

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

(i)

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	e tha	at other Em	ersion m	odules	s refe	erred to ir	n this manu	ial are no	ot describ	ed i	n detail
in t	his	document.	Please	refer	the	specific	Emersion	system	manual	for	further
info	rma	tion about e	ach mod	ule if r	equii	red.					

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: Complete the <i>Address</i> field.
Bold text	Bold text indicates either the name of a command, button or other interactive element. For example:
	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:
	Type your password, and then press ENTER.
Navigation >	Menu options or navigation paths are described in shorthand using the following convention:
	Module > Functional Area > Option
	For example, selecting the Account Profile area can be described as:
	Select Admin > Settings > Account Profiles from the Menu.
Monospace text	Used to represent the text you may type in a field. For example
	Type abc in the <i>Search</i> field.
(i)	The ① 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.

Home C	Customers	Billing Service	es Packages and Plans	Products	Report	Finance	Events	Admin				
Product Ma	anagement	Product Pricing	Product Categories									
Product	t Category	Management										
	ld:											
	Name:											
											Search	Clear
											Create New Catego	ory
											Manage Sub Catego	ories
8	ID 💝			Name	3					Description		
238		Phones							Phones			
240		Routers and Mod	lems						Routers and Modems			
242		Phone Accessor	ies						Phone Accessories			
								1				

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.

ate New Product Category	
Category Id:	
Category Name:	
* Description:	

Create Back

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.

Categor	y ld: 238		
* Category Na	ame: Phones		
* Descrip	tion: Phones		
			Edit
			2010/01/0
	the Contractory of Cash		Back
	ub Category list	Description	
ld ≯	Hame	Description	Category Hame
ld ¥ 01		Description Nokia iPhones	
ld ¥ 01 03	Nokia	Nokia	Category Ilame Phones
	Hame Nokia iPhones	Nokia iPhones	Category Hame Phones 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.

Category Id:		
Category Name:	Phones	
* Description:	Phones	
		St

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.

Product Sub Category Management

1000		
Icl:		
Name:		

Nam	e:				
				Search	Clear
				Create New Sub C	ategory
				Back to Category Ma	inagement
ld ≫	Hame	Description	Category Har	ne	
01	Nokia	Nokia	Phones		
03	iPhones	iPhones	Phones		
05	Motorola	Motorola	Phones		
08	HTC	HTC	Phones		
110	Samsung	Samsung	Phones		
		4			

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.

Create New Product Sub Category

Sub Category ld:		
* Sub Category Name:		
Description:		
Product Category:	Select a Product Category	Y

Create	
Back	

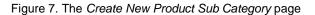
Figure 6. The Create New Product Sub Category page

- 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.

Edit	
Back	



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.

Sub Category Id:	108	
* Sub Category Name:	HTC	
Description:	HTC	
roduct Category:	Phones	*

Save	
 Back	

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.

Home Customer:	Billing	Services	Packages and Plans	Products	Report	Finance	Events	Admin
Product Managemer	t Product	Pricing F	Product Categories					
Point of Sale Pr	oduct Mana	gement						
Product Id:								
Product Name:								
Product Category:	All		~					
								Search

ID 💝	Product Name	Product Description	Product Category	Product type	Тах
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 ES	Huawei E5 USB Mobile Broadband 3G Modern / 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+ Modern with 4 Ethernet Ports & 802.11BGN Wireless	Hardware	Physical Product	
21036	Line Filter	Line Filter/Splitter Unit	Hardware	Physical Product	
21037	Netcomm 3GT1V/N	Netcomm 3GT1VVN 3G Travel Router	Hardware	Physical Product	
1704085	Nokia C5000	Nokia C5000	Phones	Physical Product	Australian GS1
1704091	E11 cable	E11 cable	Hardware	Physical Product	Australian GS1

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.

New Product Detai	s
Product Id:	
Price List Id:	
* Product Category:	Select a Product Category
Product Sub Category:	
* Product Name:	
* Description:	
	Use Default Ledger Code : MISC_PRODUCT_PURCHASE
* Product Type:	Physical Product 💉
* Total (inc Tax):	0.00
* Tax Type:	Australian GST 💌
Tax Type Percentage(%):	10 🗸
Amount(Ex. Tax):	0.00
Tax Amount:	0.00
* Saleale From:	16 Dec 2011
Saleale To:	
Minimum Quantity;	1

8	Create	
-	Back	_

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.

Price List Id ≫ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Profile 1754990 239.00 2 3 16 Dec 2011 175	iew Product Detai	ls							
Product Sub Nokia Category: * Product Name: Nokia C5000 * Description: Nokia C5000 □ Use Product Ledger Code : MISC_PRODUCT_PURCHASE Custom Ledger PHONES Code: * Product Type: Physical Product * Tex Type: Australian GST Eat Back roduct Price List Details To update the product price information, please use the Product Pricing module Price List Id > Price per Unit To update the product price information, please use the Product Pricing module Price List Id > Price per Unit To update the product price information, please use the Product Pricing module Price List Id > Price per Unit To update the product price information, please use the Product Pricing module Price List Id > Price per Unit To update the product price information, please use the Product Pricing module Price List Id > Price per Unit To update the product price information, please use the Product Price per Unit Tax Saleable From Saleable To 1754800 239.00 3 16 Dec 2011	Product Id:	1704085							
Category: * Product Name: Nokia C5000 base Product Ledger Code : MISC_PRODUCT_PURCHASE Custom Ledger PHONES: Code: * Product Type: PHONES: Code:	Product Category:	Phones							
* Description: Nokia C5000 ☐ Use Product Ledger Code : MISC_PRODUCT_PURCHASE Custom Ledger PHONES Code: * Product Type: Physical Product * Tax Type: Australian GST Price List Details To update the product price information, please use the Product Pricing module Price List Id ≷ Price per Unit Tax Saleable From Saleable To To update the product price information = 1 Price List Id ≷ Price per Unit Tax Saleable From Saleable To Price List Id ≷ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Price List Id ≷ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Price List Id ≷ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Price Value Price Value Valu		Nokia							
□ Use Product Ledger Code : MISC_PRODUCT_PURCHASE Custom Ledger PHONES Code: * Product Type: Physical Product * Tax Type: Australian OST * Tax Type: Australian OST • Tax Type: List ID betails • Trice List Id * • Price Point Details • Tax • Saleable From • Saleable From • Tax • Tax • Price List Id * • Price Point Details • Tax • Tax • Tax • Price Point Details • Tax • Tax<	* Product Name:	Nokia C5000							
Custom Ledger PHONES Code: * * Product Type: Physical Product * * Tax Type: Australian OST Edit bduct Price List Details Back * Oupdate the product price information, please use the Product Pricing module 16 Dec 2011 * 1 * 754899 16 Dec 2011 * 1 <t< td=""><td>* Description:</td><td>Nokia C5000</td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	* Description:	Nokia C5000							
Code: **Product Type: Physical Product * Tax Type: Australian GST		Use Produ	ct Ledger Code : MISC_PRODI	JCT_PURCHASE					
[•] Product Type: Physical Product [•] Tax Type: Australian GST [•] Tax Type: Australian GST [•] Tax Type: Australian GST [•] Output the List Details [•] Price List Id [×] Price per Unit Tax Saleable From Saleable To [•] 16 Dec 2011 [•] 1754900 [•] 16 Dec 2012 [•] 16 Dec 2011 [•] 16 Dec 201 [•] 16 Dec 2		PHONES							
* Tex Type: Australian GST Tex Type: Australian GST		Dhysical Drodu	4						
Edit Back Back Back To update the product price information, please use the Product Pricing module Price List Id ≫ Price per Unit Tax Saleable From Saleable To 1 Price List Id ≫ Price per Unit Tax Saleable From Saleable To Price List Id ≫ Price per Unit Tax Saleable From Saleable To Price List Id ≫ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Price List Id ≫ Price per Unit Minimum Quantity Saleable From Saleable To Price List Id Saleable To Price List Id Saleable From <th colsp<="" td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th>	<td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>								
boduct Price List Details To update the product price information, please use the Product Pricing module Price List Id Price List Id Price per Unit Tax Saleable From Saleable To 18 Price List Id Price Per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Price List Id Price List Id Price List Id Price Down I I I I I I I I I I I I I I I I I I I	* lax Type:	Australian GS1							
oduct Price List Details To update the product price information, please use the Product Pricing module Price List Id Price Price List Id Price List Id Price Point Details Price Point Details Price List Id Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Profile I754900 239.00 2 3 16 Dec 2011								Edit	
Price List Id ≫ Price product Pricing module Price List Id ≫ Price per Unit Tax Saleable From Saleable To 1754839 259.95 Australian GST 16 Dec 2011 1 0 1 1 1 1 0 1 1 1 1 1 0 1 1 1 1 1 1 1 Price List Id ≫ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Pricelie 1754900 239.00 2 3 16 Dec 2011 1 1								Back	
Price List Id X Price per Unit Tax Saleable From Saleable To 1754999 259.95 Australian GST 16 Dec 2011 1 I Oduct Price Point Details Price List Id X Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Profile 1754900 239.00 2 3 16 Dec 2011 1 1	oduct Price List I	Details							
Instrument Instru	io update the	product pric	e information, please ι	ise the Product Pricing	module				
I aduct Price Point Details Price List Id ≫ Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Profile 1754900 239.00 2 3 16 Dec 2011 1754900	Prie	e List Id ∛	Pri	ce per Unit	Tax	Saleable From		Saleable To	
Price Point Details Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Profile 754900 239.00 2 3 16 Dec 2011	754899			259.95 Aus	tralian GST		16 Dec 2011		
Price List Id Price per Unit Minimum Quantity Maximum Quantity Saleable From Saleable To Profile 1754900 239.00 2 3 16 Dec 2011					1				
1754900 239.00 2 3 16 Dec 2011	oduct Price Poin	t Details							
	Price List	d ¥	Price per Unit	Minimum Quantity	Maximum Quantity	Saleable From	Saleable To	Profile Name	
754901 200.00 4 16 Dec 2011	754900		239.00 2		3	16 Dec 2011			
	1754901		200.00 4			16 Dec 2011			

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.

Product Id:	1704085		
Product Category:	Phones	~	
Product Sub Category:	Nokia	~	
* Product Name:	Nokia C5000		
* Description:	Nokia C5000		
	Use Product Ledger Co	ode : MISC_PRODUCT_PURCH	IASE
Custom Ledger Code:	PHONES V		
New Ledger Code:			
* Product Type:	Physical Product	1	
* Product Type:	Physical Product 🛛 👻 Australian GST]	

Save	
 Back	

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.

me Customers	Billing Services Package	es and Plans Products Report	Finance Events Adm	in :		
duct Management	Product Pricing Product Ca	tegories				
oint of Sale Produ	ct Pricing Management					
Product Id:		1				
Designed blacks						
Product Name:						
Product Category: All	×					
					Searc	h Cle
	21 10 2007					
Price List Id ≫	Product Name	Product Category	Price per Unit	Tax	Saleable From	Saleable To
00025	DELIVERY			Australian GST	1 Jan 2010	
00026	FIN CHARGE	Finance		Australian GST	1 Jan 2010	
00027	MISC	Miscellaneous Charge		Australian GST	1 Jan 2010	
00028	MBB-SIM	Hardware		Australian GST	1 Jan 2010	
00029	BKB Netstick E1762	Hardware	135.45	Australian GST	1 Jan 2010	
00030	BKB Netstick E160e	Hardware	90.86	Australian GST	1 Jan 2010	
00031	BKB Netstick E1552	Hardware	90.86	Australian GST	1 Jan 2010	
00032	BKB NetWifi E5	Hardware	0.00	Australian GST	1 Jan 2010	
00033	Linksys AM300	Hardware	80.00	Australian GST	1 Jan 2010	
00034	Linksys AG300	Hardware	90.00	Australian GST	1 Jan 2010	
00035	Linksys WAG160N	Hardware	154.50	Australian GST	1 Jan 2010	
00036	Line Filter	Hardware	16.50	Australian GST	1 Jan 2010	
	Netcomm 3GT1WN	Hardware	159.00	Australian GST	1 Jan 2010	
00037		Diverse	259.95	Australian GST	16 Dec 2011	
00037 754899	Nokia C5000	Phones	200.00			

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.

				(1.4.1)					
754901		200.00 4		1		16 Dec 2011			Edit
754900		239.00 2		3		16 Dec 2011			Edit
Price List l	d∛ Price p		Minimum Quantity	Maximum Qua	ntity	Saleable From	Saleable To	Profile Name	
duct Price Point	t Details							Dack	
								Back	_
							ſ	Edit	
linimum Quantity:	1								
Saleale To:									
* Saleale From:	16 Dec 2011								
Tax Amount:	5.0970588								
Amount(Ex. Tax):	254.8529412								
Percentage(%):									
Тах Туре	10								
* Tax Type:	Australian GST								
* Total (inc Tax):	259.95								
* Product Type:	Physical Product								
Code:									
Custom Ledger	PHONES								
	Use Product Ledger	Code : MISC_PR	ODUCT_PURCHASE						
* Description:	Nokia C5000								
* Product Name:	Nokia C5000								
Category:	Hond								
Product Sub									
Product Category:	Phones								
Price List Id:	1754899								
Product Id:	1704085								

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.

		1					
Product Id:	1704085						
Price List Id:	1754899						
Product Category:	Phones	~					
Product Sub Category:	Nokia						
* Product Name:	Nokia C5000						
* Description:	Nokia C5000						
	Use Product Ledger Code : MISC	_PRODUCT_PURCHASE					
Custom Ledger Code:	PHONES						
New Ledger Code:							
* Product Type:	Physical Product 🛛 😒						
* Total (inc Tax):	259.95	This is the product's ba	se price.Use the Price Point feature	below to			
		enter multi-quantity, dat	e dependant, or account profile bas	ed pricing.			
* Tax Type:	Australian GST 💌						
Tax Type Percentage(%):	10 💌						
Amount(Ex. Tax):	254.8529412						
Tax Amount:	5.0970588						
* Saleale From:	16 Dec 2011						
Saleale To:							
Minimum Quantity:	1						
					ſ	Save	
						Cancel	
Product Price Point	t Details						
	I∛ Price per Unit	Minimum Quantity	Maximum Quantity	Saleable From	Saleable To	Profile Name	
Price List Id	a conservation of the			16 Dec 2011		1 COMO FINANO	Edit
Price List Id	239.00	2	3	16 Dec 20111			
	239.00		3	16 Dec 2011			Edit

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.

Price List Id ≫	Price per Unit	Minimum Quantity	Maximum Quantity	Saleable From	Saleable To	Profile Name
1754900	239.00 2		3	16 Dec 2011		Ed
1754901	200.00 4			16 Dec 2011		Ed
			1			
anage Product Price Poi	int Details					
						Add Price Point
Saleale From:						
Saleale To:						
Minimum Gty (From Gty):	0 💌					
Maximum Qty (To Qty):	*					
* Total (inc Tax):	0.00					
* Tax Type	Australian GST					
Tax Type Percentage(%):						
Amount(Ex. Tax):	0.00					
Tax Amount:	0.00					
Account Profile:	Select Profile					
						Save
						Cancel

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.

Price List Id 🗸	Price per Unit	Minimum Quantity	Maximum Quantity	Saleable From	Saleable To	Profile Name
1754900	239.00 2		3	16 Dec 2011		E
1754901	200.00 4			16 Dec 2011		E
	95 - 97 - 97 - 97 - 97 - 97 - 97 - 97 -		1			- X.
anage Product Price Poi	nt Details					
						Add Price Point
Price List Id:	1754901					
	16 Dec 2011					
Saleale To:						
* Minimum Qty (From Qty):	4					
Maximum Gty (To Gty):	Leave blank 💌					
* Total (inc Tax):	200					
* Tax Type:	Australian GST					
Tax Type Percentage(%):	10					
Amount(Ex. Tax):	196.0784314					
Tax Amount:						
Account Profile:	Select Profile					
						Save
					ſ	Cancel

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.

Purchase Type			 	 		
* Select Purchase Type	Outright Purchase ○ Installment Plan					
Outright Purchase : Product S	election					
* Product Category:	Select a Product Category 💙					
Product Sub Category:						
* Product:	Select a Product Category 💙					
	Use Product Ledger Code					
Custom Ledger Code:	Select Ledger Code 💟					
* Oty Required:	1					
* Price:	0.00	per Unit				
Purchase Notes/Serial:						
			Add to Cart			
			That to ball			
Cart Details						
No items in the cart.						
Complete Purchase						
Complete Purchase k	oy Creating a Cardline					
Invoicing Method:	Create Invoice 💌					
Payment Method:	Take Payment Now					
					ſ	Proceed to Confirmation

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.

* Select Purchase Typ	e 💿 Outright Purchase					
- Select Purchase Typ	 Outright Purchase Installment Plan 					
ight Purchase : Produc						
ighti aichase.i rodac	ociection					
* Product Catego	y: Select a Product Category ⊻	1				
Product Sub Catego	y: 💌					
^ Produ	ct: Select a Product Category 💌					
	Vise Product Ledger Code					
Custom Ledger Co	e: Select Ledger Code ⊻					
* Gty Require	d: 1					
* Prio	e: 0.00	per Unit				
Purchase Notes/Seri	d:					
				_		
			Add to Cart			
Detaile			Add to Cart			
Details		,ii	Add to Cart			
	ret Name Product No		,	Tax Amount	Sub Totaliine G	
ID Produ	ist llame Product Ilo	1	Unit Price(Ex GST) Tax	Tax Amount 23.63	Sub Total(inc G	SST)
ID Produ	nct Hame Product Ho		,			
ID Produ 4085 Nokia C5000	net Hame Product Ho		Unit Price(Ex GST) Tax	23.63	259.95	
ID Produ	nct Hame Product Ho		Unit Price(Ex GST) Tax	23.63	259.95	
ID Produ 4085 Nokia CS000 nplete Purchase			Unit Price(Ex GST) Tax	23.63	259.95	
ID Produ 4085 Nokia CS000 nplete Purchase	e by Creating a Cardline		Unit Price(Ex GST) Tax	23.63	259.95	
ID Produ 4085 Nokia CS000 nplete Purchase	e by Creating a Cardline		Unit Price(Ex GST) Tax	23.63	259.95	

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

- 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.

			Confirm The F	urchase
			Back	
nod: Pay Later				
nod: Invoice immediately				

Figure 21. The Purchase Confirmation page

Total: 23.63

259.95

16. Review the purchase details.

Talla Davasant

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.

myone ID V	invoice Period	issue Date	Due Date	Nothing Fo		Disputed Amount	Anocated Ame	ount
Invoice ID ≫	Invoice Period	Issue Date	Due Date	Total Amount	Outstanding Amount	Disputed Amount	Allocated Amo	ount
Account Number:								
Account Name:								
BSB:								
Bank:	Select Bank		~					
	Use One Time Direct Debit							
CVV :								
Expiry Year:	Select Expiry Year 👻							
Expiry Month:	Select Expiry Month 💌							
Credit Card No.:								
Card Type:	Select Card Type 👻							
Name On Card :								
	Use One Time Credit Card							
Payment Note:								
Stored Payment Method:	None 💌						Calicer	
	Auto Allocate						Submit	Cle
* Total:				Un	allocated Funds: 0.00	C		
Customer Name:	Matt Test							
Customer Neme:	Mott Teet			A	ccount Balance: 0.00			

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.

Invoice ID 😽	Invoice Period	Issue Date	Due Date	Total Amount	Outstanding Amount	Disputed Amount	Allocated Ar	nount
Payment Note:								
	16 Dec 2011 15:05:10							
Payment Method:	Please Select A Method 💌							
yment Reference:							Cancel	
	Auto Allocate						Submit	Cle
Total:				Un	allocated Funds: 0.00			
Customer Name:	Matt Test				ccount Balance: 0.00			

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.

* Seed Ruckas Trig Object Provide * Seed Ruckas Trig Object Provide	allment Plan - Product Selec roduct Product Calegory:	Instalment Plan tion Monthly Repayment Option			
Product Odelgogi Witter Responsent Odelogi Product Odelgogi Witter Responsent Odelgogi Product Delgogi Beet Ledger Ode Notationet Plane Configuration Notationet Odelgogi Matheware Odelgogi Product Togeno Hongin Instrudiettry Service Product Togeno Hongin First Installenert Odelgogi Matheware Odelgogi Product Togeno Hongin Instrudiettry Service Product Togeno Hongin First Installenert Date Service Product Togeno Hongin Instrudiettry Service Product Togeno Hongin Instrudiettry Service Product Togeno Hongin First Installenert Date First Installenert D	Product Category:				
Product Odelgogi Witter Responsent Odelogi Product Odelgogi Witter Responsent Odelgogi Product Delgogi Beet Ledger Ode Notationet Plane Configuration Notationet Odelgogi Matheware Odelgogi Product Togeno Hongin Instrudiettry Service Product Togeno Hongin First Installenert Odelgogi Matheware Odelgogi Product Togeno Hongin Instrudiettry Service Product Togeno Hongin First Installenert Date Service Product Togeno Hongin Instrudiettry Service Product Togeno Hongin Instrudiettry Service Product Togeno Hongin First Installenert Date First Installenert D	Product Category:				
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Product husbance Code Product Husbance Product Husbance Code Product Husbance Code Prod	Instalment Offcycle Payment Handling	Auto Prorata 🗠	8		
Serial / Product Instance Code Product Instance Description First Installment Date First Installment Date Statiment Pricing Method Specify markup percentage, about per installment, and the installment period length Specify markup percentage, about per installment, and the installment period length Specify markup percentage, about per installment, and the installment period length Specify markup percentage, about per installment, and the installment period length Specify totak cost, data amout of installment period length Specify totak cost, about per installment, and the installment period length Specify totak cost, about per installment, and the installment period length Statiment Details Statiment Details Totak installment: Data Installment: Dat	Invoicing Method.	Create Invoice			
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Specify total cost, anount per installment, and the installment period length Istallment Details Base Price: 0.00 Markias: 0.00 Stall Installment: 0.00 Charge per Installment & 0.00 % Final Cost for Installment Pirce 0.00					
Istallment Details Base Price 0.00 Markuag 0.000 Stall Installments Charge per Installment Pars 0.00 Pinal Cost for Installment Pars 0.00					
Base Price: 0.00 Markup: 0.00 % Total Installment: 0.00 Charge per Installment Plac: 0.00	Specify total cost, amount pe	ir installment, and the installment perio	d length		
Markax 0.00 % Total Installments: Charge per Installment 0.00 Pinal Cost for Installment Place 0.00	stallment Details				
Total Installments: 0.00 Pinal Cost for Installment Pina: 0.00	Base Price:	0.00			
Charge per Installment 0.00	Markup:	0.00	5		
Final Cost for Installment Plan: 0.00	Total installments:				
Final Cost for Installment Plan: 0.00	Charge per instalment	0.00			
Installment Period Length: 1 month					
		and by the			

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.

(i) 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.

urchase Type		
* Select Purchase Type Outright Purchase		
Product Purchase Information	Installment Information	
Product Purchased: Nokia C5000	Installment Amount: 26.00	Custom Next Installment: 0.00
Purchased Qty: 1	Next Installment: 16 Dec 2011	Installment Period Length: 1 months(s)
Product Type: Physical Product	Original Total Amount: 259.95	Base Amount (prior to 259.95
Product Category: Phones	Total Amount Remaining: 259.95	markup):
Purchase Type: Installments	Installments Remaining: 10	Charge Invoicing Method: Create Invoice
Purchase Date: 16 Dec 2011	Note: All figures	Ad Hoc Payment Method: Auto Prorata s shown above are EX TAX
Product Information		
	Product information required to start Installments	
Product Instance ID:	Product Instance Description: 423524354	
Product Serial Number: 234453		Create Installment Purchase !
Instance Created:		Modify

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.

istomer Lis	t Create New Customer						
	Matt Test (Account ID : 🖘		dian Ladone Cardlinan I Incole	Transactions Deafile		Decement Methods Decemen	Payment Take Payment Portal N
10.00	10000	iptions Service Subscriptions Pen	ang Leager Caraines Invoici	as fransactions prome	Graer	Payment methous Receive	Payment Take Payment Portai IN
Furchase	Management						
Purchase	Status: All Statuses Complete Incomplete In Progress	Out	Purchase Types Arright allments	Se	Product Types rvice Charge able Item ysical Product		
				ſ	Search	Clear	
					Add New Purc		
						liase	
ID	Name	Product Category	Product Type	Purchase Type	Supplier	Purchase Date	
1779836	Nokia C5000	Phones	Physical Product	Installments	Bellinnenn	2011-12-16 15:39:20	Incomplete
779835	Nokia C5000	Phones	Physical Product	Installments	Exception and a second second	2011-12-16 15:19:57	InProgress
779834	Nokia C5000	Phones	Physical Product	Outright	Dillingen	2011-12-16 15:07:00	Complete
779833	Nokia C5000	Phones	Physical Product	Outright	Ekitinneenneitt:	2011-12-16 15:05:09	Complete
779826	BKB Netstick E160e	Hardware	Physical Product	Outright	Billinneennill	2011-12-15 13:24:36	Complete
770232	Service Plan Access	Access Fee	Service Charge	Outright	Service and a service of the service	2011-11-01 15:15:29	Complete
755947	Package Plan Access	Access Fee	Service Charge	Outright	ENIO (Ginanamenterit)	2011-11-01 13:07:20	Complete
664300	Package Plan Access	Access Fee	Service Charge	Outright	ENIGHING Internetic	2011-10-02 03:22:03	Complete
632468	Service Plan Access	Access Fee	Service Charge	Outright	Billinnernett	2011-10-01 17:24:30	Complete
586541	Package Plan Access	Access Fee	Service Charge	Outright	Billisemmentel	2011-09-01 14:25:12	Complete
533590	Service Plan Access	Access Fee	Service Charge	Outright	Bliffulghener."	2011-09-01 12:58:03	Complete
480622	Service Plan Access	Access Fee	Service Charge	Outright	Billineenman'	2011-08-01 19:08:43	Complete
452057	Package Plan Access	Access Fee	Service Charge	Outright	ENCONTRACTOR	2011-08-01 16:58:28	Complete
354031	Service Plan Access	Access Fee	Service Charge	Outright	Entitionenomia.	2011-07-01 20:00:08	Complete
346096	Package Plan Access	Access Fee	Service Charge	Outright	ENHINEMENT	2011-07-01 18:25:54	Complete
214115	Package Plan Access	Access Fee	Service Charge	Outright	EM020mmerminit:	2011-06-01 21:58:24	Complete
199045	Service Plan Access	Access Fee	Service Charge	Outright	Billinneenwa	2011-06-01 21:07:00	Complete
109780	Service Plan Access	Access Fee	Service Charge	Outright	Billinneessa	2011-05-02 01:11:49	Complete
098385	Package Plan Access	Access Fee	Service Charge	Outright	Bittmeener	2011-05-01 23:55:15	Complete
1010353	Service Plan Access	Access Fee	Service Charge	Outright	BRUMMenmet	2011-04-01 22:41:04	Complete

Figure 26. The Purchase Management page

Search

 \geq

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.

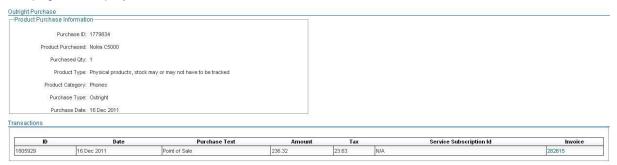


Figure 27. The Installment Purchase page showing an Outright Purchase

- 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.

Product Purchase Information			Installment Information		
Purchase ID: 17	779835		Installment Amoun	it: 26.00	Custom Next Installment: 0.00
Product Purchased: No	okia C5000		Next Installmen	it: 16 Dec 2011	Installment Period Length: 1 months(s)
Purchased Qty: 1 Product Type: Pf	nysical products, stock may or may not have to	be tracked	Original Total Amoun Total Amount Remainin		Base Amount (prior to 259.95 markup):
Product Category: Ph	nones		Installments Remaining	7	Charge Invoicing Method: Create Invoice Ad Hoc Payment Method: Auto Prorata
Purchase Type: In				Note: All figures sh	own above are EX TAX
Purchase Date: 16	5 Dec 2011				
Product Information					
		P	roduct Supplied		
Product Instance ID: 14	4570		Product Instance Description:	423524354	
Product Serial Number: 23	34453				
Instance Created: 16	6 Dec 2011				
Transactions					
ID Date	Purchase Text	Amount	Tax	Service Subscription	ld Invoice
Ad Hoc Payment-					
Amount to Charge 0.00					Create AdHoc Payment
Charge Invoice Create Invo Method:	ice 💌				Finalise all Payments (Break out)

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.

oduct Purchase Information		rmation		
Purchase ID: 1779836	Installe	ment Amount: 21.67	Custom Next Installment	: 0.00
Product Purchased: Nokia C5000	Ne	xt Installment:	Installment Period Length	: 1 months(s)
Purchased Qty: 1	Original	Total Amount: 259.95	Base Amount (prior to markup)	
Product Type: Physical products, stock may or may not have to	be tracked Total Amou	nt Remaining: 259.95		
Product Category: Phones	Installmen	ts Remaining: 12	Charge Invoicing Method	
Purchase Type: Installments		Parata and a second	Ad Hoc Payment Method res shown above are EX TAX	: Auto Prorata
Purchase Date: 16 Dec 2011		Note: All figu	res shown above are EX TAX	
oduct Information	100			
	Product information required to start Installine	ents		
Product Instance ID:		ct Instance escription:		
Product Serial Number:		bachpuon.		
* Instance Created:				
				ave Droduct Information
			s	Save Product Information
sactions			5	Save Product Information

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.

Product Purchase Information			Installment Infor	mation	
Purchase ID: 177983	5		Installm	ent Amount: 26.00	Custom Next Installment: 0.00
Product Purchased: Nokia C	5000		Nex	t Installment: 16 Dec 2011	Installment Period Length: 1 months(s)
Purchased Gty: 1			Original T	otal Amount: 259.95	Base Amount (prior to 259.95 markup);
Product Type: Physics	al products, stock may or may not have to b	pe tracked	Total Amour	it Remaining: 259.95	Charge Invoicing Method: Create Invoice
Product Category: Phones	Į.		Installment	s Remaining: 10	
Purchase Type: Installm	ents			Note: All figures	Ad Hoc Payment Method: Auto Prorata shown above are EX TAX
Purchase Date: 16 Dec	2011			Hoto, Hit light oc	
-Product Information-			5.84		
		P	roduct Supplied		
Product Instance ID: 14570			Product Instance De	scription: 423524354	
Product Serial Number: 234453	i				
Instance Created: 16 Dec	2011				
	853.9294				
ransactions					
	Purchase Text	Amount	Tax	Service Subscript	ion Id Invoice
ID Date					
ID Date Ad Hoc Payment-					
Ad Hoc Payment-					Create AdHoc Payment
Ad Hoc Payment					Create AdHoc Payment Finalise all Payments (Break out)

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
- 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.

roduct Purchase Informatio	on		Installment Information		
Purchase ID:	1779835		Installment Amount	26.00	Custom Next Installment: 0.00
Product Purchased:	Nokia C5000		Next Installment	16 Dec 2011	Installment Period Length: 1 months(s)
Purchased Gty:	ĩ		Original Total Amount	259.95	Base Amount (prior to 259.95 markup):
Product Type: Product Category:	Physical products, stock may or may not have to Phones	be tracked	Total Amount Remaining Installments Remaining		Charge Invoicing Method: Create Invoice Ad Hoc Payment Method: Auto Prorata
Purchase Type: Purchase Date:				Note: All figures sh	own above are EX TAX
duct Information			244		
			Product Supplied		
Product Instance ID:	14570		Product Instance Description: 4	23524354	
			Product Instance Description: 4	23524354	
Product Serial Number:	234453		Product Instance Description: 4	23524354	
	234453		Product Instance Description: 4	23524354	
Product Serial Number: Instance Created:	234453		Product Instance Description: 4	23524354	
Product Serial Number: Instance Created: sactions	234453 16 Dec 2011				
Product Serial Number:	234453	Amount	Product Instance Description: 4	23524354 Service Subscription	ld Invoice
Product Serial Number. Instance Created: sactions ID Date	234453 16 Dec 2011	Amount			ld Invoice
Product Serial Number: Instance Created: sactions ID Date Hoc Payment-	234453 16 Dec 2011	Amount			
Product Serial Number: Instance Created: sactions ID Date Hoc Payment Amount to Charge 0.00	234453 16 Dec 2011	Amount			Id Invoice
Product Serial Number: Instance Created: Sactions ID Date I Hoc Payment Amount to Charge 0.00 including Tax	234453 16 Dec 2011 Purchase Text	Amount			
Product Serial Number: Instance Created: sactions ID Date Hoc Payment Amount to Charge 0.00	234453 16 Dec 2011 Purchase Text	Amount			Create AdHoc Payment

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.

Installment Breakout	×
Are you sure you want to f (Break out)? Amount required:\$95.45 E	
	Yes No

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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