

Product Management User Manual

© 2012 Emersion Software Systems Pty Ltd

No part of this manual may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, recording or otherwise without the prior written permission of Emersion Software Systems Pty Ltd.

The content of this manual is furnished for informational use only. It is subject to change without notice. Emersion Software Systems Pty Ltd assumes no responsibility or liability for any errors or inaccuracies that may appear in this Manual.

Table of Contents

About This Document	4
Purpose	4
Intended Audience	4
Document Control	4
Emersion® Umbrella System	5
Introduction	6
Emersion Product Management	6
Document Conventions	6
Assumptions Made	7
Product Categories and Sub Categories	8
To Display the Product Categories	8
To Create a Product Category	8
To Display a Product Category	9
To Edit a Product Category	9
To Display the Product Sub Categories	10
To Create a Product Sub Category	10
To Display a Product Sub Category	11
To Edit a Product Sub Category	11
Products	12
To Display Products	12
To Create a Product	13
To Display a Product	15
To Edit a Product	16
Manage Inventory	17
To Manage Product Inventory	17
To Import Inventory	18
Product Inventory Import File Format	18
To Edit a Serial Number	19
To Delete an Inventory Item	19
Product Pricing	20
To Display Product Pricing	20
To Set a Product Price Point	21
To Edit a Product Price Point	24
Product Purchases	25
To Create a Product Purchase	25
To Create an Outright Purchase	26
To Create an Installment Plan	31
Purchase Management	34

35
40
40
40

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
1.1	31/5/2012	Updated with serialised product feature	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 Emersion® Cumulus user interface 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 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 \checkmark
- 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 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 module, 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 Address 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 <i>Customer Name</i> 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 Search field.
$(\mathbf{\hat{I}})$	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 Cust	tomers	Billing Service:	s Packages and Plans	Products	Report	Finance	Events	Admin				
Product Manag	gement	Product Pricing	Product Categories									
Product Ca	ategory I	Management										
	ld:											
1	Name:											
											Search	Clear
										C	reate New Categ	ory
										Me	anage Sub Catego	ories
ID	×			Name	\$				Description			1
238		Phones							Phones			
240		Routers and Mode	ms						Routers and Moderns			
242		Phone Accessorie	s						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.

Create 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.

ew Product C	ategory		
Category	y ld: 238		
* Category Na	me: Phones		
* Descript	ion: Phones		
			Edit
Product Su	b Category list		Back
Product Su	b Category list	Description	Back Category Hame
Product Su	Ib Category list	Description	Category Hame Phones
Product Su Id ¥ 101 103	Ib Category list	Description Nokia iPhones	Category Ilame Phones Phones
Product Su 101 103 105	b Category list Nokia IPhones Motorola	Description Nokia IPhones Motorola	Category Ilame Phones Phones Phones
Product Su 101 103 105 108	ib Category list Nokia Phones Motorola HTC	Description Nokia iPhones Motorola HTC	Category Hame Phones Phones Phones 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:	38	
egory Name:	hones	
Description:	hones	
		Save
		Back

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.

	ld:			
	Name:			
			Search	Clear
			Consider Marco Code Code	10. N
			Create New Sub Cate	egory
			Back to Category Mana	iegory igement
ld ≫	Hame	Description	Create New Sub Cate Back to Category Mana Category Ilame	agement
ld ≫	Nokia Hame	Description Nokia	Create New Sub Cate Back to Category Mana Category Name Phones	agement
ld ¥ 101 103	Nokia IPhones	Description Nokia iPhones	Create New Sub Cate Back to Category Mana Category Hame Phones Phones	agement
ld ¥ 101 103 105	Nokia iPhones Motorola	Description Nokia iPhones Motorola	Category Nama Category Hame Phones Phones Phones Phones	agement
Id ≫ 101 103 105 108	Nokia iPhones Motorola HTC	Description Nokia iPhones Motorola HTC	Category Nama Category Ilame Phones P	agement

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 Produ	ct Sub Category		
Sub Category Id:			
* Sub Category Name:			
Description:			
Product Category:	Select a Product Category	¥	
			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.

View Product Sub Category	
Sub Category ld: 108	
* Sub Category HTC Name:	
Description: HTC	
* Product Category: Phones	
	Edit
	Back

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.

Edit Product Sub C	tegory	
Sub Category Id:	108	
* Sub Category Name:	нтс	
Description:	нтс	
Product 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.

The system allows you to create products that are *serialised* for items such as hardware that are recorded with individual product inventory, such as a serial number. For more information about enabling serialised products, please contact the Emersion Sales or Support teams.

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.

The *Serialised* column indicates whether the product stores individual product inventory, such as a serial number.

The second		4 10.00000										
oduct Ma	anagement Prod	uct Pricing	Product Catego	ories								
Point of	Sale Product Ma	anagement	t									
į	Product Id:											
Proc	duct Name:											
Dunchund			V									
Product	. Category. [~"									_		
											Search	Clear
											Create New F	Product
4 Results	Found											
ID 💝	Product Name			Product I	escription	is .			Product Category	Product type	Tax	Serialise
		12 33	- 1 - 1								20 B	
21025	DELIVERY	Postage an	nd Handling							Billable Item		NO
21025 21026	FIN CHARGE	Postage an Late payme	nd Handling ent fee					F	inance	Billable Item Billable Item		NO NO
21025 21026 21027	FIN CHARGE MISC	Postage an Late payme Misc charg	nd Handling ent fee ges					F	'inance /liscellaneous Charge	Billable Item Billable Item Billable Item		NO NO NO
21025 21026 21027 21028	FIN CHARGE MISC MBB-SIM	Postage an Late payme Misc charg Mobile Broa	nd Handling ent fee jes adband SIM-Only Pa	ck				F	'inance Miscellaneous Charge Hardware	Billable Item Billable Item Billable Item Physical Product		NO NO NO NO
21025 21026 21027 21028 21028	FIN CHARGE MISC MBB-SIM	Postage an Late payme Misc charg Mobile Broa	nd Handling ent fee jes adband SIM-Only Pa ick E1762	ck				F 1	'inance discellaneous Charge fardware fardware	Billable Item Billable Item Billable Item Physical Product Physical Product		NO NO NO NO NO
21025 21026 21027 21028 21028 21029 21030	ELIVERY FIN CHARGE MISC MBB-SIM , Netstick E1762 E Netstick E160e	Postage an Late payme Misc charg Mobile Broa L. NetStill	nd Handling ent fee es adband SIM-Only Pa ick E1762 ck E160e	ck				F F F F	'inance discellaneous Charge tardware tardware tardware	Billable Item Billable Item Billable Item Physical Product Physical Product Physical Product		NO NO NO NO NO NO
21025 21026 21027 21028 21029 21029 21030 21031	DELIVERY FIN CHARGE MISC MBB-SIM , Netstick E1762 E Netstick E160e , Netstick E1552	Postage an Late payme Misc charg Mobile Broa L. NetStic L. Vetstic	rd Handling ent fee adband SIM-Only Pa ick E1762 ck E160e ck E1552	ck				F P F F	inance discellaneous Charge tardware tardware tardware tardware	Billable Item Billable Item Billable Item Physical Product Physical Product Physical Product Physical Product		NO NO NO NO NO NO NO
21025 21026 21027 21028 21029 21030 21031 21032	DELIVERY FIN CHARGE MISC MBB-SIM , Netstick E1762 E Netstick E160e , Netstick E1552 L NetWifi E5	Postage an Late payme Misc charg Mobile Broa L. NetStir L. NetStir L. ivetstir Huawei E5	nd Handling est adband SIM-Only Pa ick E1762 ck E160e ck E1552 : USB Mobile Broadb	ck and 3G Modem	/Wifi Route	, ,		F 8 8 1 1 1	iinance Aliscellaneous Charge Hardware Hardware Hardware Hardware Hardware	Billable item Billable item Billable item Physical Product Physical Product		NO NO NO NO NO NO NO NO
21025 21026 21027 21028 21029 21030 21031 21032 21033	DELIVERY FIN CHARGE MIBC MBB-SIM · . Netstick E1762 E Netstick E1762 E Netstick E1552 E NetWifi E5 Linksys AM300	Postage an Late payme Misc charg Mobile Broe L. NetStic L. NetStic L. NetStic Huawel ES Linksys AM	nd Handling ent fee adband SIM-Only Par ick E1762 ck E160e ck E1552 : USB Mobile Broadb //300 ADSL2+ Moder	ck and 3G Modem n with 1 Ethern	/Wifi Route	*		F F F F F	inance discellaneous Charge lardware lardware lardware lardware lardware	Billable item Billable item Billable item Physical Product Physical Product Physical Product Physical Product Physical Product		NO NO NO NO NO NO NO NO NO
21025 21026 21027 21028 21029 21030 21030 21031 21032 21033 21034	DELIVERY FIN CHARGE MISC MBB-SIM Netstick E1762 ENetstick E160e Netstick E1562 Linksys AM300 Linksys AM300	Postage an Late payme Misc charg Mobile Broa L. NetStin L Netstin Huawel ES Linksys AM Linksys AG	nd Handling ent fee adband SIM-Only Par ick E1762 ck E160e ck E1552 USB Mobile Broadb //300 ADSL2+ Moder 3300 ADSL2+ Moder	ck and 3G Modem n with 1 Ethern n with 4 Ethern	/Wifi Route let Port let Ports	2		F P F F F F F	inance Alscellaneous Charge Iardware Iardware Iardware Iardware Iardware Iardware Iardware	Billable item Billable item Billable item Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product		NO NO NO NO NO NO NO NO NO NO
21025 21026 21027 21028 21029 21030 21031 21032 21033 21034 21035	DELIVERY FIN CHARGE MISC MBB-SIM . Netstick E1762 E Netstick E160e . Metstick E1552 NetWifi E5 Linksys AM300 Linksys AM300 Linksys VAG160N	Postage an Late payme Misc charg Mobile Broa L. NetStin L Netstin Huawel ES Linksys AM Linksys AM Linksys W/	nd Handling ent fee jes adband SIM-Only Pa- ick E1762 ck E160e ck E1552 i USB Mobile Broadb- i/300 ADSL2+ Moder AG160N ADSL2+ Moder	ck and 3G Modem n with 1 Ethern n with 4 Ethern odem with 4 Eth	/Wifi Router het Port het Ports hernet Ports	r & 802.11BGN	Wireless	F F F F F F F F F F F F F F F F F F F	inance inscellaneous Charge fardware fardware fardware fardware fardware fardware fardware fardware	Billable item Billable item Billable item Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product		NO NO NO NO NO NO NO NO NO NO
21025 21026 21027 21028 21029 21030 21031 21032 21033 21034 21035 21036	DELIVERY FIN CHARGE MISC MBB-SIM MBB-SIM MBB-SIM Netstick E1762 E Netstick E160e Netstick E1552 UN NetWH E5 Linksys AM300 Linksys AG300 Linksys VAG160N Link Filter	Postage an Late payme Misc charg Mobile Broa L. NetStir L. NetStir Huawei E5 Linksys AM Linksys AM Linksys W/ Linksys W/	nd Handling ent fee ges adband SIM-Only Par ick E1762 ck E160e ck E1552 u USB Mobile Broadb i USB Mobile Broadb i USB Mobile Broadb i USB Mobile Ander 3300 ADSL2+ Moder 3300 ADSL2+ Moder 340160N ADSL2+ Moder Splitter Unit	ck and 3G Modem n with 1 Ethern n with 4 Ethern odem with 4 Eth	/Wifi Route let Port let Ports hernet Ports	r & 802.11BGN	Wireless	F 7 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	inance discellaneous Charge lardtware lardtware lardtware lardtware lardtware lardtware lardtware lardtware lardtware lardtware	Billable item Billable item Billable item Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product		NO NO NO NO NO NO NO NO NO NO
21025 21026 21027 21028 21029 21030 21031 21032 21033 21034 21035 21036 21037	DELIVERY FIN CHARGE MISC MBB-SIM , Netstick E1762 E Netstick E1762 Linksys Ad300 Linksys Ad300 Linksys Ad300 Linksys WAG160N Linksfilter Netcomm 3GT1WN	Postage an Late payme Misc charg Mobile Broa L. NetStir L. NetStir Huawei ES Linksys AM Linksys AM Linksys W Linksys W Line Filter/S Netcomm 3	nd Handling ent fee ges adband SIM-Only Pai lok E1762 ok E160e ck E1552 USB Mobile Broadb 4300 ADSL2+ Moder 3300 ADSL2+ Moder AG160N ADSL2+ Mic gyltter Unit IGT1VWN 3G Travel R	ck and 3G Modem n with 1 Ethern n with 4 Ether odem with 4 Eth	/Wifi Route let Port let Ports hernet Ports	r & 802.11BGN	Wireless		inance discellaneous Charge lardware lardware lardware lardware lardware lardware lardware lardware lardware lardware	Billable item Billable item Billable item Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product Physical Product		NO NO NO NO NO NO NO NO NO NO NO NO NO N

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 Detail	8
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:	Select a Product Type 💌
* Sell Price (inc Tax):	0.00
* Tax Type:	Tax Exempt
Tax Type Percentage(%):	
Sell Price (ex Tax):	0.00
Sell Tax Amount:	0.00
Cost Price (inc Tax):	0.00
* Tax Type:	Tax Exempt
Tax Type Percentage(%):	
Cost Price (ex Tax):	0.00
Cost Tax Amount:	0.00
* Saleable From:	31 May 2012
Saleable To:	
Minimum Quantity:	
	Serialised
	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 system default product ledger code to this product. This ledger code will be recorded against the cardline when the product is sold to a customer. The system 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 sell price of the item in the *Sell Price (inc Tax)* field. The system will automatically calculate the price *Sell Price (ex Tax)* and *the Sell Tax Amount*.

Alternately, enter the price of the item in the Sell Price (ex Tax) field. The system will automatically calculate the price Sell Price (inc tax) and the Tax Amount.

Note that this price is referred to as the product *base sell* price, or *regular* sell price. It is the price the item will be sold at when there are no product price points in effect.

- 10. Select the Sell Tax Type applicable to this item in the drop list.
- 11. Enter the cost price of the item in the *Cost Price (inc Tax)* field. The system will automatically calculate the price *Cost Price (ex Tax)* and *the Cost Tax Amount.*

Alternately, enter the price of the item in the Cost Price (ex Tax) field. The system will automatically calculate the price Cost Price (inc tax) and the Cost Tax Amount.

- 12. Select the Cost Tax Type applicable to this item in the drop list.
- 13. 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.
- 14. 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 is available to sell to your customers. If you do not enter a Saleable To date, the product will be available indefinitely.

- 15. 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 20 for further information). Normally, you should leave this minimum quantity as '1'.
- 16. If this product is required to hold individual product inventory (e.g. serial numbers), tick the *Is Serialised* check box.
- 17. Click the **Create** button. The *Point of Sale Product Management* page will be displayed with an information box showing the product has been saved.
- 18. 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.

The price point details are maintained using the *Product Pricing* function.

If the product is serialised (i.e. holds individual product inventory) the *Manage Inventory* button will be displayed to enable you to record the serial number details (see the To Manage Product Inventory section on page 17). Otherwise, this button will not be shown.

	lis										
Product Id:	1704205										
Product Category:	Sim Card										
Product Sub											
Category:											
* Product Name:	3G SIM										
* Description:	3G SIM -										
	📝 Default Product Led	ger Code : MISC	PRODUCT_PURCH	ASE							
Custom Ledger Code:											
* Product Type:	Physical Product										
* Tax Type:	Australian GST										
	V Is Serialised										
									_		Edit
										Monoas	
										Manage	nventory
oduct Price List [Details									Manage	e Inventory Back
oduct Price List [fo update the j Results Found	Details product price inforr	nation, plea	se use the Pro	duct Pricin	ng module					Manage E	ack
oduct Price List [fo update the Results Found Price List Id ≫	Details product price inforr Unit Price (Ex Ta x)	nation, plea	se use the Pro	duct Pricin Tax	ng module Cost Price (Ex Ta	x)	Cost Price (Inc Tax	() Ta	x Sale	Manage E Ible From	ack Saleable 1
oduct Price List [To update the Results Found Price List Id ≫ 1759705	Details product price inforr Unit Price (Ex Tax)	nation, plea Unit Pric	se use the Pro e (Inc Tax) 16.50 Aust	duct Pricin Tax ralian GST	ng module Cost Price (Ex Ta 1	x) 0.00	Cost Price (Inc Tax 11	() Ta 1.00 Australian	x Sale GST	Manage E Ible From 31 May 201	Saleable T
oduct Price List [To update the j Results Found Price List Id ≫ 1759705	Details product price inforr Unit Price (Ex Tax)	unation, plea	se use the Pro e (Inc Tax) 16.50 Aust	duct Pricin Tax ralian OST	ng module Cost Price (Ex Ta 1	x) 0.00	Cost Price (Inc Tax 1'	() Ta 1.00 Australian	x Sale GST	Manage E Ible From 31 May 201	Saleable 1 2 100 150 2
oduct Price List [To update the j Results Found Price List Id ≫ 1759705 oduct Price Point	Details product price inforr Unit Price (Ex Tax) 15. t Details	Unit Pric	se use the Pro e (Inc Tax) 16.50 Aust	duct Pricin Tax ralian GST	ng module Cost Price (Ex Ta 1	x) 0.00	Cost Price (Inc Tax 1'	() Ta 1.00 Australian	x Sale	Manage E ble From 31 May 201	Saleable 1 2 100 150 2
oduct Price List I To update the Results Found Price List Id 7759705 oduct Price Point Results Found	Details product price inforr Unit Price (Ex Tax) 15. t Details	Unit Pric	se use the Pro e (Inc Tax) 16.50 Aust	duct Pricin Tax ralian GST	Cost Price (Ex Ta	x) 0.00	Cost Price (Inc Tax 1 ⁴	i) Ta 1.00 Australian	x Sale	Manage E ble From 31 May 201 50	Saleable T 2 100 150 2
oduct Price List I Fo update the Price List Id Price List Id I759705 oduct Price Point Results Found Price List Ik	Details product price inforr Unit Price (Ex Tax) 15. t Details	Unit Pric	e (Inc Tax) 16.50 Aust Minimum Qua	duct Pricin Tax ralian GST	Cost Price (Ex Ta Cost Price (Ex Ta 1 1 Maximum Que	x) 0.00	Cost Price (Inc Tax 1 ⁴ Saleable	() Ta 1.00 Australian	x Sale GST Saleable To	Manage E ble From 31 May 201 50	Saleable T 2 100 150 2 100 150 2
oduct Price List I To update the Results Found <u>Price List Id ≫</u> 1759705 oduct Price Point Results Found <u>Price List Ic</u> 1759706	Details Unit Price (Ex Tax) Unit Price (Ex Tax) 15 t Details	Unit Pric 10 1 Unit 9:00	e (Inc Tax) 16.50 Aust Minimum Oua	duct Pricin Tax relian GST	Cost Price (Ex Ta Cost Price (Ex Ta 1 1 Maximum Oua	x) 0.00	Cost Price (Inc Tax 1' Saleable	() Ta 1.00 Australian 9 From 1 Jun 2012	x Sale GST Saleable To 31 Jul 2	Manage E ble From 31 May 201 50 9 012	Saleable T 2 100 150 2 100 150 2
oduct Price List I To update the Results Found Price List Id ≫ 1759705 oduct Price Point ? Results Found Price List It 1759706 1759707	Details Unit Price (Ex Tax) Unit Price (Ex Tax) 15. t Details	Unit Pric 10 10 10 10 10 10 10 10 10 10 10 10 10	se use the Pro e (Inc Tax) 16.50 Aust Minimum Qua	duct Pricin Tax ralian GST	Ig module Cost Price (Ex Ta 1 1 Maximum Qua	x) 0.00	Cost Price (Inc Tax 1' Saleable	 to Australian Australian From Jun 2012 Aug 2012 	x Sale GST GST Saleable To 31 Jul 2 4 Sep 2	Manage E ble From 31 May 201 50 50 P 012 012	Saleable T 2 100 150 2 rofile Name

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, Product Type, and Is Serialised details.

To modify the product price, minimum quantity, and saleable date information, 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.

Manage Inventory

The Manage Product Inventory function allows you to enter and manage serial numbers for products that have been set up as serialised (i.e. that hold individual product inventory).

If the product is serialised, the *Manage Inventory* button will be displayed on the *View Product Details* page. Otherwise, this button will not be shown.

To Manage Product Inventory

- 1. On the *Point of Sale Product Management* page, click the product link in the *ID* column of the serialised item the list. The *View Product Details* page will appear showing the selected product.
- 2. Click the **Manage Inventory** button. The *Product Inventory* page will appear showing all serial numbers held for the item.

Serial Num	ber:				
Purchase	e ID:				
Sta	itus: Select Status 💌				
Cala	Te: Select an Account		~		
500			67.8		
					Search
					Back
					Import Inventory
08 Results Four	nd				
ID 🛠	Serial Number	Purchase ID	Sold To	Status	Actions
7078	PsWtB9WK			Held	Edit Remove
7079	za∨STNp7			Held	Edit Remove
7081	NkLup5g9			Held	Edit Remove
7082	AcbnDCHg			Held	Edit Remove
7083	7Ld3u2h9	2210744	C i internet	Shipped	
7084	SSnFWqgA			Held	Edit Remove
7085	vUSmNEbu			Held	Edit Remove
7086	ypkGNZ3W			Held	Edit Remove
7087	NB2r76tr			Held	Edit Remove
7088	CZjePt7w			Held	Edit Remove
7089	XLGQPzkD			Held	Edit Remove
7090	dbfeCCpf			Held	Edit Remove
7091	mUFS2u8e			Held	Edit Remove
7092	bS5ENKDN			Held	Edit Remove
7093	KfaTmWex			Held	Edit Remove
7094	PaVvkD2dF			Held	Edit Remove
7095	N6CMsZwV			Held	Edit Remove
7000	kuBcHhfs			Held	Edit Remove
7030	HuAnnOnm			Held	Edit Remove
7098					

Figure 13. The *Product Inventory* page

Search

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

- Serial Number
- Purchase ID the transaction or purchase ID that the product with the serial number was sold in
- Status Held (on hand) or Shipped (sold)
- Sold To the account that the particular product with the serial number was sold to

To Import Inventory

 \bigcirc

The *Import Inventory* function allows you to import serial numbers to store against the serialised product and store them in the product inventory. The serial numbers must be loaded via a .CSV file that is imported and processed to load all the serial numbers against the serialised product.

Product Inventory Import File Format

The product inventory import file must in .CSV format, with a column heading row containing the field names as specified below:

Field	Description
PRODUCT_ID	The product ID of the serialised product in the system
SERIAL_NUMBER	The serial number to store in the product inventory
OWNING_ACCOUNT_ID	Your account number within the system. This can be located at the very bottom, right hand corner of all pages in the system

1. On the *Product Inventory* page, click the **Import Inventory** button. The *Import Product Inventory* page will appear.

Import Product Inventory f	r Modem (1704201)	
* Select file to imort (CSV format):	Browse	Inport to Inventory
		Back

Figure 14. The Import Product Inventory page

- 2. Upload the product inventory import file. Click the **Browse** button. The *File Upload* window will appear. Navigate to and select the required file, and then click **Open**.
- 3. Click the **Import to Inventory** button. The system will load the serial numbers from the product inventory import file.

The import will not successfully complete unless the all details in the .csv file are correct i.e. the PRODUCT_ ID must match the serialised product, the OWNING_ACCOUNT_ID must match your account, and the product is configured as a serialised product.

If the system detects a duplicate serial number (i.e. a number already exists in the product inventory, or a serial number appears more than once in the .csv import file, the import process will not successfully complete.

When the import has successfully completed, the *Product Inventory* page will be displayed with an information box showing the file was imported. The serial numbers imported will be available in the list.

To Edit a Serial Number

A product's inventory serial number may be edited (e.g. if the information imported was incorrect etc). However only serial numbers of the product that have not be shipped (i.e. sold) to a customer in a product purchase transaction can be edited (see the *To Create a Product Purchase* section on page 25).

1. On the *Product Inventory* page, click the **Edit** link in the *Action* column of the serial number in the list. The *Update Inventory Product* page will appear.

pdate Inventory	Product	
* Serial Number:	PsWtB9WK	
Status:	Held	
		Save
		Back

Figure 15. The Update Inventory Product page

- 2. Modify the Serial Number field as required.
- 3. Select the required *Status* from the drop list.
- 4. Click the **Save** button. The *Product Inventory* page will be displayed with an information box showing the inventory item was saved.

To Delete an Inventory Item

Serial numbers may be deleted (e.g. if the product is faulty etc). However only serial number of the product that have not be shipped (i.e. sold) to a customer in a product purchase transaction can be deleted.

1. On the *Product Inventory* page, click the **Remove** link in the *Action* column of the serial number in the list. A message will display to prompt you to confirm that you want to remove the item from inventory.

Remove Item from In	iventory	×
Warning: You are abou from inventory permane	t to remove this ently.	s item
Are you sure you want	to continue?	

Figure 16. The Remove Item from Inventory message

- 2. Click the **Yes** button to confirm. The *Product Inventory* page will be displayed with an information box showing the serial number was removed from inventory.
- 3. Click the **No** button to cancel. The serial number will not be removed.

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.

Customers Bi	lling Services	Packages and Plans	Products Rep	oort Finance	Events Adm	in				
Product Managen	nent Product Pr	icing Product Cate	gories							
Point of Sale	Product Pricing	Management								
	a 1									
Product	ld:									
Product Nar	ne:									
Product Catego	ry: All	~								
									Search	Clear
14 Results Found										
Price List Id ¥	Product Name	Product Category	Unit Price (Ex Tax)	Unit Price (Inc Tax)	Тах	Cost Price (Ex Tax)	Cost Price (Inc Tax)	Tax	Saleable From	Saleable To
100025	DELIVERY		10.00	11.00	Australian GST	0.00	0.00	1	1 Jan 2010	
100026	FIN CHARGE	Finance	15.00	16.50	Australian GST	0.00	0.00		1 Jan 2010	C
100027	MISC	Miscellaneous Charge	0.00	0.00	Australian GST	0.00	0.00		1 Jan 2010	
100028	MBB-SIM	Hardware	15.00	16.50	Australian GST	0.00	0.00		1 Jan 2010	C
100029	Vetstick E1762	Hardware	135.45	149.00	Australian GST	0.00	0.00		1 Jan 2010	E
100030	Vetstick E160e	Hardware	90.86	99.95	Australian GST	0.00	0.00		1 Jan 2010	C
100031		Hardware	90.86	99.95	Australian GST	0.00	0.00		1 Jan 2010	E
100032	NetWifi E5	Hardware	0.00	0.00	Australian GST	0.00	0.00		1 Jan 2010	C
100033	Linksys AM300	Hardware	80.00	88.00	Australian GST	0.00	0.00		1 Jan 2010	E
100034	Linksys AG300	Hardware	90.00	99.00	Australian GST	0.00	0.00		1 Jan 2010	C
100035	Linksys WAG160N	Hardware	154.50	169.95	Australian GST	0.00	0.00		1 Jan 2010	E
100036	Line Filter	Hardware	16.50	18.15	Australian GST	0.00	0.00		1 Jan 2010	C
100037	Netcomm 3GT1V/N	Hardware	159.00	174.90	Australian GST	0.00	0.00		1 Jan 2010	E
1759705	3G SIM · · ·	Sim Card	15.00	16.50	Australian GST	10.00	11.00	Australian GST	31 May 2012	C
					1				5	0 100 150 20
									De	elete

Figure 17. 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 a Product Price Point

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.

Product ld: 1704205								
Price List kt: 1759705								
* Product Category: Sin Card								
Product Sub Category:								
* Product Name: 30 SM K0	0							
* Description: 3G SM KG	8							
🕑 Defav	It Product Ledger Code : MISC_PRODUC	T_PURCHASE						
Custom Ledger Code:								
* Product Type: Physical Pr	roduct							
Sell Price (inc Tax): 16.50								
* Tax Type: Australian	OST							
Tax Type 10 Percentage(%)								
Sell Price (ex Tax): 15								
Sell Tax Amount: 1.5								
Cost Price (inc Tax): 11.00								
* Tax Type: Australian	GST							
Tax Type 10 Percentage(%):								
Cost Price (ex Tax): 10								
Cost Tex Amount: 1								
Cost Tax Amount: 1 * Salesble From: 31 May 20	12							
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To:	12							
Cost Tax Anount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Guantity: 1	12							
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1	12						Edit	
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1	12						Edit Back	
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 *roduct Price Point Details	12						Edit Back	
Cost Tax Amount 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found	12						Edit Back elete	
Cost Tax Amount 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List M S	12 Price per Unit Mil	nimum Guantity	Maximum Quantity	Saleable From	Saleable To	Profile tlame	Edit Back elete	
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List Id 1759706	12 Price per Unit Min 9.00 5	nimum Guantity	Maximum Quantity	Saleable From 1 Jun 2012	Saleable To 31 Jul 2012	Profile tlame	Edit Dack elete	
Cost Tax Amount: 1 *Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List Id 1759706 1759707	12 Price per Unit Min 9.00 5 8.00 0	nimum Guantity	Maximum Quantity	Saleable From 1 Jun 2012 1 Aug 2012	Saleable To 31 Jul 2012 4 Sep 2012	Profile Hame	Edit Back elete Edit Edit	
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List Id 1759706 1759707	12 Price per Unit Min 9.00 8.00 0	nimum Quantity	Maximum Quantity	Saleable From 1 Jun 2012 1 Aug 2012	Saleable To 31 Jul 2012 4 Sep 2012	Profile tlame	Edit Back elete Edit Edit	
Cost Tax Amount 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List Id 1759705 1759707	12 Price per Unit Mir 9 00 5 8.00 0	nimum Quantity	Maximum Quantity	Saleable From 1 Jun 2012 1 Aug 2012	Saleable To 31 Jul 2012 4 Sep 2012	Profile thane	Edit Back elete Edit Edit Edit	50 J200
Cost Tax Amount: 1 * Salesble From: 31 May 2(Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List Id 1759706 1759707	12 Price per Unit Min 9.00 5 8.00 0	nimum Quantity	Maximum Quantity	Saleable From 1 Jun 2012 1 Aug 2012	Saleable To 31 Jul 2012 4 Sep 2012	Profile flame	Edit Bisck elete Edit Edit Edit	50 200
Cost Tax Amount: 1 * Salesble From: 31 May 20 Salesble To: Minimum Quantity: 1 Product Price Point Details 2 Results Found Price List Id 1759706 1759707 fanage Product Price Point	12 Price per Unit Min 9:00 5 0:00 0	nimum Quantity	Maximum Quantity	Saleable From 1 Jun 2012 1 Aug 2012	Saleable To 31 Jul 2012 4 Sep 2012	Profile flame	Edit Back elete Edit Edit Edit	50 200

Figure 18. The View Product Price Details page

2. To modify the product's *base* details, click the **Edit** button. The *Edit Product Details* page will update to show the product price detail fields editable.

~	These base product details affect the <i>default</i> product data that is applied when there
(\mathbf{i})	are no price points in effect i.e. regular item price, availability for sale, and minimum
	quantity

dit Product Details	3 K.			
This is t	he product's base price.Use the P	rice Point feature below to		
enter m	ulti-quantity, date dependant, or ac	count profile based pricing.		
Product Id:	1704205			
Price List Id:	1759705			
Product Category:	Sim Card			
Product Sub Category:				
* Product Name:	3G SIM			
* Description:	3G SIM			
	Default Product Ledger Code : MIS	SC_PRODUCT_PURCHASE		
* Product Type:	Physical Product			
Call Dring (ing Tau)	16.5			
Sell Price (Inc. Tax):	10.3			
* Tax Type:	Australian GST			
Tax Type Percentage(%):	10			
Sell Price (ex Tax):	15			
Sell Tax Amount:	1.5			
ost Price (inc Tax):	11			
* Tax Type:	Australian GST 💌			
Tax Type Percentage(%):	10			
Cost Price (ex Tax):	10			
Cost Tax Amount:	1	1		
* Saleable From:	31 May 2012			
Saleable To:				
Minimum Quantity:	1			

Figure 19. The Edit Product Price Details page showing the product's base price fields editable

- a. Enter or modify the product's base price information, as required.
- b. Click the **Save** button to save the product's base price details.

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

						Delete
Results Found						
Price List Id 💝	Price per Unit	Minimum Quantity	Maximum Quantity	Saleable From	Saleable To	Profile Name
1914533	145.65 10	5				Edit
			1			50 100 150 2
						100 1100 1100 11
nage Product Price Poi	nt Details					
						Add Price Point
Saleable From:						
saleable To:						
Minimum Oty (Erom Oty):	0 💌					
Meximum Oty (To Oty):						
A Total (inc. Tay):	0.00					
total (Inc. Tax).	Luctrolice CST					
- lax type.	Australian 031					
Tax Type Percentage(%):	10					
Amount(Ex. Tax):	0.00					
Tax Amount:	0.00					
Account Profile:	Select Profile	- *				
						Save

Figure 20. The Manage Product Price Point Details section

- 4. To set date driven pricing:
 - a. Enter the date the special product pricing is available in the *Saleable From* field. A calendar tool will appear to allow you to select the required dates.
 - b. Enter the date the special product pricing is available until in the *Saleable To* fields. A calendar tool will appear to allow you to select the required dates.
 - c. If the new price point is required to apply indefinitely, you can leave the Saleable To field empty to indicate no end date.
- 5. To set multiple quantity pricing:
 - a. Enter the minimum quantity this price point applies to in the Minimum Qty (From Qty) field.
 - b. Enter the maximum quantity this price point applies to in the Maximum Qty (To Qty) field.
 - c. If there is no maximum quantity for the price point, you can leave the *Maximum Qty* field empty to indicate no maximum.
- 6. 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*.

- 7. To set account profile pricing:
 - a. Select the required Account Profile to apply the price point in the drop list.
 - b. Leave the drop list selection showing 'Select Profile' to indicate no account profile pricing.
 - c. To apply account profile pricing to multiple account profiles, you will need to create a new price point record for each account profile required.
- 8. 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".
- 9. Add further price points by clicking the Add Price Point button, and repeating steps 3 to 8.

To Edit a Product Price Point

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 ia V	Price per Unit	Minimum Quantity	Maximum Quantity	Saleable From	Saleable To	Profile Name
1754900	239.00 2	1	3	16 Dec 2011		E
1754901	200.00 4	L.		16 Dec 2011		E
			1			
inage Product Price Po	int Details					
						Add Price Point
Price List lo	1754901					
Selesie From	16 Dec 2011					
Saleale I Tuli	1000002011					
Saleale Io						
Minimum Oty (Erom Oty)	4 44					
winimum any (moni ary)	4					
Maximum Qty (To Qty)	Leave blank					
Maximum Gty (To Gty) * Total (inc Tax)	: Leave blank 💙 : 200					
Maximum Gty (To Gty) * Total (inc Tax) * Tax Type	: Leave blank V : Leave blank V : 200 : Australian GST					
Maximum Gty (To Gty; Maximum Gty (To Gty; * Total (inc Tax; * Tax Type Tax Type Percentage(%)	: Leave blank 200 : Australian GST : 10					
Maximum dity (To Gity) Maximum Gity (To Gity) * Total (inc Tax) * Tax Type Tax Type Percentage(%) Amount(Ex. Tax)	Leave blank Zo0 Australian GST 10 196.0784314					
Maximum dity (To Gity, Maximum Gity (To Gity, * Total (inc Tax) * Tax Type Tax Type Percentage(%) Amount(Ex. Tax) Tax Amount	Leave blank 200 Australian GST 10 196.0784314 3.9215686					
Maximum Gay (Toolday, Maximum Gay (To Gay, * Total (Inc Tax, * Tax Type Percentage(%) Amount(Ex. Tax, Tax Amount Account Profile	Leave blank Leave blank 200 Australian GST 10 196.0784314 3.9215686 Select Profile					
Maximum Gay (Tool Gay, Maximum Gay (To Gay, * Total (Inc Tax, * Tax Type Percentage(%) Amount(Ex. Tax) Tax Amount Account Profile	Leave blank Leave blank 200 Australian GST 10 196.0784314 3.9215686 Select Profile					Save

Figure 21. The Manage Product Price Point Details section showing existing details

- 2. Enter further price point 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

The system 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:

 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.



Figure 22. The *Purchase Type* page

2. Select whether to create an Outright Purchase or an Installment Plan using the option buttons. See the following sections for details about creating outright purchases and installment plans.

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 💙			
	Vise Product Ledger Code			
Custom Ledger Code:	Select Ledger Code 💌			
* Qty Required:	1			
* Unit Price (Inc Tax):	0.00			
		Add to Cart	1	
			,	
Cart Details				
No items in the cart.				
Complete Purchase				
Complete Purchase v	ia Service Information Record			
O Complete Purchase b	y Creating a Cardline			
Invoicing Method:	Create Invoice			
Payment Method:	Take Payment Now			
				Proceed to Confirmation

Figure 23. 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.

The system will look up the product and show the product's *base* sell price in the *Unit Price (inc Tax)* field.

If the product selected is serialised, the Serial Number field will appear.

- 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.
- 8. If the product is serialised, enter the product's serial number in the *Serial Number* field. The system will verify the serial number entered is held in the product inventory.

If you entered a quantity greater than 1, the *Serial Number* field will be hidden. You will need to enter the serial numbers of each item once the product has been added to the cart.

- 9. If you entered a quantity greater than 1, the *Create single cardline for all items* check box will appear.
 - Tick the Create single cardline for all items check box to allow the system to create a single consolidated cardline entry on the customer account's invoice for the total value of the items.
 - Leave the Create single cardline for all items check box blank to allow the system to create a separate cardline on the customer account's invoice for each instance of the product (e.g. if there are 5 products purchased, the system will create 5 cardlines, one for each item).
- 10. If required, overwrite the product's unit price by entering the required price in the *Unit Price (inc Tax)* field.

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

If you overwrote the product's unit price, the system will use the price entered without applying any of the price point information.

The Card Details will show the Unit Price (Ex Tax) field to show the product price per unit, as well as show the Sub Total (Ex Tax) and Sub Total (Inc Tax).

* 5	Select Purchase Type	Outright Pure	chase					
		O Installment P	lan					
right Pu	urchase : Product Se	election						
	* Product Category:	Select a Produc	t Category 🔽					
Ρ	Product Sub Category:	~						
	* Product:	Select a Produc	t Category 💌					
		Use Product	Ledger Code					
)	Custom Ledger Code:	Select Ledger C	ode 💌					
	* Qty Required:	1						
	and the second s							
	* Unit Price (Inc Tax):	0.00						
rt Detail	* Unit Price (Inc Tax):	0.00				Add to Cart		
t Detail	* Unit Price (Inc Tax):	0.00	Init Price (Fy Tay)	linit Tay	Tax Type	Add to Cart	Sub Total/Ine Taxi	Action
t Detail ID 4201	* Unit Price (Inc Tax): ils Product Ham	e Oty	Unit Price(Ex Tax) 318.18	Unit Tax 31.82	Tax Type	Add to Cart Sub Total(Ex Tax) 1 272 73	Sub Total(Inc Tax)	Action Serial Numbers I Delete
t Detail ID 4201	* Unit Price (Inc Tax): IIS Product Ilam Modem	e Oty 4	Unit Price(Ex Tax) 318.18	Unit Tax 31.82 A	Tax Type ustralian QST Total:	Add to Cart Sub Total(Ex Tax) 1,272.73 1,272.73	Sub Total(Inc Tax) 1,400.00 1,400.00	Action Serial Numbers Delete
t Detail 4201 nplete	Vont Price (inc Tax): IIs Vont Product Ilam Modem Vurchase Complete Purchase b Complete Purchase b Invoicing Method:	e Oty 4 ia Service Inform y Creating a Carc Create Invoice	Unit Price(Ex Tax) 318.18 ation Record	Unit Tax 31.82	Tax Type ustralian GST Total:	Add to Cart Sub Total(Ex Tax) 1,272.73 1,272.73	Sub Total(Inc Tax) 1,400.00 1,400.00	Action Serial Numbers Delete
t Detail 4201 nplete	Vont Price ((no Tax): IIs Product Ham Modem Purchase Complete Purchase v Complete Purchase b Invoicing Method: Payment Method:	e Oty 4 ia Service Inform y Creating a Caro Create Invoice Take Payment N	Unit Price(Ex Tax) 318.18 stion Record	Unit Tax 31.82	Tax Type sustralian OST Total:	Add to Cart Sub Total(Ex Tax) 1,272.73 1,272.73 1,272.73	Sub Total(Inc Tax) 1,400.00 1,400.00	Action Serial Numbers Delete
t Detail 4201 nplete	Voit Price (Inc Tax): Its Product Ilam Modem Purchase Complete Purchase v Complete Purchase b Invoicing Method: Payment Method:	e Oty 4 ia Service Inform y Creating a Caro Create Invoice Take Payment N	Unit Price(Ex Tax) 318.18 ation Record line	Unit Tax 31.82	Tax Type ustralian GST Total:	Add to Cart Sub Total(Ex Tax) 1,272.73 1,272.73	Sub Total(Inc Tax) 1,400.00 1,400.00	Action Serial Numbers Delete

Figure 24. The Outright Purchase section showing the Cart Details

- 12. Add further products to the purchase transaction by selecting additional products repeating steps 2 to 11.
- 13. To remove a product from the cart, click the **Delete** link in the *Action* column of the required product in the *Cart*. The product will be removed from the cart list.

- 14. If you have any serialised products in the *Cart*, a *Serial Numbers* link will appear in the *Action* column of the product record. This will allow you to record the product's individual serial numbers from the product inventory.
 - a. Click the Serial Numbers link in the Action column of the serialised product. The Serial Numbers window will appear.

Serial Numbers						×
Assign Serial Numbers f	or 4 × Modem					
Note: You can paste	directly from an excel co	olumn into the first serial	l number to fill all	records		
* Serial Number 1:						
* Serial Number 2:						
* Serial Number 3:						
* Serial Number 4:						
				Close	Save Serial Number	

Figure 25. The Serial Numbers window

b. Enter the serial numbers of the individual products in the *Serial Number 1*, *Serial Number 2* etc fields.

Note that you can paste multiple serial numbers into the *Serial Number* fields (i.e. from a spreadsheet). In the spreadsheet, select all required serial numbers and click *Copy*. In the Serial Numbers window, click in the first *Serial Number* field and click *Paste*. All selected serial numbers from the spreadsheet will be pasted into each *Serial Number* field.

c. Click the **Save Serial Numbers** button. The system will validate all the serial numbers entered are held in the product inventory. Once complete, a message will display at the top of the window showing that the serial numbers have been saved.

sign Serial Numbers	for $4 \times Modem$		
Saved Se purchase	arial Numbers successfu a.	fully, please close this dialogue to continue with your product $\hfill \square$	
Note: You can pas	te directly from an exce	cel column into the first serial number to fill all records	
* Serial Number 1:	SSnFWqgA		
* Serial Number 2:	vUSmNEbu		
* Serial Number 3:	ypkGNZ3W		
* Serial Number 4:	CZjePt7w		

Figure 26. The Serial Numbers window

d. Click the Close button to return to the product purchase.

- 15. In the *Complete Purchase* section, the *Complete Purchase by Creating a Cardline* option will be selected, which you cannot modify.
- 16. Select the Invoicing Method required for the purchase from the drop list. Options include:
 - Create Invoice a pending invoice will be created once the purchase is confirmed
 - Next Invoice a pending cardline will be created to be processed at the next bill run.
- 17. Select the *Payment Method* required from the drop list. The options include:
 - Take Payment Now record a payment through the Emersion Payment \triangleright system, such as Credit Card or Direct Debit etc. You will be prompted to enter the payment details when you confirm the purchase. \succ **Receive Payment Now** record a manual payment. You will be prompted to enter the manual payment details when you confirm the purchase. do not record a payment. Payment can then be Pay Later \triangleright recorded at a later time through the Accounts Receivable module.
- 18. 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.

Purchase C	onfirmation							
Invoice N	tethod: Invoice immediately							
Payment N	tethod: Pay Later							
								Back
								Cancel
							Confirm	The Purchase
art Details								
ID	Product Name	Product Note	Oty	Unit Price(Ex GST)	Tax	Tax Amount	Sub Total(inc GS	r)
704085	Nokia C5000		1	236.32	2 Australian GST	23.63	259.95	Delete
		~				Total: 23.63	259.95	

Figure 27. The Purchase Confirmation page

19. Review the purchase details.

 \geq

20. 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 cardlines for each item in 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 pending cardlines for each item in the product purchase. If you elected to *Create single cardline for all items* for a product with a quantity greater than 1, the system to create a single consolidated pending cardline for the total value of the product. These pending cardlines will be picked up and processed on to the customer's next invoice during the next bill run, or you can manually create an invoice if there are no existing pending invoices. You can view the cardlines by clicking the *Pending Ledger Cardlines* tab from the *View Customer* page.

21. 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.

Invoice ID 💛	Invoice Period	Issue Date	Due Date	Total Amount Nothing Fo	Outstanding Amount	Disputed Amount	Allocated Amount
Account Number:							
Account Name:							
BSB:							
Bank:	Select Bank		*				
	Use One Time Direct Debi	t					
CVV.	Territor and an a second se						
Expiry World	Select Expiry Year						
Evpire Months	Select Expiry Month						
Credit Cord No.	Select Card Type						
warne On Card :	Coloct Cord Tuno						
	Use One Time Credit Card	1					
Payment Note:							
Stored Payment Method:	None M						Lancei
	Auto Allocate						Submit Clea
* Total:				Un	allocated Funds: 0.00		
	mate look				codini balance. 0.00		

Figure 28. The Take Payment page

22. 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.

Payment Note:					
Payment Date:	16 Dec 2011 15:05:10				
Payment Method:	Please Select A Method 💌				
yment Reference:					Cancel
	Auto Allocate				Submit
Total:			Un	allocated Funds: 0.00	
Customer Name.	Matt lest		A	ccount Balance. 0.00	

Figure 29. The Receive Payment page

- 23. To return to the purchase to modify the purchase details or to change the products, click the **Back** button.
- 24. 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.

Purchase Type			
* Select Purchase Type	Outright Purchase D installment Plan tion		
Product			
Part of Column	Muthly Renaument Online		
Product Category.	Coludia Control Columnia		
+ Basis Drive	0.00		
Partie Lines	Use Product Ledger Code		
Cuttom Ledner Code	Select Ledger Code		
	Los e com Provincia		
-Instalment Plan Confermation			
and an	and Brands		
Installment Offcycle Payment Handling	AURO PTOFIER		
Invoicing Method:	Creste Invoice		
	Product supplied, payment to begin in	meteoliately	
Serial / Product Instance Code:			
Product Instance Description:			
First Installment Date:			
-Installment Pricing Method			
Specify markup percentage, Specify markup percentage, Specify total cost, total amou	total amount of installments, and the install amount per installment, and the installment ni of installments, and the installment perior r installment, and the installment period len	liment period length t period length al length sigth	
-Installment Details			
Base Price	0.00		
Markup	0.00	5	
Total installments:			
Charge per instalment	0.00		
Final Cost for Installment Plan	0.00		
Instalment Period Length	1 month 🗸		
-			
			Continue

Figure 30. 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:

 \geq

\triangleright	Auto Prorata	the	pay	ment	t	amount	is	automati	cally	pro	-rated
		resu	lting	in t	he	installm	ent	payment	amou	nts	being
		redu	iced.								

- 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.
\succ	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 (j) 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.

Purchase Type		
* Select Purchase Type Outright Purchase Outright Purchase Installment Plan 	Indeline and information	
Product Purchase Information		
Product Purchased: Nokia C5000	Installment Amount: 26.00	Custom Next Installment: 0.00
Purchased Oty: 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 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 31. 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.

me Cust	tomers Billing Services	Packages and Plans Products	Report Finance E	vents Admin			
istomer List	Create New Customer						
istomer N	Matt Test (Account ID)	-2)					
ummary De	etail Contacts Package Subsc	iptions Service Subscriptions Pen	ding Ledger Cardlines Invoic	es Transactions Profile	Order Purchase	Payment Methods Receive Payment	Take Payment Portal Not
Purchase	Management						
Purchase	Status: All Statuses	Purchase Type: All F	Purchase Types	Product Type: A	Il Product Types		
	Incomplete	Inst	allments	B	illable item		
	In Progress		~	P	hysical Product		
					Search	Clear	
				12	Add New Purch	hase	
ID	Name	Product Category	Product Type	Purchase Type	Supplier	Purchase Date	Purchase Status
1779836	Nokia C5000	Phones	Physical Product	Installments	Billingenout	2011-12-16 15:39:20	Incomplete
1779835	Nokia C5000	Phones	Physical Product	Installments	Billionnerster	2011-12-16 15:19:57	InProgress
1779834	Nokia C5000	Phones	Physical Product	Outright	Billinnen	2011-12-16 15:07:00	Complete
1779833	Nokia C5000	Phones	Physical Product	Outright	EN:Innewenett	2011-12-16 15:05:09	Complete
1779826	BKB Netstick E160e	Hardware	Physical Product	Outright	Billinneennit	2011-12-15 13:24:36	Complete
1770232	Service Plan Access	Access Fee	Service Charge	Outright	2000 to the second second	2011-11-01 15:15:29	Complete
1755947	Package Plan Access	Access Fee	Service Charge	Outright	2001(Linkementymetts)	2011-11-01 13:07:20	Complete
1664300	Package Plan Access	Access Fee	Service Charge	Outright	ENUERANDAMINATI	2011-10-02 03:22:03	Complete
1632468	Service Plan Access	Access Fee	Service Charge	Outright	E0000000000000000000000000000000000000	2011-10-01 17:24:30	Complete
1586541	Package Plan Access	Access Fee	Service Charge	Outright	Billippinnennot	2011-09-01 14:25:12	Complete
1533590	Service Plan Access	Access Fee	Service Charge	Outright	Bliffiniatema:"	2011-09-01 12:58:03	Complete
1480622	Service Plan Access	Access Fee	Service Charge	Outright	Billinnentte:	2011-08-01 19:08:43	Complete
1452057	Package Plan Access	Access Fee	Service Charge	Outright	ENTRICINE	2011-08-01 16:58:28	Complete
1354031	Service Plan Access	Access Fee	Service Charge	Outright	ENITIONNEROMET	2011-07-01 20:00:08	Complete
1346096	Package Plan Access	Access Fee	Service Charge	Outright	E Million and and a	2011-07-01 18:25:54	Complete
1214115	Package Plan Access	Access Fee	Service Charge	Outright	BV/2/mmember:	2011-06-01 21:58:24	Complete
1199045	Service Plan Access	Access Fee	Service Charge	Outright	Billionneenwitt	2011-06-01 21:07:00	Complete
1109780	Service Plan Access	Access Fee	Service Charge	Outright	Billinimenter	2011-05-02 01:11:49	Complete
1098385	Package Plan Access	Access Fee	Service Charge	Outright	Billionnenoverti	2011-05-01 23:55:15	Complete
CONTRACTOR OF THE OWNER.	Coming Diag Assess	Baaaaa Faa	Company Channes	Construction of the local sector of the local	Post of Long and Long a	0044 04 04 00 4004	Comulate

Figure 32. 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 33. 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: 17798	335		Installment Amou	nt: 26.00	Custom Next Installment: 0.00	
Product Purchased: Nokia	C5000		Next Installme	nt: 16 Dec 2011	Installment Period Length: 1 months(s)	
Purchased Qty: 1			Original Total Amou	nt: 259.95	Base Amount (prior to 259.95 markup):	
Product Type: Physic	cal products, stock may or may not have to	be tracked	Total Amount Remainin	ng: 259.95	Charge Invoicing Method: Create Invoice	c.
Product Category: Phone	es		Installments Remainin	ng: 10	Ad Hoc Payment Method: Auto Prorata	
Purchase Type: Install	Iments			Note: All figures s	shown above are EX TAX	
Purchase Date: 16 De	ec 2011					
Product Information						
			Product Supplied			
Product Instance ID: 14570)		Product Instance Description:	423524354		
Product Serial Number: 23445	53					
Instance Created: 16 De	ec 2011					
	Secondary 2.2					
Transactions						
					1.004 P	
ID Date	Purchase Text	Amount	Tax	Service Subscriptio	n Id Invo	vice
Ad Hoc Payment						
0.00						
Amount to Charge 0.00 including Tax:					Create AdHoc Pe	ayment
Charge Invoice Create Invoice	~				Finalise all Payments	(Break out)
Method						

Figure 34. 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.

Installment Purchase				
Product Purchase Information		Installment Information		
Purchase ID: 1779836		Installment Amount:	21.67 Custom Ne	ext Installment: 0.00
Product Purchased: Nokia C5000		Next Installment:	Instaliment I	Period Length: 1 months(s)
Purchased City: 1		Original Total Amount:	259.95 Base Ar	mount (prior to 259.95 markup);
Product Type: Physical products, stock may or may not have to b	be tracked	Total Amount Remaining:	259.95 Charge Invi	oicing Method: Create Invoice
Product Category: Phones		Installments Remaining:	12 Ad Hoc Pay	vment Method: Auto Prorata
Purchase Type: Installments			Note: All figures shown above are EX	TAX
Purchase Date: 16 Dec 2011				
Product Information	Product information requ	ired to start installments		
Product Instance ID:		* Product Instance Description:		
Product Serial Number:				
* Instance Created:				
				Save Product Information
Transactions				
ID Date Purchase Text	Amount Ta	x	Service Subscription Id	Invoice

Figure 35. 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.

Installme	ent Purchase					
Produc	ct Purchase li	formation		Installment	Information	
	Pur	hase ID: 1779835		Ir	nstallment Amount: 26.00	Custom Next Installment: 0.00
	Product Pu	chased: Nokia C5000			Next Installment: 16 Dec 2011	Installment Period Length: 1 months(s)
	Purcha	sed Qty: 1 ct Type: Physical products, stock may or may not have	to be tracked	Ori Total /	ginal Total Amount: 259.95 Amount Remaining: 259.95	Base Amount (prior to 259.95 markup):
	Product (ategory: Phones		Insta	- illments Remaining: 10	Charge Invoicing Method: Create Invoice Ad Hoc Payment Method: Auto Prorata
	Purcha	se Date: 16 Dec 2011			Note: All figures	shown above are EX TAX
-Produc	ct Information					
				Product Supplied		
	Product Ins	ance ID: 14570		Product Instan	ce Description: 423524354	
	Product Serial	Number: 234453				
	Instance	Created: 16 Dec 2011				
Transacti	lions					
ID	Date	Purchase Text	Amount	Tax	Service Subscript	ion Id Invoice
Ad Hoc	c Payment-					
Amou i	unt to Charge including Tax:	0.00				Create AdHoc Payment
Cł	harge Invoice Method:	Create Invoice 💌				Finalise all Payments (Break out)

Figure 36. 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.
- 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.

Custom Next Installment: 0.00
Custom Next Installment: 0.00
11 Installment Period Length: 1 months(s)
Base Amount (prior to 259.95 markup):
Charge Invoicing Method: Create Invoice Ad Hoc Payment Method: Auto Prorata
te: All figures shown above are EX TAX
e Subscription Id Invoice

Figure 37. 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 Finalise all Payments (Break out)? Amount required:\$95.45 EXT 9.545 tax		
	Yes No	

Figure 38. 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

Phone:1300 793 310Fax:1300 793 320Email:emesupport@emersion.com.au

Emersion Web Site:

www.emersion.com.au