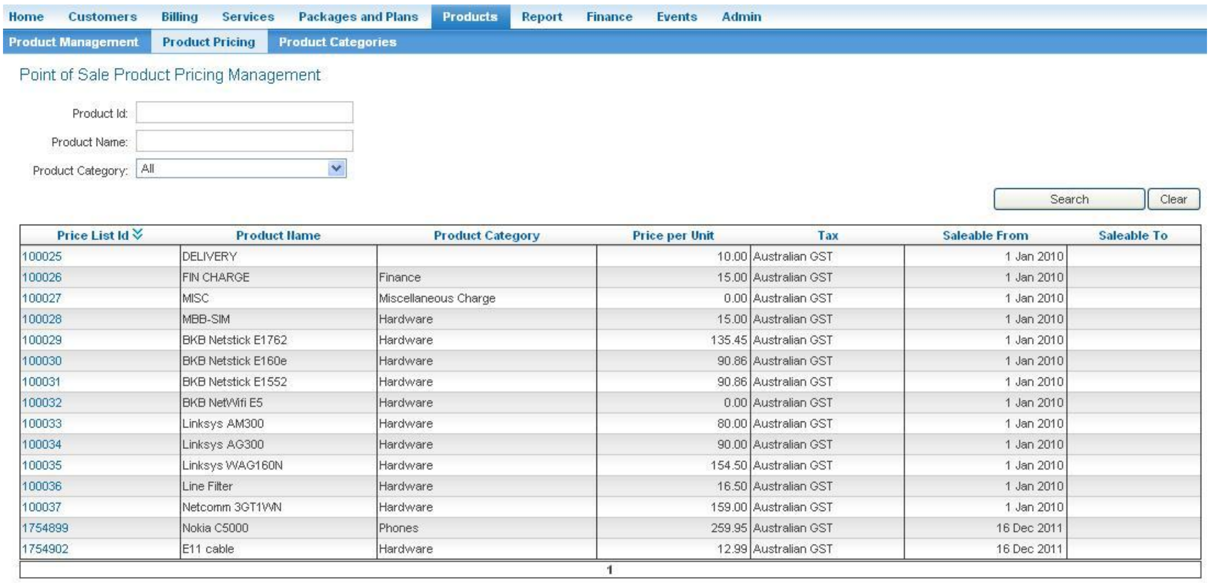
Multiple quantity pricing allows you to set product price by the number of items purchased. For example, the base or regular product price may be $50; for purchases of between 1 and 3 products, the price is the regular price, but for purchases of more than 4 products, the price is $45 etc. You can set multiple price points for each product.

## Account Profile Pricing

Account profile pricing allows product prices to be set by customer account profile. Account profiles are a simple grouping of customers, which can help you identify different types of customers and apply different pricing based on the customer's profile. For example, you may set up an account profile for business customers, and another for residential customers. Different prices may be applied to each profile.

# To Display Product Pricing

1. Select **Products** > **Product Pricing** > from the Menu. The *Point of Sale Product Pricing Management* page will appear showing a list of existing products.


Home Customers Billing Services Packages and Plans Products Report Finance Events Admin
Product Management Product Pricing Product Categories

Point of Sale Product Pricing Management

Product Id:
Product Name:
Product Category: All

Search Clear

| Price List Id | Product Name | Product Category | Price per Unit | Tax | Saleable From | Saleable To |
|---|---|---|---|---|---|---|
| 100025 | DELIVERY | | 10.00 | Australian GST | 1 Jan 2010 | |
| 100026 | FIN CHARGE | Finance | 15.00 | Australian GST | 1 Jan 2010 | |
| 100027 | MISC | Miscellaneous Charge | 0.00 | Australian GST | 1 Jan 2010 | |
| 100028 | MBB-SIM | Hardware | 15.00 | Australian GST | 1 Jan 2010 | |
| 100029 | BKB Netstick E1762 | Hardware | 135.45 | Australian GST | 1 Jan 2010 | |
| 100030 | BKB Netstick E160e | Hardware | 90.86 | Australian GST | 1 Jan 2010 | |
| 100031 | BKB Netstick E1552 | Hardware | 90.86 | Australian GST | 1 Jan 2010 | |
| 100032 | BKB NetWifi E5 | Hardware | 0.00 | Australian GST | 1 Jan 2010 | |
| 100033 | Linksys AM300 | Hardware | 80.00 | Australian GST | 1 Jan 2010 | |
| 100034 | Linksys AG300 | Hardware | 90.00 | Australian GST | 1 Jan 2010 | |
| 100035 | Linksys WAG160N | Hardware | 154.50 | Australian GST | 1 Jan 2010 | |
| 100036 | Line Filter | Hardware | 16.50 | Australian GST | 1 Jan 2010 | |
| 100037 | Netcomm 3GT1WN | Hardware | 159.00 | Australian GST | 1 Jan 2010 | |
| 1754899 | Nokia C5000 | Phones | 259.95 | Australian GST | 16 Dec 2011 | |
| 1754902 | E11 cable | Hardware | 12.99 | Australian GST | 16 Dec 2011 | |

1

Figure 13. The *Point of Sale Product Pricing Management* page

## Search

You can locate a product by using the *Search* function. The following fields can be used to search:

- Product ID
- Product Name
- Product Category

## To Set Product Pricing

You can set product prices using any combination of pricing methods. More than one can be applied at once. For example, a multi quantity price that is only available between certain dates and only to particular customers. The system automatically looks up the product pricing during the purchase transaction and applies the appropriate pricing depending on the price points set up.

1. On the *Point of Sale Product Pricing Management* page, click the product link in the *Price List ID* column of the list. The *View Product Price Details* page will appear showing the selected product details and existing price points in the *Product Price List Details* section.

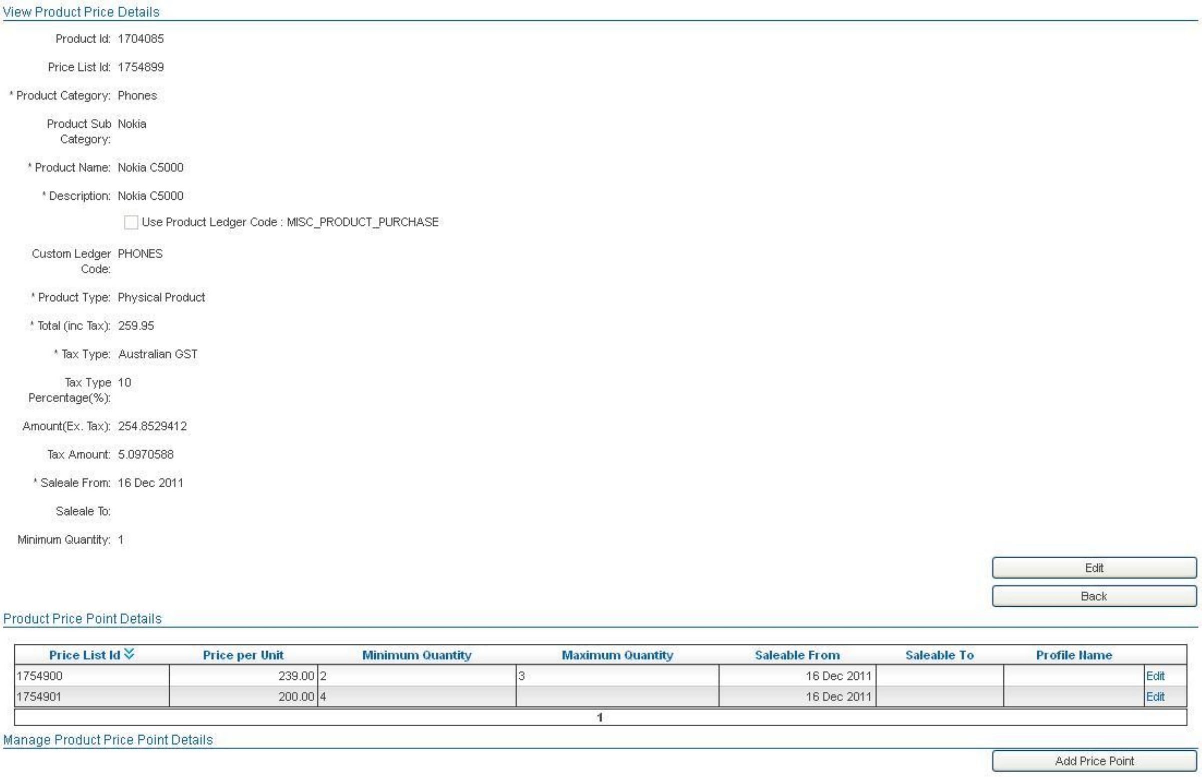



Figure 14. The *View Product Price Details* page

2. To modify the product's *base* details, click the **Edit** button. The *Edit Product Details* page will display showing the product *Category, Sub Category, Name, Description, Ledger Code, Type, Total, Tax, Saleable* and *Minimum Quantity* fields will display editable.

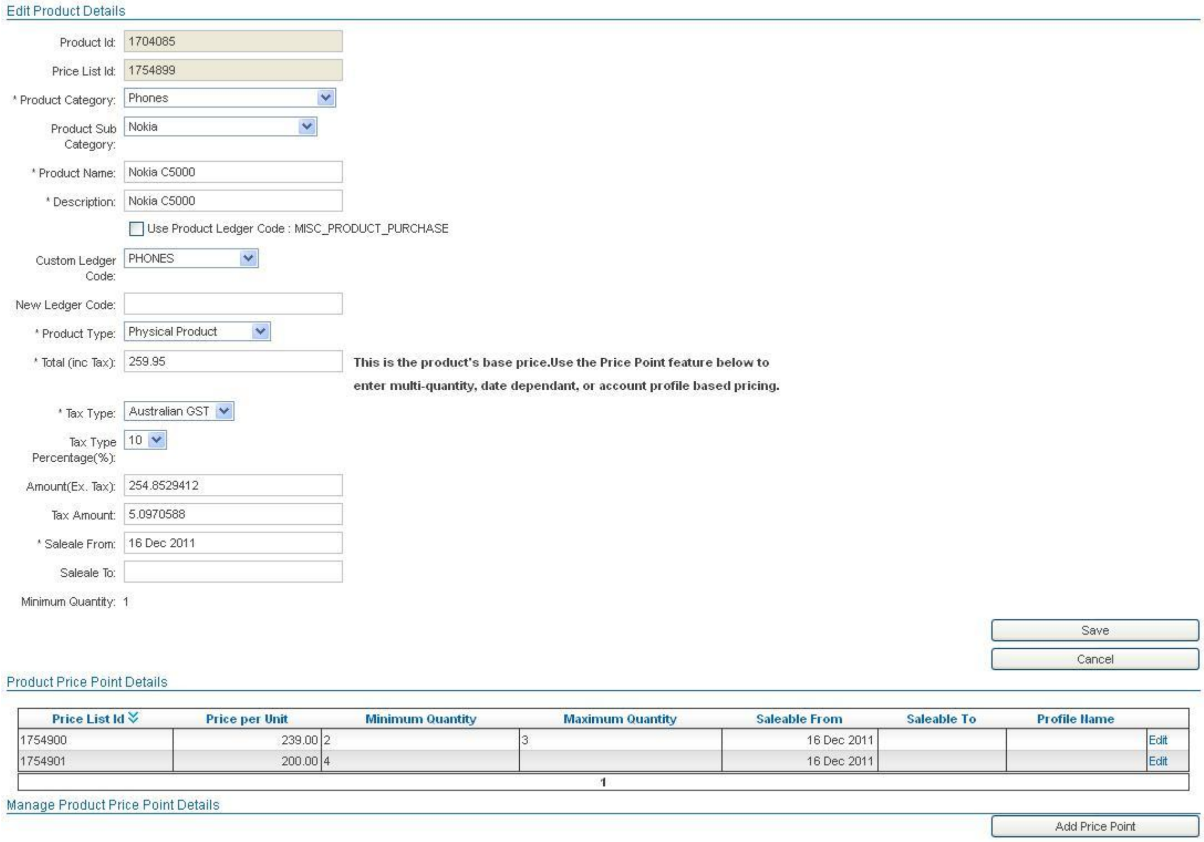



Figure 15. The *Edit Product Price Details* page

3. Click the **Save** button to save the product base details.

   Note that these base product details affect the *default* product data that is applied when there are no price points in effect i.e. regular item price, availability for sale, and minimum quantity.

4. Click the **Add Price Point** button. The *Manage Product Price Point Details* section will appear at the bottom of the page showing additional information.

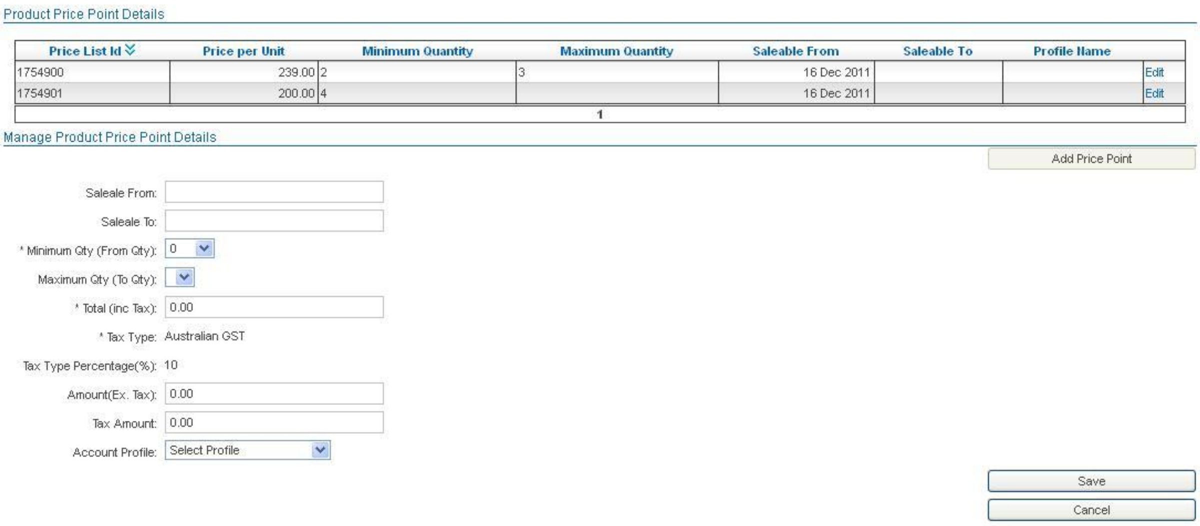



Figure 16. The *Manage Product Price Point Details* section

5. To set date driven pricing, enter the date range the special product pricing is available in the *Saleable From* on *Saleable To* fields. A calendar tool will appear to allow you to select the required dates. If the new price point is required to apply indefinitely, you can leave the *Saleable To* field empty to indicate no end date.
6. To set multiple quantity pricing, enter the quantity range in the *Minimum Qty (From Qty)* and the *Maximum Qty (To Qty)* fields. If there is no maximum quantity for the price point, you can leave the *Maximum Qty* field empty to indicate no maximum.
7. Enter the price for this price point in the *Total (Inc Tax)* field. The system will automatically calculate the price *Amount (Ex tax)* and *the Tax Amount.*

   Alternately, enter the price for this price point in the *Total (Ex Tax)* field. The system will automatically calculate the price *Total (inc tax)* and the *Tax Amount*.
8. To set account profile pricing, select the required *Account Profile* to apply the price point in the drop list. Leave the drop list selection showing '*Select Profile'* to indicate no account profile pricing.

   To apply account profile pricing to multiple account profiles, you will need to create a new price point record for each account profile required.
9. Click the **Save** button. The *Product Details* page will update, showing the price point details in the *Product Price List Details* list and a message at the top of the screen showing, "New price point added".
10. Add further price points by clicking the **Add Price Point** button, and repeating steps 4 to 9.

## To Edit Product Pricing

1. In the *Product Price Point Details* list, click the **Edit** link of the required *Price Point*. The *Manage Product Price Point Details* area will appear showing the existing price point details.

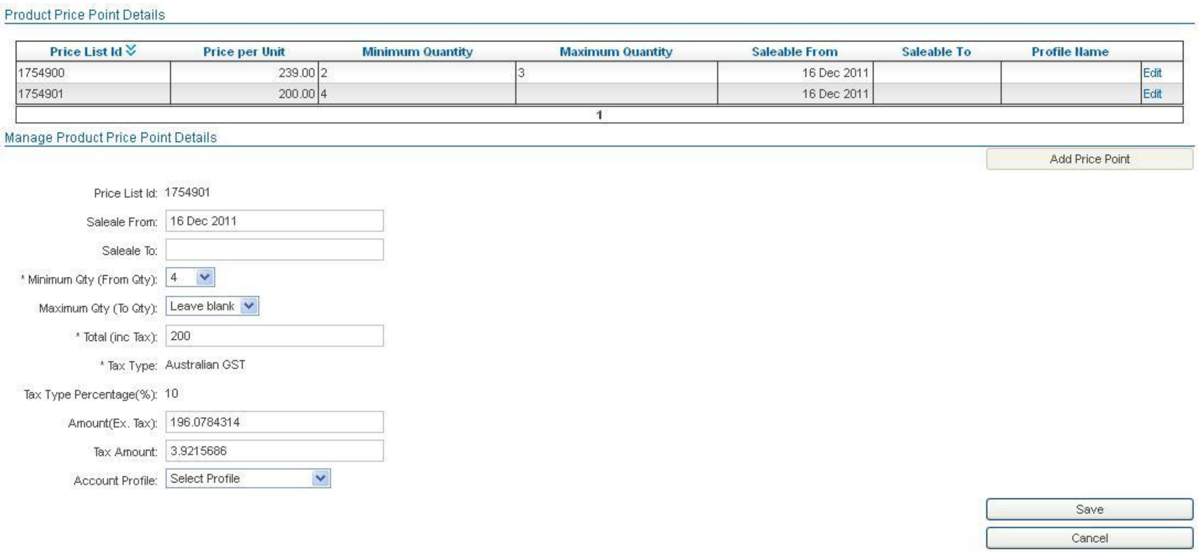



Figure 17. The *Manage Product Price Point Details* section showing existing details

2. Enter further pricing information or modify the entered product price point information in the appropriate fields.
3. Click the **Save** button. The *Product Details* page will update, showing the updated price point details in the *Product Price List Details* list.

# Product Purchases

Emersion allows you to sell products to customers, either as an *Outright Purchase,* or under an *Installment Plan* that can be invoiced to the customer immediately or at the end of the billing period. Purchases are created against an existing customer from the *Customers* menu.

### Outright Purchase

An Outright purchase is simply a regular sale where the goods are provided to the customer, and the customer is either invoiced immediately, or at the end of their next billing period. Payment may be taken immediately, or at a later date.

### Installment Plan

An Installment Plan purchase allows products to be sold to a customer and then paid for over a period of time in smaller payment amounts. A variety of methods are available to calculate the installment plan final figure and payment period, as well as the repayment amounts. The system automatically creates cardlines on the relevant customer's invoices for the required installment payment amount, per the installment plan's configuration. Customers may also make additional payments on their installment plans, or finalise or break out of the installment plan.

## To Create a Product Purchase

There are two ways to navigate to the *Purchase* function:

1. Select **Customers** > **Customer List** > from the Menu. The *Customer List* page will appear showing a list of existing customers. Locate the required customer and then click the **Create Purchase** link on the right side of the customer record.

   or

   Select **Customers** > **Customer List** > from the Menu. The *Customer List* page will appear showing a list of existing customers. Select the required customer to display the customer details page. Select the **Purchase** tab. The *Purchase Management* page will appear showing a list of the customer's previous purchases. Click the **Add New Purchase** button.

   The *Purchase Type* page will display. You then select whether to create an Outright Purchase or an Installment Plan.


Figure 18. The *Purchase Type* page

## To Create an Outright Purchase

1. From the *Purchase Type* page, select the *Outright Purchase* option. The *Outright Purchase* section will appear showing additional fields and information.

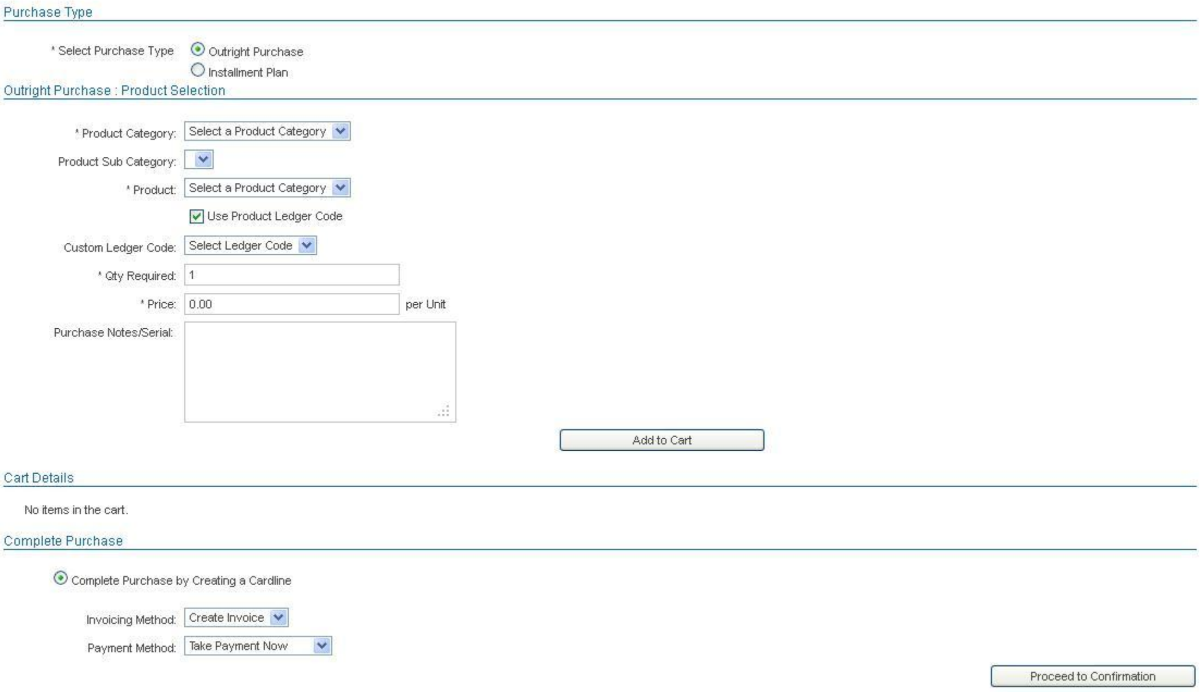



Figure 19. The *Outright Purchase* section

2. Select the required *Product Category* from the drop list.
3. Select the required *Product Sub Category* from the drop list. The list will contain all sub categories associated with the product category selected.
4. Select the required *Product* from the drop list. The list will contain all products associated with the product category and sub category selected.
5. Tick the *Use Product Ledger Code* tick box to assign the sale cardline transaction to the product ledger code set up in the product details.
6. If you wish to assign the sale to another ledger code, un-tick the *Use Product Ledger Code* check box. The *Custom Ledger Code* drop list will be enabled. Select the required ledger code from the drop list.
7. Enter the number of items purchased in the *Qty Required* field.

   The system will look up the product and examine the price point information to determine the applicable product price based on the current date, quantity and the customer's account profile.

   The system will update the *Price* field to show the product price per unit, as well as show the *Sub Total* amount (i.e. price * quantity), and the *Tax* amount.
8. Enter any notes or other relevant information about the product purchase, for example serial number or other sale specific data, in the *Purchase Notes/Serial* field.

9. Click the **Add to Cart** button. The *Cart Details* section will be updated to show the product and purchase information entered.

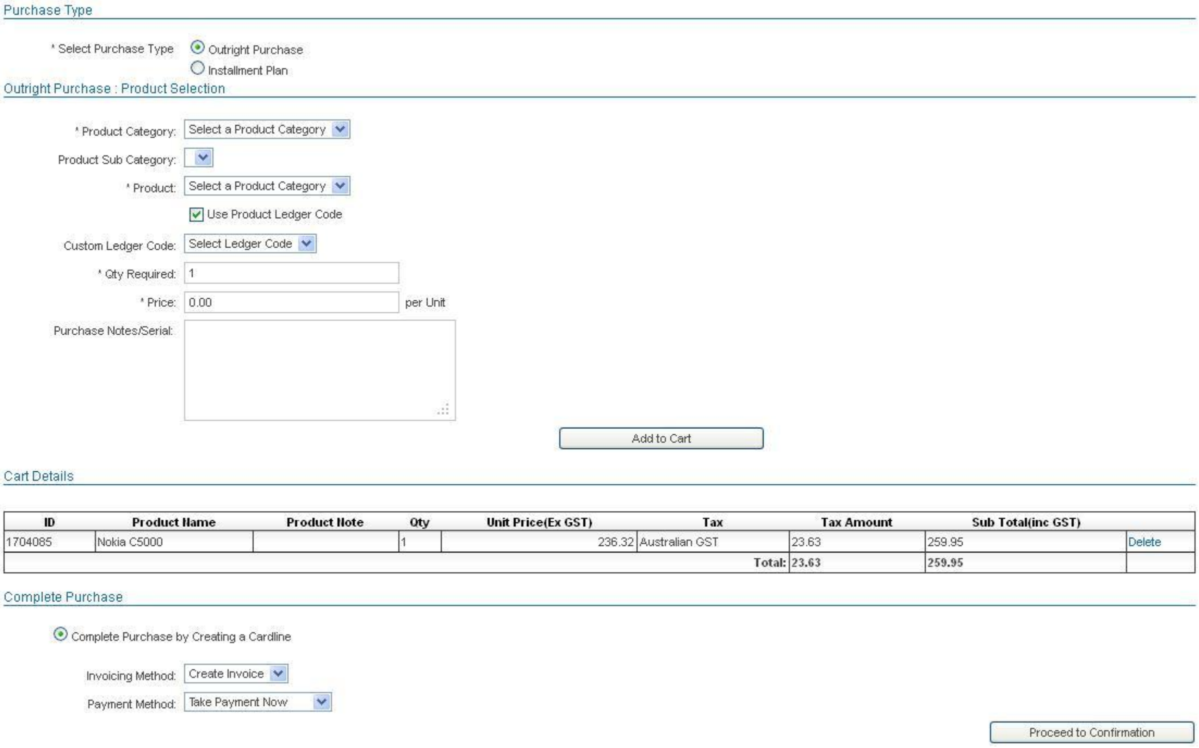



Figure 20. The *Outright Purchase* section showing the Cart Details

10. Add further products to the purchase transaction by selecting additional products using steps 2 to 9.
11. To remove a product from the cart, click the **Delete** link in the *Cart Details* list. The product will be removed from the list.
12. In the *Complete Purchase* section, the *Complete Purchase by Creating a Cardline* option will be selected, which you cannot modify.
13. Select the *Invoice Method* required for the purchase from the drop list. Options include:
    - Invoice immediately — a pending invoice will be created once the purchase is confirmed
    - Invoice at end of billing period — an pending cardline will be created to be processed at the next bill run
14. Select the *Payment Method* required from the drop list. The options include:
    - Take Payment Now — record a payment through the Emersion Payment system, such as Credit Card or Direct Debit etc. You will be prompted to enter the payment details when you confirm the purchase.
    - Receive Payment Now — record a manual payment. You will be prompted to enter the manual payment details when you confirm the purchase.
    - Pay Later — do not record a payment. Payment can then be recorded at a later time through the Accounts Receivable module.

15. Once you have entered all required products and selected your purchase completion options, click the **Proceed to Confirmation** button. The *Purchase Confirmation* page will display showing the product purchase information and cart details entered.

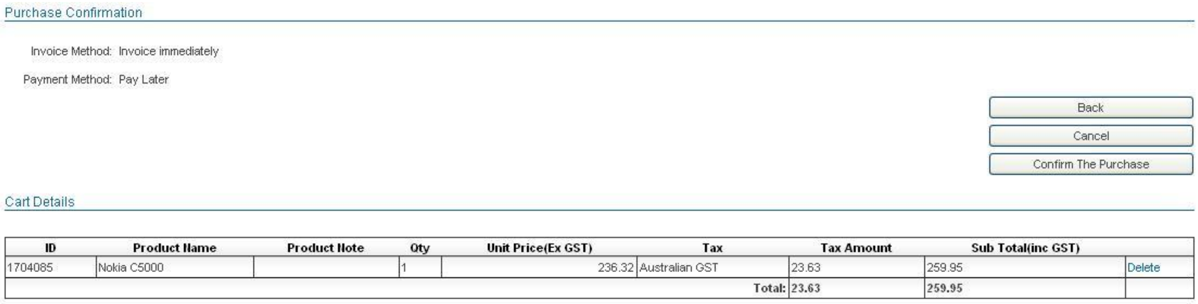



Figure 21. The *Purchase Confirmation* page

16. Review the purchase details.
17. Click the **Confirm The Purchase** button to confirm the product purchase transaction and save the details.

    If you elected to create an invoice immediately, the system will create a pending invoice containing the product purchase. You can view the invoice by clicking the *Invoices* tab on the *View Customer* page.

    If you elected to invoice the customer at the end of the billing period, the system will create a pending cardline, which will be picked up and processed on to the customer's next invoice. You can view the cardline by clicking the *Pending Ledger Cardlines* from the *View Customer* page.
18. If you elected to *Take Payment Now* in the *Payment Method* option, the *Take Payment* page will be displayed for you to enter the payment details and the process the payment through the Emersion Payment System.


Figure 22. The *Take Payment* page

19. If you elected to *Receive Payment Now* in the *Payment Method* option, the *Receive Payment* page will be displayed for you to enter the manual payment details.


Figure 23. The *Receive Payment* page

20. To return to the purchase to modify the purchase details or to change the products, click the **Back** button.
21. To cancel the purchase, click the **Cancel** button.

## To Create an Installment Plan

1. From the *Purchase Type* page, select the *Installment Plan* option. The *Installment Plan* area will appear showing additional fields and information.

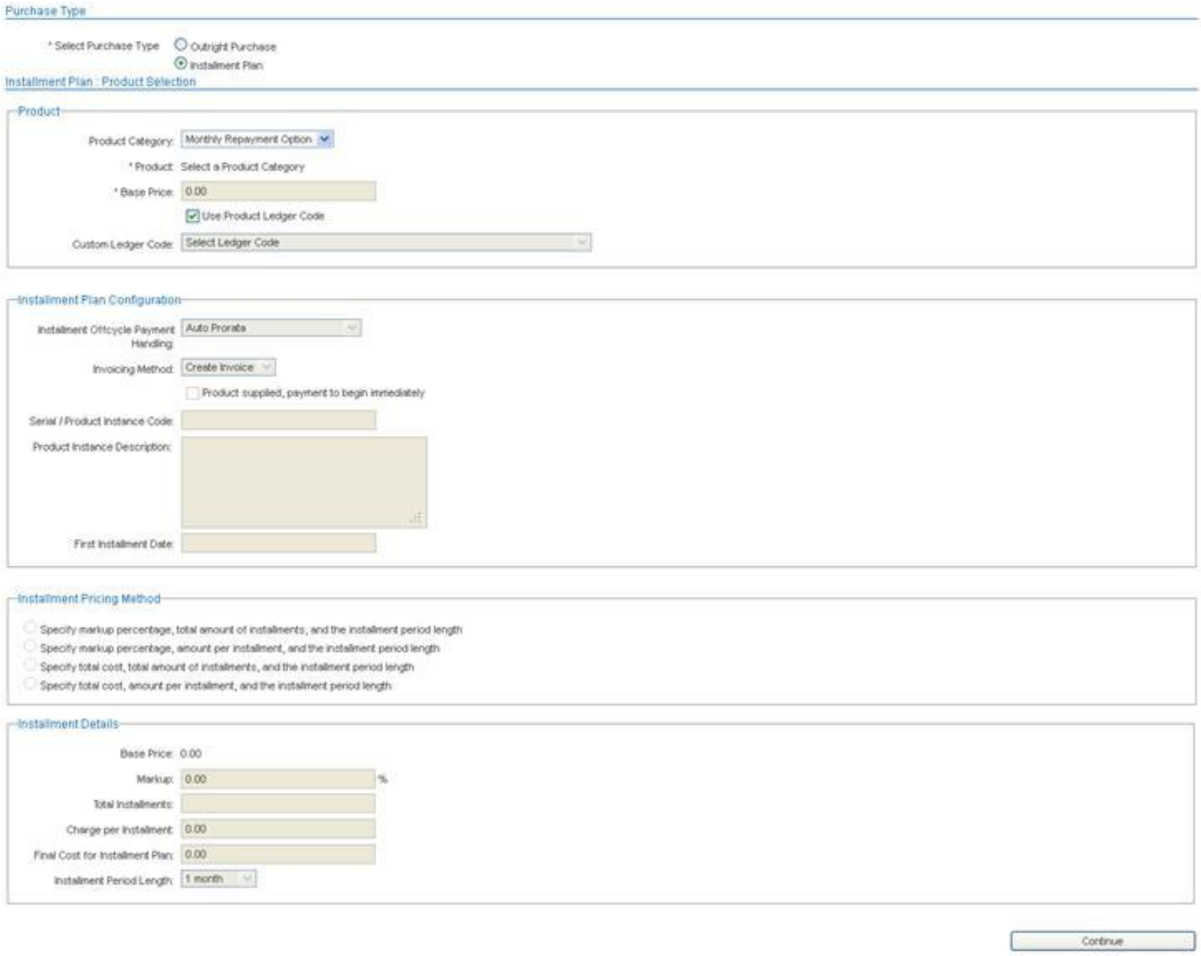



Figure 24. The *Installment Plan* area

2. Select the required *Product Category* from the drop list.
3. Select the required *Product* from the drop list. The product price will display in the *Base Price* field.
4. Tick the *Use Product Ledger Code* tick box to assign the sale to the product ledger code set up in the product details.
5. If you wish to assign the sale to another ledger code, un-tick the *Use Product Ledger Code* check box. The *Custom Ledger Code* drop list will be enabled. Select the required ledger code from the drop list.

6. In the *Installment Plan Configuration* section, select the *Installment Offcycle Payment Handling* method required in the drop list. This option controls how the system processes customer payments that are made outside of the regular billing cycle.

   The options include:

   - Auto Prorata — the payment amount is automatically pro-rated resulting in the installment payment amounts being reduced.
   - Reduce Payments — the number of payments may be reduced but the installment payment amount will remain the same.
   - No Off Cycle Payments — off cycle payments are not permitted.
   - Off Cycle payment acts as credit — off cycle payments are treated as payment in advance and appear as a credit on the customer's account.

7. Select the *Invoicing Method* required for the first installment from the drop list.

   The options include:

   - Create Invoice — a pending invoice will be created containing the first installment once the installment plan purchase is confirmed.
   - Next Invoice — a pending cardline will be created for the first installment to be processed at the next bill run.

8. If the product has been provided to the customer:

   a. Tick the *Product supplied, payment to begin immediately* check box. The *Serial / Product Instance Code*, *Product Instance Description* and *First Installment Date* fields will be enabled for entry.

   b. Enter the product's serial number or other unique ID (e.g. IMIE etc) in the *Serial / Product Instance Code* field.

   c. Enter the description in the *Product Instance Description* field.

   d. Enter the date the first instalment of the plan is due in the *First Installment Date* field. A calendar tool will appear to allow you to select the required date.

> ⓘ The installment plan processing will not commence until the product has been provided to the customer. You can use the *View / Manage Installment Plan* function to update the details after the instalment plan has been saved.

9. Select a pricing method to apply to the product from the *Installment Pricing Method* option radio buttons.

   The system provides a variety of methods to calculate the final product total and installment payment amounts based on a several attributes as follows:

   - Specify markup percentage, total amount of installments, and the installment period length
   - Specify markup percentage, amount per installment, and the installment period length
   - Specify total cost, total amount of installments, and the installment period length
   - Specify total cost, amount per installment, and the installment period length.

10. Depending on the *Installment Pricing Method* option selected, the system will enable or disable the *Installment Details* fields. The product *Base Price* will display showing the original base price, which cannot be modified.
    a. For the *Specify markup percentage, total amount of installments, and the installment period length* and *Specify markup percentage, amount per installment and the installment period length* pricing methods, enter the markup percentage in the *Markup* field. For no markup, you can leave the value as zero (0).
    b. For the *Specify markup percentage, total amount of installments, and the installment period length* and the *Specify total cost, total amount of installments, and the installment period length* pricing methods, enter the number of installments for the plan in the *Total Installments* field. The system will automatically create the specified number of payment installments on the subsequent customer's invoices until the installment plan is complete.
    c. For the *Specify markup percentage, amount per installment and the installment period length* and the *Specify total cost, amount per installment, and the installment period length* pricing methods, enter the amount of each installment payment in the *Charge per Installment* field. The system will automatically create the payment installments of the entered amount on the subsequent customer's invoices.
    d. For the *Specify total cost, total amount of installments, and the installment period length* and the *Specify total cost, amount per installment, and the installment period length* pricing methods, enter the total cost for the product including any additional fees or charges in the *Final Cost for Installment Plan* field. The system will use this figure to calculate each payment installment amount.
11. Select the frequency of the installment payments from the *Installment Period Length* drop list. Options include 1, 3, 6, 9, 12, 18, 24 and 36 months.
12. Click the **Continue** button. The *Purchase* page will display showing all details of the installment plan entered.

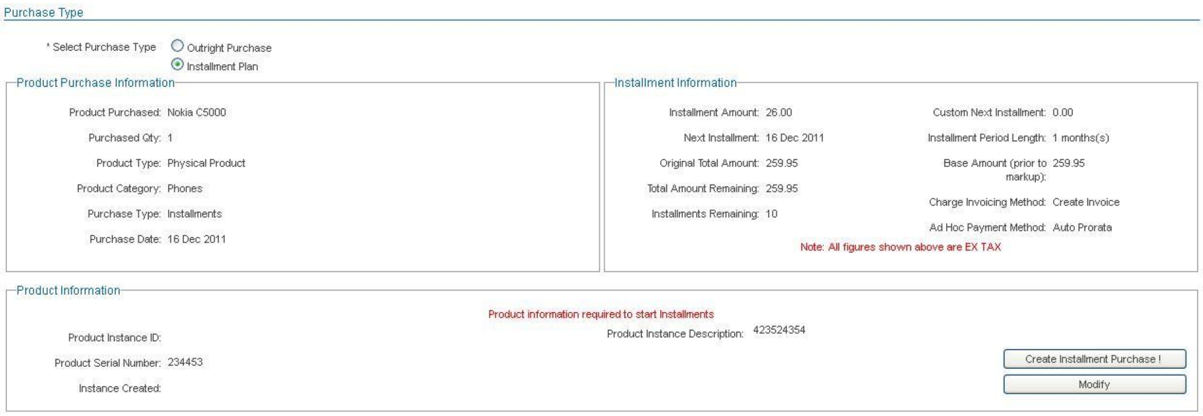



Figure 25. The *Purchase* page showing the confirmation details

13. Review the information to confirm it is correct.
14. Click the **Create Installment Purchase** button. A message will display at the top of the screen showing, "Installment Plan created".

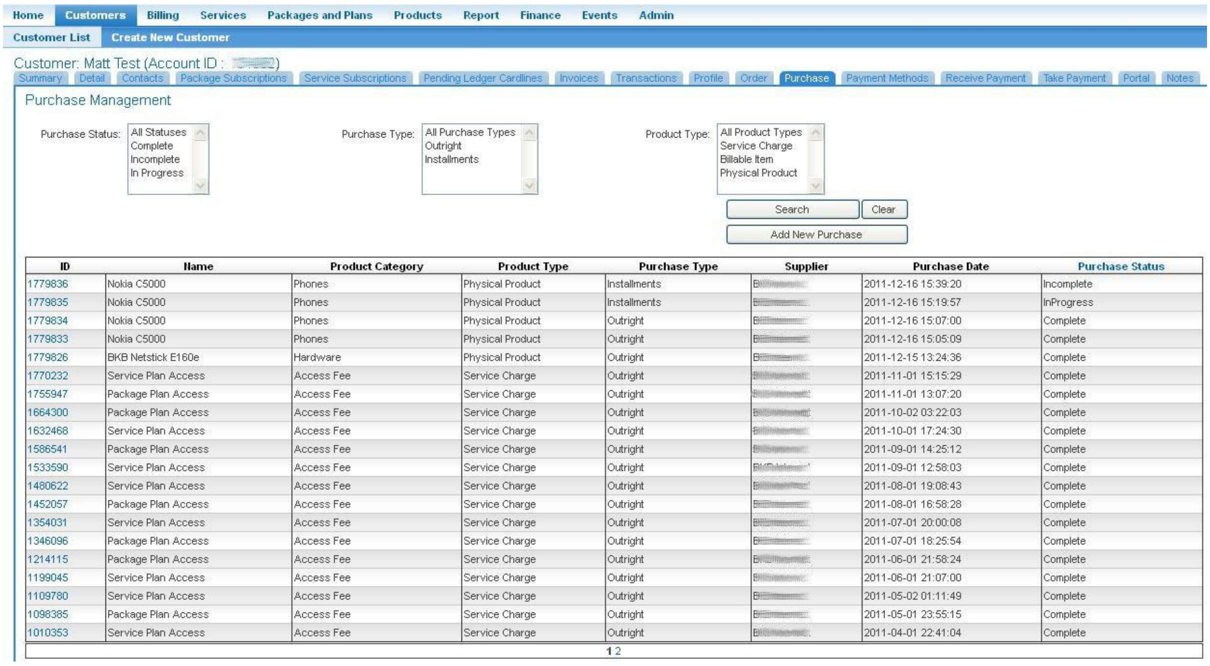
    To return to the Installment Plan page to make changes, click the **Modify** button.

# Purchase Management

Purchases made by customers, both outright purchases and installment plans, are stored with the customer's details. You can view past purchase details, as well as view the invoices the purchases appeared on.

## To View a Customer's Purchase History

1. Select **Customers** > **Customer List** > from the **Menu.** The *Customer List* page will display showing a list of existing customers.
2. Locate the customer required in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display listing all the customer's purchases.




| ID | Name | Product Category | Product Type | Purchase Type | Supplier | Purchase Date | Purchase Status |
|---|---|---|---|---|---|---|---|
| 1779836 | Nokia C5000 | Phones | Physical Product | Installments | [illegible] | 2011-12-16 15:39:20 | Incomplete |
| 1779835 | Nokia C5000 | Phones | Physical Product | Installments | [illegible] | 2011-12-16 15:19:57 | InProgress |
| 1779834 | Nokia C5000 | Phones | Physical Product | Outright | [illegible] | 2011-12-16 15:07:00 | Complete |
| 1779833 | Nokia C5000 | Phones | Physical Product | Outright | [illegible] | 2011-12-16 15:05:09 | Complete |
| 1779826 | BKB Netstick E160e | Hardware | Physical Product | Outright | [illegible] | 2011-12-15 13:24:36 | Complete |
| 1770232 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-11-01 15:15:29 | Complete |
| 1755947 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-11-01 13:07:20 | Complete |
| 1664300 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-10-02 03:22:03 | Complete |
| 1632468 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-10-01 17:24:30 | Complete |
| 1586541 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-09-01 14:25:12 | Complete |
| 1533590 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-09-01 12:58:03 | Complete |
| 1480622 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-08-01 19:08:43 | Complete |
| 1452057 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-08-01 16:58:28 | Complete |
| 1354031 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-07-01 20:00:08 | Complete |
| 1346096 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-07-01 18:25:54 | Complete |
| 1214115 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-06-01 21:58:24 | Complete |
| 1199045 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-06-01 21:07:00 | Complete |
| 1109780 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-05-02 01:11:49 | Complete |
| 1098385 | Package Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-05-01 23:55:15 | Complete |
| 1010353 | Service Plan Access | Access Fee | Service Charge | Outright | [illegible] | 2011-04-01 22:41:04 | Complete |

Figure 26. The *Purchase Management* page

### Search

You can locate a purchase by using the *Search* function. The following fields can be used to locate a purchase:

- Purchase Status — All, Complete, Incomplete and In Progress
- Purchase Type — All, Outright, or Installment plans
- Product Type — All, Service Charges, Billable items, or Physical Products

## To View an Outright Purchase

1. Locate the required purchase that has a *Purchase Type* of ‘*Outright’* on the *Purchase Management* page.
2. Click the purchase number link in the *ID* column of the list. The *Product Purchase Information* page will display.

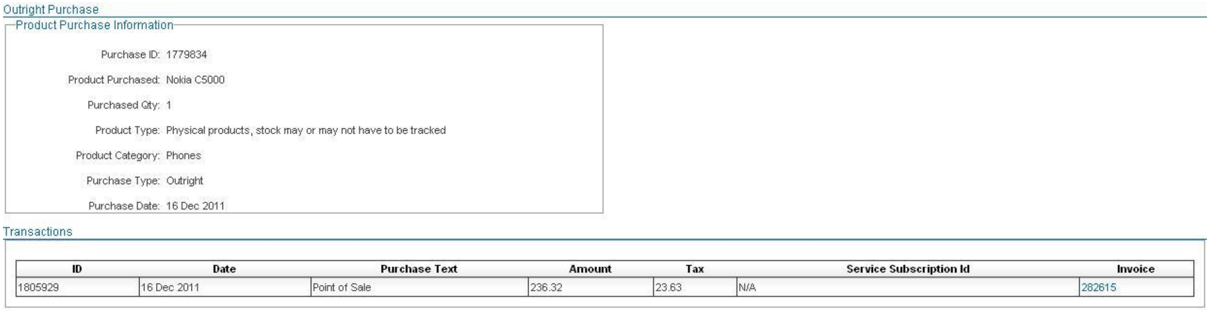



Figure 27. The *Installment Purchase* page showing an Outright Purchase

3. To view the invoice that the purchase appeared on, click the invoice number in the *Invoice* column of the Transactions list. The invoice details will appear.
4. Click the *View Invoice* button to view the invoice .pdf.

## To View an Installment Plan

1. Locate the required installment plan that has a *Purchase Type* of 'Installments' on the *Purchase Management* page.
2. Click the installment plan number link in the *ID* column of the list. The *Installment Purchase* page will display.

   The *Product Purchase Information* section shows the basic product purchase information.

   The *Installment Information* section shows the installment payment particulars, including the payment amount, next installment date, total outstanding etc.

   The *Product Information* shows the product instance details.

   The *Transactions* section shows all payments created to date for the installment plan, as well as whether each payment has been included on a customer invoice, or is still pending.

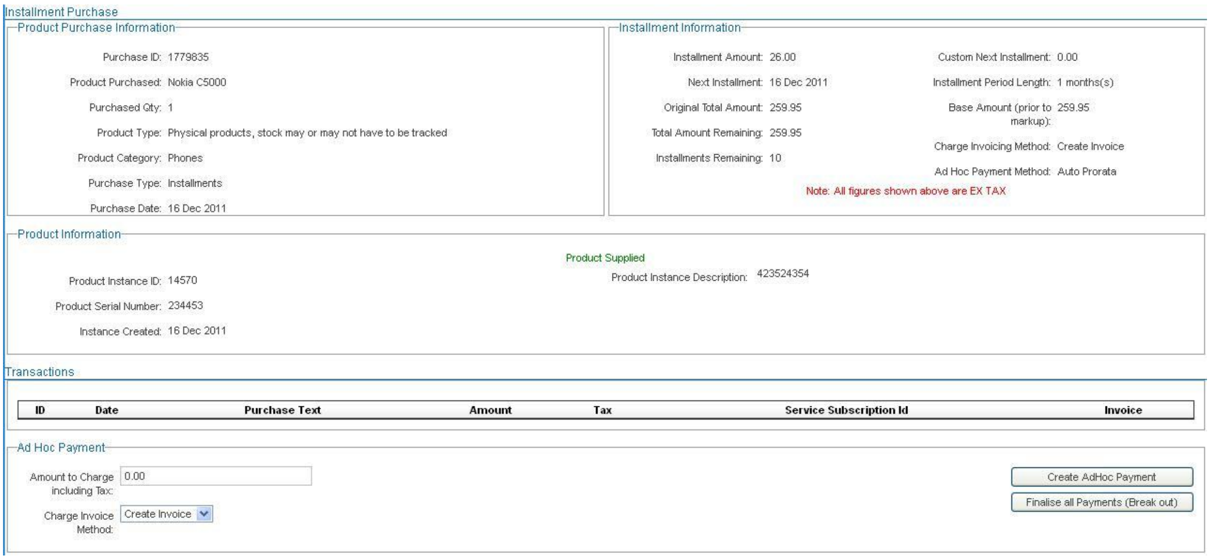



Figure 28. The *Installment Purchase* page showing an Installment Plan

3. Depending on the installment plan's status, you may perform various actions:
   - Incomplete — update the product supplied information
   - In Progress — create an ad hoc payment against the instalment plan, or finalise the installment plan (i.e. break out and complete the plan)
   - Complete — view the invoice(s) that the installment payments appeared on, if processed.

## To Update the Product Supplied Information

If an installment plan was created but the product was not supplied to the customer at the time the purchase was saved, you can update the installment plan once the product has been supplied. The system will not create installment plan payment cardlines for invoicing until the product has been updated as provided to the customer.

1. Select **Customers** > **Customer List** > from the **Menu.** The *Customer List* page will display showing a list of existing customers.
2. Locate the customer that has the required installment plan in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display.
4. Locate the required installment plan with *a Purchase Status* of *'Incomplete'* on the *Purchase Management* page and click the installment plan number link in the *ID* column. The *Installment Purchase* page will display.

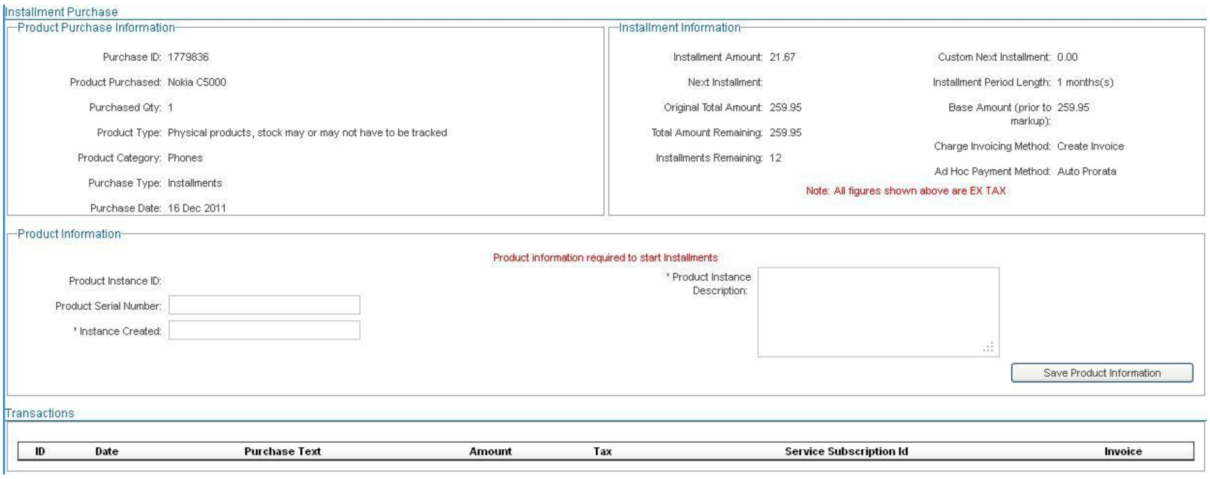



Figure 29. The *Installment Purchase* page showing an *Incomplete* Installment Plan

5. In the *Product Information* section, enter the serial number, or other unique information (e.g. IMIE etc) in the *Product Serial Number* field.
6. Enter the description in the *Product Instance Description* field.
7. Enter the date the product was supplied in the *Instance Created* field. A calendar tool will appear to allow you to select the required date.
8. Click the **Save Product Information** button. A message will display at the top of the screen showing, "Product Instance created, installments will now proceed".

## To Create an Ad Hoc Payment on an Installment Plan

Once an installment plan is *In Progress* (i.e. the product has been supplied to the customer), the system will automatically create cardline entries for the instalment payments that will appear on the customers' invoices. Customers may wish to make an Ad Hoc, or unscheduled, payment against the installment plan between invoices e.g. to reduce the amount owing etc.

1. Select **Customers** > **Customer List** > from the **Menu.** The *Customer List* page will display showing a list of existing customers.
2. Locate the customer that has the required installment plan in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display.
4. Locate the required installment plan with *a Purchase Status* of *'In Progress'* on the *Purchase Management* page and click the installment plan number link in the *ID* column. The *Installment Purchase* page will display.

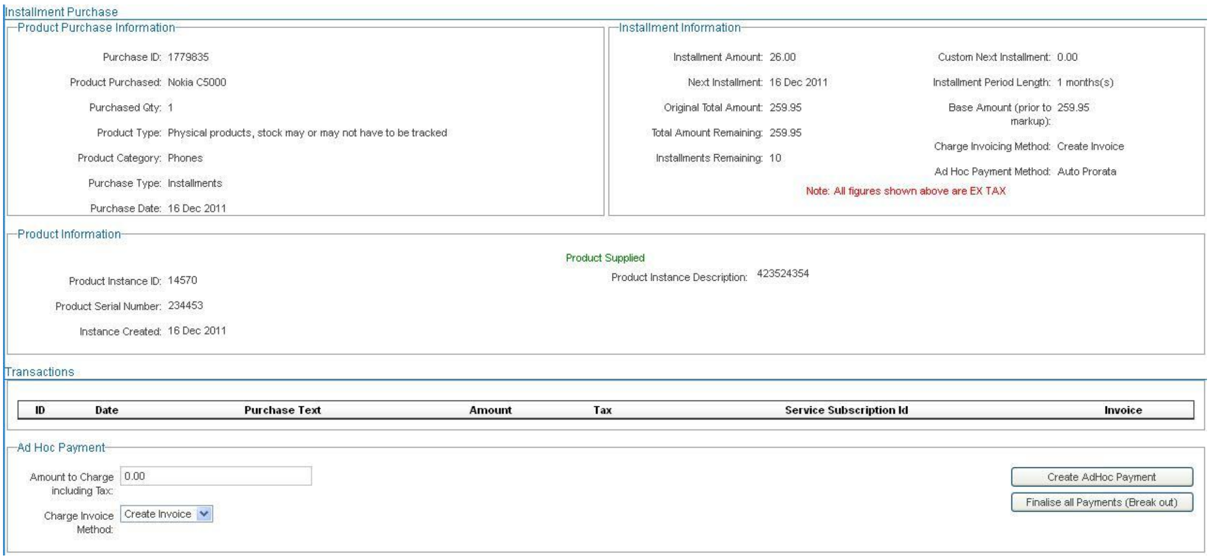



Figure 30. The *Installment Purchase* page showing an *In Progress* Installment Plan

5. In the *Ad Hoc Payment* section, enter the payment amount in the *Amount to Charge including Tax* field.
6. Select the invoicing method required for the payment from the *Charge Invoice Method* drop list. Options include:
   - Create Invoice — a pending invoice will be created for the payment once the payment is confirmed
   - Next Invoice — a pending cardline will be created for the payment to be included on the customer's invoice at the next bill run
7. Click the **Create AdHoc Payment** button. A message will display at the top of the screen showing, "Once off payment has been accepted…" The payment will appear in the *Transactions* list.

## To Finalise an Installment Plan

An installment plan may be finalised, or broken out at any time i.e. if a customer wishes to pay out the amount outstanding before the scheduled completion date. This effectively stops the payment plan processing in the system and creates a corresponding invoice for the balance remaining.

1. Select **Customers** > **Customer List** > from the **Menu.** The *Customer List* page will display showing a list of existing customers.
2. Locate the customer that has the required installment plan in the list and click either the **Account Number** or **Customer Name** link in the list. The *Customer* page will display showing the account information summary.
3. On the *Customer* page, select the **Purchase** tab. The *Purchase Management* page will display.
4. Locate the required installment plan with *a Purchase Status* of *'In Progress'* on the *Purchase Management* page and click the installment plan number link in the *ID* column. The *Installment Purchase* page will display.

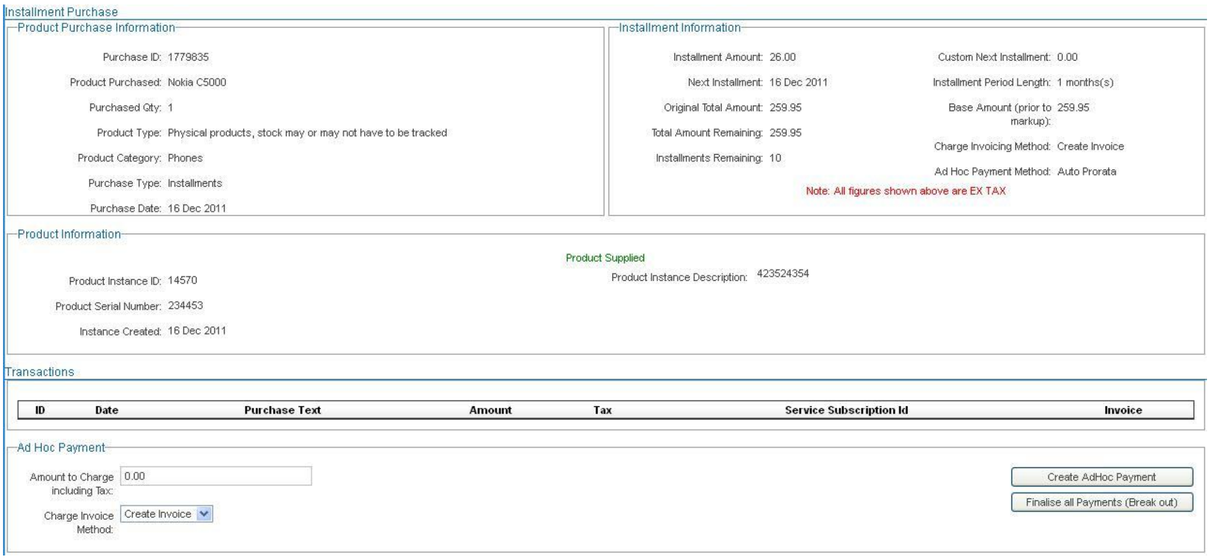



Figure 31. The *Installment Purchase* page showing an *In Progress* Installment Plan

5. Click the **Finalised all Payments (Break out)** button. A message will display showing the breakout details, and prompt you to confirm the installment breakout.

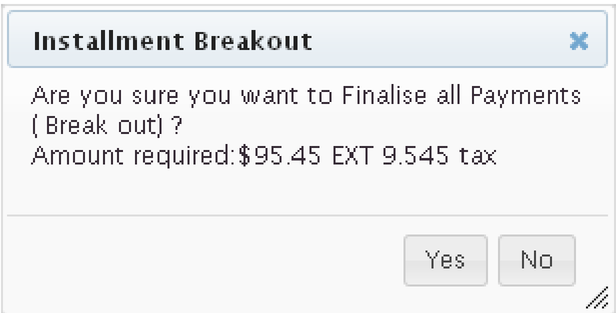



Figure 32. The *Installment Breakout confirmation* message

6. Click the **Yes** button to confirm. A message will display at the top of the screen showing, "Finalising…"

   The system will process the installment plan finalisation and create a pending cardline will be created for the final payment amount to be included on the customer's invoice at the next bill run. The installment plan status will be updated to *'Complete'.*

7. Click the **No** button to cancel. The system will not process the installment plan breakout and will display the *Installment Purchase* page as before.

# Further Information

For further information about Emersion's Product Management System, or other Emersion system modules, please contact Emersion.

If you are using Emersion on agreement from a supplier (i.e. in connection with the supply of a particular service or product), and have been provided a login for Emersion by your supplier, please contact your supplier directly for assistance.

## Emersion

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